
ASIA- PACIFIC REGION AS A GAME CHANGER IN THE WORLD TOURISM

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ABSTRACT

In the present era, tourism has become a popular generic decompression activity. It may take up domestic or international form which in turn can either be inbound or outbound as well. The global tourism is of relative economic significance as it contributes 9% of world's direct and indirect GDP and 6% of World's exports. Moreover it provides employment to every 1 out of 11 persons. The present researcher paper is a sincere attempt to analyze the pattern of growth in foreign tourist arrivals and foreign exchange earnings globally since 1990 and to bring forth the shift of foreign tourist arrivals and corresponding foreign exchange earnings from developed to developing economies. The researchers have used secondary sources of data from the United Nations World Trade Organization (UNWTO) key statistical facts, related articles from reputed journals of tourism. The analysis of data reveal the fact that there is a revolutionary increase in foreign tourist arrivals and foreign exchange earnings globally and a corresponding shift in the preference of foreign tourists from developed economies to developing ones. Thus the paper provides significant insight to the developing economies to make maximum use of the opportunity.

Key Words: Developed Economies, developing economies, global tourism, pattern of growth in tourism

INTRODUCTION

Tourism is travel for recreational, leisure, or business purposes. The World Tourism Organization defines tourists as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes"

Tourism has become a popular global leisure activity. After slowly recovering from the contraction resulting from the late-2000s recession, where tourism suffered a strong slowdown from the second half of 2008 through the end of 2009, and the outbreak of the H1N1 influenza virus, international tourist arrivals surpassed the milestone of 1 billion tourists globally for first time in history in 2012 i.e. 1035 billion. International tourism receipts (the travel item of the balance of payments) grew to US\$1.159 trillion in 2013.

ORIGIN OF THE RESEARCH PROBLEM

In the 21st century the global economy will be driven by three major service industries – *technology*, *telecommunication* and *tourism*. Travel and tourism will be one of the world's highest growth sectors in the current century. Tourism, according to experts is expected to capture the global market and become the largest industry in the world.

The following statistics point to an era of unprecedented growth of tourism around the world.

Table 1

International Tourist Arrivals (millions) & International Tourism Receipts (US \$ Billion)

Year	1990	1995	2000	2005	2009	2010	2011	2012	2013
ITA	435	528	674	799	883	940	983	1035	1087
ITR	262	403	475	679	853	927	1030	1078	1159

Source: UNWTO highlights collected in June 2013

Table 1 clearly shows the increase in International Tourist Arrivals and International Tourism Receipts. Let us now have a look at the overview of tourism in Asia Pacific Region.

Table 2

**International Tourist Arrivals (in' 000)and International Tourism Receipts (in millions)
in Asia Pacific Region**

Year	1990	1995	2000	2005	2009	2010	2011	2012	2013
ITA	56165	82451	110573	155353	181127	204439	216996	233564	248070
ITR	47474	80700	90207	140765	204155	255254	289448	323865	358923

Source: UNWTO highlights collected in June 2013

Table 2 also reveals an increasing trend of International Tourist Arrivals and International Tourism Receipts in the Asia Pacific Region as well. The statistics available at the UNWTO website also point towards a shift of foreign tourist arrivals from the advanced economies to the emerging economies as shown in Table 3

The World Travel & Tourism Council (WTTC) is a global business leaders' forum, the Members are Chief Executives of the world's foremost Travel & Tourism private sector organizations with a common vision to promote the proven potential of the industry to create wealth, jobs and prosperity across all sectors of society and the global economy. It is known for being the only forum to represent the private sector in all parts of the industry worldwide. Its activities include research on the economic and social impact of the industry and its organisation of global and regional summits focused on issues and developments relevant to the industry.

About 150 Chief Executives, Presidents and Chairs of companies from all industries in the Travel & Tourism sector – airlines, airports, hotels, cruise lines, travel agencies, tour operators and travel technology suppliers – make up WTTC's high-profile membership.

This gives WTTC a unique overview of Travel & Tourism as one of the world's largest sectors, supporting 266 million jobs and generating 9.5 per cent of global GDP.

Table 3

Shift of trend in International Tourist Arrivals

	Actual Data			Projections		Share	
	1990	1995	2010	2020	2030	2010	2030
World	277	528	940	1360	1809	100	100
To Developed Economies	194	334	498	643	772	53	43
To Developing Economies	83	193	442	717	1037	47	57

Source: UNWTO highlights collected in June 2013

The World Economic Forum has been actively engaged in studying issues related to national competitiveness for nearly three decades, motivated by a desire to better understand the drivers of growth and prosperity. Over the years, it has been providing benchmarking tools that enable countries to identify key obstacles into competitiveness and to provide a platform for dialogue among government, business and civil society to discuss the best ways of removing them. It has come up with its Travel and Tourism Competitiveness Reports. Table 3 clearly shows that there is a shift in the preference of foreign tourists from the developed economies to the developing economies.

REVIEW OF RESEARCH AND DEVELOPMENT IN THE SUBJECT

Tourism is a subject of contemporary interest and adequate literature and data is available on the subject. In section below, I have briefly outlined the studies, I came across, that are relevant to my topic.

India's Image As A Tourist Destination-A Perspective Of Foreign Tourists - Manjula Chaudhary (2000)

The study was conducted with the purpose of determining pre-and post-trip perceptions of foreign tourists about India as a tourist destination. A gap analysis between expectations and satisfaction levels was used to identify strengths and weaknesses of India's tourism-related image dimensions so that necessary efforts can be made to ensure that tourists expectations are met. In this study it was observed that India is rated highly for its rich art forms and

cultural heritage .However, irritants like cheating, begging, unhygienic conditions, lack of safety etc dampen the spirit of tourists.

Comparative performance analysis: Tourists' perceptions of Turkey relative to other tourist destinations - Atila Yüksel and Fisun Yüksel (2001)

As a result of ever-intensifying competition, destination managers are increasingly in need of comparative information in order to identify their relative product strengths and weaknesses, a critical step in formulating appropriate competitive actions. The study found that tourists might judge the destination's performance on a set of attributes, some being more tangible, and some being relatively more important. The relation found between tourists' perceptions of other destinations and their evaluation of the current holiday suggests that what other destinations have to offer might affect tourists' current satisfaction judgments and their future behavioral intentions.

Tourism Demand Model: Determinants of Thailand's International Tourism Receipts- Maeta Chumni 2001

The study aims to identify and examine some major determinants affecting Thailand's international tourism receipts and also to examine the situation and statistics of Thailand tourism industry. The annual time series data from 1978 to 1999 is employed from secondary sources. Econometric models were constructed and estimated on five selected countries of tourists' origin in order to measure the response of demand to the change in determinants. The empirical results show that the income variable and relative price are statistically significant and highly elastic in two cases. The lagged income is statistically significant and highly elastic on three cases. The variable of national tourism office marketing is found to be significant on four out of five cases. The dummy variable on special marketing program is insignificant on all cases while the dummy variable on the world political crisis is found to be significant on only one case with unexpected sign of coefficient.

Tourist Satisfaction in Singapore- A Perspective From Indonesian Tourists

This research paper identifies the image of new Asia Singapore from the Indonesian tourists' perspective and evaluates their satisfaction level. It highlights the various strong and weak attributes of Singapore as seen by Indonesian tourists. It was found that from the Indonesian tourists' point of view, Singapore Tourism Board was successful in promoting and

maintaining the performance of the local tourism industry. Singapore outclassed its competitors by exceeding Indonesian tourists' predictions. Despite Singapore's outstanding performance, Indonesian tourists were disappointed with the attributes of 'unavailability of wide range of products' and 'no unique tourist places of interest'. It demands attention of Singapore Tourism Board as both these attributes belong to the attractive category

Tourism Flows between India and Singapore - *Faizal Yahya (2003)*

This paper examines the growing importance of India as a source of inbound tourists for countries in South East Asia and in particular, Singapore. The data collected reveals that India is one of the top 12 source countries of tourists for Singapore. The more important fact is that the average daily spending of Indian tourists in Singapore is the highest which gives an incentive to the Singapore Tourism Board to attract more Indian tourists to visit Singapore. The data shows that the number of Indian tourists visiting Singapore is increasing every year at a fast pace. Singapore's position in the tourism sector has improved a lot but now it wants to be a tourism hub. As the space constraint is there in Singapore so now it is exploring more investment opportunities in the tourism sector overseas. The lack of cultural and heritage sites in Singapore is also a hurdle in the path of its becoming a tourism hub. Thus, the Singapore Tourism Board is collaborating with Indian tourism industry to have win-win situation for both the countries. A Memorandum of Understanding (MOU) has been signed between India and Singapore which will promote the bilateral flow of cultural contacts.

Determinants of Tourism Destination Competitiveness in Asia Pacific: Comprehensiveness and Universality - *Michael J. Enright and James Newton (2005)*

This study compares the importance of business factors & attractiveness factors in destination competitiveness measurement of three countries in the Asia Pacific Region viz. Hong Kong, Singapore and Bangkok. Rank order correlations were calculated to check the level of importance. Overall the ranking of the tourism attractors was strongly correlated among all three groups, with a very strong correlation (0.962) between Hong Kong, & Singapore. However, for the business factors the strongest correlation (0.824) was between Singapore and Bangkok. Thus, it is found that there is a very close relationship of the rankings of importance in the three different locations of Hong Kong, Singapore and Bangkok.

Testing for the Random Walk Hypothesis in the case of Visitor Arrivals: Evidence from Indian Tourism- Mita Bhattacharya and Paresh Kumar Narayan(2005)

This study provides evidence on the random walk hypothesis for visitor arrivals to India from ten major source countries. The findings of this study have significant policy relevance. The findings suggest that shocks like natural calamities, border tension between India and Pakistan and Gulf war do not have any permanent effect on visitor arrivals to India. These factors are transitory and will have short term effect on the industry. This is supported by the fact that after 11 September, 2001 terrorist attack, the tourist arrivals in India declined by 15% between January & August 2002, but the decline stabilized and tourist arrivals again increased to the same as it was in the pre-attack period.

Competitiveness of Tourist Destinations: A Comparative study of Taiwan's Four Major Cities - Wang Dah – Lih, TSAI Yu-Fen, LIOU Yaw – Hwa (2006)

This study has applied the Conceptual model of destination Competitiveness of Taiwan's four major cities viz. Taipei City, Taichung City, Tainan city and Kashsuing city. The analysis shows that each city has its own weaknesses and strengths in destination competitiveness. There is no dominator in destination competition among four major cities in Taiwan. However, if a great improvement can be made in the supporting factors and resources category, Tainan city will be the preferred tourism destination among the four major cities in Taiwan. It also suggests that all the cities are required to have some improvements in order to strengthen their ability to compete with other cities, either domestically or internationally.

Thailand- the Asia and the Pacific Intra-regional Outbound Series –World Tourism Organization, Madrid, Spain 2006

In 2003 Thailand's economy was ranked seventh from the Asia Pacific region with a GDP of US\$ 142953 million. The Thai outbound tourism grew since 1978 and there was a change in the perception amongst the Thai who used to see travelling as a luxury activity to one that is beneficial and productive. Although average annual per capita income of Thai is low, households with an annual income of over US \$ 6000 comprise 14% of the population and are the primary target for Thai outbound travel. Seasonality of Thai outbound is different from the other Asian markets. The main age group of outbound Thai travelers is between 24-

44 years old, representing 54.3% of the total outbound travelers in 2004. The major purpose of travel is for holiday only and one third of travel is in the form of package tours.

Indian Tourists' Motivation, Perception, and Satisfaction of Bangkok, Thailand-
Raktida Siri, B.A. May 2009

The purpose of the study were to identify Indian tourists' demographics and travel patterns, examine Indian tourists' motivation to take the Bangkok area trip, examine the level of importance of information sources, identify the level of satisfaction of Indian tourists on their travel experience on the Bangkok area attributes and examine the intention to return and willingness to recommend the Bangkok area and Thailand. The findings show that Indian tourists were motivated to visit the Bangkok area by both push and pull factors. Family and/or friends and the Internet are considered as important sources in trip decision making. Indian tourists are generally satisfied with the Bangkok area's attributes. They also showed the desire to revisit and recommend Bangkok and Thailand as travel destinations.

An Analysis of Factors Influencing the Competitiveness of the Thai Tourism

Industry- *Thavorn Thitthongkam, John Walsh 2010*

The tourism industry plays a crucial role in the Thai economy. It is the second largest source of revenue for the country. However, there are numerous factors that influence the competitiveness of the industry. The aim of the paper is to study the factors influencing the competitiveness of the Thai tourism industry. The study is based on secondary sources and prior research articles in order to identify those issues and analyze their importance. The results indicated that political turmoil and crisis are the principal factors, while others include epidemic diseases, economic situation, media, disaster, crime and war, technology, marketing plan, culture, education, environmental issues, demographic change and other factors affecting the attitudes of international tourists. Language is another factor that influences Thai tourism industry competitiveness. The study does not provide positive solutions for the problems facing Thai tourism since its competitiveness is directly linked to politics and this has been in worsening crisis since 2006.

Factors and Competitiveness of Malaysia as a Tourist Destination: A Study of Outbound Middle East Tourists- *Ali Salman1 & Mohd Safar Hasim 2012*

Tourism has been and continues to be an important foreign exchange earner to many countries in South East Asia and Malaysia is no exception. The aim of the article is to trace the factors for visiting Malaysia, image of Malaysia as a tourism destination and competitiveness of Malaysia as a tourism destination among outbound Middle East tourists to Malaysia. A survey was used to obtain data randomly from 357 outbound Middle East tourists leaving Kuala Lumpur International Airport (KLIA). From the results, for most of the Middle East tourists, safety and security is extremely important for choosing Malaysia as a foreign country for long-haul travel. Malaysia is at the top of the list of top five countries for long-haul travel. Hospitality in Malaysia was better and excellent than many long-haul countries for the Middle East tourists, followed by natural environment. The article concludes that there exists a strong relationship between government, tourism industry players, local authorities, private agencies and businesses. It is a known fact that Middle East tourists have a high taste. Therefore the various tourism industry players need to work hand in hand to improve all types of services provided to the tourists.

Review of literature supports the fact that the international destinations of Asia-Pacific region (developing economies) have a great scope and potential to attract the international tourists as compared to the European region (developed economies).

Objectives of the Paper

- 1) To analyze the pattern of international tourist arrivals and international tourism receipts at Global level.
- 2) To analyze the pattern of international tourist arrivals and international tourism receipts in Asia-Pacific Region.
- 3) To ascertain the game changing role of Asia- Pacific Region in Global Tourism.

Research Methodology

The paper is descriptive in nature and is based on secondary data sources retrieved from the official website of World Economic Forum, various newsletters and research journal of national and international repute.

Findings of the paper

The Asia-Pacific region includes:

- Australia
- Brunei
- Cambodia

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- People's Republic of China
 - Hong Kong
 - Macau
 - Fiji
 - Indonesia
 - Japan
 - Kiribati
 - North Korea
 - South Korea
 - Laos
 - Malaysia
 - Marshall Islands
 - Federated States of Micronesia
 - Nauru
 - New Zealand
 - Palau
 - Papua New Guinea
 - Philippines
 - Samoa
 - Singapore
 - Solomon Islands
 - Thailand
 - Timor-Leste
 - Tonga
 - Republic of China (Taiwan)
 - Tuvalu
 - Vanuatu
 - Vietnam
 - United States Territories -
 - American Samoa
 - Guam
 - Northern Mariana Islands

Sometimes included -

- India (member of the East Asia Summit)
- Mongolia (landlocked country in East Asia)
- Myanmar (Burma) (member of the ASEAN)
- Russia (the Russian Far East borders the Pacific Ocean)

The table below highlights the International Tourists Arrivals by the region of origin in the World

Table 4

International Tourist Arrivals by Region of Origin

Region	1990	1995	2000	2005	2009	2010	2012	2013
Europe	250.3	302.6	388.8	449.7	476.5	496.6	537.3	585.9
Asia Pacific	58.7	86.3	114.2	153.2	180.9	206.3	237.2	250.3
America	99.3	108.4	130.8	136.5	147.1	158.3	171.6	178.1
Middle East	8.2	9.3	14.1	22.9	32.3	34.6	31.8	32.3
Africa	9.8	11.5	14.9	19.3	25.5	28.3	31.9	33.4
Total	426.3	518.1	662.8	781.6	700.3	924.1	1009.8	1080

Source: UNWTO highlights collected in June 2013

Table 4 clearly shows that the tourism activity around the globe has experienced growth as the number of international tourist arrivals has only increased since 1990. WTO has estimated that international tourism arrivals worldwide would be 1.5 billion by the year 2020. In 2010, world tourism recovered more strongly than expected from the shock it suffered in late 2008 and 2009 as a result of the global financial crisis and economic recession. Worldwide, international tourist arrivals reached 924 million in 2010, crossed the 1 billion mark in 2012 and reached 1080 million in 2013. It is also highlighted in the above table that both Europe and America were the major attractions for international tourists till 2000 followed by Asia-Pacific, Africa and Middle -East. But by 2005, the situation changed and the Asia-Pacific region surpassed America in terms of international tourist arrivals and gained second position only after Europe.

Table 5

TTCI Index -Ranking of Top 10 Asia-Pacific Countries

2009	2011	2013
Australia	Singapore	Singapore
Singapore	Hongkong	Australia
Hongkong	Australia	NewZealand
NewZealand	NewZealand	Japan
Japan	Japan	Hongkong
South Korea	South Korea	Korea

Malaysia	Malaysia	Taiwan
Thailand	Taiwan	Malaysia
Taiwan	China	Thailand
China	Thailand	China

Source: UNWTO highlights collected in June 2013

Table 5 shows the ranking of top 10 countries in Asia Pacific Region as per International Tourists' Arrivals.

Table 6

UNESCO World heritage sites in 2013(country wise)

Country	Number
Singapore	Nil
Australia	19
New Zealand	3
Japan	16
Hongkong	Nil
South Korea	10
Taiwan	Nil
Malaysia	4
Thailand	5
China	43

Source: UNESCO World heritage Sites 2013

Table 6 shows the number of UNESCO World heritage sites as possessed by top 10 destinations of Asia Pacific Region in 2013.

In this era of globalization, no economy can live in isolation as they are not self sufficient. To keep pace in this volatile environment every country has to keep a watch over the key economic indicators- the GDP, the employment rate and most important of them all the foreign exchange reserves. International tourism helps to stabilize all the three. International tourists today are fascinated by either the natural attractions or by the man made ones such as games, sports activities, nightlife, art exhibitions etc. So the countries need to capitalize on both these aspects. Thus, analysis of data reveals the fact that there is a revolutionary increase in foreign tourist arrivals and foreign exchange earnings globally and a corresponding shift in the preference of foreign tourists from developed economies to developing ones. Thus the paper provides significant insight to the developing economies to make maximum use of the opportunity

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