



## Contents

Quick overview of key trends	3
International Tourism Receipts	7
International Tourism Expenditure	7
Regional results	8
Hospitality	10
Meetings industry	13
Statistical Annex	Annex-1 to Annex-35

This issue of the *UNWTO World Tourism Barometer* and its accompanying *Statistical Annex* include an analysis of preliminary results for international tourism for the period January-September 2013. It is based on arrivals and receipts data reported by destinations around the world, as well expenditure data reported by major tourism source markets. Furthermore, this issue includes data on hotel performance and the meetings industry.

This release is available only in electronic format, through the UNWTO eLibrary, and is free of charge for members. The release is provided in English only, while the Statistical Annex is available in English, French, Spanish and Russian.

## International tourism an engine for the economic recovery

In the first nine months of 2013, international tourism grew by 5%. The number of international tourist arrivals reported by destinations around the world increased by some 41 million between January and September, growing above UNWTO's initial forecast and creating an important stimulus for the receiving economies.

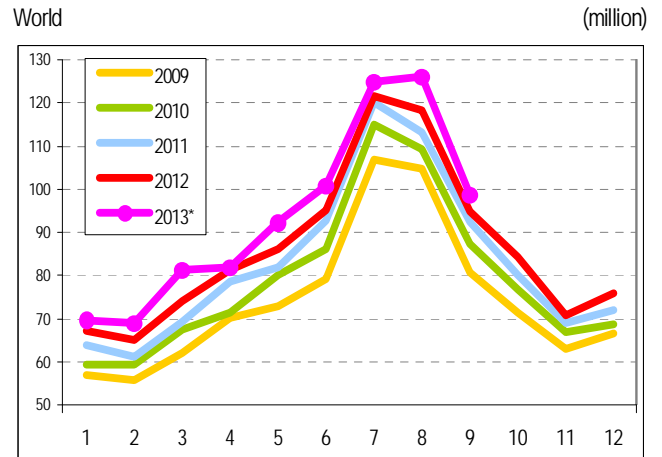
### *Sustained demand in many destinations drive world tourism*

Demand for international tourism remained strong throughout the first three quarters of 2013, despite a global economy remaining 'in low gear'. International tourist arrivals (overnight visitors) grew by 5% in the first nine months of the year, to reach a record 845 million worldwide, an estimated 41 million more than in the same period of 2012. Growth was driven by Europe and Asia and the Pacific with both seeing a 6% increase in tourist numbers.

"International tourism continues to grow above expectations, supporting economic growth in both advanced and emerging economies and bringing much needed support to job creation, Gross Domestic Product (GDP) and the balance of payments of many destinations" said UNWTO Secretary-General, Taleb Rifai. "It is particularly encouraging to see the strong results in many

European destinations, where the tourism sector is, undoubtedly, one of the engines of the economic recovery."

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

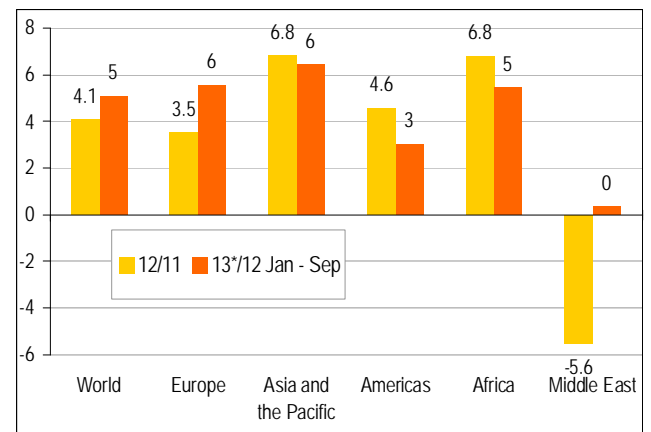
### *Europe beats expectations*

In Europe, the world's most visited region, international tourist arrivals grew by 6%, led by above-average results in Central and Eastern Europe (+7%) and Southern and Mediterranean Europe (+6%). This growth exceeds the initial forecast for 2013 and is double the average growth rate of international tourism in Europe since 2000 (+2.7% a year between 2000 and 2012).

Asia and the Pacific (+6%) continued to show robust results, bolstered by South-East Asia (+12%). The Americas (+3%) reported comparatively weaker results, with a better performance in North America (+4%) and Central America (+3%). In Africa (+5%), growth was fuelled by the recovery in North Africa (+6%), while the Middle East saw only a marginal increase (+0.3%).

International Tourist Arrivals

(% change)



Source: World Tourism Organization (UNWTO) ©

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO). By monitoring short-term tourism trends on a regular basis, UNWTO aims to provide all those involved, directly or indirectly, in tourism with adequate up-to-date statistics and analysis in a timely fashion.

The *UNWTO World Tourism Barometer* is periodically updated. Issues contain as regular sections: an overview of short-term tourism data from destinations, generating countries and air transport; the results of the latest survey among the UNWTO Panel of Tourism Experts, providing an evaluation of and prospects for short-term tourism performance; and selected economic data relevant for tourism. The objective for future editions of the *UNWTO World Tourism Barometer* will be to broaden its scope and improve coverage gradually over time.

The *UNWTO World Tourism Barometer* is prepared by UNWTO's Tourism Trends and Marketing Strategies Programme, with the collaboration of consultants, Nancy Cockerell and David Stevens. The UNWTO Secretariat wishes to express its sincere gratitude to all those who have participated in the elaboration of the *UNWTO World Tourism Barometer*, in particular all institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable contributions.

For more information on the *UNWTO World Tourism Barometer*, including copies of previous issues, please refer to the Facts & Figures section on the UNWTO website at [www.unwto.org/facts/menu.html](http://www.unwto.org/facts/menu.html).

We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org), tel +34 915678205 / fax +34 915678217.



The World Tourism Organization (UNWTO), a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 156 countries, 6 territories, 2 permanent observers and over 400 Affiliate Members.

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### World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain  
Tel (34) 91 567 81 00 / Fax (34) 91 571 37 33  
[barom@unwto.org](mailto:barom@unwto.org)

**[www.unwto.org](http://www.unwto.org)**

Data collection for this issue was closed in early December 2013.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published on the occasion of the Spanish tourism fair Fitur (22-26 January 2014).

The *UNWTO World Tourism Barometer* is developed as a service for UNWTO Members and published three times a year in English, French and Spanish. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.

If you are interested in receiving the *UNWTO World Tourism Barometer* and you are not a UNWTO Member, you can subscribe to the next three issues for € 70 (pdf version delivered electronically) or € 100 (pdf plus hard copy).

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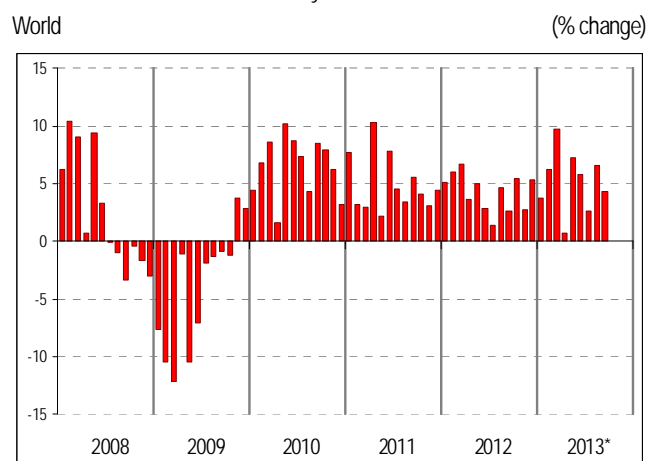
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## Quick overview of key trends

### International tourism demand up 5% through September 2013 compared to the same period of 2012

- As of early December this year, a total of 143 countries and territories have so far reported data on international tourist arrivals (overnight visitors) for at least three months of 2013 (out of 220). Of these, over three quarters (109 countries or territories) have reported an increase in tourist arrivals, with 36 countries (25%) enjoying double-digit growth, while 34 countries (24%) have posted a decrease. Close to 110 countries have already reported results for the nine months January-September 2013.
- Based on this sample of destinations that reported data, it is estimated that destinations worldwide recorded 845 million international tourists between January and September 2013, some 41 million more than the 804 million recorded in the same period of 2012. This increase corresponds to a growth of 5%, reflecting a generally robust tourism sector despite on-going challenges in some parts of the world.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

- In September 2013 an estimated 99 million international tourists were recorded worldwide, up from 95 million in 2012 (+4%). The Northern hemisphere summer months of July and August achieved sound results with 3% and 6% growth respectively compared to the corresponding months of 2012. In absolute numbers, international arrivals topped 125 million in July and 126 million in August, while in June the 100 million arrivals mark was exceeded for the first time in that month. July was weaker than August, which can largely be attributed to a slowdown in travel during Ramadan in countries with large Muslim populations. This month of fasting for Muslims occurred mostly in July this year and travel tends to be strong before and after, but slow during, Ramadan.
- Boosted by an early Easter holiday (with a date shift from early April in 2012 to late March in 2013), the strongest growth in international tourist arrivals was recorded in March, when they increased by an estimated 10% compared to the same month last year. For the same reason, April was the

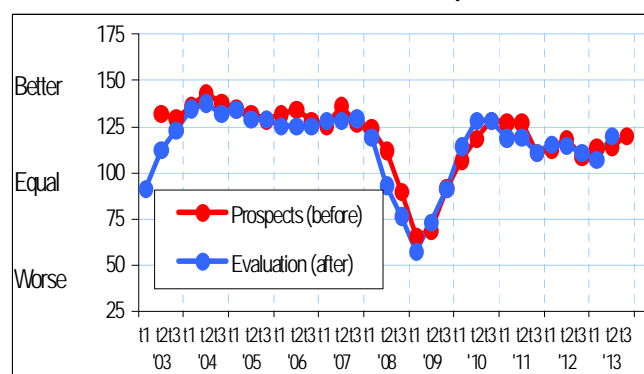
weakest month (+1%). May 2013 was also strong in tourism activity at +7%. February and June (both +6%) were just above the average for the whole period, while January was slightly below (+4%).

- Worldwide, international tourist arrivals grew at a solid 5% rate in the first nine months of the year compared to the same period of 2012, despite global economic growth 'in low gear', according to the International Monetary Fund (IMF).
- Europe saw sustained growth in international arrivals (+6%) despite continuing economic challenges. Asia and the Pacific recorded 6% more arrivals, fuelled by South-East Asia (+12%). Results were weaker in the Americas with 3% more arrivals, driven in this case by North America (+4%). Tourist flows in Africa increased by 5% in line with the world average, led by North Africa (+6%). The Middle East only posted a slight increase (0.3%).

### Panel of Experts shows sharp improvement in confidence

- UNWTO's Panel of Experts confirms the positive trend in arrivals as reported by destinations. Its evaluation of the May-August period shows a significant improvement in confidence, while prospects for the last four months of 2013 remain upbeat as well.
- World tourism performed better than expected in the period May to August 2013 according to the business confidence survey conducted among UNWTO's Panel of Experts this September. The survey revealed a sharp increase in confidence among destinations and businesses, in particular among experts from advanced economies in line with the better than expected performance in world tourism. For the last four months of the year the Panel continues to be optimistic as well. (See full report in the October Barometer.)

### UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

### Air transport reservations for September-December 2013 up by 4%

- According to air transport booking data from business intelligence tool ForwardKeys, international air departures worldwide increased by 4% from May to August. Air travel within the same region (+4%) was slightly stronger than travel between regions (+3%). Travel within the same region was strongest in Africa and the Middle East (+8%), followed by the Americas (+6%), while Europe (+7%) experienced the strongest demand from other regions.

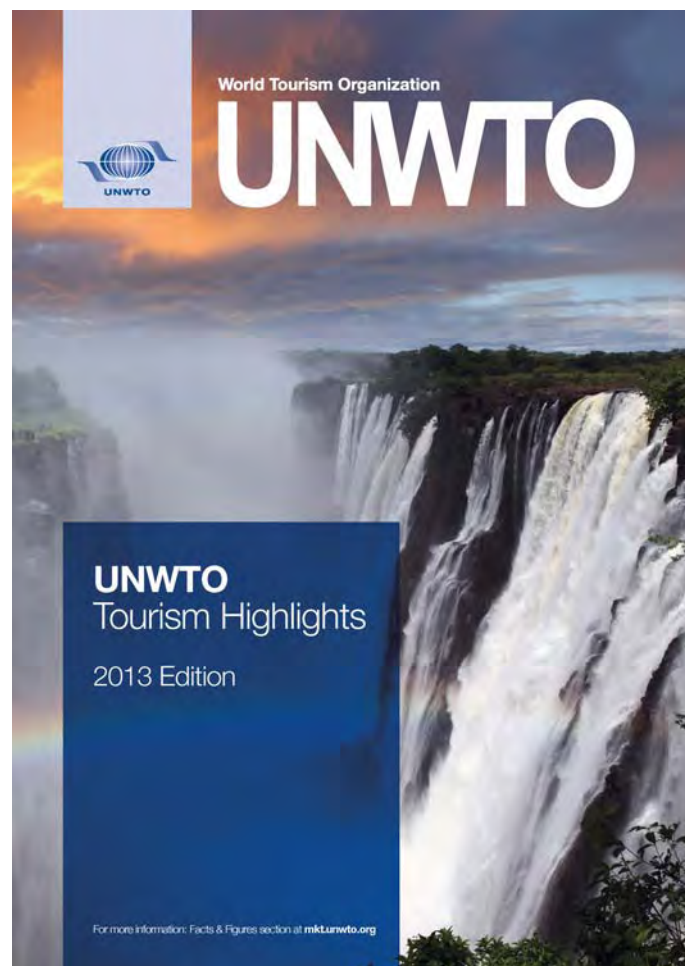
- Worldwide bookings for the September-December 2013 period show a continuation of trends, with reservations up by 4% compared to the same moment a year ago. Reservations for international trips within the same region (+5%) remain stronger than travel between different regions (+3%). International bookings were stronger from markets in the Americas (+8%), Asia and the Pacific (+4%) and Africa and the Middle East (+4%). Europe continues to be the major beneficiary of interregional traffic (+6% overall), with reservations from the Americas to Europe up by 7%, the same as from Africa and the Middle East, and from Asia and the Pacific by 3%. (See full report in the October Barometer.)

#### Outlook for full year 2013 and 2014

- At the beginning of the year UNWTO projected that international tourist arrivals would increase by 3% to 4% in 2013. With the strong results of the first nine months of the year in retrospect, it is almost certain that international tourism will exceed initial expectations.
- Growth is expected to continue through the remainder of 2013, but at a somewhat slower pace than in the first three quarters.
- The first three quarters of the year normally account for around 78% of the total arrivals count for the year.
- In September international tourism grew at slightly over 4%, and this rate of growth is expected to continue through the remainder of the year. The more than 50 countries that have already reported data up to October indicate that growth is maintained at comparable rate. For the full year 2013, this would bring growth close to 5%.
- UNWTO will announce detailed full year results for international arrivals in its traditional news conference on 20 January 2014 on the eve of Spanish tourism fair Fitur.
- Globally, demand for international tourism over the past few years has been very little affected by the economic volatility, with growth exceeding the average of 3.8% a year projected for the decade 2010-2020, according to UNWTO's long-term forecast *Tourism Towards 2030*.
- For 2014 growth is expected to continue but at a somewhat more moderate rate in the range of 3% to 4%. A comprehensive forecast by region will be included in the January 2014 issue of the *UNWTO World Tourism Barometer*.

## *UNWTO Tourism Highlights, 2013 Edition*

*UNWTO Tourism Highlights, 2013 Edition*, presents a concise overview of international tourism in the world based on the results for 2012.



*UNWTO Tourism Highlights* aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. The *2013 Edition* presents in 16 pages a snapshot of international tourism in the world for 2012 based on the latest available information collected from national sources. Trends and results are analysed for the world, regions and major regional destinations, with statistics included on international tourist arrivals and international tourism receipts. Furthermore, it provides the ranking of top tourism destinations by arrivals and receipts, as well as information on outbound tourism generating regions and a list of top source markets in terms of spending.

Electronic copies can be downloaded in English, Spanish and French free of charge from <http://mkt.unwto.org/publications>

International Tourist Arrivals by (Sub)region

	Full year					Share		Change		Monthly/quarterly data series												
	2000	2005	2010	2011	2012*	2012*	10/09	11/10	12*/11	(percentage change over same period of the previous year)												
	(million)					(% )		(% )		2013*	2013*				2012*							
										YTD	Q1	Q2	Q3	May	Jun	Jul	Aug	Sep	Q1	Q2	Q3	Q4
<b>World</b>	677	807	949	995	1,035	100	6.5	4.9	4.1	5.1	6.7	4.7	4.5	7.3	5.8	2.6	6.5	4.3	6.2	3.6	2.8	4.2
Advanced economies <sup>1</sup>	420	459	506	531	551	53.3	5.3	4.9	3.8	5.3	5.1	4.5	6.0	7.6	6.2	4.6	8.1	5.2	6.0	3.6	2.6	4.0
Emerging economies <sup>1</sup>	256	348	442	463	484	46.7	7.9	4.8	4.4	4.9	7.8	5.2	2.6	7.0	5.4	0.1	4.8	3.1	6.3	3.7	2.9	4.4
<i>By UNWTO regions:</i>																						
<b>Europe</b>	388.0	448.9	484.9	516.1	534.2	51.6	3.1	6.4	3.5	5.6	6.6	5.4	5.2	8.8	6.1	3.5	7.7	4.3	4.2	3.2	3.1	4.5
Northern Europe	46.4	60.4	62.8	64.5	65.6	6.3	2.1	2.8	1.7	3.6	4.1	3.2	3.7	4.9	5.2	-0.3	7.9	4.7	4.5	2.5	-1.9	5.0
Western Europe	139.7	141.7	154.4	161.5	166.7	16.1	3.9	4.6	3.2	4.4	4.2	3.5	5.1	8.5	4.9	4.6	8.8	0.6	5.0	3.3	2.0	4.0
Central/Eastern Eu.	69.3	90.4	94.5	103.2	111.3	10.8	3.5	9.2	7.8	7.0	12.1	7.7	3.8	9.1	7.4	3.5	4.5	3.3	8.0	8.0	7.8	8.4
Southern/Mediter. Eu.	132.6	156.4	173.3	186.9	190.7	18.4	2.5	7.9	2.0	6.4	6.2	6.5	6.4	10.3	6.9	3.8	8.2	7.5	0.7	0.8	3.2	2.1
- of which EU-27	326.8	356.1	371.0	391.4	401.0	38.7	2.7	5.5	2.5	4.6	4.0	4.0	5.2	7.6	5.6	3.6	7.6	4.2	4.2	2.1	1.6	3.1
<b>Asia and the Pacific</b>	110.1	153.6	205.1	218.6	233.5	22.6	13.2	6.6	6.8	6.4	7.1	5.0	7.2	5.9	7.0	5.3	7.0	9.5	8.5	7.6	4.7	6.9
North-East Asia	58.3	85.9	111.5	115.8	122.8	11.9	13.8	3.8	6.0	3.2	3.7	1.6	4.4	2.0	4.5	2.7	4.4	6.3	8.5	8.6	5.4	2.3
South-East Asia	36.1	48.5	70.0	77.5	84.2	8.1	12.5	10.7	8.7	11.8	12.8	10.5	11.9	12.1	11.1	9.0	11.3	15.8	9.5	7.2	3.6	14.3
Oceania	9.6	11.0	11.6	11.7	12.1	1.2	6.1	0.9	4.1	4.1	5.0	3.0	4.2	4.2	4.9	4.5	4.9	3.2	4.5	5.2	2.9	3.9
South Asia	6.1	8.1	12.0	13.7	14.4	1.4	19.5	13.9	5.2	5.2	3.5	4.6	7.7	6.2	5.0	7.0	8.4	7.6	6.6	2.7	7.3	6.9
<b>Americas</b>	128.2	133.3	150.6	156.0	163.1	15.8	6.6	3.6	4.6	3.0	2.9	1.6	4.4	4.3	3.8	3.6	6.2	3.1	7.3	3.0	3.8	3.9
North America	91.5	89.9	99.5	102.1	106.7	10.3	7.0	2.6	4.5	4.0	4.2	2.2	5.3	4.6	4.5	4.6	7.4	3.6	8.1	2.2	3.9	4.6
Caribbean	17.1	18.8	19.5	20.1	20.8	2.0	1.6	3.0	3.2	-0.2	0.1	-0.9	0.3	3.1	0.5	-0.4	2.2	-1.3	4.0	3.9	3.0	1.1
Central America	4.3	6.3	7.9	8.3	8.9	0.9	4.0	4.4	7.3	3.1	4.1	2.1	3.0	4.5	2.1	2.9	3.0	3.2	8.2	7.9	6.1	7.0
South America	15.3	18.3	23.6	25.5	26.7	2.6	10.4	7.8	5.0	1.6	1.0	1.1	2.9	4.1	4.0	2.3	3.5	3.0	7.5	4.4	3.3	2.3
<b>Africa</b>	26.2	34.8	49.9	49.6	52.9	5.1	9.3	-0.7	6.8	5.4	4.5	3.9	7.4	6.3	5.6	5.7	10.3	6.1	5.7	8.2	8.7	2.2
North Africa	10.2	13.9	18.8	17.1	18.5	1.8	6.7	-9.1	8.3	6.1	2.4	3.6	9.8	9.2	4.3	7.4	15.2	6.4	12.7	12.6	7.8	1.1
Subsaharan Africa	16.0	20.9	31.1	32.5	34.5	3.3	10.9	4.4	6.0	5.1	5.4	4.1	5.7	4.8	6.5	4.4	6.9	5.9	3.2	5.8	9.4	2.7
<b>Middle East</b>	24.1	36.3	58.2	54.4	51.4	5.0	11.6	-6.4	-5.6	0.3	19.8	5.0	-23.1	4.8	2.8	-26.6	-20.2	-21.4	6.3	-8.3	-17.1	-6.1

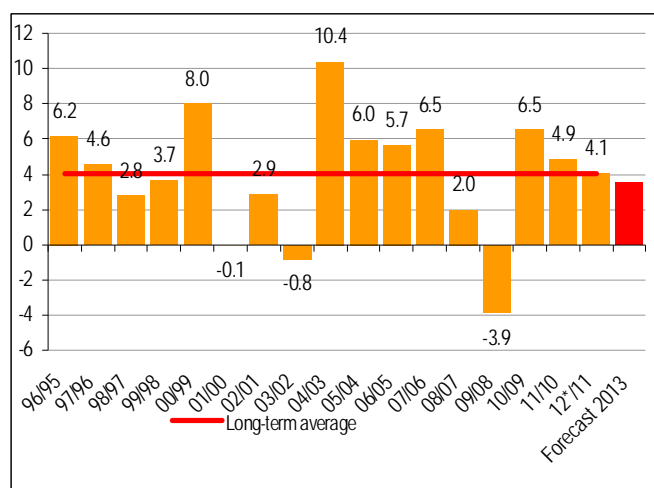
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO December 2013)

<sup>1</sup> 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](http://www.imf.org/external/pubs/ft/weo/2012/01).

See box at page 'Annex-1' for explanation of abbreviations and signs used

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the complimentary excerpt of this document.

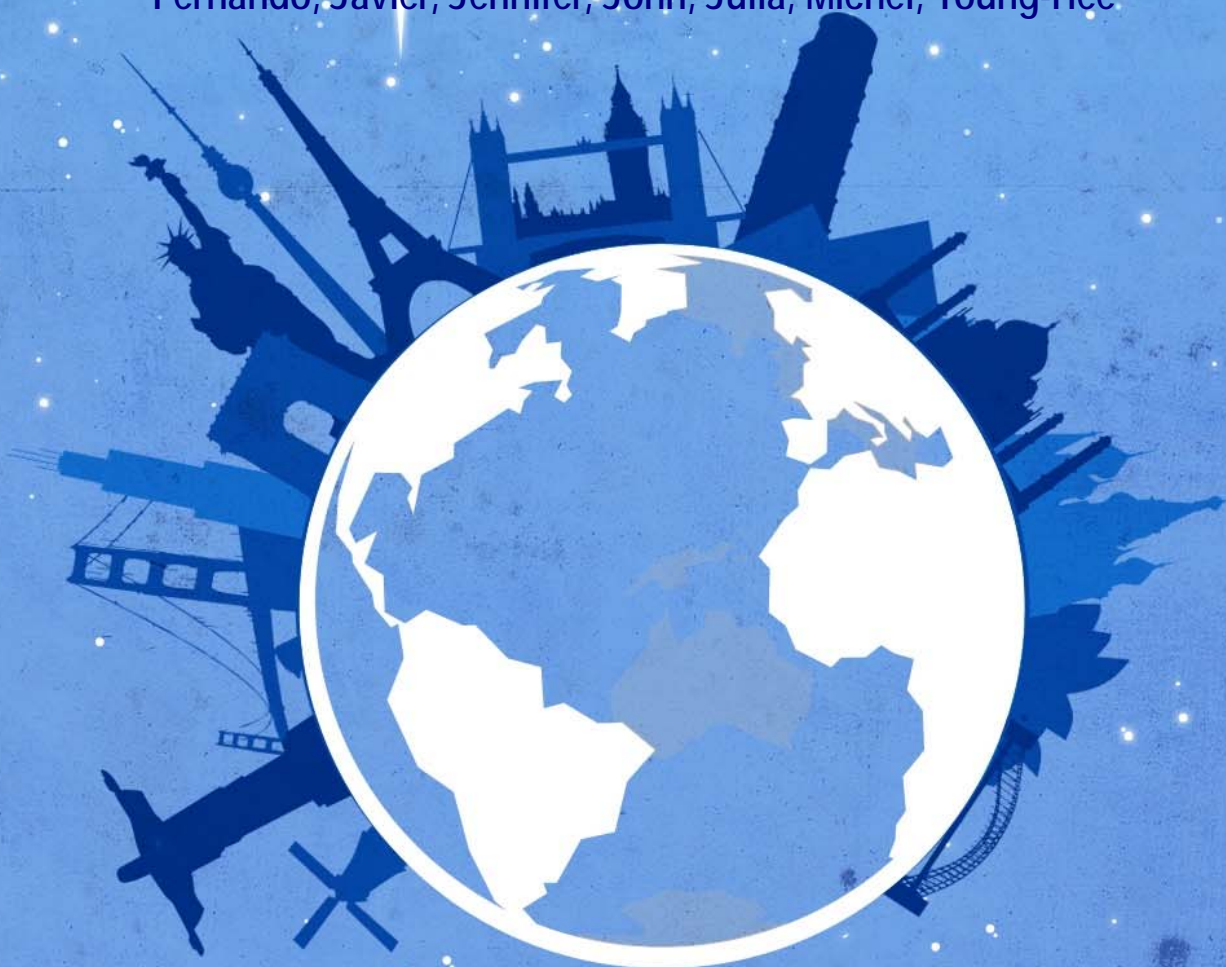
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Best wishes from the team of the  
UNWTO Tourism Trends and Marketing Strategies programme  
Fernando, Javier, Jennifer, John, Julia, Michel, Young-Hee



May this new year's journey bring you peace and joy  
Que le parcours de cette nouvelle année vous apporte joie et paix  
Que la travesía de este nuevo año les traiga paz y felicidad  
Пусть новый год подарит вам путешествие, наполненное умиротворенностью и радостью  
فلتجلب لكم رحلة هذا العام الجديد السلام والسعادة



# World Tourism Organization UNWTO Publications

## 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



## Understanding Brazilian Outbound Tourism – What the Brazilian blogosphere is saying about Europe

With over 70 million internet users in 2012, Brazil has Latin America's biggest population of 'netizens' or social media users, the 5th largest in the world. An increasing number of National Tourist Organizations (NTO's) are interested in targeting this important market through websites, blogs and other social media. This joint research project by ETC and UNWTO analyses the trends, themes and behaviour of Brazilian tourists in Europe based on internet searches and social media activity.

Available in English



## Key Outbound Tourism Markets in South-East Asia

Asia and the Pacific is not only a major tourism destination region but also an increasingly important tourism outbound market. This study, a collaborative project between Tourism Australia (TA) and UNWTO, aims to provide an up-to-date perspective of the major tourism trends in five key outbound markets: Indonesia, Malaysia, Singapore, Thailand and Vietnam. The report includes an overview of tourism demand and travel patterns, a detailed country-specific analysis and a comparative evaluation of current and future tourism potential.

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



## 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 and Spanish



## The Chinese Outbound Travel Market and Understanding Chinese Outbound Tourism

China is the fastest-growing tourism source market in the world and the top international tourism spender since 2012. In view of the worldwide interest in this market, ETC and UNWTO have prepared two joint reports on this subject: *The Chinese Outbound Travel Market – 2012 Update*, which offers an overview of the features and rapid evolution of the Chinese outbound tourism market, and *Understanding Chinese Outbound Tourism – What the Chinese Blogosphere is Saying about Europe*, which analyses the trends, themes and behaviour of Chinese tourists based on the analysis of online social media and internet searches.

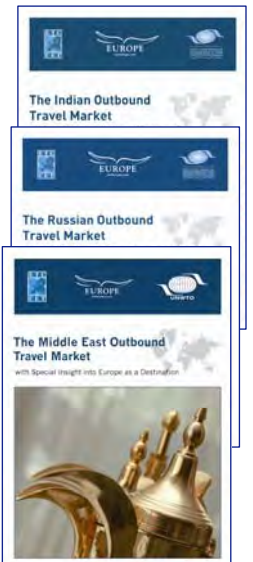
Available in English



## The Indian Outbound Travel Market, The Russian Outbound Travel Market and The Middle East Outbound Travel Market

The Middle Eastern, Indian and Russian outbound travel markets are some of the fastest growing, and consequently increasingly important markets in the world. UNWTO and ETC have jointly published in-depth studies of each unique market, which aim to provide the necessary information to understand the structure and trends of these growing markets. 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.

Available in English



## Compendium of Tourism Statistics, 2013 Edition, Data 2007–2011

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 2012 edition presents data for 209 countries from 2007 to 2011, with methodological notes in English, French and Spanish.

## Yearbook of Tourism Statistics, 2013 Edition, Data 2007–2011

The Yearbook of Tourism Statistics focuses on inbound tourism-related data (total arrivals and overnight stays), broken down by country of origin. The 2012 Edition presents data for 199 countries from 2007 to 2011, with methodological notes in English, French and Spanish.



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