

Tourism Highlights

2006 Edition



For more information:

Facts & Figures section at www.unwto.org

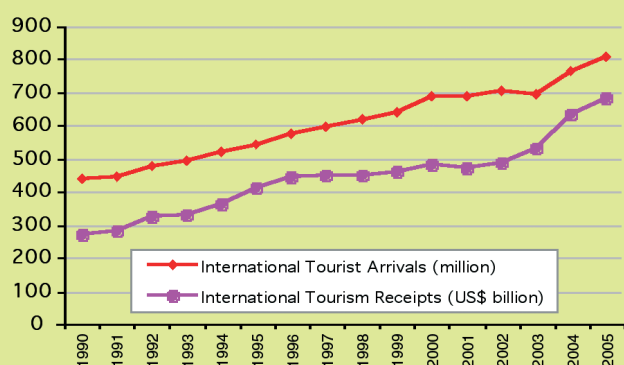
Overview

International Tourism 2005

Terrorism, natural disasters, health scares, oil price rises, exchange rate fluctuations and economic and political uncertainties – these were just some of the issues facing the tourism industry in 2005. Yet, international tourist arrivals worldwide beat all expectations exceeding 800 million and achieving an all-time record. The estimated increase represents a staggering 42 million additional arrivals: more than 17 million in Europe, 11 million in Asia and the Pacific, 8 million in the Americas, 3 million in Africa and in the Middle East respectively. The 2005 results not only represent a worldwide increase of 5.5%, but also mean a consolidation of the bumper growth achieved in 2004 (+10%). Although world tourism growth was more moderate in 2005, it was still almost one-and-a-half percentage points above the long-term average annual growth rate of 4.1%.

Results by region show that Africa recorded the best growth in arrivals last year (+9%), followed by the Asia and the Pacific (+8%), Middle East (+8%), the Americas (+6%) and Europe (+4%). Meanwhile, despite a comparatively slower growth rate in 2005, the Middle East has shown the strongest average annual increase over the past five years. Since 2000, it has averaged 10% a year as against 7% for Asia and the Pacific, 5% for Africa, 2% for Europe and less than 1% for the Americas. By comparison, the world average was just over 3%. North America is the only subregion to not record an increase in international arrivals over the five-year period (-0.3%).

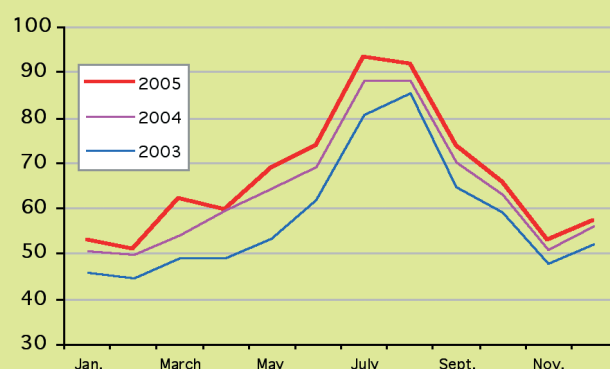
Inbound Tourism, 1990-2005



Source: World Tourism Organization (UNWTO) ©

Inbound Tourism by month

International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

* = provisional figure or data; - = figure or data not (yet) available

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

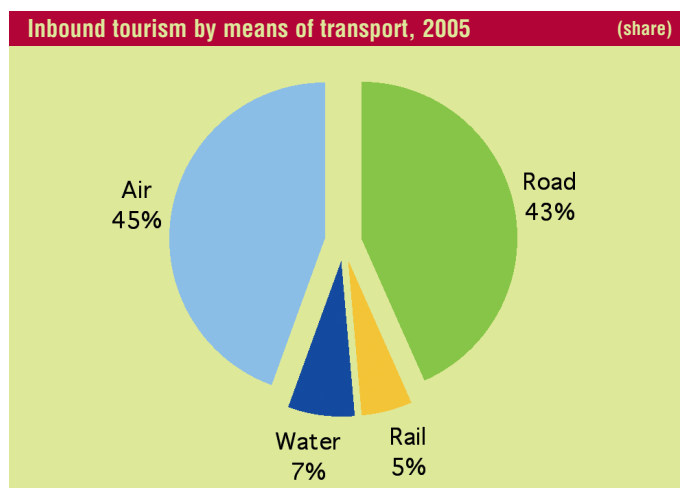
In 2005, the majority of international tourist arrivals corresponded to trips for the purpose of leisure, recreation and holidays (50%) reaching a total of 402 million. Business travel accounted for some 16 per cent of the total (125 million) and another 26% consisted of travel for other motives, such as visiting friends and relatives (VFR), religious purposes/pilgrimages, health treatment, etc (212 million). For the remaining 8% of arrivals the purpose of visit was not specified.

Just about half of all international tourists arrived over land by road (43%) or rail (5%) to their destination in 2005. Air transport represented 45% of arrivals and transport over water accounted for 7%. For the past two years the trend has been for air transport to grow at a faster pace than transport over land or water.

International Tourist Arrivals by (Sub) region



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

	International Tourist Arrivals (million)						Market share (%) 2005*	Change (%)		Average annual growth (%) 00/05*
	1990	1995	2000	2003	2004	2005*		04/03	05*/04	
World	439	540	687	694	764	806	100	10.1	5.5	3.3
Europe	265.6	315.0	395.8	407.1	424.4	441.5	54.8	4.3	4.0	2.2
Northern Europe	31.6	40.1	45.8	45.8	49.6	52.9	6.6	8.4	6.5	2.9
Western Europe	108.6	112.2	139.7	136.1	139.0	142.7	17.7	2.2	2.6	0.4
Central/Eastern Europe	31.5	60.0	69.6	78.5	86.3	87.9	10.9	10.0	1.9	4.8
Southern/Mediter. Eu.	93.9	102.7	140.8	146.8	149.5	158.0	19.6	1.9	5.7	2.3
Asia and the Pacific	56.2	82.4	110.5	113.3	144.2	155.4	19.3	27.3	7.8	7.1
North-East Asia	26.4	41.3	58.3	61.7	79.4	87.6	10.9	28.6	10.3	8.5
South-East Asia	21.5	28.8	36.9	36.1	47.1	49.3	6.1	30.4	4.8	6.0
Oceania	5.2	8.1	9.2	9.0	10.1	10.5	1.3	12.1	3.8	2.6
South Asia	3.2	4.2	6.1	6.4	7.6	8.0	1.0	18.5	5.5	5.7
Americas	92.8	109.0	128.1	113.1	125.7	133.5	16.6	11.1	6.2	0.8
North America	71.7	80.7	91.4	77.3	85.7	89.9	11.2	10.9	4.9	-0.3
Caribbean	11.4	14.0	17.1	17.1	18.1	18.9	2.3	5.9	4.3	2.0
Central America	1.9	2.6	4.3	4.9	5.7	6.5	0.8	15.6	15.7	8.5
South America	7.7	11.7	15.3	13.8	16.2	18.2	2.3	17.2	12.2	3.6
Africa	15.2	20.3	28.2	31.0	33.8	36.7	4.6	9.1	8.5	5.4
North Africa	8.4	7.3	10.2	11.1	12.8	13.7	1.7	15.1	7.5	6.0
Subsaharan Africa	6.8	13.0	17.9	19.9	21.1	23.0	2.9	5.8	9.1	5.1
Middle East	9.6	13.7	24.2	29.5	36.3	39.1	4.8	22.8	7.7	10.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

International Tourism Receipts by (Sub) region

International tourism generated over US\$ 2 billion a day in 2005

For many destinations visitor expenditure on accommodation, food and drink, local transport, entertainment, shopping, etc. is an important pillar of their economy, creating much needed employment and opportunities for development. Some 70 countries earned more than US\$ 1 billion from international tourism in 2005.

Worldwide, international tourism receipts are estimated at US\$ 680 billion (547 billion euros) in 2005. In absolute terms, international tourism receipts increased by US\$ 47 billion, an amount comparable to the receipts of the world's second biggest tourism earner, Spain, or to the combined receipts of the Caribbean, Central America, South America and South Asia.

All regions and subregions shared in this increase. Europe gained an additional US\$ 20 billion, raising receipts to over US\$ 348 billion (51% of the world total). The Americas improved results by US\$ 13 billion to US\$ 145 billion (21% share), and Asia and the Pacific added US\$ 11 billion taking the total to US\$ 139 billion (20% share). Estimates based on still limited available data point to an increase by US\$ 2 billion to US\$ 21 billion for Africa and a rise of US\$ 2 billion to US\$ 28 billion for the Middle East, representing 3% and 4% of the world total respectively.

In relative terms, international tourism receipts, computed in local currencies and deflated by the corresponding rate of inflation, grew by 3.3% in 2005, building on the extraordinary increase of 9.3% of 2004.

	International Tourism Receipts (billion)						Change current prices (%)		Change constant prices (%)	
	1990	1995	2000	2003	2004	2005*	04/03	05*/04	04/03	05*/04
Local currencies							12.3	6.4	9.3	3.3
US\$	270	411	481	533	633	680	18.7	7.5	15.6	4.0
Euro	212	314	521	471	509	547	7.9	7.5	5.7	5.2

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

International Tourism Receipts	Change			Share (%)	US\$			Euro		
	Local currencies, constant prices (%)				Receipts per Arrival	(billion)		Receipts per Arrival		
	03/02	04/03	05*/04	2004		2005*	2004		2005*	2005
				2005*						
World	-1.7	9.3	3.3	100	633	680	840	509	547	680
Europe	-1.5	3.2	2.4	51.2	328.5	348.2	790	264.1	279.9	630
Northern Europe	-2.2	5.8	8.4	7.9	48.9	53.8	1,020	39.3	43.3	820
Western Europe	-3.3	1.8	1.5	17.9	117.6	121.9	850	94.6	98.0	690
Central/Eastern Europe	-2.6	5.5	0.3	4.7	29.0	32.3	370	23.3	26.0	300
Southern/Mediterr. Europe	0.8	2.9	1.5	20.6	133.0	140.2	890	106.9	112.7	710
Asia and the Pacific	-9.3	24.4	4.3	20.4	127.8	138.6	890	102.7	111.4	720
North-East Asia	-11.1	30.4	7.7	10.4	64.0	70.8	810	51.5	56.9	650
South-East Asia	-16.7	26.1	0.0	4.9	32.2	33.4	680	25.9	26.8	540
Oceania	0.6	8.3	0.5	3.6	22.9	24.5	2,330	18.4	19.7	1,880
South Asia	17.9	20.6	5.7	1.4	8.7	9.8	1,220	7.0	7.9	980
Americas	-2.1	11.5	3.8	21.2	132.0	144.6	1,080	106.1	116.2	870
North America	-4.7	12.9	4.2	15.7	98.2	107.1	1,190	79.0	86.1	960
Caribbean	5.8	3.9	1.9	3.0	19.2	20.4	1,080	15.4	16.4	870
Central America	13.0	13.0	8.9	0.7	4.0	4.6	700	3.2	3.7	560
South America	5.0	13.6	2.3	1.8	10.6	12.5	690	8.5	10.1	550
Africa	24.2	6.9	8.5	3.2	19.2	21.5	590	15.4	17.3	470
North Africa	-0.3	13.4	14.5	1.0	6.1	7.0	510	4.9	5.6	410
Subsaharan Africa	38.0	4.0	5.7	2.1	13.1	14.5	630	10.5	11.7	510
Middle East	20.6	11.3	1.5	4.0	25.5	27.6	710	20.5	22.1	570

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

By region, the highest relative growth was recorded in Africa (+8.5%), followed by Asia and the Pacific (+4.3%), the Americas (+3.8%), Europe (+2.4%) and the Middle East (+1.5%). In all cases, the growth in receipts lagged behind the increase in international tourist arrivals. This can be attributed to various factors, such as the still somewhat fragile recovery of high-yield business tourism, a comparatively strong increase in short trips, very much stimulated by the attractive fares from low-cost airlines, and a shift towards destinations that offer good value for money.

For destination countries, receipts from international tourism count as exports and cover transactions generated by same-day as well as overnight visitors. However, it does not include receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category, international passenger transport. Although the availability of comparable international data is somewhat limited, the export value of international passenger transport has in recent years been estimated at some 16% of the total of international tourism and international passenger transport receipts. For 2005, this corresponds to some US\$ 130 billion.

Total receipts from international tourism, including international passenger transport, thus exceeds US\$ 800 billion. In other words, more than US\$ 2 billion a day is earned by international tourism. As an export category, it represents around 6% of the total value of worldwide exports of goods and services and ranks fourth after fuels, chemicals and automotive products. Yet, for many destination countries, in particular developing countries and islands, tourism counts as the most important category of export earnings.

China and Turkey on the rise

When talking about top destinations for international tourism, it is always advisable to take more than just one indicator into account. Ranked according to the two key tourism indicators –international tourist arrivals and international tourism receipts–, nine of the top ten destinations appear in both lists, albeit in a different order. The first three places are occupied by the United States, Spain and France. The United States ranks first in terms of receipts but third in arrivals and France first in arrivals but third in receipts, while Spain comes second in both lists. Italy ranks fourth in receipts but fifth in arrivals, while China ranks fourth in arrivals and sixth in receipts. The United Kingdom, Germany, Turkey and Austria occupy positions 5, 7, 8 and 9 in receipts and rank one place lower respectively in arrivals. Mexico only appears among the first ten destinations for arrivals and Australia only for receipts.

The differences between the two rankings are explained by the fact that every destination has its own characteristics with regard to duration of stay, visitor profile, expenditure level, cost of living, share of receipts from same-day visitors and cruise passengers, etc. France for instance, a destination surrounded by a number of large European source markets, attracts a relatively high share of short-staying tourists, while the average stay of international visitors in the much larger United States tends to be comparatively much longer.

Compared with 2004, the top-ten rankings in 2005 remained virtually unchanged. The only development with regard to receipts was that China ousted Germany from sixth place, continuing its inexorable rise with a 14% increase as against Germany's still commendable 6%. For international tourist arrivals, the major change has been that Turkey entered the ranking in the ninth position, as a result of its 21% increase in 2005 –on top of a 26% rise in 2004. Both China and Turkey are examples of destinations that have shown very dynamic growth over the past decade. China leads in Asia and the Pacific by a wide margin. In the worldwide ranking, it is climbing steadily and is approaching the United States in terms of arrivals and the UK in terms of receipts. Turkey has consolidated its position in recent years as the fourth most important destination in the Mediterranean region and the sixth in Europe after the tourism giants France, Spain, Italy, the UK and Germany.

World's Top Tourism Destinations

International Tourist Arrivals (million)						International Tourism Receipts (US\$ billion)								
Rank		Series ¹	Million		Change (%)		Rank		US\$				Local currencies	
			2004	2005*	04/03	05*/04			Billion		Change (%)		Change (%)	
									2004	2005*	04/03	05*/04	04/03	05*/04
1	France	TF	75.1	76.0	0.1	1.2	1	United States	74.5	81.7	15.8	9.6	15.8	9.6
2	Spain	TF	52.4	55.6	3.1	6.0	2	Spain	45.2	47.9	14.1	5.8	3.8	5.8
3	United States	TF	46.1	49.4	11.8	7.2	3	France	40.8	42.3	11.6	3.5	1.5	3.5
4	China	TF	41.8	46.8	26.7	12.1	4	Italy	35.7	35.4	14.1	-0.7	3.8	-0.7
5	Italy	TF	37.1	36.5	-6.4	-1.5	5	United Kingdom	28.2	30.7	24.6	8.7	11.1	9.5
6	United Kingdom	VF	27.8	30.0	12.3	8.0	6	China	25.7	29.3	47.9	13.8	47.9	12.7
7	Mexico	TF	20.6	21.9	10.5	6.3	7	Germany	27.7	29.2	19.7	5.6	8.9	5.5
8	Germany	TCE	20.1	21.5	9.4	6.8	8	Turkey	15.9	18.2	20.3	14.2	14.7	7.8
9	Turkey	TF	16.8	20.3	26.1	20.5	9	Austria	15.3	15.5	9.9	0.9	-0.1	0.9
10	Austria	TCE	19.4	20.0	1.5	3.0	10	Australia	13.6	15.0	21.7	9.6	7.7	5.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Regional Results

Europe - sustained growth in Northern and Southern destinations

Although Europe's economic environment in some of its major intraregional source markets had not been overly conducive to tourism growth, international tourist arrivals still increased by 4%, virtually equalling the growth of the previous year. Among subregions, Northern Europe and Southern and Mediterranean Europe were the winners – increasing by almost 7 and 6% respectively. In Western Europe and Central and Eastern Europe growth was much weaker at around 2%.

Northern Europe's much better than average results – for the second consecutive year – are due in large part to the United Kingdom's strong performance (+8%). Despite the London bomb attacks in July 2005, the growth in international visitor arrivals in the UK remained positive throughout the year. Ireland, up an estimated 6% suffered declines in arrivals from United States and Japan, but saw compensation in European traffic.

The results in Southern and Mediterranean Europe owe much to the excellent results achieved by Turkey (+21%) and the solid performance of Spain (+6%), which has succeeded in diversifying its markets through the development of new products that highlight the multiple, lesser-known attractions of the country.

Western Europe's overall result was again lower than average in 2005 – attributable to the continuing slow performance of France (+1%), which accounts for slightly over half of arrivals in the subregion. Germany was the best performer, increasing arrivals by 7%.

In Central and Eastern Europe, growth slowed down markedly from 10% in 2004 to 2% in 2005, but this was hardly surprising given that 2004's growth was strongly influenced by the European Union (EU) opening its doors to ten new members, seven of which belong to this subregion. Low-cost airlines have been a major factor in the tourism success stories in Central and Eastern Europe. In 2005, Belarus was by far the star performer (+35%), but many other countries achieved above-average increases, for example Estonia (+9%), Slovakia (+8%) and Poland (+6%).

Major destinations Series ¹		International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2004	2005*	2004/03	2005*/04		2004	2005*	2004/03	2005*/04	
		2004	2005*	2004/03	2005*/04	2005*	2004	2005*	2004/03	2005*/04	2005*
Europe		424,448	441,528	4.3	4.0	100	328,499	348,234	15.9	6.0	100
Austria	TCE	19,373	19,952	1.5	3.0	4.5	15,334	15,467	9.9	0.9	4.4
Belgium	TCE	6,710	6,747	0.3	0.6	1.5	9,233	9,863	12.7	6.8	2.8
Bulgaria	TF	4,630	4,837	14.4	4.5	1.1	2,221	2,401	34.8	8.1	0.7
Croatia	TCE	7,912	8,467	6.8	7.0	1.9	6,848	7,463	8.6	9.0	2.1
Czech Rep.	TCE	6,061	6,336	19.4	4.5	1.4	4,172	4,631	17.3	11.0	1.3
France	TF	75,121	76,001	0.1	1.2	17.2	40,841	42,276	11.6	3.5	12.1
Germany	TCE	20,137	21,500	9.4	6.8	4.9	27,668	29,204	19.7	5.6	8.4
Greece	TF	13,313	14,276	-4.7	7.2	3.2	12,872	13,731	19.8	6.7	3.9
Hungary	TF	12,212	10,048	–	-17.7	2.3	4,061	4,271	0.4	5.2	1.2
Ireland	TF	6,953	7,333	2.8	5.5	1.7	4,398	4,744	14.1	7.9	1.4
Italy	TF	37,071	36,513	-6.4	-1.5	8.3	35,656	35,398	14.1	-0.7	10.2
Netherlands	TCE	9,646	10,012	5.1	3.8	2.3	10,333	10,475	12.8	1.4	3.0
Norway	TF	3,628	3,859	11.0	6.4	0.9	3,087	3,441	16.1	11.5	1.0
Poland	TF	14,290	15,200	4.2	6.4	3.4	5,833	6,284	43.4	7.7	1.8
Portugal	TF	11,617	–	-0.8	–	–	7,846	7,931	18.6	1.1	2.3
Russian Fed.	TF	19,892	19,940	-2.7	0.2	4.5	5,225	5,466	16.1	4.6	1.6
Spain	TF	52,430	55,577	3.1	6.0	12.6	45,248	47,891	14.1	5.8	13.8
Switzerland	TH	–	7,229	–	–	1.6	10,556	11,040	14.9	4.6	3.2
Turkey	TF	16,826	20,273	26.1	20.5	4.6	15,888	18,152	20.3	14.2	5.2
Ukraine	TF	15,629	–	24.9	–	–	2,560	3,125	173.8	22.1	0.9
United Kingdom	VF	27,754	29,970	12.3	8.0	6.8	28,221	30,669	24.6	8.7	8.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Asia and the Pacific - the growing giant

Regional Results

Asia and the Pacific recorded another strong year in 2005, with growth averaging 8%, following the exceptional post-SARS rebound in 2004 (+27%). The 2005 results are impressive, not only coming immediately after such a strong performance the previous year, but more significantly even as the region was still suffering the lingering impact of December 2004's Indian Ocean tsunami and seaquake, which dealt a severe blow to tourism in the Maldives and also seriously affected the other destinations involved – Sri Lanka, Thailand and Indonesia. Although it certainly weakened growth, South and South-East Asia still both advanced by 5%. The most successful subregion in 2005 was North-East Asia, up 10%, while Oceania's arrivals increased by a more modest 4%.

Among the countries affected by the December 2004 tsunami tragedy, the Maldives reported a 39% decrease although the rate of decline had eased in the last months of the year. Arrivals to Indonesia were down by 6%, while Sri Lanka reported a 3% drop. As for Thailand, monthly figures turned positive from June onwards and over the full year the decline was limited to 1.4%. Other destinations in South-East and South Asia managed to report remarkable growth, such as the Mekong countries Lao PDR (+65%), Cambodia (+35%) and Vietnam (+18%), as well as the Philippines (+15%) and India (+13%).

North-East Asia (+10%) emerged as the most dynamic subregion with the strongest performers being Taiwan (province of China) (+15%), China (+12%) and Japan (+10%). Hong Kong (China) and Macao (China) (both +8%), both benefited from growing intraregional demand in 2005, stimulated by the increased availability of low-cost airline service and from the continued liberalization of travel from mainland China.

In Oceania, despite the strong Australian dollar, tourist arrivals to Australia grew by more than 5% in 2005, and a number of the Pacific island destinations looked likely to reach a similar growth level. These included the Cook Islands and Guam (both +6%). But the best performances were turned in by Papua New Guinea (+17%) and Fiji (+10%).

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2004	2005*	2004/03	2005*/04	2005*	2004	2005*	2004/03	2005*/04	2005*
Asia and the Pacific		144,224	155,432	27.3	7.8	100	127,761	138,588	31.6	8.5	100
Australia	TF	4,774	5,020	9.6	5.2	3.2	13,647	14,952	21.7	9.6	10.8
Cambodia	TF	1,055	1,422	50.5	34.7	0.9	603	840	55.0	39.3	0.6
China	TF	41,761	46,809	26.7	12.1	30.1	25,739	29,296	47.9	13.8	21.1
Guam	TF	1,157	1,228	27.2	6.1	0.8	–	–	–	–	–
Hong Kong (China)	TF	13,655	14,773	41.1	8.2	9.5	8,999	10,286	26.1	14.3	7.4
India	TF	3,457	3,915	26.8	13.2	2.5	6,121	7,356	37.1	20.2	5.3
Indonesia	TF	5,321	5,002	19.1	-6.0	3.2	4,798	4,521	18.8	-5.8	3.3
Iran	TF	1,659	–	7.3	–	–	1,074	–	4.0	–	–
Japan	TF	6,138	6,728	17.8	9.6	4.3	11,269	12,439	27.8	10.4	9.0
Korea, Republic of	VF	5,818	6,022	22.4	3.5	3.9	6,069	5,660	13.3	-6.7	4.1
Lao P.D.R.	TF	407	672	107.7	65.1	0.4	119	147	36.7	23.4	0.1
Macao (China)	TF	8,324	9,014	31.9	8.3	5.8	7,479	7,757	45.1	3.7	5.6
Malaysia	TF	15,703	16,431	48.5	4.6	10.6	8,198	8,543	39.0	4.2	6.2
New Zealand	VF	2,334	2,365	10.9	1.3	1.5	4,790	4,865	20.3	1.6	3.5
Philippines	TF	2,291	2,623	20.1	14.5	1.7	2,017	2,130	30.6	5.6	1.5
Singapore	TF	6,553	7,080	39.3	8.0	4.6	5,219	5,740	38.1	10.0	4.1
Taiwan (pr. of China)	VF	2,950	3,378	31.2	14.5	2.2	4,054	4,977	36.2	22.8	3.6
Thailand	TF	11,737	11,567	16.4	-1.4	7.4	10,034	10,108	27.7	0.7	7.3
Vietnam	VF	2,928	3,468	20.6	18.4	2.2	–	–	–	–	–

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Regional Results

Americas - Central and South America continue advance

In the Americas, growth reached 6% with North America (+5%) and the Caribbean (+4%) slightly below the regional average. Of the major destinations, the United States continued the recovery started in 2004 (+7%), while Mexico (+6%) and Cuba (+12%) still showed above-average increases, even after having suffered the impact of last year's devastating hurricanes. Destinations in Central America (+16%) and South America (+12%), on the other hand, can look back on a very positive year.

Although troubled by an extraordinarily active hurricane season, arrivals to the Caribbean overall were up an estimated 4% in 2005. Several Caribbean destinations bucked the general trend. Among the best performers are Anguilla (+15%), the British Virgin Islands (+11%) and Saint Lucia (+6.5%). Arrivals in the Dominican Republic grew by a significant 7%, due in large part to the boom from the US market that surpassed the million mark. Cuba (+12%) had a good 2005, attracting healthy growth from many Latin American markets, as well as key European sources and emerging markets like Russia and China.

Natural disasters in Central and South America also dealt a blow to some of the region's economies, but most of Central America appears to have survived the floods caused by hurricane Stan more or less unscathed. The 16% growth for Central America makes it the fastest growing subregion in the world in 2005. With the exception of Belize, all Central American destinations recorded healthy double-digit increases for the second year in a row.

Results and trends were similar for South America (+12%), with most countries in the subregion benefiting from favourable exchange rates, an improved range of quality tourism products, enhanced air capacity and economic recovery in key source markets. The prosperity of South American countries is also attracting increased business travellers and investments. The strongest growth was reported by Venezuela (+45%), while Argentina, Brazil, Chile, Colombia, Paraguay, Peru and Suriname all recorded growth rates in the 10-20% range, following already very positive 2004 results.

Major destinations	Series ¹	International Tourist Arrivals				International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)	
		2004	2005*	2004/03	2005*/04		2004	2005*	2004/03	2005*/04
Americas		125,708	133,546	11.1	6.2	100	132,021	144,551	15.6	9.5
Argentina	TF	3,457	3,895	15.4	12.7	2.9	2,235	2,753	11.4	23.2
Aruba	TF	728	733	13.4	0.6	0.5	1,052	1,096	22.2	4.2
Bahamas	TF	1,561	1,608	3.4	3.0	1.2	1,884	2,069	7.2	9.8
Brazil	TF	4,794	5,358	16.0	11.8	4.0	3,222	3,861	30.0	19.8
Canada	TF	19,031	18,612	9.2	-2.2	13.9	12,871	13,584	22.0	5.5
Chile	TF	1,785	2,027	10.6	13.6	1.5	1,149	1,256	30.1	9.3
Colombia	TF/VF	791	933	26.6	18.0	0.7	1,058	1,218	18.5	15.1
Costa Rica	TF	1,453	1,679	17.3	15.6	1.3	1,358	1,570	13.3	15.6
Cuba	TF	2,017	2,261	9.2	12.1	1.7	1,915	1,920	3.7	0.3
Dominican Rep.	TF	3,450	3,691	5.1	7.0	2.8	3,152	3,508	0.8	11.3
Ecuador	VF	819	861	7.6	5.1	0.6	462	486	13.8	5.0
El Salvador	TF	966	1,154	12.7	19.5	0.9	441	543	15.1	23.2
Guatemala	TF	1,182	1,316	34.2	11.4	1.0	776	869	25.0	12.0
Honduras	TF	595	749	-2.6	25.9	0.6	429	472	22.7	10.0
Jamaica	TF	1,415	1,479	4.8	4.5	1.1	1,438	1,545	6.1	7.4
Mexico	TF	20,618	21,915	10.5	6.3	16.4	10,796	11,803	15.3	9.3
Nicaragua	TF	615	712	16.9	15.9	0.5	192	207	20.0	7.9
Panama	TF	621	702	9.8	13.0	0.5	651	780	11.3	19.8
Peru	TF	1,277	1,486	19.4	16.4	1.1	1,142	1,308	21.4	14.6
Puerto Rico	TF	3,541	3,686	9.3	4.1	2.8	3,024	3,239	13.0	7.1
United States	TF	46,084	49,402	11.8	7.2	37.0	74,547	81,680	15.8	9.6
Uruguay	TF	1,756	1,808	23.7	2.9	1.4	494	594	43.3	20.3
Venezuela	TF	486	706	44.3	45.2	0.5	481	641	45.9	33.2

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Africa - tourism development maintains momentum

Regional Results

Africa performed best of all regions in 2005, with an increase in arrivals estimated at around 9% for the second consecutive year. Growth was about as strong in Sub-Saharan Africa (+9%) as in North Africa (+8%). Algeria reported 17% more arrivals, while Morocco increased arrivals by 7% and Tunisia by 6%. Among the Sub-Saharan destinations, particularly remarkable results were reported by the Democratic Republic of Congo (+103%), Swaziland (+83%), Gambia (+23%) and Senegal (+15%). Major destinations such as South Africa (+10%), as well as the island destinations of Seychelles (+7%) and Mauritius (+6%), all improved on their 2004 results. Kenya also reported strong growth (+23% in visitor arrivals although final results for tourists are not yet in). Product improvement and diversification have been two of the main factors boosting tourism demand for African destinations. Investment in infrastructure has also been very positive, and enhanced cooperation between the public and private sectors has helped to ensure increased benefits for all stakeholders.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2004	2005*	2004/03	2005*/04	2005*	2004	2005*	2004/03	2005*/04	2005*
Africa		33,838	36,715	9.1	8.5	100	19,171	21,514	19.1	12.2	100
Algeria	VF	1,234	1,443	5.8	16.9	3.9	178	–	58.9	–	–
Botswana	TF	–	–	–	–	–	549	562	20.2	2.3	2.6
Ghana	TF	584	–	10.0	–	–	466	–	12.6	–	–
Kenya	TF	1,199	–	29.3	–	–	486	579	39.8	19.2	2.7
Mauritius	TF	719	761	2.4	5.9	2.1	853	871	22.5	2.2	4.1
Morocco	TF	5,477	5,843	15.0	6.7	15.9	3,924	4,617	21.6	17.7	21.5
Namibia	TF	–	–	–	–	–	403	348	22.1	-13.8	1.6
Reunion	TF	430	409	-0.5	-4.9	1.1	448	384	8.5	-14.3	1.8
Senegal	TF	667	769	34.7	15.3	2.1	–	–	–	–	–
Seychelles	TF	121	129	-1.0	7.1	0.4	172	192	0.3	11.9	0.9
South Africa	VF	6,815	7,518	2.6	10.3	20.5	6,282	7,327	13.7	16.6	34.1
Swaziland	THS	459	839	-0.4	82.8	2.3	95	–	-5.9	–	–
Tanzania	TF	566	–	2.5	–	–	746	796	15.4	6.7	3.7
Tunisia	TF	5,998	6,378	17.3	6.3	17.4	1,970	2,063	24.5	4.7	9.6
Uganda	TF	512	468	68.2	-8.7	1.3	266	–	44.6	–	–
Zambia	TF	515	–	24.8	–	–	161	–	8.1	–	–
Zimbabwe	VF	1,854	1,559	-17.8	-15.9	4.2	194	99	217.5	-48.9	0.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Middle East - moderating the pace of growth

Following the very strong performance over the past couple of years, the Middle East seems to have entered a more moderate phase of growth, with the increase for 2005 estimated at 8%. Although terrorist attacks also took their toll to a varied degree on tourism demand for some Middle Eastern destinations, the impact generally was short-lived. Egypt (+6%), Saudi Arabia (+6%) and Jordan (+5%) are all close to the regional average, while Syria (+11%) and Palestine (+57%, albeit from a small base) exceed it.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2004	2005*	2004/03	2005*/04	2005*	2004	2005*	2004/03	2005*/04	2005*
Middle East		36,265	39,062	22.8	7.7	100	25,474	27,553	13.4	8.2	100
Bahrain	TF	3,514	–	18.9	–	–	864	–	20.0	–	–
Egypt	TF	7,795	8,244	35.7	5.8	21.1	6,125	6,851	33.6	11.8	24.9
Jordan	TF	2,853	2,987	21.2	4.7	7.6	1,330	1,441	25.2	8.3	5.2
Lebanon	TF	1,278	1,140	25.9	-10.9	2.9	5,411	–	-15.1	–	–
Oman	TF	1,195	–	15.0	–	–	414	481	7.4	16.4	1.7
Saudi Arabia	TF	8,579	9,100	17.0	6.1	23.3	6,486	6,111	14.7	-5.8	22.2
Syrian Arab Rep.	TCE	3,033	3,368	45.5	11.0	8.6	2,057	2,130	53.5	3.5	7.7
Untd Arab Emirates	THS	–	–	–	–	–	1,593	2,233	10.8	40.2	8.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

¹ See note on the first page

Outbound

Tourism

Outbound tourism by generating regions – long-haul back to growth

By far most international travel takes place within the same region, some four-fifths of the total. After having contracted for three years in a row, long-haul travel outgrew intraregional travel both in 2004 (+17% vs. +8%) and in 2005 (+6% vs. +5%). This is in line with the long-term trend as in normal circumstances travel between regions tends to grow at a somewhat faster pace than intraregional travel, while between 2001 and 2003 the situation had been the opposite.

As for source markets, international tourism is still relatively concentrated in the industrialized countries of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth in the last decades, in particular in North-East and South-East Asia, Central and Eastern Europe, the Middle East and Southern Africa. In 2005, most markets continued the growth regained in 2004, when they rebounded from the depressed results of the preceding years. By region, Africa recorded the biggest gain in relative terms (+8%), followed by Asia and the Pacific (+7%) and the Middle East (+7%). The Americas (+5%) finally surpassed the record of 2000 and was the last region to make up for three years of decreases. Europe (+4%) grew most in absolute numbers as it generated almost 18 million more international arrivals than in 2004.

	International Tourist Arrivals (millions)						Change (%)			Share (%)
	1990	1995	2000	2003	2004	2005*	2003/02	2004/03	2005*/04	2005*
World	439.4	540.5	686.8	694.1	764.5	806.3	-1.8	10.1	5.5	100
From:										
Europe	252.6	309.5	396.7	414.6	431.4	449.0	1.0	4.1	4.1	55.7
Asia and the Pacific	59.1	87.4	115.5	115.5	144.4	154.3	-8.2	25.0	6.9	19.1
Americas	100.3	108.9	131.5	116.1	130.2	137.1	-4.8	12.1	5.3	17.0
Middle East	8.3	9.7	13.7	17.0	20.5	21.9	-2.1	20.7	6.9	2.7
Africa	10.0	12.9	16.5	17.7	18.8	20.3	1.1	6.2	8.2	2.5
Origin not specified*	9.2	12.1	12.9	13.3	19.3	23.6	–	–	–	2.9
Same region	350.8	430.6	540.9	561.1	605.5	634.1	-1.4	7.9	4.7	78.6
Other regions	79.4	97.8	133.0	119.7	139.7	148.6	-3.5	16.7	6.3	18.4

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

* 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 such as 'other countries of the world' is used grouping countries together that are not separately specified.

International Tourism Top Spenders

In 2005, Germany kept the first position in the ranking of the world's top tourism spenders, won in 2003 from the United States. It is important to note, however, that these results as expressed in US dollars are much influenced by the exchange rate between the euro and the US dollar, which in past years was clearly favourable to the eurozone currency. Consequently, in spite of the continued recovery of US tourism expenditure (+5%), the United States maintained the second post. The United Kingdom held steady at the number 3 spot, and so did Japan, France and Italy as the 4th, 5th and 6th biggest source markets in terms of international tourism expenditure. The last four positions are occupied by the emerging source markets of China and the Russian Federation, and the more traditional source markets of Canada and the Netherlands.

Rank		International Tourism Expenditure (US\$ billion)		Change ¹ (%)		Share (%)	Population 2005	Expenditure per capita
		2004	2005*	2004/2003	2005*/2004	2005*	(million)	(US\$)
	World	633	680	18.7	7.5	100	6.451	105
1	Germany	71.0	72.7	9.7	2.4	10.7	82	882
2	United States	65.8	69.2	14.5	5.2	10.2	296	234
3	United Kingdom	56.5	59.6	17.9	5.5	8.8	60	987
4	Japan	38.2	37.5	32.7	-1.9	5.5	127	295
5	France	28.6	31.2	22.2	8.9	4.6	61	514
6	Italy	20.5	22.4	-0.4	9.0	3.3	58	385
7	China	19.1	21.8	26.1	13.6	3.2	1,306	17
8	Canada	15.9	18.4	18.8	15.2	2.7	33	560
9	Russian Federation	15.7	17.8	22.1	13.2	2.6	143	124
10	Netherlands	16.4	16.2	7.7	-1.6	2.4	16	985

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO 2006)

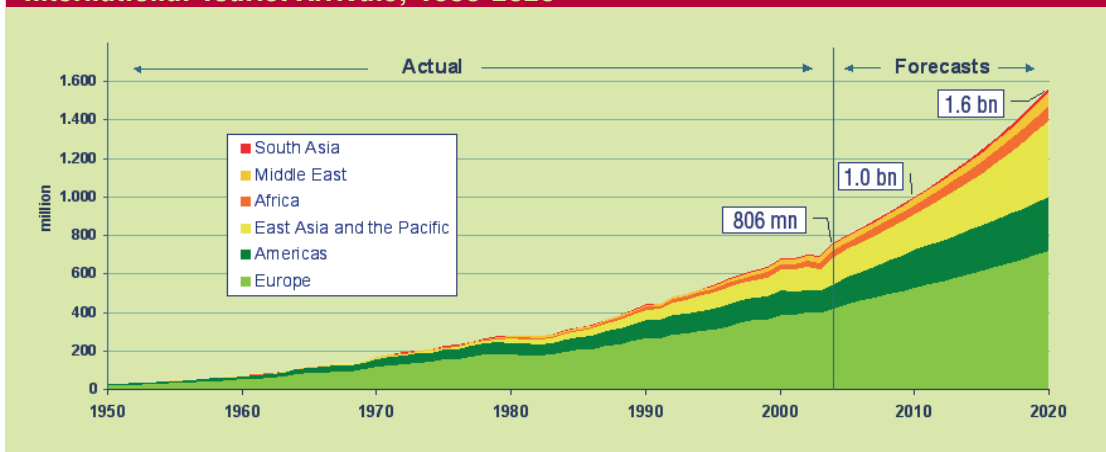
¹ Local currencies, current prices

Long-term Prospects

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 years period, with 1995 as base year and forecasts for 2010 and 2020.

Although the evolution of tourism in the last few years has been irregular, UNWTO maintains its long-term forecast for the moment. The underlying structural trends of the forecast are believed not to have significantly changed. Experience shows that in the short-term, periods of faster growth (1995, 1996, 2000) alternate with periods of slow growth (2001 to 2003). While the pace of growth till 2000 actually exceeded the *Tourism 2020 Vision* forecast, it is generally expected that the current slowdown will be compensated in the mid- to long-term.

International Tourist Arrivals, 1950-2020



Source: World Tourism Organization (UNWTO) ©

UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 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 per cent 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.

International Tourist Arrivals by Region (millions)

	Base Year	Forecasts		Average Annual Growth Rate (%)	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 (UNWTO) ©

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.

Tourism

2020

Vision



UNWTO World Tourism Barometer

The UNWTO World Tourism Barometer offers a unique overview of short-term international tourism trends, updated three times a year. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on major routes; a retrospective and prospective evaluation of

current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The UNWTO World Tourism Barometer is published in January, June and October.

Price: € 60 for 3 issues (electronic version), € 90 (electronic and print version)
Available in English, French and Spanish in print and electronic version (pdf).



Structures and Budgets of National Tourism Organizations, 2004-2005

Structures and Budgets of National Tourism Organizations (NTOs) is a benchmarking reference tool on inbound tourism promotion. The report compiles and analyses updated and comparable information on the budgets that NTOs allocate for the promotion of inbound tourism as well as their structure, functions and forms of operation in order to illustrate different forms of NTO organization and possible action in the area of inbound tourism promotion. The first part of the report is

focused on the NTOs structure and functioning, including a benchmarking analysis. The second part presents an overall view of NTO budgets for around 50 countries, including data on overall and promotional budgets, funding sources, budget allocation by source markets, products and promotional instruments, among other areas. The report is complemented with case studies from twelve countries covering a series of important aspects of their NTOs structure and organization.

Published: 2006

Price: € 75

Available in English



Tourism Market Trends, 2005 Edition

Tourism Market Trends is UNWTO's regular series of reports with a comprehensive and timely analysis of international tourism trends in the world and the various regions, subregions and countries. The series examines short- and medium-term tourism development and analyzes statistical information on a set of indicators including international tourist arrivals, international tourism receipts, arrivals by region of origin, purpose of visit and means of transport, volume of trips abroad, international tourism expenditure, etc.

The full series consists of one volume providing an overview of the tourism trends in the world, World Overview & Tourism Topics, and five regional volumes highlighting the regional and subregional trends in each UNWTO region and presenting for each country a digest of statistical data as well as a qualitative evaluation of the past year with respect to tourism products, access, markets, marketing and promotion, tourism policy, etc.

Published: 2006

Price: € 75 each.

Set of five regional reports + World Overview: € 290

Africa: Available in English and French

Americas: Available in English and Spanish

Asia: Available in English

Europe: Available in English and French

Middle East: Available in English

World Overview & Tourism Topics: Available in English, French and Spanish



The Impact of Rising Oil Prices on International Tourism

Oil prices reached historic levels in 2005 and forecasts underline this upward trend. In view of this, questions have been raised about the current and future effects of very high oil prices on international tourism and on one of its major components, air transport. The purpose of this study is to analyze the observed or possible impact of the recent rise in oil prices on international tourism. Therefore, the study focuses in particular on: Statistical analysis of oil price increases in nominal and real terms; Comparisons with earlier oil shocks in 1974, 1979 and 1990; Analysis of the short-term effect of rising oil prices since 2002; Evaluation of the impact on air transport; Analysis of medium-term scenarios, by region, in terms of positive, negative, or neutral impact and The development of proposals and recommendations.

Published: December 2003

Price: € 45

Available in English, French and Spanish



City Tourism & Culture - The European Experience

'City Tourism & Culture: The European Experience', is a new report commissioned jointly by the World Tourism Organization (UNWTO) and European Travel Commission (ETC), which presents a new insight into the expansion of European cities as cultural tourism destinations. Besides, defining a conceptual framework for the analysis of city tourism with a cultural motivation, the study aims to contribute to the marketing and product development of city tourism by throwing more light on the evolution of cultural tourism in Europe from 'traditional' to 'innovative'.

Published: January 2005

Price: € 30

Available in English, French, Spanish and Russian



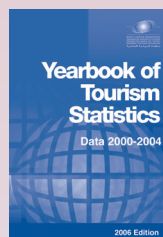
Evaluating NTO Marketing Activities

"Evaluating NTO Marketing Activities" is the first comprehensive guide for National Tourism Organizations (NTOs) on how to evaluate the effectiveness of their marketing activities. Based on the results of a survey on current evaluation practices among NTOs, the study compares different evaluation methodologies in terms of best practices and presents an extensive analysis of the research carried out on the subject. It provides a guide for the evaluation of the marketing activities of NTOs, setting out a number of practical steps.

Published: December 2003

Price: € 45

Available in English, French and Spanish



Yearbook of Tourism Statistics

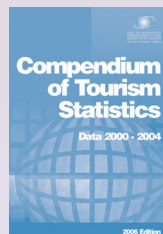
The 2006 edition of the Yearbook of Tourism Statistics provides for 206 countries and territories data on total arrivals and overnight stays associated to inbound tourism with breakdown by country of origin for the period 2000-2004.

The titles of the tables are in English only. Notes are given in English, French and Spanish. Names of countries, regions and sub-regions as well as the classification included on the tables are in English only. Countries are classified in accordance with English alphabetical order.

Published: 2006

Price: € 175

Trilingual (English, French and Spanish)



Compendium of Tourism Statistics

The Compendium is designed to provide a condensed and quick-reference guide on the major tourism statistical indicators in each country. The 2006 edition provides statistical information on tourism in 209 countries and territories around the world for the period 2000-2004. It is edited in English only, with countries classified according to English alphabetical order. For easy reference in Arabic, French, German, Russian and Spanish, the text of the basic indicators and the basic references has been printed in a separate pasteboard.

Published: 2006

Price: € 60

Multilingual (English, French, Russian, Spanish, Arabic, German)

The easy way to order UNWTO publications:
www.unwto.org/infoshop

For further information, please contact:

UNWTO Publications Department

Tel. (34) 91 567 8100 - Fax: (34) 91 571 3733

e-mail: pub@unwto.org