

World Tourism Organization

UNWTO



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UNWTO Tourism Highlights

2014 Edition

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Tourism in the world: key figures

9% of GDP - direct, indirect and induced impact

1 in 11 jobs

US\$ **1.4** trillion in exports

6% of the world's exports

from **25** million international tourists in 1950

to **1087** million in 2013

5 to 6 billion domestic tourists

1.8 billion international tourists forecast for 2030

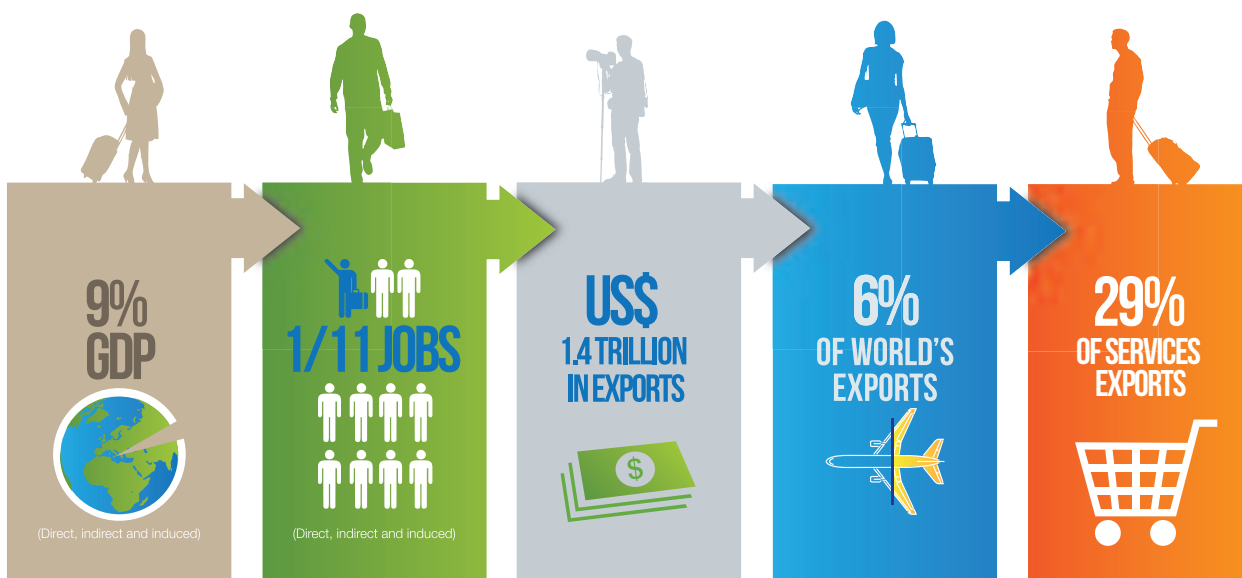
Tourism, key to development, prosperity and well-being

- An ever increasing number of destinations worldwide have opened up to, and invested in tourism, turning tourism into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development.
- Over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favourites of Europe and North America.
- Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 25 million in 1950 to 278 million in 1980, 528 million in 1995, and 1087 million in 2013.

Long-term outlook

- International tourist arrivals worldwide are expected to increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030, according to UNWTO's long term forecast *Tourism Towards 2030*.
- Between 2010 and 2030, arrivals in emerging destinations (+4.4% a year) are expected to increase at twice the rate of those in advanced economies (+2.2% a year).
- The market share of emerging economies increased from 30% in 1980 to 47% in 2013, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals.

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WHY TOURISM MATTERS

International tourism in 2013 - key trends and outlook

- International tourist arrivals (overnight visitors) grew by 5% worldwide in 2013, reaching a record 1087 million arrivals, after topping the 1 billion mark in 2012.
- Asia and the Pacific recorded the strongest growth with a 6% increase in arrivals, followed by Europe and Africa (both +5%).
- In the Americas, international arrivals grew by 3%, while in the Middle East they were flat.
- International tourism receipts reached US\$ 1159 billion worldwide in 2013, up from US\$ 1078 billion in 2012.
- With a 5% increase in real terms, the growth in international tourism receipts equalled the growth in arrivals.
- China has consolidated its position as the number one tourism source market in the world, spending US\$ 129 billion on international tourism.
- Forecasts prepared by UNWTO in January 2014 point to growth of 4% to 4.5% in international tourist arrivals in 2014 – above *The Tourism Towards 2030* long-term forecast of 3.3% a year.
- By UNWTO region, prospects for 2014 are strongest for Asia and the Pacific (5% to 6%), followed by Africa (4% to 6%).

About UNWTO

The World Tourism Organization (UNWTO) is the United Nations' agency responsible for the promotion of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy and a source of tourism know-how.

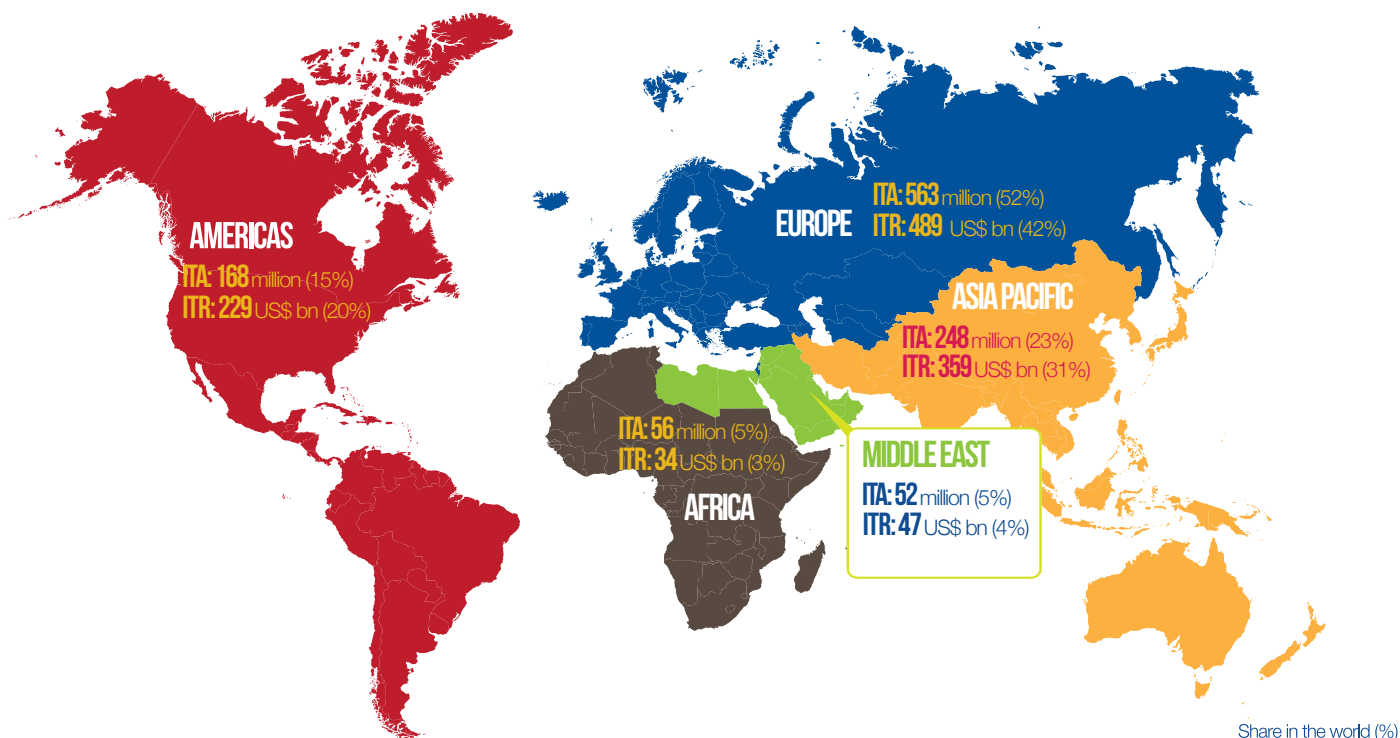
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INTERNATIONAL TOURISM 2013

International tourist arrivals (ITA): 1087 million
International tourism receipts (ITR): US\$ 1159 billion



Share in the world (%)

International Tourist Arrivals

Demand exceeded expectations in 2013

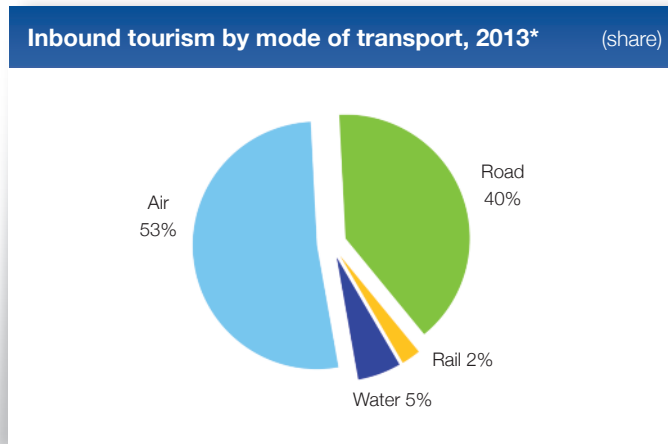
International tourist arrivals (overnight visitors) grew by 5% in 2013, reaching a record 1087 million arrivals worldwide, up from 1035 million in 2012, when the 1 billion mark was exceeded for the first time ever. Despite a global economy in 'low gear', demand for international tourism exceeded expectations, with an additional 52 million international tourists travelling internationally in 2013.

Europe led the growth in absolute terms, welcoming 29 million more international tourists in 2013, and raising the total to 563 million. Growth (+5%) was double the region's average for the period 2005-2012 (+2.5% a year).

Asia and the Pacific recorded the fastest relative growth across all UNWTO regions, with a 6% increase in international arrivals, or 14 million more than in 2012. Africa saw an increase of 5%, equivalent to 3 million more tourists, reaching 56 million.

In the Americas, international arrivals grew by 3% to 168 million, or an increase of five million. The Middle East (0%) has not yet succeeded in returning to growth, even though some destinations performed rather well and others saw a moderate recovery.

Growth is expected to continue in 2014 at a sustained rate of 4.0% to 4.5% worldwide. By UNWTO region, prospects for 2014 are strongest for Asia and the Pacific (+5% to +6%) and Africa (+4% to +6%), followed by Europe and the Americas (both +3% to +4%). In the Middle East (0% to +5%) prospects are positive yet volatile.



Source: World Tourism Organization (UNWTO) ©

Most travel by air and for leisure purposes

Slightly over half of all travellers arrived at their destination by air (53%) in 2013, while the remainder travelled by surface transport (47%) – whether by road (40%), rail (2%) or over water (5%). Over time, the trend has been for air transport to grow at a somewhat faster pace than surface transport, so the share of air transport is gradually increasing.

	International Tourist Arrivals (million)							Market share (%)	Change (%)		Average annual growth (%) '05-'13*
	1990	1995	2000	2005	2010	2012	2013*		12/11	13/12	
World	434	528	677	807	948	1,035	1,087	100	4.1	5.0	3.8
Advanced economies¹	296	334	421	459	506	551	581	53.4	3.8	5.4	3.0
Emerging economies¹	139	193	256	348	442	484	506	46.6	4.4	4.5	4.8
By UNWTO regions:											
Europe	261.1	304.0	388.2	448.9	484.8	534.4	563.4	51.8	3.6	5.4	2.9
Northern Europe	28.2	35.8	46.6	60.4	62.7	65.1	68.9	6.3	0.9	5.8	1.6
Western Europe	108.6	112.2	139.7	141.7	154.4	167.2	174.3	16.0	3.5	4.2	2.6
Central/Eastern Europe	33.9	58.1	69.3	90.4	94.5	111.7	118.9	10.9	8.3	6.5	3.5
Southern/Medit. Eu.	90.3	98.0	132.6	156.4	173.3	190.4	201.4	18.5	1.9	5.7	3.2
- of which EU-28	229.7	267.3	332.3	363.8	380.0	412.2	432.7	39.8	2.7	5.0	2.2
Asia and the Pacific	55.8	82.0	110.1	153.5	204.9	233.5	248.1	22.8	6.9	6.2	6.2
North-East Asia	26.4	41.3	58.3	85.9	111.5	122.8	127.0	11.7	6.0	3.5	5.0
South-East Asia	21.2	28.4	36.1	48.5	70.0	84.2	93.1	8.6	8.7	10.5	8.5
Oceania	5.2	8.1	9.6	10.9	11.4	11.9	12.5	1.1	4.0	4.7	1.7
South Asia	3.1	4.2	6.1	8.1	12.0	14.6	15.5	1.4	6.2	6.1	8.4
Americas	92.8	109.1	128.2	133.3	150.6	162.7	167.9	15.5	4.3	3.2	2.9
North America	71.8	80.7	91.5	89.9	99.5	106.4	110.1	10.1	4.2	3.5	2.6
Caribbean	11.4	14.0	17.1	18.8	19.5	20.7	21.2	2.0	3.0	2.4	1.5
Central America	1.9	2.6	4.3	6.3	7.9	8.9	9.2	0.8	7.3	3.7	4.9
South America	7.7	11.7	15.3	18.3	23.6	26.7	27.4	2.5	5.0	2.6	5.2
Africa	14.7	18.7	26.2	34.8	49.9	52.9	55.8	5.1	6.6	5.4	6.1
North Africa	8.4	7.3	10.2	13.9	18.8	18.5	19.6	1.8	8.2	6.1	4.4
Subsaharan Africa	6.3	11.5	16.0	20.9	31.2	34.5	36.2	3.3	5.8	5.0	7.1
Middle East	9.6	13.7	24.1	36.3	58.2	51.7	51.6	4.7	-5.4	-0.2	4.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

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International Tourism Receipts

Growth in receipts equals growth in international arrivals

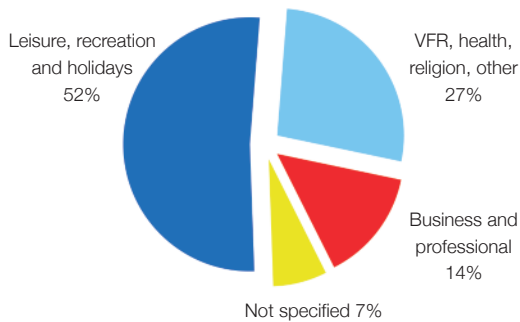
In 2013, international tourism receipts in destinations around the world grew 5% in real terms (taking into account exchange rate fluctuations and inflation) to reach US\$ 1159 billion (euro 873 bn). Growth in receipts mirrored the growth in international arrivals (also +5%), confirming the strong correlation between these two key indicators of international tourism.

In absolute terms, receipts increased by US\$ 81 billion (euro 34 billion, comparatively less due to the depreciation of the dollar). Europe, which accounts for 42% of all international tourism receipts, saw the largest growth in 2013: up US\$ 35 billion to US\$ 489 billion (euro 368 billion), boosted partly by a stronger euro. Destinations in Asia and the Pacific (accounting for 31% of worldwide receipts) increased earnings by US\$ 30 billion to US\$ 359 billion (euro 270 bn). In the Americas (20% share), receipts increased by US\$ 16 billion to US\$ 229 billion (euro 173 bn). In the Middle East (4% share) international tourism receipts are estimated at US\$ 47 billion (euro 36 bn) and in Africa (3% share) at US\$ 34 billion (euro 26 bn).

In relative terms, Asia and the Pacific (+8%) recorded the largest increase in receipts, followed by the Americas (+6%) and Europe (+4%). Africa posted flat results while receipts in the Middle East were down 2% compared to 2012.

International tourism receipts are the earnings generated in destination countries from expenditure on accommodation, food

Inbound tourism by purpose of visit, 2013* (share)



Source: World Tourism Organization (UNWTO) ©

In 2013, travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals (52% or 568 million). Some 14% of international tourists reported travelling for business and professional purposes and another 27% travelled for other reasons, such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment, etc. The purpose of visit for the remaining 7% of arrivals was not specified.

	International Tourism Receipts				Market share (%)	Receipts (US\$)			Receipts (euro)		
	Local currencies, constant prices (% change)					(billion)	per arrival	(billion)	per arrival		
	10/09	11/10	12/11	13*/12							
World	5.2	4.5	4.2	5.3	100	1,078	1,159	1,070	839	873	800
Advanced economies¹	5.8	5.9	4.0	6.0	64.3	688	745	1,280	536	561	970
Emerging economies¹	4.0	2.1	4.5	4.0	35.7	390	413	820	303	311	610
By UNWTO regions:											
Europe	-0.2	4.9	1.9	3.8	42.2	454.0	489.3	870	353.4	368.4	650
Northern Europe	3.4	2.4	3.3	7.1	6.4	67.6	74.2	1,080	52.6	55.9	810
Western Europe	1.4	3.9	2.7	1.7	14.5	157.9	167.9	960	122.9	126.4	730
Central/Eastern Europe	-3.5	6.8	4.0	3.4	5.2	56.3	59.9	500	43.8	45.1	380
Southern/Mediterr. Eu.	-1.9	6.1	0.0	4.5	16.2	172.2	187.3	930	134.0	141.0	700
- of which EU-28	0.9	4.0	1.7	3.4	34.8	374.2	402.9	930	291.2	303.4	700
Asia and the Pacific	14.9	8.3	6.7	8.2	31.0	329.1	358.9	1,450	256.1	270.3	1,090
North-East Asia	21.4	9.2	7.9	9.3	15.9	167.2	184.7	1,450	130.1	139.0	1,090
South-East Asia	15.0	12.9	10.6	9.7	9.3	96.0	107.4	1,150	74.7	80.9	870
Oceania	-3.0	-4.1	-1.3	1.9	3.7	43.0	42.6	3,410	33.4	32.0	2,570
South Asia	10.7	11.6	-0.6	5.3	2.1	22.9	24.3	1,570	17.8	18.3	1,180
Americas	4.2	5.1	5.7	6.4	19.8	212.9	229.2	1,360	165.7	172.6	1,030
North America	6.0	5.9	6.7	7.8	14.8	156.4	171.0	1,550	121.7	128.8	1,170
Caribbean	0.7	-1.5	1.2	2.1	2.1	24.2	24.8	1,170	18.8	18.7	880
Central America	0.3	9.7	7.5	3.2	0.8	8.7	9.4	1,020	6.8	7.1	770
South America	-2.2	5.7	3.2	3.2	2.1	23.6	23.9	870	18.4	18.0	660
Africa	2.6	1.7	7.3	0.0	3.0	34.3	34.2	610	26.7	25.8	460
North Africa	0.2	-5.5	9.1	-1.4	0.9	10.0	10.2	520	7.8	7.7	390
Subsaharan Africa	3.8	5.0	6.5	0.6	2.1	24.3	24.0	660	18.9	18.1	500
Middle East	16.3	-17.2	2.2	-1.9	4.1	47.5	47.3	920	36.9	35.6	690

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

	1990	1995	2000	2005	2006	2007	2008	2009	2010	2011	2012	2013*	11/10	12/11	13*/12	11/10	12*/11	13*/12			
International Tourist Arrivals (overnight visitors)													Change (%)								
Million	434	528	677	807	853	908	926	890	948	995	1,035	1,087				4.9	4.1	5.0			
Index (2008=100)							100	96	102	107	112	117									
International Tourism Receipts													Current prices (%)			Constant prices (%)					
Local currencies													8.7	7.4	7.8	4.5	4.2	5.3			
Index (2008=100) (constant prices)																					
US\$ billion	262	403	476	681	747	861	944	856	931	1,042	1,078	1,159	12.0	3.4	7.5	8.6	1.3	6.0			
Euro billion	206	308	515	548	595	629	641	614	702	749	839	873	6.7	12.0	4.0	3.8	9.3	2.6			

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

and drink, local transport, entertainment, shopping and other services and goods. In macro-economic terms, expenditure by international visitors counts as exports for the destination country and as imports for the country of residency of the visitor. In the Balance of Payments, receipts from inbound tourism are reported as 'travel credit' under the services balance and expenditure on outbound tourism as 'travel debit'. For many countries tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development.

Apart from receipts in destinations, tourism also generates export earnings through international passenger transport services (rendered to non-residents). In 2013, the export value of the latter is estimated at US\$ 218 billion, bringing total tourism export earnings to US\$ 1.4 trillion (euro 1.0 trillion), or US\$ 3.8 billion (euro 2.8 billion) a day on average.

International tourism (travel and passenger transport) accounts for 29% of the world's exports of services and 6% of overall exports of goods and services. As a worldwide export category, tourism ranks fifth after fuels, chemicals, food and automotive products, while ranking first in many developing countries.

World's Top Tourism Destinations

Only minor changes in the top 10 by arrivals and receipts

Only two changes took place in the top 10 rankings by international tourist arrivals and tourism receipts in 2013. In the ranking by arrivals, Spain (with 61 million arrivals) regained the third position it had lost in 2010 to China (56 million). Thailand

International Tourist Arrivals						
Rank	Series ¹	Million		Change (%)		
		2012	2013*	12/11	13*/12	
1	France	TF	83.0	..	1.8	..
2	United States	TF	66.7	69.8	6.3	4.7
3	Spain	TF	57.5	60.7	2.3	5.6
4	China	TF	57.7	55.7	0.3	-3.5
5	Italy	TF	46.4	47.7	0.5	2.9
6	Turkey	TF	35.7	37.8	3.0	5.9
7	Germany	TCE	30.4	31.5	7.3	3.7
8	United Kingdom	TF	29.3	31.2	-0.1	6.4
9	Russian Federation	TF	25.7	28.4	13.5	10.2
10	Thailand	TF	22.4	26.5	16.2	18.8

Source: World Tourism Organization (UNWTO) ©

¹ See note on page 9

entered the top 10 arrivals ranking at number 10, climbing an amazing five positions, while it moved up two places to 7th in the ranking by tourism receipts.

When ranking the world's top international tourism destinations, it is preferable to take more than a single indicator into account. Ranked according to the two key tourism indicators – international tourist arrivals and international tourism receipts – it is interesting to note that eight of the top ten destinations appear on both lists, despite showing marked differences in terms of the type of tourists they attract, as well as in average length of stay and spending per trip and per night. In the case of international tourism receipts, changes not only reflect relative performance, but also (to a considerable extent) exchange rate fluctuations between national currencies and the US dollar.

France continues to top the ranking of international tourist arrivals with 83 million visitors in 2012 (2013 still to be reported), and is 3rd in international tourism receipts (US\$ 56 billion in 2013). The United States ranks 1st in receipts with US\$ 140 billion and 2nd in arrivals with 70 million. Spain is still the second largest earner worldwide and the first in Europe (US\$ 60 billion), and recovered its 3rd place in arrivals with 61 million visitors. China moved to 4th in arrivals (56 million) and remains 4th in receipts (US\$ 52 billion). Italy has consolidated its 5th place in arrivals (48 million) and 6th in receipts (US\$ 44 billion). Turkey remains 6th in arrivals and 12th in receipts.

Thailand moved up two positions in the ranking by international receipts to 7th, while it entered the top 10 by arrivals in 10th position, in a bumper 2013 when international arrivals were up by 19% to 27 million and receipts by 23% to US\$ 42 billion. Germany and the United Kingdom remain respectively 7th and 8th in arrivals, but moved down one place each in terms of earnings to 8th and 9th places respectively. The Russian Federation completes the top ten ranking by arrivals in 9th place, while the two Chinese Special Administrative Regions Macao and Hong Kong rank respectively 5th and 10th in receipts.

International Tourism Receipts							
Rank		US\$				Local currencies	
		Billion	Change (%)	Change (%)	Change (%)		
2012	2013*	12/11	13*/12	12/11	13*/12		
1	United States	126.2	139.6	9.2	10.6	9.2	10.6
2	Spain	56.3	60.4	-6.3	7.4	1.5	3.9
3	France	53.6	56.1	-2.2	4.8	6.0	1.3
4	China	50.0	51.7	3.2	3.3	0.8	1.4
5	Macao (China)	43.7	51.6	13.7	18.1	13.2	18.1
6	Italy	41.2	43.9	-4.2	6.6	3.8	3.1
7	Thailand	33.8	42.1	24.4	24.4	26.7	23.1
8	Germany	38.1	41.2	-1.9	8.1	6.3	4.5
9	United Kingdom	36.2	40.6	3.3	12.1	4.8	13.2
10	Hong Kong (China)	33.1	38.9	16.2	17.7	15.8	17.7

(Data as collected by UNWTO May 2014)

Regional Results

Europe – a surprisingly strong 2013

International tourist arrivals in Europe were up by a solid 5% in 2013, an increase of 29 million on 2012 to a total of 563 million. As the most visited region in the world with 52% of all international arrivals and comprising many comparatively mature destinations, a growth rate of 5% in Europe is remarkable. Tourism receipts grew by 4% in real terms, reaching US\$ 489 billion (euro 368 billion), accounting for 42% of receipts worldwide.

By subregion, the highest growth was recorded in Central and Eastern Europe, with 7% more arrivals in 2013. Many destinations recorded double-digit growth, especially smaller ones such as Georgia and Belarus (both +15%), Armenia (+14%) and Kazakhstan (+11%). While the subregion's largest destination, the Russian Federation, reported a robust 10% increase. Ukraine and Poland (both +7%) consolidated their healthy growth of 2012 when they hosted the UEFA European football Championship.

Growth in absolute terms was led by Southern and Mediterranean Europe, which reported some 11 million more international arrivals (+6%) in 2013. The subregion's largest destination Spain recorded a sound 6% increase in arrivals to 61 million. Other major destinations such as Greece (+16%), Portugal (+8%), Turkey (+6%) and Croatia (+6%) also saw robust growth last year.

Northern Europe posted a 6% increase in arrivals with smaller destination Iceland recording the highest relative growth (+20%). Norway (+8%) also saw robust growth, while the United Kingdom, the subregion's leading destination, reported a 6% increase in arrivals.

In Western Europe international arrivals grew by 4%. France reported an 8% increase in international arrivals to accommodation establishments (2013 data on arrivals at frontiers still pending). The Netherlands, Switzerland (both +5%), Germany (+4%) and Austria (3%) also reported healthy figures, while Belgium saw a modest 1% increase.

Asia and the Pacific – fourth consecutive year of robust growth

Asia and the Pacific welcomed 248 million international tourists in 2013, 15 million more than in 2012. This represents an increase of 6% compared to 2012, making it the fastest growing region last year in relative terms. In terms of tourism earnings, the region recorded US\$ 359 billion, up US\$ 30 billion from 2012 (+8% in real terms). While arrivals in the region accounted for 23% of the world's total, receipts in the region accounted for 31%.

As in 2012, South-East Asia was again the fastest growing subregion both in the region and in the world in 2013, with an increase of 11% in international tourist arrivals on the back of buoyant intraregional demand. Thailand reported strong growth (+19%), welcoming 27 million tourists, 4 million more than in 2012. Among the smaller destinations, Myanmar has seen a

surge in tourist arrivals in the last few years and recorded an extraordinary 52% increase in 2013. Timor-Leste (+42%) and Cambodia (+18%) also enjoyed high growth rates, as well as Vietnam (+11%), the Philippines (+10%) and Indonesia (+9%).

South Asia (+6%) also showed solid growth last year as Sri Lanka welcomed 27% more tourists and Maldives 17%. The subregion's largest destination India (7 million arrivals) posted 4% growth.

North-East Asia, the largest subregion in Asia and the Pacific with over half of all international arrivals in the region, saw a 4% increase last year. Japan (+24%) led this growth, reporting over 10 million arrivals for the first time ever. Taiwan (pr. of China) (+10%) and the Republic of Korea (+9%) also experienced robust growth, as did the two Chinese Special Administrative Regions Hong Kong (+8%) and Macao (+5%). China itself, however, the region's top destination, saw a decline of 4% in arrivals compared to 2012.

Oceania saw an increase of 5% in tourist arrivals last year, with leading destination Australia posting 6% growth.

The Americas – solid second half of 2013 after slow start

The Americas received 5 million additional international arrivals in 2013 (+3%), reaching a total of 168 million. The region had a slow start of the year, but growth picked up throughout the second half. International tourism receipts in the region reached US\$ 229 billion, an increase of 6% in real terms. The region maintained its share of worldwide arrivals at 15%, while its share of receipts was at 20%.

North America, the largest subregion accounting for some two-thirds of international arrivals in the region, saw 3% growth. The United States recorded a solid 5% increase whereas Canada posted 2% and Mexico 1% growth in tourist arrivals.

In Central America (+4%) all destinations reported consistent growth, with Costa Rica, El Salvador and Nicaragua (all +4%) around the subregion's average. Belize (+6%) and Honduras (+5%) grew somewhat faster and Guatemala and Panama (both +3%) slightly slower.

Growth in South America (+3%) was in line with the region's average. Peru (+11%) recorded double-digit growth while Ecuador (+7%), Paraguay and Colombia (both +5%) all posted sound results. Arrival data for Brazil, the subregion's largest destination, is not yet available but receipt figures indicate a rather flat trend.

The Caribbean registered a modest 2% increase in arrivals in 2013. Among the larger destinations, Puerto Rico (+4%) and the Dominican Republic (+3%) saw growth above the subregional average. Smaller destinations such as Aruba (+8%), the Cayman Islands, Anguilla (both +7%) and Curaçao (+5%) also reported healthy growth. After a decline in 2012, Haiti reported a solid 20% increase in arrivals.

Destinations	Series ¹	International Tourist Arrivals							International Tourism Receipts					
		(1000)				Change (%)			Share (%)	(US\$ million)				Share (%)
		2010	2011	2012	2013*	11/10	12/11	13*/12	2013*	2010	2011	2012	2013*	2013*
Africa		49,938	49,646	52,948	55,799	-0.6	6.6	5.4	100	30,389	32,680	34,325	34,216	100
North Africa		18,756	17,058	18,464	19,582	-9.1	8.2	6.1	35.1	9,661	9,589	10,018	10,235	29.9
Algeria	VF	2,070	2,395	2,634	2,733	15.7	10.0	3.7	4.9	219	209	217	..	..
Morocco	TF	9,288	9,342	9,375	10,046	0.6	0.4	7.2	18.0	6,703	7,281	6,703	6,850	20.0
Sudan	TF	495	536	..	..	8.3	..	..	..	94	185	872	933	2.7
Tunisia	TF	6,902	4,785	5,950	6,269	-30.7	24.4	5.3	11.2	2,645	1,914	2,227	2,210	6.5
Subsaharan Africa		31,181	32,588	34,484	36,217	4.5	5.8	5.0	64.9	20,728	23,090	24,307	23,981	70.1
Angola	TF	425	481	528	..	13.2	9.8	..	..	719	647	706	..	..
Benin	TF	199	209	220	..	5.0	5.3	..	..	149	187	189	..	..
Botswana	TF	2,145	..	..	..	..	..	..	..	78	33	34	..	..
Burkina Faso	THS	274	238	..	..	-13.1	..	..	..	72	133	..	..	..
Burundi	TF	142	..	..	..	..	..	..	..	2	2	2	..	..
Cameroon	VF	573	604	817	..	5.5	35.3	..	..	159	409	349	..	..
Cabo Verde	THS	336	428	482	464	27.4	12.6	-3.8	0.8	278	369	414	462	1.4
Cent.Afr.Rep.	TF	54	..	..	..	..	..	..	..	6	..	..	..	..
Chad	THS	71	77	86	..	8.5	11.7	..	..	..	..	..	..	..
Comoros	TF	15	19	..	..	22.9	..	..	..	35	44	39	..	..
Congo	THS	194	218	256	..	12.4	17.4	..	..	..	..	..	..	..
Côte d'Ivoire	VF	252	270	289	..	7.1	7.0	..	..	201	141	..	..	..
Dem.R.Congo	TF	81	186	..	..	129.6	..	..	..	11	11	7	..	..
Djibouti	TF	..	..	..	..	..	..	..	..	18	19	21	..	..
Equatorial Guinea	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Eritrea	VF	84	107	..	..	27.6	..	..	..	..	..	..	..	..
Ethiopia	TF	468	523	596	..	11.7	14.0	..	..	522	770	607	416	1.2
Gabon	TF	..	..	..	..	..	..	..	..	..	..	..	..	..
Gambia	TF	91	106	157	171	16.4	48.4	8.8	0.3	74	83	88	..	..
Ghana	TF	931	..	..	..	..	..	..	..	620	694	914	..	..
Guinea	TF	..	..	..	..	..	..	..	..	2	2	1	..	..
Kenya	TF	1,470	1,750	1,619	..	19.1	-7.5	..	..	800	926	935	..	..
Lesotho	TF	414	398	422	..	-4.0	6.1	..	..	25	29	46	..	..
Liberia	..	..	..	..	..	..	..	..	..	12	232	..	..	..
Madagascar	TF	196	225	256	196	14.8	13.7	-23.3	0.4	321	..	..	..	..
Malawi	TF	746	767	..	..	2.8	..	..	..	33	34	34	..	..
Mali	TF	169	160	134	..	-5.3	-16.3	..	..	283	267	..	..	..
Mauritania	TF	..	..	..	..	..	..	..	..	..	..	..	..	..
Mauritius	TF	935	965	965	993	3.2	0.1	2.9	1.8	1,282	1,488	1,477	1,321	3.9
Mozambique	TF	1,718	1,902	2,113	..	10.7	11.1	..	..	197	231	250	..	..
Namibia	TF	984	1,027	..	..	4.4	..	..	..	438	517	485	409	1.2
Niger	TF	74	82	81	..	10.9	-1.2	..	..	105	96	..	..	..
Nigeria	TF	1,555	715	..	..	-54.0	..	..	..	576	628	559	543	1.6
Reunion	TF	421	471	447	416	12.1	-5.3	-6.8	0.7	296	344	315	..	..
Rwanda	TF	504	688	815	..	36.5	18.5	..	..	202	252	282	..	..
Sao Tome Prn	TF	8	12	..	..	52.5	..	..	..	11	16	14	..	..
Senegal	TF	900	1,001	..	..	11.2	..	..	..	453	468	..	..	..
Seychelles	TF	175	194	208	230	11.4	7.0	10.7	0.4	274	291	310	344	1.0
Sierra Leone	TF	39	52	60	81	35.8	13.9	36.0	0.1	26	44	42	59	0.2
Somalia	..	..	..	..	..	..	..	..	..	..	..	..	..	..
South Africa	TF	8,074	8,339	9,188	9,510	3.3	10.2	3.5	17.0	9,070	9,547	9,994	9,238	27.0
Swaziland	TF	1,078	880	1,093	..	-18.4	24.2	..	..	50	21	30	..	..
Tanzania	TF	754	843	1,043	..	11.8	23.7	..	..	1,255	1,353	1,713	1,880	5.5
Togo	THS	202	300	235	..	48.5	-21.7	..	..	66	79	..	..	..
Uganda	TF	946	1,151	1,197	1,206	21.7	3.9	0.8	2.2	784	960	1,135	1,184	3.5
Zambia	TF	815	920	859	..	12.9	-6.7	..	..	125	146	155	..	..
Zimbabwe	VF	2,239	2,423	1,794	1,833	8.2	-26.0	2.1	3.3	634	662	749	851	2.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

¹ See note on page 9

Africa – sustained growth across many destinations

Africa continued to enjoy sustained growth, attracting 5% more international tourist arrivals in 2013, corresponding to an increase of 3 million. The region welcomed a total of 56 million tourists (5% of the world) last year after surpassing the 50 million mark in 2012. International tourism receipts remained at US\$ 34 billion. The region maintained a 5% share in worldwide arrivals and a 3% share in receipts.

North Africa (+6%) had another year of robust growth. Morocco (+7%) is the first African destination to have surpassed the mark of 10 million international arrivals, while Tunisia (+5%) recovered further.

Arrivals growth in Sub-Saharan Africa is estimated at 5%, though individual destinations with data available show a mixed picture. South Africa, the largest destination in the subregion, reported 4% growth. Seychelles (+11%) and Gambia (+9%) reported strong growth, while Mauritius (+3%), Zimbabwe (+2%) and Uganda (+1%) posted more modest increases.

Middle East – mixed and volatile results

The Middle East continued to show some mixed trends in 2013 due to the ongoing tension in some destinations. International tourist arrivals remained at 52 million (0% growth) whereas earnings decreased by 2% to US\$ 47 billion. The region has a 5% share in total world arrivals and 4% in receipts.

Results varied across individual destinations. The United Arab Emirate of Dubai grew at a robust pace of 11%, while Palestine (+11%) and Oman (+8%) also reported healthy growth. Other destinations faced declines. The region's top destination Saudi Arabia reported 7% less tourist arrivals than in 2012. Egypt posted double-digit growth in the first half of the year, but saw a significant drop in arrivals in the second half due to renewed political tension in the country, leading to an overall decrease of 18%. Lebanon (-7%) and Jordan (-5%) continued to suffer from the conflict in neighbouring Syria.

Destinations	Series ¹	International Tourist Arrivals							International Tourism Receipts					
		(1000)				Change (%)			Share (%)	(US\$ million)				Share (%)
		2010	2011	2012	2013*	11/10	12/11	13/12	2013*	2010	2011	2012	2013*	2013*
Middle East		58,172	54,629	51,684	51,571	-6.1	-5.4	-0.2	100	52,016	44,769	47,462	47,276	100
Bahrain	TF	..	..	..	..	..	..	..	..	1,362	1,035	1,051	..	..
Egypt	TF	14,051	9,497	11,196	9,174	-32.4	17.9	-18.1	17.8	12,528	8,707	9,940	6,044	12.8
Iraq	VF	1,518	..	..	..	..	..	..	..	1,660	1,543	1,634	..	..
Jordan	TF	4,207	3,960	4,162	3,945	-5.9	5.1	-5.2	7.7	3,585	3,425	4,061	4,117	8.7
Kuwait	THS	207	269	300	..	29.6	11.6	..	..	290	319	425	298	0.6
Lebanon	TF	2,168	1,655	1,366	1,274	-23.7	-17.5	-6.7	2.5	7,861	6,545	6,032	..	..
Libya	TF	..	..	..	..	..	..	..	..	60	..	..	..	..
Oman	TF	1,446	1,343	1,987	..	-7.1	48.0	..	..	780	996	1,095	..	..
Palestine	THS	522	449	490	545	-14.1	9.3	11.3	1.1	667	795	755	..	1.8
Qatar	TF	1,519	2,527	1,170	..	66.4	-53.7	..	..	584	1,170	2,857	3,456	7.3
Saudi Arabia	TF	10,850	17,498	14,276	13,213	61.3	-18.4	-7.4	25.6	6,712	8,459	7,432	7,651	16.2
Syria	TF	8,546	5,070	..	..	-40.7	..	..	..	6,190	1,753	..	..	..
Untd Arab Emirates ²	THS	7,432	8,129	8,977	9,990	9.4	10.4	11.3	19.4	8,577	9,204	10,380	..	..
Yemen	TF	1,025	829	874	..	-19.1	5.4	..	..	1,161	780	849	940	2.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

¹ See note on page 9

² Dubai only

Outbound Tourism

Most tourists visit destinations within their own region

The large majority of international travel takes place within travellers' own regions, with about four out of five worldwide arrivals originating from the same region.

Source markets for international tourism have traditionally been largely concentrated in the advanced economies of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth over recent years, especially in markets of Asia, Central and Eastern Europe, the Middle East, Africa and Latin America.

Europe is currently still the world's largest source region, generating over half of the world's international arrivals, followed by Asia and the Pacific (23%), the Americas (16%), the Middle East (3%) and Africa (3%).

	International Tourist Arrivals by region of origin (million)								Market share (%)	Change (%)		Average annual growth (%)
	1990	1995	2000	2005	2009	2010	2012	2013*		2013*	12/11		13*/12
World	434	528	677	807	890	948	1,035	1,087	100	4.1	5.0	3.8
From:												
Europe	250.3	302.6	388.8	449.7	476.5	496.6	537.3	565.9	52.1	3.4	5.3	2.9
Asia and the Pacific	58.7	86.3	114.2	153.2	180.9	206.3	237.2	250.3	23.0	6.5	5.5	6.3
Americas	99.3	108.4	130.8	136.5	147.1	156.3	171.6	178.1	16.4	4.4	3.8	3.4
Middle East	8.2	9.3	14.1	22.9	32.3	34.6	31.6	32.3	3.0	-6.7	2.0	4.4
Africa	9.8	11.5	14.9	19.3	25.5	28.3	31.9	33.4	3.1	6.1	4.8	7.1
Origin not specified ¹	7.8	9.4	14.1	25.4	28.2	26.3	25.7	26.8	2.5			
Same region	348.7	422.6	532.5	630.6	686.8	728.1	799.6	840.2	77.3	4.0	5.1	3.7
Other regions	77.6	95.6	130.3	150.9	175.4	194.0	210.0	219.8	20.2	4.2	4.7	4.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

¹ 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.

Top spenders in international tourism

China strengthens its lead in global tourism expenditure

China, which leaped to first place in the ranking by international tourism expenditure in 2012, extended its lead further, increasing expenditure in 2013 by a massive US\$ 27 billion to a record US\$ 129 billion. Boosted by rising disposable incomes, fewer restrictions on foreign travel and an appreciating currency, Chinese tourism spending abroad has increased almost tenfold in the 13 years since 2000, when it ranked only 7th. In 2013 the gap in expenditure between China and second and third largest spenders the United States and Germany widened to over US\$ 42 billion. The United States (+3%) and Germany (+2%) recorded moderate growth last year, with expenditure just over and just under US\$ 86 billion respectively.

The Russian Federation climbed one place in 2013 to become the fourth largest outbound market, following a 25% increase to US\$ 54 billion. It has been the second fastest growing market in recent years after China, doubling expenditure since 2010. As a consequence, the United Kingdom (+4%) fell one position to 5th, with an expenditure of US\$ 53 billion. France (+5%), Canada (+3%) and Australia (+9%) held on to positions 6, 7 and 8 respectively, with expenditure of US\$ 42 billion, US\$ 35 billion and US\$ 28 billion. Italy moved up one place to 9th with expenditure of US\$ 27 billion.

Brazil entered the top 10 by expenditure in 10th place, following a 13% increase to US\$ 25 billion. Other source markets beyond the top 10 showing substantial growth were Norway, Taiwan (pr. of China), Kuwait, Qatar, Ukraine and Turkey.

Rank	International Tourism Expenditure (US\$ billion)		Local currencies change (%)		Market share (%)	Population (million)	Expenditure per capita (US\$)	
	2012	2013*	12/11	13*/12				2013*	2013*
1	China	102.0	128.6	37.3	23.8	11.1	1,361	94
2	United States	83.5	86.2	6.7	3.3	7.4	316	273
3	Germany	81.3	85.9	2.5	2.3	7.4	81	1,063
4	Russian Federation	42.8	53.5	36.5	28.9	4.6	143	374
5	United Kingdom	51.3	52.6	2.1	3.5	4.5	64	821
6	France	39.1	42.4	-5.8	4.9	3.7	64	665
7	Canada	35.0	35.2	6.2	3.2	3.0	35	1,002
8	Australia	28.0	28.4	2.1	8.8	2.4	23	1,223
9	Italy	26.4	27.0	-0.3	-1.0	2.3	60	452
10	Brazil	22.2	25.1	4.6	12.9	2.2	198	127

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

UNWTO Tourism Towards 2030

Long-term forecasts – substantial potential for further growth

UNWTO Tourism Towards 2030 is UNWTO's long-term outlook and assessment of the development of tourism for the two decades from 2010 to 2030. It is a broad research project building on UNWTO's ongoing work in the field of long-term forecasting, initiated in the 1990s. The new study substitutes the earlier *Tourism 2020 Vision*, which has become a worldwide reference for international tourism forecasts.

Key outputs of *Tourism Towards 2030* are quantitative projections of international tourism demand over a 20-year period, with 2010 as the base year and ending in 2030. The updated forecast is enriched with an analysis of the social, political, economic, environmental and technological factors that have shaped tourism in the past, and which are expected to influence the sector in the future.

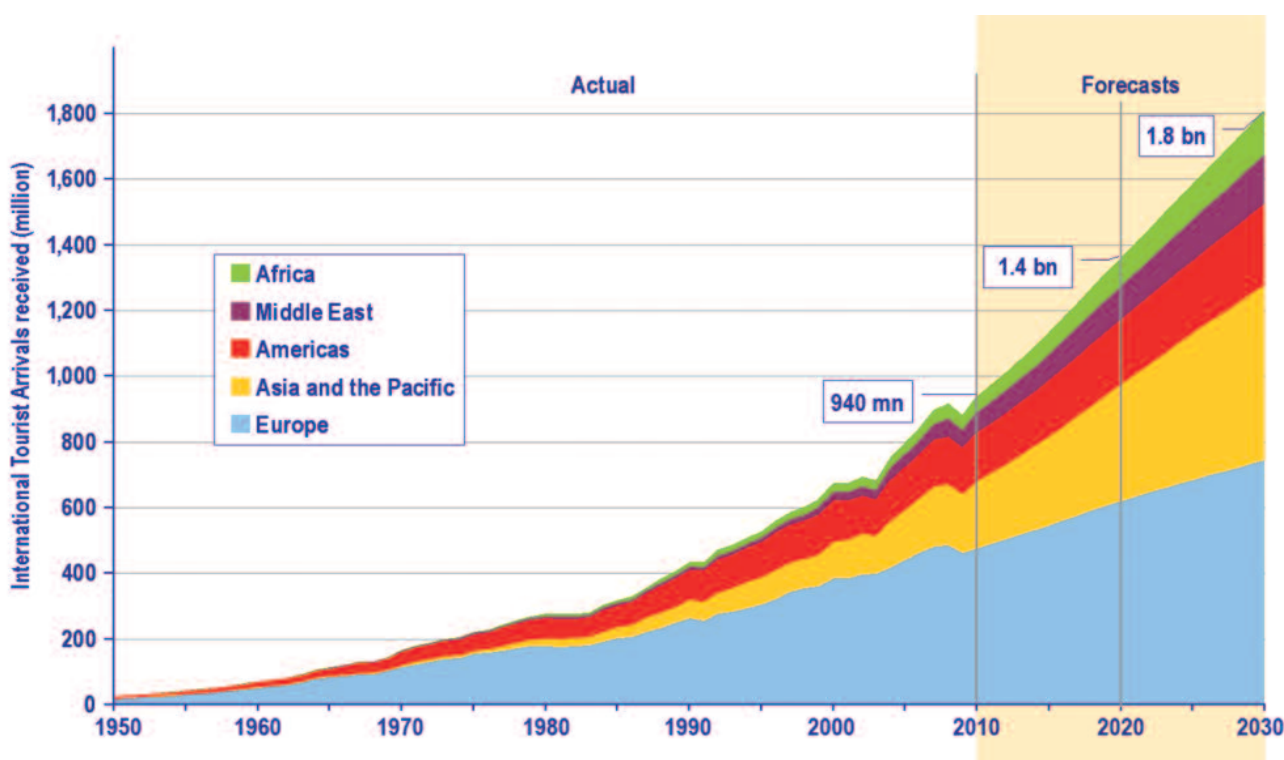
According to *Tourism Towards 2030*, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. Over time, the rate of growth will gradually slow, from 3.8% in 2012 to 2.9% in 2030, but on top of growing base numbers. In absolute numbers, international tourist arrivals will increase by some 43 million a year, compared with an average increase of 28 million a year during the period 1995 to 2010. At the projected rate of growth, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020 and 1.8 billion by the year 2030.

International tourist arrivals in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa will grow at double the rate (+4.4% a year) of that in advanced economy destinations (+2.2% a year). As a result, arrivals in emerging economies are expected to exceed those in advanced economies before 2020. In 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980).

By region, the strongest growth will be seen in Asia and the Pacific, where arrivals are forecast to increase by 331 million to reach 535 million in 2030 (+4.9% per year). The Middle East and Africa are also expected to more than double their arrivals in this period, from 61 million to 149 million and from 50 million to 134 million respectively. Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) will grow comparatively more slowly.

Thanks to their faster growth, the global market shares of Asia and the Pacific (to 30% in 2030, up from 22% in 2010), the Middle East (to 8%, from 6%) and Africa (to 7%, from 5%) will all increase. As a result, Europe (to 41%, from 51%) and the Americas (to 14%, from 16%) will experience a further decline in their share of international tourism, mostly because of the slower growth of comparatively mature destinations in North America, Northern Europe and Western Europe.

UNWTO Tourism Towards 2030: Actual trend and forecast 1950-2030



UNWTO Tourism Towards 2030: International tourism by region of destination

	International Tourist Arrivals received (million)					Average annual growth (%)					Share (%)	
	Actual data			Projections		Actual data		Projections			2010	2030
	1980	1995	2010	2020	2030	1980-'95	'95-2010	2010-'30, of which	2010-'20	2020-'30		
World	277	528	940	1,360	1,809	4.4	3.9	3.3	3.8	2.9	100	100
to Advanced economies ¹	194	334	498	643	772	3.7	2.7	2.2	2.6	1.8	53	43
to Emerging economies ¹	83	193	442	717	1,037	5.8	5.7	4.4	4.9	3.8	47	57
By UNWTO regions:												
Africa	7.2	18.9	50.3	85	134	6.7	6.7	5.0	5.4	4.6	5.3	7.4
North Africa	4.0	7.3	18.7	31	46	4.1	6.5	4.6	5.2	4.0	2.0	2.5
West and Central Africa	1.0	2.3	6.8	13	22	5.9	7.5	5.9	6.5	5.4	0.7	1.2
East Africa	1.2	5.0	12.1	22	37	10.1	6.1	5.8	6.2	5.4	1.3	2.1
Southern Africa	1.0	4.3	12.6	20	29	10.1	7.4	4.3	4.5	4.1	1.3	1.6
Americas	62.3	109.0	149.7	199	248	3.8	2.1	2.6	2.9	2.2	15.9	13.7
North America	48.3	80.7	98.2	120	138	3.5	1.3	1.7	2.0	1.4	10.4	7.6
Caribbean	6.7	14.0	20.1	25	30	5.0	2.4	2.0	2.4	1.7	2.1	1.7
Central America	1.5	2.6	7.9	14	22	3.8	7.7	5.2	6.0	4.5	0.8	1.2
South America	5.8	11.7	23.6	40	58	4.8	4.8	4.6	5.3	3.9	2.5	3.2
Asia and the Pacific	22.8	82.0	204.0	355	535	8.9	6.3	4.9	5.7	4.2	21.7	29.6
North-East Asia	10.1	41.3	111.5	195	293	9.9	6.8	4.9	5.7	4.2	11.9	16.2
South-East Asia	8.2	28.4	69.9	123	187	8.7	6.2	5.1	5.8	4.3	7.4	10.3
Oceania	2.3	8.1	11.6	15	19	8.7	2.4	2.4	2.9	2.0	1.2	1.0
South Asia	2.2	4.2	11.1	21	36	4.3	6.6	6.0	6.8	5.3	1.2	2.0
Europe	177.3	304.1	475.3	620	744	3.7	3.0	2.3	2.7	1.8	50.6	41.1
Northern Europe	20.4	35.8	57.7	72	82	3.8	3.2	1.8	2.2	1.4	6.1	4.5
Western Europe	68.3	112.2	153.7	192	222	3.4	2.1	1.8	2.3	1.4	16.3	12.3
Central/Eastern Europe	26.6	58.1	95.0	137	176	5.3	3.3	3.1	3.7	2.5	10.1	9.7
Southern/Mediterranean	61.9	98.0	168.9	219	264	3.1	3.7	2.3	2.6	1.9	18.0	14.6
Middle East	7.1	13.7	60.9	101	149	4.5	10.5	4.6	5.2	4.0	6.5	8.2

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

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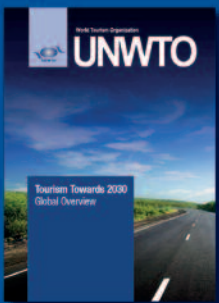
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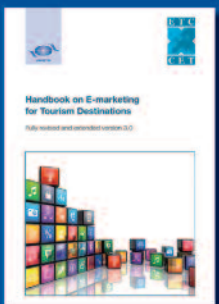
UNWTO World Tourism Barometer

The UNWTO World Tourism Barometer aims at providing all those involved in tourism with up-to-date statistics and adequate analysis, in a timely fashion. Issues cover short-term tourism trends, a retrospective and prospective evaluation of current tourism performance by the UNWTO Panel of Experts, and a summary of economic data relevant for tourism. The information is updated throughout the year. Available in English, French, Spanish and Russian



Tourism Towards 2030

UNWTO Tourism Towards 2030 is UNWTO's long-term outlook and assessment of future tourism trends from 2010 to 2030. It is a broad research project building on UNWTO's on-going work in the field of long-term forecasting, initiated in the 1990s. Key outputs of the study are quantitative projections for international tourism flows up until 2030, based on data series on international tourist arrivals by subregion of destination, region of origin and mode of transport for the period 1980-2010. Available in English



Handbook on E-Marketing for Tourism Destinations (version 3.0)

This UNWTO/ETC fully revised and extended version 3.0 covers all essential aspects of an e-marketing strategy including strategic planning, branding measures, content-building, search engine optimization, e-commerce and email marketing. It also provides practical information on latest trends and developments in mobile marketing and social media, as well as detailed insight into the measurement of effective e-marketing strategies using the latest technologies. Available in English



Handbook on Tourism Product Development

The UNWTO/ETC Handbook on Tourism Product Development outlines the essential elements in the process of tourism product development planning and implementation. It demonstrates a range of successful approaches and case studies from around the world and sets out best practice examples and benchmarks by which destinations can assess their own product development system and methods. Available in English, French and Spanish



Handbook on Tourism Destination Branding

This handbook is a recognition by UNWTO and ETC of the value of successfully building and managing a destination's brand. With an Introduction by Simon Anholt, the handbook presents a step-by-step guide to the branding process, accompanied by strategies for brand management. Given case studies illustrate concepts, present best practices from around the world and provide fresh insight into destination branding. Available in English, French and Spanish



Key Outbound Tourism Markets in South-East Asia

The Indian Outbound Travel Market

The Russian Outbound Travel Market

The Middle East Outbound Travel Market

Understanding Brazilian Outbound Tourism

Understanding Chinese Outbound Tourism

The Chinese Outbound Travel Market

The series of outbound travel markets studies offer a unique understanding of trends and travel behaviour in fast-growing source markets in the world. UNWTO has published in-depth studies on key outbound markets jointly with the European Travel Commission (ETC) covering India, Russian Federation, Middle East, Brazil, and China and with Tourism Australia on key South-East Asian markets Indonesia, Malaysia, Singapore, Thailand and Vietnam. Topics covered include destination choice, purpose of travel, tourism expenditure, holiday activities and market segmentation, as well as the use of the Internet and social media.

Furthermore, the innovative UNWTO/ETC netnographic studies, Understanding Outbound Tourism, explore the behaviour and mind-set of outbound travellers based on internet and social media activity.

Available in English



Compendium of Tourism Statistics, 2014 Edition, Data 2008 - 2012

The Compendium of Tourism Statistics provides data and indicators on inbound, outbound and domestic tourism, as well as on the number and types of tourism industries, the number of employees by tourism industries, and macroeconomic indicators related to international tourism. The 2014 edition presents data for 203 countries from 2008 to 2012, with methodological notes in English, French and Spanish.

Yearbook of Tourism Statistics, 2014 Edition, Data 2008 - 2012

The Yearbook of Tourism Statistics focuses on inbound tourism-related data (total arrivals and overnight stays), broken down by country of origin. The 2014 edition presents data for 197 countries from 2008 to 2012, with methodological notes in English, French and Spanish.