

## Sheet No. 5: Developing countries as international tourism destinations

This PPT information sheet provides a brief overview of some developing countries that are important international tourism destinations. The statistical data for this section is taken from the World Tourism Organisation (WTO) as this is the most comparative and comprehensive data available<sup>1</sup>. The data describes international travel flows, thus excluding domestic travel which can be highly significant in some regions including South Asia, Southern Africa and South America. It does include international business travel.

While the majority of international tourism occurs within a relatively small number of developed countries, developing countries have increased their market share considerably since the early 1970s (see PPT Info-sheet No 4). However, international tourist arrivals are spread very unequally among developing countries. The main reasons for this are the varying degrees of safety, accessibility and availability, standard of tourism infrastructure, tour operator links and connections, and historical and political links to the main generating areas. While tourism to developing countries is growing more rapidly than global tourism, there are large differences between regions and countries<sup>2</sup> (Table 1).

**Table 1: Differences between developing countries in arrival numbers in 2000**

Region	Countries with >10m arrivals	Countries with 5m to 10m arrivals	Countries with 1m to 5m arrivals
Americas	Mexico	Brazil	Dominican Republic, Cuba, Cost Rica, Jamaica, Argentina, Chile, Peru, Uruguay, Puerto Rico
East Asia / Pacific	China, Malaysia	Thailand, Indonesia, Oceania/Pacific Islands	Vietnam
Africa		South Africa, Tunisia	Morocco, Zimbabwe
Middle East		Egypt	Jordan, Syria
South Asia			India, Iran
CEE	Russian Federation, Poland, Hungary	Turkey, Croatia, Czech Republic, Bulgaria, Romania	

Table 2 provides a more detailed breakdown of arrivals by country, summarised in Figure 1. A number of key features characterise these destinations:

- All are middle-income countries (either upper or lower middle income)

<sup>1</sup> The WTO uses the World Bank definition of 'developing' country. This therefore includes some major European destinations (Turkey) and some of the most rapidly growing ones in Eastern Europe (e.g. Bulgaria, Estonia, Slovakia).

<sup>2</sup> For a detailed analysis see Dilys Roe, Caroline Ashley, Sheila Page and Dorothea Meyer 'Tourism and the Poor: Analysing and interpreting tourism statistics from a poverty perspective', PPT Working Paper N.16, ODI, 2004

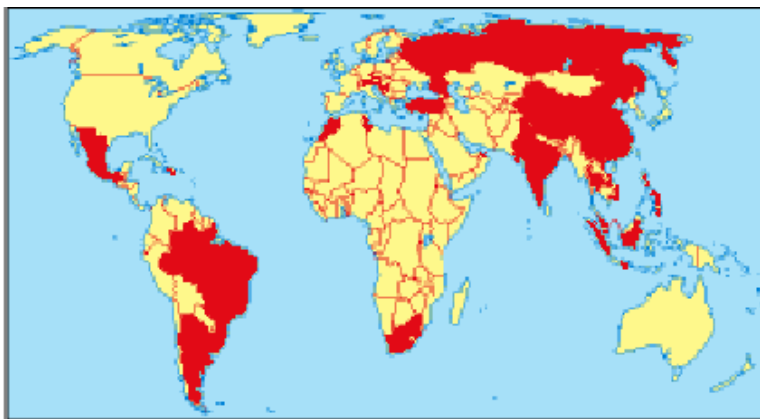
- The majority are located in, or adjacent to, the main generating areas of Europe, North America, Japan.
- A large number are featured by European, American and Asian tour-operators as mainstream package holidays (e.g. Mexico, Turkey, Thailand, Malaysia, Tunisia, Morocco, Puerto Rico, Dominican Republic). However, high volumes of arrivals also take place in countries that are not package holiday destinations (e.g. Central and Eastern Europe<sup>3</sup>). Here a high percentage of arrivals are independent travellers, business travellers and those visiting friends or relations (VFR).

**Table 2: Developing countries with the most international arrivals**

Rank	Country	Arrivals in 2000 ('000s)	Rank	Country	Arrivals in 2000 ('000s)
1	China	31,229	11	Czech Republic	5,700
2	Russian Federation	21,169	12	Brazil	5,313
3	Mexico	20,643	13	Indonesia	5,064
4	Poland	17,400	14	Tunisia	5,057
5	Hungary	15,571	15	Morocco	4,113
6	Malaysia	10,222	16	Puerto Rico	3,341
7	Turkey	9,587	17	Romania	3,274
8	Thailand	9,509	18	Argentina	2,991
9	South Africa	6,001	19	Dominican Republic	2,977
10	Croatia	5,831	20	Bulgaria	2,785

Source: WTO database ([http://www.world-tourism.org/frameset/frame\\_statistics.html](http://www.world-tourism.org/frameset/frame_statistics.html))

**Figure 1: Developing Countries with High Arrival Numbers**



This situation is not static, however. Table 3 highlights the developing countries that have grown rapidly in terms of international arrivals in the last decade – many of which are low-income countries. The highest growth rates are shown by South East Asia, although in many cases these can be explained by the very low starting point. Cambodia, Lao PDR and Myanmar, in particular, received few tourists in 1990 and although numbers are still not high in 2000 the rate of growth appears spectacular. This table also highlights strong tourism growth in African countries. These figures are rather more significant than those for South-East Asia given a higher starting point – particularly for South Africa.

<sup>3</sup> The WTO estimates that by the year 2020, every third international trip within Europe will go to one of the Central or East European countries (WTO 2001). Growth rates between 2000 and 2001 were 14% for Bulgaria, 13% for Slovakia, and 9% for Estonia. Turkey has seen spectacular growth rates of international tourism arrivals since its emergence on the tourism circuit in the 1980s.

**Table 3: The fastest growing developing countries in terms of international arrivals between 1990 and 2000**

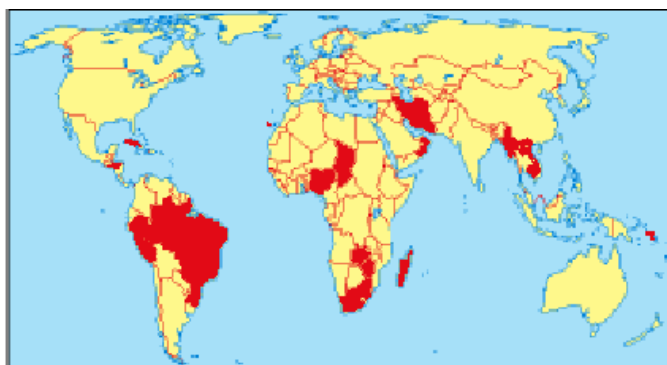
Rank	Country	Growth 1990 to 2000	Arrivals in 1990 ('000)	Arrivals in 2000 ('000)
1	Cambodia	2,641%	17	466
2	Lao PDR	2,043%	14	300
3	Iran	1,004%	154	1,700
4	Myanmar	890%	21	208
5	Vietnam	756%	250	2,140
6	Cape Verde	496%	24	143
7	South Africa	483%	1,029	6,001
8	Cuba	420%	327	1,700
9	Poland	412%	3,400	17,400
10	Chad	389%	9	44

Rank	Country	Growth 1990 to 2000	Arrivals in 1990 ('000)	Arrivals in 2000 ('000)
11	Brazil	387%	1,091	5,313
12	Nicaragua	358%	106	468
13	Nigeria	328%	190	813
14	Micronesia	313%	8	33
15	El Salvador	310%	194	795
16	Zambia	307%	141	574
17	Tanzania	227%	153	459
18	Peru	224%	317	1,027
19	Zimbabwe	209%	605	1,868
20	Madagascar	202%	53	160

Source: WTO database ([http://www.world-tourism.org/frameset/frame\\_statistics.html](http://www.world-tourism.org/frameset/frame_statistics.html))

**Figure 2: The main growth destinations in the developing world.**



While travel to developing countries has in the past frequently been the domain of independent travellers or niche operators<sup>4</sup>, a slight shift seems to have occurred by which 'off-the-beaten track' destinations are becoming of interest to a wider range of tour operators, and travellers. In the past two decades, several areas and destinations moved from receiving relatively small numbers of international arrivals to becoming large volume, mainstream package tour destinations sold by big tour operators in the UK, North America and Japan. Table 4 and Figure 3 highlight the developing country destinations that are significant to the UK package holiday industry.

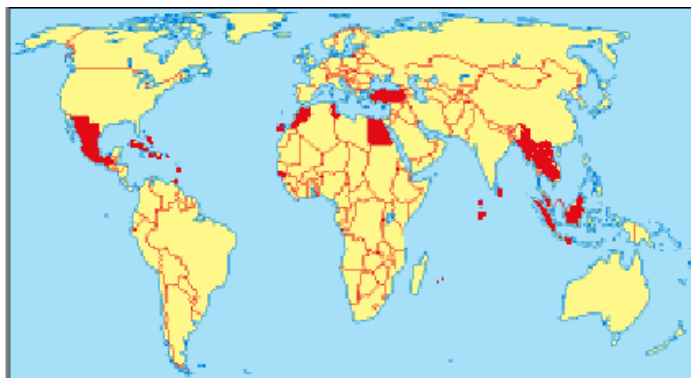
<sup>4</sup> The main exceptions to this are the traditional beach destinations in Northern Africa and the Caribbean.

**Table 4: package holiday destinations in developing countries that are offered by the top UK tour operators**

Tour operator	Developing countries included in the mainstream summer sun / winter sun 2003/04 programme	Other developing countries that are featured but in specialised programmes
<p><b>TUI UK</b> examples from: Thomson Holidays (summer and winter programmes, 2003/4), Portland Holidays (summer and winter programmes, 2003/4), Tropical Places (summer and winter programmes, 2003/4), Thomson World Wide (summer and winter, 2003/4)</p>	<p><a href="#">Antigua and Barbuda</a>, <a href="#">Bahamas</a>, <a href="#">Barbados</a>, Borneo, British Virgin Islands China, <a href="#">Cuba</a>, <a href="#">Dominican Republic</a>, Dubai, <a href="#">Egypt</a>, Gambia, Grenada, Grenadines India, Indonesia, <a href="#">Jamaica</a>, <a href="#">Kenya</a>, Malaysia, Maldives, Mauritius, Mexico, Morocco, Peru, Seychelles, South Africa, Sri Lanka, St Kitts and Nevis, St Lucia, Vietnam, Tanzania and Zanzibar, Thailand, Tobago, Tunisia, Turkey, Turks and Caicos, Vietnam</p>	<p>Botswana, Cambodia, Cook Islands, French Polynesia, Myanmar, Namibia, Nepal, Reunion, Samoa, Zambia, Zimbabwe</p>
<p><b>My Travel</b> Examples from Direct Holidays summer sun 2003, and Tradewinds 2003/04</p>	<p>Antigua, Bahamas, Barbados, Brazil, China, Cuba, Dominican Republic, Dubai, Egypt, Gambia, Grenada, Indonesia, Jamaica, Kenya, Malaysia, Maldives, Mauritius, Mexico, Morocco, Seychelles, South Africa, Sri Lanka, St Lucia, Tanzania, Thailand, Tobago, Tunisia, Turkey, Vietnam,</p>	<p>Cambodia, Costa Rica, India, Myanmar, Oceania, UAE</p>
<p><b>First Choice</b> Examples taken from: Main summer sun / winter sun brochure 2003 / 04</p>	<p>Antigua, Aruba, Bahamas, Barbados, Cuba, Dominican Republic, Egypt, Gambia, India, Jamaica, Kenya, Malaysia, Maldives, Mexico, Morocco, South Africa, Sri Lanka, Thailand, Tunisia, Turkey</p>	<p>Belize, Bhutan, Bolivia, Borneo, Botswana, Cambodia, China, Costa Rica, Equator, Eritrea, Ethiopia, Ghana, Guatemala, Indonesia, Iran, Jordan, Ladakh, Madagascar, Malawi, Mali, Mozambique, Namibia, Nepal, Pakistan, Peru, Sudan, Syria, Tanzania, Tibet, Zimbabwe</p>
<p><b>Thomas Cook</b> (examples taken from beach holiday selection, main programme 2003/4)</p>	<p>Brazil, Barbados, Cuba, Jamaica, St. Lucia, China, Dominican Republic, Dubai, Egypt, India, Sri Lanka, Jordan, Kenya, Malaysia, Maldives, Mauritius, Morocco, Mexico, Polynesia, Seychelles, South Africa, Thailand, Tunisia, UEA, Zanzibar</p>	<p>Costa Rica, Indonesia, Nepal, Peru, Tanzania, Tunisia, Vietnam,</p>

Source: company websites accessed 28 May 2003

**Figure: 3 The main (i.e. high arrival) package tour destination areas for UK visitors**



### **Key trends<sup>5</sup>**

1. **Developed to developed:** The majority of international tourism still takes place within the developed world. In 2000 seven of the top ten destinations were also among the top ten tourist generating markets, China being the sole representative of a developing country in both groups. Harrison (2001) argues that there has been remarkable consistency in these tables, which is not surprising given the volume of international visitors attracted by the top ten destinations. Changes in recent years have occurred predominately due to political reasons, in particular the opening up of several countries to international visitors such as China, the former Soviet Union and other Central and Eastern European countries.
2. **Developed to developing:** Although the majority of tourism occurs within the developed world, there is a strong and growing movement from North to South. The main generating countries are still located in Europe, North America and industrialised Asia. This is, however, expected to change with increased economic development in the South.
3. **Most travel is intra-regional:** The vast majority of international travel takes place within regions. Northern Europeans holiday predominantly in Southern Europe (particularly the Mediterranean), while the Caribbean and Mexico have been 'host' to the North American and Canadian snowbirds. This is hardly surprising given financial and temporal restrictions on travel for most people. However, this is slowly changing so that long-haul travel is used increasingly as the main annual holiday option due to decreasing real cost of flights, greater travel experience, and new destinations coming onto the market.
4. **International tourism to developing countries is significant and increasing:** Over 40 per cent of global tourism arrivals take place in the developing world. While the vast majority of well established destinations are middle-income countries, the fastest growers are low-income countries.
5. **Very distinct differences between developing countries:** While some developing countries are highly successful as destinations and have been able to attract large numbers of visitors, others have so far not entered the international tourism scene. The reasons for this vary greatly, they are linked to physical characteristics and climate; government commitment to tourism; security issues; accessibility; distribution channels; image and marketing; to name but a few. Destinations that have been adopted by mainstream tour-operators (especially in East Asia, North Africa and the Americas) show very high arrival numbers due to the capacities carried by the larger tour operators.
6. **Access to generating markets:** Generally, the top tourism countries among the developing world are relatively easily accessible. They have good international and national transport infrastructure as well as information, marketing and purchasing channels, often organised by mainstream tour-operators. This accessibility strongly influences the strength and importance of the tourism industry. Inaccessibility,

<sup>5</sup> As analysed by several writers: see Harrison 2001, Mill and Morrison 1992.

especially in terms of land transport networks have led in the past to the high physical concentration of tourism infrastructure and the creation of enclave development close to major gateways, reducing significantly the distributive potential of tourism. Furthermore, the inaccessibility for developing countries to electronic reservation systems that are favoured by tour operators has hampered the success of many developing countries to capture the global tourism market.

**Note:** While the WTO collects inter-country comparative data on international tourists, domestic tourists as well as overnight tourists and same-day visitors, the most comprehensive and widely used data series is concerned with international arrivals, i.e. "Any person who travels to a country other than that in which s/he has her/his usual residence but outside her/his usual environment for a period not exceeding 12 months, and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited". These figures have a number of limitations:

- figures do not reflect the strength and significance of domestic tourism;
- not all countries are members of the WTO and the reliability of the data varies from country to country
- national data has limited utility in assessing the importance of tourism locally
- International visitor arrival figures focus purely on *volume* and not on the *value* of tourism.

However, WTO data is the most comprehensive data available that allows inter-country comparisons.

**References:**

World Tourism Organisation (WTO) (2001) *Tourism 2020 Vision – Global Forecast and Profiles of Market Segments*. Madrid: World Tourism Organisation  
Harrison, D. (2001) *Tourism and the Less Developed World: Issues and Case Studies*. Wallingford: CABI  
Mill, R.C. and Morrison, A.M. (2002) *The Tourism System*. 4<sup>th</sup> ed. Dubuque, Iowa: Kendall/Hunt Publishing Company

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