



Tourism Highlights 2002

Tourism enjoyed exceptional years in 2000 and 2001. In 2000, international tourism grew by forty-five million arrivals, reaching levels rarely seen before.

In 2001 international arrivals declined by 0.6 per cent, the first year of negative growth for international tourism since 1982. However, the results for 2001 would have been in line with the trend observed over the past decade had it not been for the magnitude of the increase in tourist arrivals in 2000, which was much larger than the figures obtained during the preceding years.

It is difficult to find a concrete confidence crisis in the past several decades that can compare with what the world experienced in 2001. One of the underlying causes, the events of 11 September, determined the results of international tourism in 2001, as well as the way in which certain destinations and sectors were affected.

It is still difficult to assess the impact of the Bali attack on 12 October 2002. WTO, however, is confident that the growth of tourism will return to normal in a short period of time, providing that the Bali tragedy is not followed by a series of attacks on tourism and tourists.

However, one thing remains certain: the economic success of countries positively influences both inbound tourism as well as outbound tourism. China is a shining example of this fact.

International Tourist Arrivals

	(million)		Growth rate (%)	Market share (%)	
	2000	2001*	2001*/2000	2000	2001*
World	696.8	692.6	-0.6	100	100
Africa	27.2	28.4	4.3	3.9	4.1
Americas	128.5	120.8	-6.0	18.4	17.4
East Asia and the Pacific	109.2	115.2	5.5	15.7	16.6
Europe	402.5	399.7	-0.7	57.8	57.7
Middle East	23.2	22.7	-2.5	3.3	3.3
South Asia	6.1	5.8	-4.5	0.9	0.8

Source: World Tourism Organization (WTO)©

*Data as collected by WTO September 2002

Worldwide tourist arrivals experienced a 0.6 per cent decrease, which is somewhat less than what was feared after 11 September. The Americas suffered the most (6.0 per cent decrease), followed by South Asia (4.5 per cent) and the Middle East (down 2.5 per cent). Europe also experienced a slight decrease of 0.7 per cent, however it still remains the world's top tourism region in terms of international arrivals. Growth continues in East Asia and the Pacific, closing the gap on the Americas, which is number two in global market share. Africa is also experiencing positive increases, but its market share is still quite low (4.5 per cent). South Asia severely felt the impact of the global security situation; its market share fell from 0.9 per cent in 2000 to 0.8 per cent in 2001.



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THE WORLD TOURISM ORGANIZATION is the only intergovernmental organization that serves as a global forum for tourism policy and issues. Its Members include 146 countries and 7 territories as well as some 350 Affiliate Members from the public and private sectors. WTO's mission is to promote and develop tourism as a significant means of fostering international peace and understanding, economic development and international trade.

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World's Top 15 Tourism Destinations

Rank		International Tourist Arrivals (million)		% Change	Market share
		2000	2001*	2001*/2000	2001*
1	France	75.6	76.5	1.2	11.0
2	Spain	47.9	49.5	3.4	7.1
3	United States	50.9	45.5	-10.7	6.6
4	Italy	41.2	39.1	-5.2	5.6
5	China	31.2	33.2	6.2	4.8
6	United Kingdom	25.2	22.8	-9.4	3.3
7	Russian Federation	21.2	-	-	-
8	Mexico	20.6	19.8	-4.0	2.9
9	Canada	19.7	19.7	0.2	2.8
10	Austria	18.0	18.2	1.1	2.6
11	Germany	19.0	17.9	-5.9	2.6
12	Hungary	15.6	15.3	-1.5	2.2
13	Poland	17.4	15.0	-13.8	2.2
14	Hong Kong (China)	13.1	13.7	5.1	2.0
15	Greece	13.1	-	-	-

Source: World Tourism Organization (WTO)©

*Data as collected by WTO September 2002

	(US\$ billion)		Growth rate (%)		Market share (%)		Average annual Growth
	2000	2001*	00/99	01/00	1995	2001*	00/95
World	477.0	463.6	4.3	-2.8	100	100	3.3
Africa	10.8	11.7	2.7	8.8	2.0	2.5	5.9
Americas	132.8	122.5	8.8	-7.7	24.6	26.4	5.9
East Asia / Pacific	82.0	82.2	9.4	0.2	18.2	17.7	2.1
Europe	234.5	230.4	0.2	-1.8	52.1	49.7	2.1
Middle East	12.2	11.8	9.1	-3.5	2.2	2.5	6.5
South Asia	4.7	5.0	3.5	5.7	0.9	1.1	6.4

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

Worldwide tourism receipts in 2001 decreased by US\$ 13 billion (2.8 per cent). Almost half of all the world's tourism receipts are still earned in Europe. It is followed by the Americas (26.4 per cent market share), which leads all regions in receipts per arrival at US\$ 1,015. The United States remained the unchallenged leader with more than US\$ 70 billion in international tourism receipts, Spain is firmly in second place with almost US\$ 33 billion (increase of 4.5 per cent), followed by France, Italy and a newcomer on the list of five top earners – China with US\$ 17.8 billion (increase of almost 10 per cent). China took fifth spot from the United Kingdom, which was also eclipsed by Germany. The United Kingdom and Australia suffered substantial declines, but Turkey increased its tourism income by 17 per cent.

Rank		International Tourism Receipts (US\$ billion)		% Change	Market share
		2000	2001*	2001*/2000	2001*
1	United States	82.0	72.3	-11.9	1.6
2	Spain	31.5	32.9	4.5	7.1
3	France	30.8	30.0	-2.5	6.5
4	Italy	27.5	25.8	-6.2	5.6
5	China	16.2	17.8	9.7	3.8
6	Germany	18.5	17.2	-6.8	3.7
7	United Kingdom	19.5	16.3	-16.7	3.5
8	Canada	10.7	10.8	0.7	2.3
9	Austria	9.9	10.1	1.9	2.2
10	Greece	9.2	-	-	-
11	Turkey	7.6	8.9	17.0	1.9
12	Mexico	8.3	8.4	1.3	1.8
13	Hong Kong (China)	7.9	8.2	4.5	1.8
14	Australia	8.5	7.6	-9.8	1.6
15	Switzerland	7.5	7.6	1.6	1.6

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

International Tourism Receipts

World's Top 15 Tourism Earners

Africa

Africa experienced a 4.6 per cent increase in international arrivals in 2001. South Africa remains the most important destination, despite suffering a 1.5 per cent decrease in arrivals. The countries enjoying the biggest growth last year were Namibia, Tanzania and Nigeria, but this is mainly due to their low baseline international arrival figures.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
Africa	27.223	28.405	3.7	4,3	100	100	10.793	11.746	2.7	8.8	100	100
South Africa VF	6.001	5.908	-0.4	-1.5	22.0	20.8	2.707		2.7		25.1	
Tunisia TF	5.057	5.387	4.7	6.5	18.6	19.0	1.496	1.605	-4.1	7.3	13.9	13.7
Morocco TF	4.113	4.223	7.8	2.7	15.1	14.9	2.040	2.460	8.5	20.6	18.9	20.9
Zimbabwe TF	1.866			-11.1	6.9		125			-38.1	1.2	
Botswana TF	995		18.0		3.7		313		33.8		2.9	
Kenya TF	899	841	4.3	-6.5	3.3	3.0	276	308	-9.2	11.6	2.6	2.6
Algeria VF	866	901	15.7	4.1	3.2	3.2	102		27.5		0.9	
Nigeria TF	813	955	4.8	17.5	3.0	3.4	148	156	2.1	5.4	1.4	1.3

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

Americas

All of the Americas, excluding Central America, suffered declines in international arrivals in 2001. The Caribbean countries did not repeat the success they had in 2000. Colombia was the most successful country, considering that this was a very bad year for the Americas, especially for the United States (10.7 per cent decrease). The entire region experienced an average decline of 6.0 per cent.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
Americas	128.497	120.840	5.0	-6.0	100	100	132.774	122.487	8.8	7.7	100	100
United States TF	50.945	45.490	5.0	-10.7	39.6	37.6	82.042	72.295	9.8	-11.9	61.8	59.0
Mexico TF	20.641	19.811	8.4	-4.0	16.1	16.4	8.295	8.401	14.8	1.3	6.2	6.9
Canada TF	19.663	19.697	1.5	0.2	15.3	16.3	10.704	10.774	5.2	0.7	8.1	8.8
Brazil TF	5.313	4.773	4.0	-10.2	4.1	3.9	4.228	3.701	5.9	-12.5	3.2	3.0
Puerto Rico TF	3.341	3.551	10.5	6.3	2.6	2.9	2.388	2.728	11.6	14.2	1.8	2.2
Dominican Rp TF	2.973	2.778	12.1	-6.6	2.3	2.3	2.860	2.689	15.2	-6.0	2.2	2.2
Argentina TF	2.909	2.629	0.4	-9.6	2.3	2.2	2.817	2.534	0.1	-10.0	2.1	2.1
Uruguay TF	1.968	1.892	-5.1	-3.9	1.5	1.6	652	561	-0.2	-14.0	0.5	0.5

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

East Asia and the Pacific

In contrast to the Americas, East Asia and the Pacific continued with strong growth, as seen in 2001, averaging 5.5 per cent. China, together with Hong Kong and Macau is becoming the unrivalled leader of Asian tourism, followed by Malaysia, Thailand and other countries, while Australia experienced a 2.6 per cent decrease from 2000, when it hosted the Olympics.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
East Asia and the Pacific	109.171	115.156	12.7	5.5	100	100	82.043	82.189	9.4	0.2	100	100
China TF	31.229	33.167	15.5	6.2	28.8	28.8	16.224	17.792	15.1	9.7	19.8	21.6
Hong Kong (China) TF	13.059	13.725	15.3	5.1	12.0	11.9	7.886	8.241	9.4	4.5	9.6	10.0
Malaysia TF	10.222	12.775	28.9	25.0	9.4	11.1	4.936		39.4		6.0	
Thailand TF	9.579	10.133	10.7	5.8	8.8	8.8	7.146	6.731	6.1	-6.8	8.7	8.2
Singapore TF	6.917	6.726	10.5	-2.8	6.3	5.8	6.016		2.7		7.3	
Korea, Republic of VF	5.322	5.147	14.2	-3.3	4.9	4.5	6.811	6.283	0.1	-7.8	8.3	7.6
Indonesia TF	5.084	5.154	7.1	1.8	4.6	4.5	5.749	5.411	22.1	-5.9	7.0	6.6
Japan TF	4.757	4.772	7.2	0.3	4.4	4.1	3.373	3.301	-1.6	-2.1	4.1	4.0

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

Europe

Preliminary

Regional

Results

Europe failed to repeat the record results posted in the Jubilee Year of 2000. But in relative terms, the decrease of 0.7 per cent does not appear that bad. Northern Europe, however, especially the United Kingdom, suffered an average decline of 5.9 per cent, while other sub-regions displayed a more favourable situation. Southern and Eastern Europe are growing steadily, with Yugoslavia, Croatia, Slovakia and Slovenia welcoming the return of market demand. Bulgaria was a success story in 2001, while Poland suffered a decline of 13.8 per cent. The greatest decline was experienced by Israel, 50.5 per cent, due to the flare-up of the conflict with Palestine.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
Europe	402,539	399,711	5.8	-0.7	100	100	234,477	230,361	0.2	-1.8	100	100
France TF	75,580	76,508	3.5	1.2	18.8	19.1	30,754	29,979	-2.4	-2.5	13.1	13.0
Spain TF	47,898	49,519	2.4	3.4	11.9	12.4	31,454	32,873	-3.2	4.5	13.4	14.3
Italy TF	41,181	39,055	12.8	-5.2	10.2	9.8	27,500	25,787	-3.0	-6.2	11.7	11.2
United Kingdom VF	25,211	22,833	-0.7	-9.4	6.3	5.7	19,544	16,263	-3.4	-16.7	8.3	7.1
Russian Fed. VF	21,169		14.5		5.3							
Germany TCE	18,983	17,861	10.9	-5.9	4.7	4.5	18,483	17,225	2.0	-6.8	7.9	7.8
Poland TF	17,400	15,000	-3.1	-13.8	4.3	3.8	6,100	4,815	0.0	-21.1	2.6	2.1
Hungary VF/2	15,571	15,340	8.1	-1.6	3.9	3.8	3,438	3,933	0.9	14.4	1.5	1.7

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

Middle East

On average, international arrivals were down 2.5 per cent from the year before. The greatest success was experienced in Lebanon, Jordan and Iraq (although on very low baseline figures), while Egypt suffered a decline of 14.8 per cent. Data for some countries are still unavailable.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
Middle East	23,237	22,653	13.2	-2.5	100	100	12,219	11,795	9.1	-3.5	100	100
Saudi Arabia *	6,295				27.1		3,420				29.0	
Egypt TF	5,116	4,357	13.9	-14.8	22.0	19.2	4,345	3,800	11.3	-12.5	35.6	32.2
Untd Arab Emirates THS	3,907		15.1		16.8		1,012		13.3		8.3	
Bahrain TF	2,420		19.9		10.4		469		15.0		3.8	
Jordan TF	1,427	1,478	5.1	3.6	6.1	6.5	722	700	-9.2	-3.0	5.9	5.9
Syrian Arab Republic TCE	1,416	1,318	2.2	-6.9	6.1	5.8	1,082		4.9		8.9	
Lebanon TF	742	837	10.2	12.9	3.2	3.7	742	837	10.3	12.8	6.1	7.1

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

South Asia

South Asia felt the impact of the increased tension between India and Pakistan and the war in Afghanistan. Arrivals were down 4.5 per cent, with Nepal, Pakistan and Sri Lanka suffering the biggest declines. India managed to keep its decline under the average, while Iran did well with 4.5 per cent growth.

Series ¹	International Tourist Arrivals						International Tourism Receipts					
	(1000)		Growth rate (%)		Market share (%)		(US\$ million)		Growth rate (%)		Market share (%)	
	2000	2001	00/99	01*/00	2000	2001*	2000	2001*	00/99	01*/00	2000	2001*
South Asia	6,091	5,818	5.4	-4.5	100	100	4,725	4,994	3.5	5.7	100	100
India TF	2,649	2,537	6.7	-4.2	43.5	43.6	3,168	3,042	5.3	-4.0	67.1	60.9
Iran TF	1,342	1,402	1.6	4.5	22.0	24.1	671	1,122	1.4	67.2	14.2	22.5
Pakistan TF	557	500	28.8	-10.2	9.1	8.6	84	92	10.5	9.5	1.8	1.8
Maldives TF	467	461	8.7	-1.3	7.7	7.9	321	331	2.3	3.2	8.8	6.6
Nepal TF	464	363	-5.7	-21.8	7.6	6.2	167	137	-0.6	-18.0	3.5	2.7
Sri Lanka TF	400	337	-8.3	-15.9	6.6	5.8	253	211	-8.0	-16.6	5.4	4.2

Source: World Tourism Organization (WTO)

*Data as collected by WTO September 2002

¹ series-TF: International tourist arrivals at frontiers (excluding same-day visitors); VF: International visitor arrivals at frontiers (including tourists and same-day visitors); THS: International tourist arrivals at hotels and similar establishments; TCE: International tourist arrivals at collective tourism establishments.

International

Tourism

Expenditure

World's

Top 15

Tourism

Spenders

The crisis in world tourism was more than evident, especially in terms of international tourism expenditure. There were a few exceptions: the United Kingdom, Belgium, Austria, and Switzerland, all among the top 15 spenders, spent more money abroad than in 2000. The list of top spenders remains the same with the United States leading Germany, the UK and Japan, followed by France and Italy. China is in seventh place, ahead of the Netherlands and Canada. Together with Hong Kong, China is becoming increasingly important in terms of expenditure, spending more than France and Italy.

Rank		International Tourism Expenditure (US\$ billion)		% Change 2001*/2000	Market share 2001*
		2000	2001*		
1	United States	64.5	58.9	-8.7	12.7
2	Germany	47.6	46.2	-3.0	10.0
3	United Kingdom	36.3	36.5	0.6	7.9
4	Japan	31.9	26.5	-16.8	5.7
5	France	17.8	17.7	-0.2	3.8
6	Italy	15.7	14.2	-9.4	3.1
7	China	13.1	-		
8	Hong Kong (China)	12.5	12.5	-0.1	2.7
9	Netherlands	12.2	12.0	-1.7	2.6
10	Canada	12.1	11.6	-4.3	2.5
11	Belgium	9.4	9.8	3.6	2.1
12	Austria	8.5	8.9	4.4	1.9
13	Republic of Korea	6.2	6.9	11.5	1.5
14	Sweden	8.0	6.8	-15.1	1.5
15	Switzerland	6.2	6.6	5.2	1.4

Source: World Tourism Organization (WTO)

*Data as collected in WTO database September 2002

Outbound

Tourism

by Generating

Regions

Outbound tourism is inevitably linked with the general economic situation. The International Monetary Fund published its World Economic Outlook last September, in which it lowered its economic development projections for the world and most countries. The figures show a generalized reduction in growth among the developed countries, which are the main tourism generators, except in the case of Japan. It is interesting to note that projected economic growth for emerging markets such as the members of ASEAN or those in Eastern Europe, have been maintained or even raised.

	International Tourist Arrivals											
	(million)					Market share (%)			Growth rate (%)		Average Annual Growth (%)	
	1990	1995	1999	2000	2001*	1990	1995	2001*	00/99	01*/00	90-00	95-00
World	457.3	551.7	652.3	696.8	692.5	100	100	100	5.8	-0.6	4.3	4.8
Africa	11.4	12.6	15.3	15.8	16.3	2.5	2.3	2.4	3.6	3.0	3.3	4.7
Americas	99.4	108.1	122.0	130.7	123.9	21.7	19.6	17.9	7.1	-5.1	2.8	3.9
East Asia and the Pacific	56.1	84.3	98.4	110.1	112.9	12.3	15.3	16.3	12.0	2.5	7.0	5.5
Europe	265.3	319.6	382.8	404.4	402.8	58.0	57.9	58.2	5.6	-0.4	4.3	4.8
Middle East	7.7	8.7	11.3	12.4	12.3	1.7	1.6	1.8	10.3	-0.8	4.9	7.5
South Asia	4.0	5.0	6.9	7.8	7.9	0.9	0.9	1.1	13.4	1.1	7.0	9.2
Origin not specified*	13.4	13.4	15.7	15.5	16.4	2.9	2.4	2.4				
Same region	362.2	438.6	513.1	546.4	549.9	79.2	79.5	79.4	6.5	0.6	4.2	4.5
Other regions	81.7	99.8	123.6	134.9	126.2	17.9	18.1	18.2	9.2	-6.4	5.1	6.2

Source: World Tourism Organization (WTO)

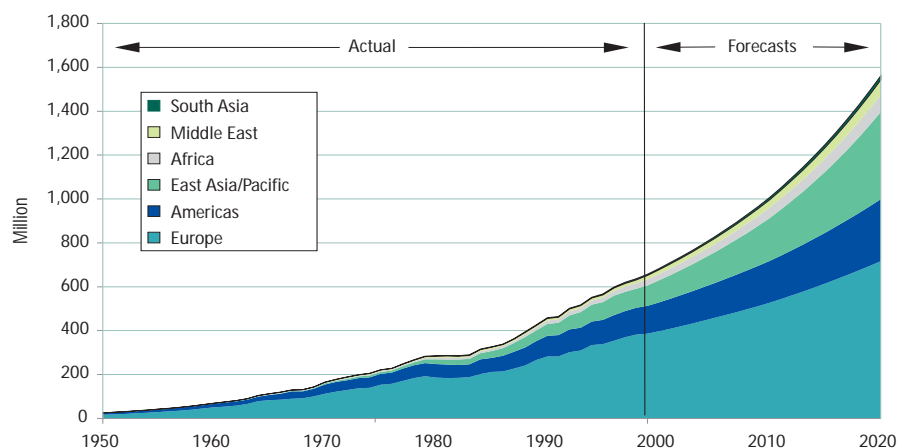
*Data as collected by WTO September 2002

*Countries that could not be allocated to a specific region of origin. As information is derived from inbound tourism data this occurs when data on the country of origin is missing or when a category like 'other countries of the world' is used grouping countries together that are not separately specified.

Furthermore, for the medium term, pent-up demand due to postponed travel may become noticeable. For some destinations, demand could be negatively influenced by the fact that operators have reduced capacity, not to mention the Bali attack of 12 October which introduced new threats, especially to the South Asian region.

Tourism 2020 Vision is the World Tourism Organization's long-term forecast and assessment of the development of tourism up to the first 20 years of the new millennium. An essential outcome of the *Tourism 2020 Vision* are quantitative forecasts covering a 25 year period, with 1995 as base year and forecasts for 2000, 2010 and 2020.

International Tourist Arrivals, 1950-2020



Source: World Tourism Organization (WTO)

WTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach over 1.56 billion by the year 2020. Of these worldwide arrivals in 2020, 1.18 billion will be intraregional and 377 million will be long-haul travellers.

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5 percent per year, compared to the world average of 4.1 per cent. The more mature regions Europe and Americas are anticipated to show lower than average growth rates.

Europe will maintain the highest share of world arrivals, although there will be a decline from 60 per cent in 1995 to 46 per cent in 2020. By 2010 the Americas will lose its number two position to the East Asia and the Pacific region which will receive 25 per cent of world arrivals in 2020 with the Americas decreasing from 19 per cent in 1995 to 18 per cent in 2020.

International Tourist Arrivals by Region (millions)

	Base Year	Forecasts		Average Annual Growth Rate (%) 1995-2020	Market share (%)	
	1995	2010	2020		1995	2020
Total	565.4	1,006.4	1,561.1	4.1	100	100
Africa	20.2	47.0	77.3	5.5	3.6	5.0
Americas	108.9	190.4	282.3	3.9	19.3	18.1
East Asia/Pacific	81.4	195.2	397.2	6.5	14.4	25.4
Europe	338.4	527.3	717.0	3.0	59.8	45.9
Middle East	12.4	35.9	68.5	7.1	2.2	4.4
South Asia	4.2	10.6	18.8	6.2	0.7	1.2
Intraregional (a)	464.1	790.9	1,183.3	3.8	82.1	75.8
Long-Haul (b)	101.3	215.5	377.9	5.4	17.9	24.2

Source: World Tourism Organization (WTO)

Notes:

- a) Intraregional includes arrivals where country of origin is not specified
- b) Long-Haul is defined as everything except intraregional travel.

Long-haul travel worldwide will grow faster, at 5.4 per cent per year over the period 1995-2020, than intraregional travel, at 3.8 per cent. Consequently the ratio between intraregional and long haul travel will shift from around 82:18 in 1995 to close to 76:24 in 2020.