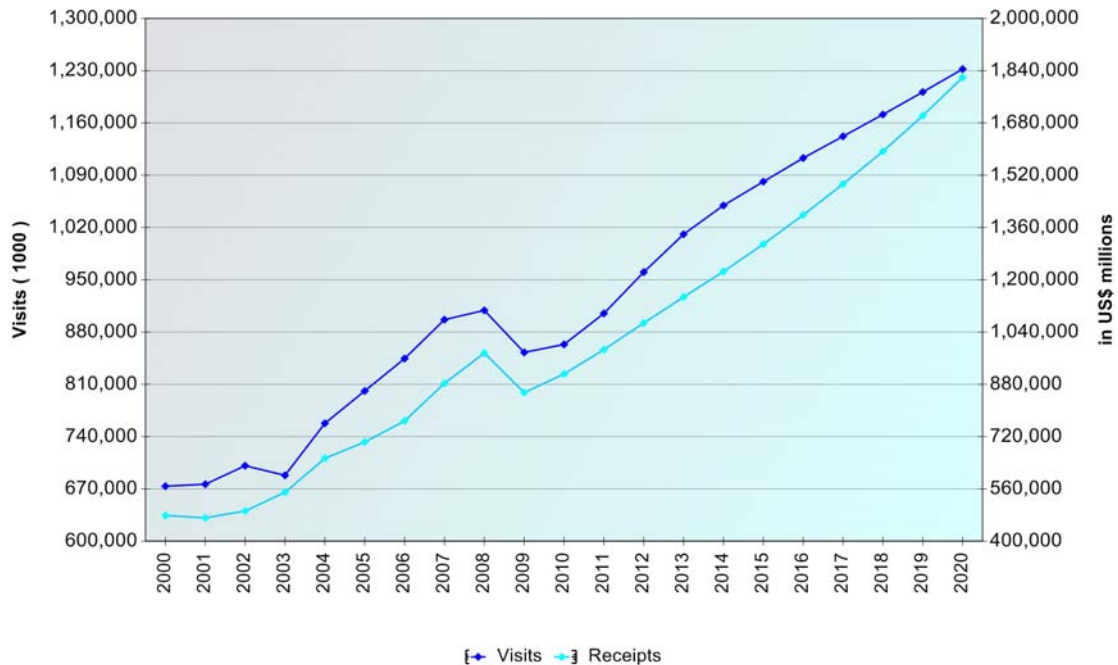


## Long Term Tourism Forecasts

The following analysis is based on projections made by Tourism Economics. As with all forecasts these should be seen as subject to a margin of error; unforeseen events regularly influence tourism flows, be these social, political or economic events. More detailed forecasts for individual markets can be found in VisitBritain's Market and Trade Profile publications.

### Global growth forecast



After a sharp decline in 2009 global tourism is expected to see modest growth in 2010 followed by a more robust recovery thereafter. The table shows the top ten origin-destination flow forecasts for the period 2008 to 2020 and it is clear that global tourism will grow primarily thanks to intra-regional rather than inter-regional demand.

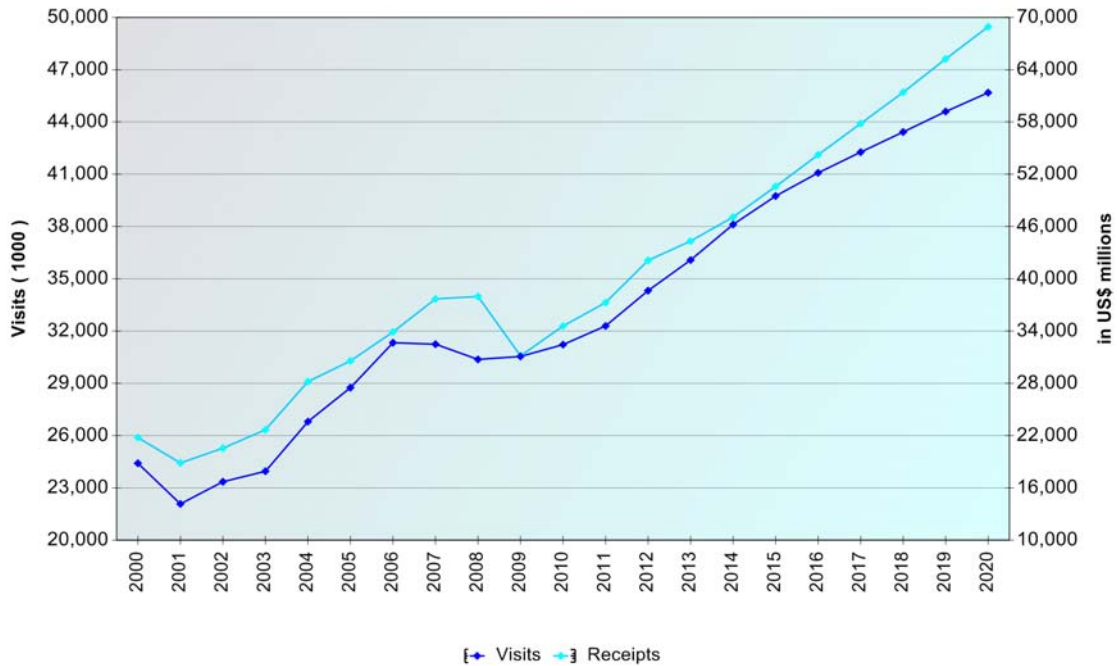
The fastest growth is expected to be within Northeast Asia followed by growth within Western Europe.

Growth in visits 2008 to 2020		
Rank	From	To
1	Northeast Asia	Northeast Asia
2	Western Europe	Western Europe
3	Middle East	Middle East
4	Southeast Asia	Southeast Asia
5	Emerging Europe	Western Europe
6	South America	South America
7	Northeast Asia	Southeast Asia
8	Western Europe	North Africa
9	Emerging Europe	Emerging Europe
10	Sub-Saharan Africa	Sub-Saharan Africa

### UK Growth

The chart overleaf reveals that Tourism Economics anticipate that it will be 2011 before inbound volumes to the UK recover to pre economic downturn levels.

## Inbound tourism to the UK



In terms of which regions are forecast to drive inbound tourism to the UK over the coming decade we can see from the following chart that strong growth is expected from many regions over the 2011 to 2013 period, in particular from European origin markets. Beyond 2014 it is interesting to observe that South Asia is forecast to deliver the fastest relative growth driven by visits from India.

## Forecast growth in inbound to the UK

