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This issue and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* present full year results for international tourism in 2013 based on preliminary data for international overnight visitors reported by destinations around the world. This analysis is complemented by data on receipts from and expenditure on international tourism for the first part of 2013.

Furthermore, this issue includes an outlook for 2014 based on current trends and the assessment by the UNWTO Panel of Tourism Experts. For this issue of the *UNWTO World Tourism Barometer* members of the Panel evaluated tourism development in their destination or business for the full year 2013 as well as the last four months of the year, and assessed their prospects for the full year 2014 and the first four months. Finally, it presents an overview of air transport trends in 2013 and booking trends for the first four months of 2014 based on business intelligence tool Forwardkeys.

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 tourist arrivals up by 52 million in 2013

Based on preliminary full year data included in this issue of the *UNWTO World Tourism Barometer*, it is estimated that international tourist arrivals (overnight visitors) grew by 5% in 2013, reaching a record 1,087 million. Despite a global economy in 'low gear', international tourism results were well above expectations, with an additional 52 million international tourists travelling the world in 2013. For 2014, UNWTO forecasts 4% to 4.5% growth - again, above the long-term projections.

Strong results in many destinations

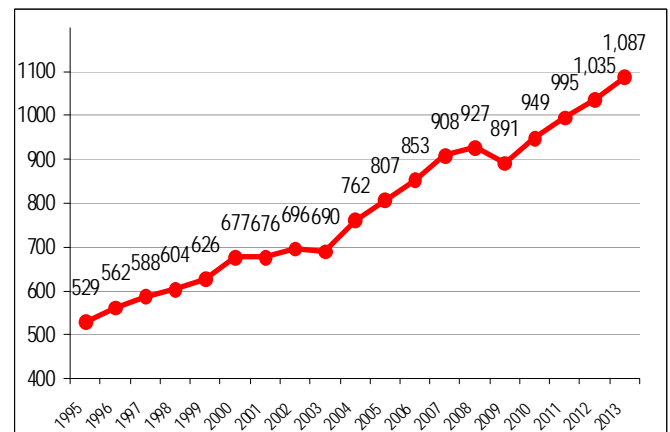
Demand for international tourism was strongest for destinations in Asia and the Pacific (+6%), Africa (+6%) and Europe (+5%). The leading sub-regions were South-East Asia (+10%), Central and Eastern Europe (+7%), Southern and Mediterranean Europe (+6%) and North Africa (+6%).

"2013 was an excellent year for international tourism," said UNWTO Secretary-General, Taleb Rifai. "The tourism sector has shown a remarkable capacity to adjust to the changing market conditions, fuelling growth and job creation around the world, despite the lingering economic and geopolitical challenges. Indeed, tourism has been among the few sectors generating positive news for many economies," he added.

World: Inbound Tourism

International Tourist Arrivals

(million)



Source: World Tourism Organization (UNWTO) ©

Growth to continue in 2014 at sustained pace

UNWTO forecasts international arrivals to increase by 4% to 4.5% in 2014, again above its long-term forecast of +3.8% per year between 2010 and 2020. The UNWTO Confidence Index, based on the feedback from over 300 experts worldwide, confirms this outlook with prospects for 2014 higher than in previous years.

2014 regional prospects 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.

"The positive results of 2013, and the expected global economic improvement in 2014, set the scene for another positive year for international tourism. Against this backdrop, UNWTO calls upon national governments to increasingly set up national strategies that support the sector and to deliver on their commitment to fair and sustainable growth," added Mr Rifai.

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.

We welcome your comments and suggestions at 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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Calle Capitán Haya, 42, 28020 Madrid, Spain

UNWTO World Tourism Barometer
ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2014 (version 30/01/14)
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Data collection for this issue was closed mid January 2014.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published April 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.

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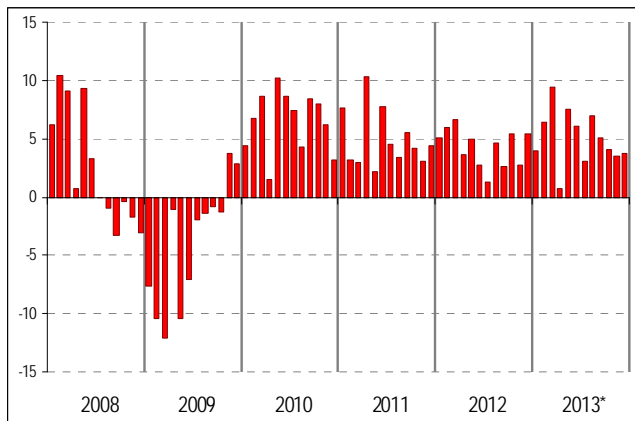
Quick overview of key trends

International tourism – 2013 results

- A total of 145 countries and territories around the world monitored by UNWTO, including virtually all major destinations, have reported monthly or quarterly data on international tourist arrivals (overnight visitors) for 2013. Among these, 115 saw an increase in arrivals (79%), 33 of which in double-digit figures (23%), while 30 reported a decline (21%). Some 128 countries reported results through September, of which 96 at least through October and 77 through November, while 36 countries already reported preliminary results for the full year.
- Based on this sample of destinations, worldwide growth in tourist arrivals is estimated at 5% for 2013. Destinations around the world welcomed some 52 million additional international tourist arrivals, raising the total to 1,087 million, up from 1,035 in 2012.
- Demand was strong throughout the year, with a slight slowdown in the last quarter. 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 9% compared to the same month of the previous year. For the same reason, April was the weakest month (+1%). May 2013 was also strong in tourism activity at +8%. February and June (both +6%) were just above the average for the whole period, while January was slightly below (+4%).

International Tourist Arrivals, monthly evolution

World (% change)

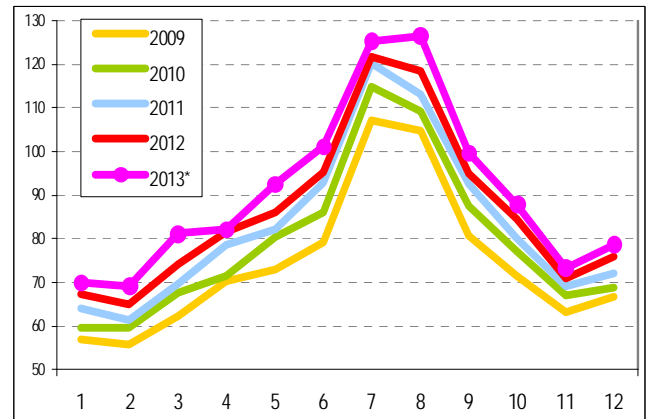


Source: World Tourism Organization (UNWTO) ©

- The Northern hemisphere summer months of July and August achieved sound results with 3% and 7% growth respectively compared to the corresponding months of 2012. 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 last year and travel tends to be strong before and after, but slow during, Ramadan.

International Tourist Arrivals, monthly evolution

World (million)



Source: World Tourism Organization (UNWTO) ©

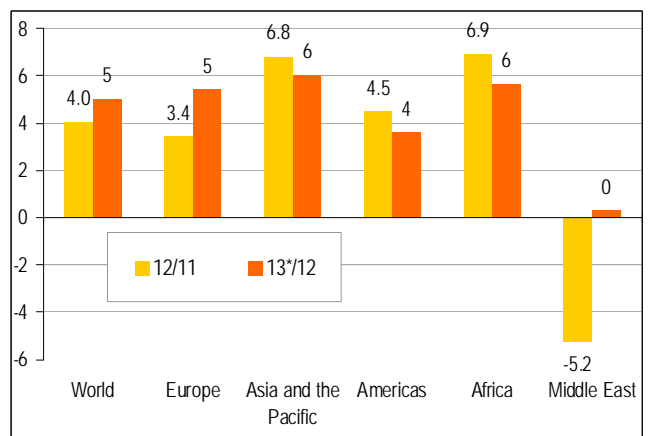
- In absolute numbers, international arrivals topped 125 million in July and 127 million in August. In June the 100 million arrivals mark was exceeded for the first time in that month, while in September the 100 million was almost reached.
- In September (+5%) growth equalled the average for the year, while the last three months were around 4%.

Europe welcomes most of the new arrivals

- Europe led growth in absolute terms, welcoming an additional 29 million international tourist arrivals in 2013, raising the total to 563 million. Growth (+5%) exceeded the forecast for 2013 and is almost double the region's average for the period 2005-2012 (+2.5% a year). This is particularly remarkable in view of the regional economic situation and as it follows an already robust 2011 and 2012. By sub-region, Central and Eastern Europe (+7%) and Southern Mediterranean Europe (+6%) reported the best results, while Northern Europe and Western Europe both grew by 4%.

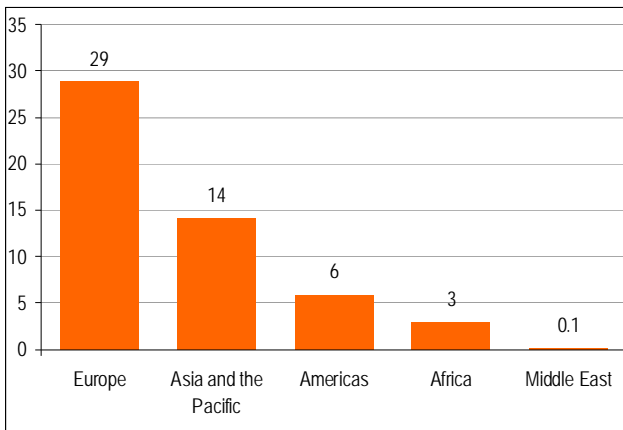
International Tourist Arrivals

(% change)



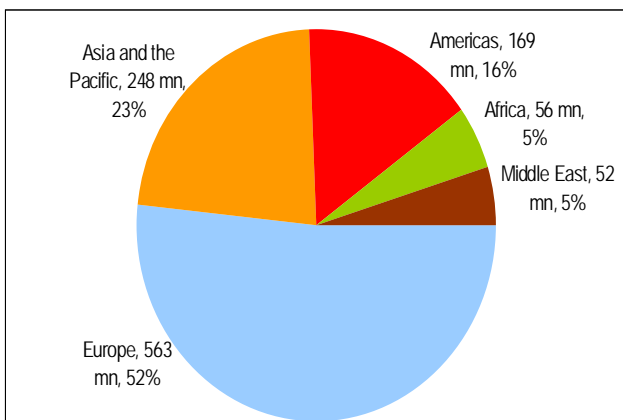
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (absolute change 2013, million)



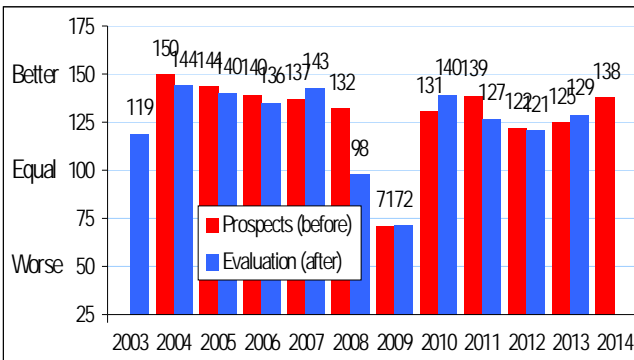
Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2013* (million)



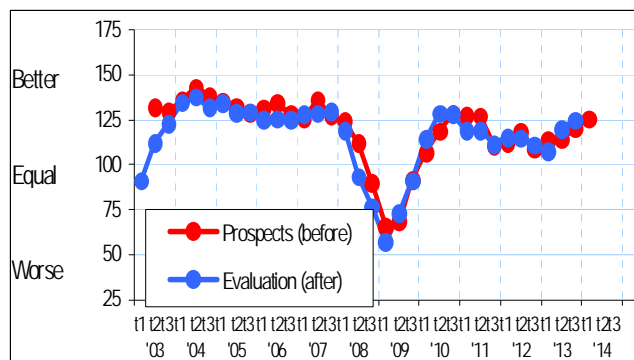
Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

- In relative terms, growth was strongest in Asia and the Pacific (+6%), where the number of international tourists grew by 14 million to reach 248 million. South-East Asia (+10%) was the best performing sub-region, while growth was comparatively more moderate in South Asia (+5%), Oceania and North-East Asia (+4% each).
- The Americas (+4%) saw an increase of six million arrivals, reaching a total of 169 million. Leading growth were destinations in North America and Central America (+4% each), while South America (+2%) and the Caribbean (+1%) showed some slowdown as compared to 2012.
- Africa (+6%) attracted three million additional arrivals, reaching a new record of 56 million, reflecting the on-going rebound in North Africa (+6%) and the sustained growth of Subsaharan destinations (+5%). Results in the Middle East (+0%) were rather mixed and volatile.

Russia and China - source markets leading in growth

- Tourism growth in recent years has been strongly driven by emerging source markets. China, which became the largest outbound market in 2012 with an expenditure of US\$ 102 billion, continued its surge, increasing by 28% in the first three quarters of 2013. The Russian Federation, which moved up to 5th largest outbound market in 2012, reported a 26% increase through September.
- Other emerging markets with substantial growth in outbound expenditure were Turkey (+24%), Egypt (+23%), Qatar (+18%), Philippines (+18%), Colombia (+16%), Kuwait (+15%), Indonesia (+15%), Ukraine (+15%) and Brazil (+14%).
- The performance of key advanced economy source markets was comparatively more modest. France (+6%) recovered from a weak 2012 and the United States, the United Kingdom, Canada and Australia all grew at 3%. In contrast, Germany, Japan and Italy reported declines in outbound expenditure.

International Tourist Arrivals by (Sub)region

	Full year						Share	Monthly/quarterly data series														
								(percentage change over same period of the previous year)														
	2000	2005	2010	2011	2012	2013*		2013*	11/10	12/11	13*/12	2013*				2012*						
					(million)	(%)				(%)	Q1	Q2	Q3	Q4	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	677	807	949	995	1,035	1,087	100	4.9	4.0	5.0	6.7	4.9	5.0	3.8	5.1	4.0	3.5	3.7	6.2	3.6	2.7	4.2
Advanced economies ¹	420	459	506	531	551	580	53.3	4.9	3.7	5.2	5.1	4.5	6.3	4.6	5.9	5.4	3.9	4.2	5.9	3.5	2.6	4.0
Emerging economies ¹	256	348	442	464	484	507	46.7	4.9	4.4	4.8	7.8	5.6	3.5	3.6	3.9	3.4	3.7	3.8	6.4	3.7	2.9	4.5
<i>By UNWTO regions:</i>																						
<i>Europe</i>	388.0	448.9	484.9	516.1	533.9	562.8	51.8	6.4	3.4	5.4	6.4	5.3	5.8	3.9	5.5	5.0	3.1	3.0	4.2	3.1	3.0	4.5
Northern Europe	46.4	60.4	62.8	64.5	65.6	68.3	6.3	2.8	1.7	4.1	4.1	3.2	4.3	5.3	6.7	9.7	1.4	4.2	4.5	2.5	-1.9	5.0
Western Europe	139.7	141.7	154.4	161.5	166.7	173.6	16.0	4.6	3.2	4.2	4.2	3.5	5.6	2.1	2.2	2.5	2.0	1.6	5.0	3.3	2.0	4.0
Central/Eastern Eu.	69.3	90.4	94.5	103.2	111.2	118.8	10.9	9.2	7.7	6.9	11.6	7.2	6.9	3.0	6.7	3.1	3.1	2.8	8.0	8.0	7.8	8.4
Southern/Mediterr. Eu.	132.6	156.4	173.3	186.9	190.4	202.0	18.6	7.9	1.9	6.1	6.2	6.5	6.0	5.6	7.0	6.5	5.0	4.3	0.5	0.7	3.1	2.0
- of which EU-28	332.1	363.8	380.1	401.3	411.1	430.0	39.5	5.6	2.5	4.6	4.3	4.0	5.6	3.5	5.2	4.7	2.7	2.6	4.1	2.2	1.6	3.1
<i>Asia and the Pacific</i>	110.1	153.6	205.1	218.6	233.6	247.7	22.8	6.6	6.8	6.0	7.5	5.0	7.2	4.5	9.6	5.4	4.3	4.0	8.5	7.6	4.7	6.9
North-East Asia	58.3	85.9	111.5	115.8	122.8	127.1	11.7	3.8	6.0	3.6	3.7	1.6	4.4	4.4	6.3	5.1	3.8	4.4	8.5	8.6	5.4	2.3
South-East Asia	36.1	48.5	70.0	77.5	84.2	92.7	8.5	10.7	8.7	10.0	13.7	10.5	12.0	4.6	16.1	5.7	5.2	3.1	9.5	7.2	3.6	14.3
Oceania	9.6	11.0	11.6	11.7	12.1	12.7	1.2	0.9	4.1	4.4	5.0	3.9	4.4	4.2	3.5	4.5	4.2	4.1	4.5	5.2	2.9	3.9
South Asia	6.1	8.1	12.0	13.7	14.4	15.2	1.4	14.0	5.4	5.3	4.2	4.3	7.4	5.2	6.5	6.3	2.7	6.7	6.8	3.1	7.5	7.1
<i>Americas</i>	128.2	133.3	150.6	156.0	163.0	168.9	15.5	3.6	4.5	3.6	2.9	1.6	4.6	5.1	3.2	6.0	4.8	4.6	7.3	3.0	3.8	3.9
North America	91.5	89.9	99.5	102.1	106.7	111.4	10.2	2.6	4.5	4.3	4.2	2.2	5.4	5.3	3.8	6.5	4.9	4.6	8.1	2.2	3.9	4.6
Caribbean	17.1	18.8	19.5	20.1	20.7	20.9	1.9	3.0	2.8	1.0	0.5	-0.8	0.8	4.0	-1.1	3.3	4.0	4.5	4.0	3.9	3.0	1.1
Central America	4.3	6.3	7.9	8.3	8.9	9.2	0.8	4.4	7.3	4.2	4.3	1.9	3.2	7.0	2.7	5.8	5.0	9.4	8.2	7.9	6.1	7.0
South America	15.3	18.3	23.6	25.5	26.7	27.4	2.5	7.8	5.0	2.4	0.7	0.8	3.9	4.5	3.2	6.0	4.7	3.1	7.5	4.4	3.3	2.3
<i>Africa</i>	26.2	34.8	49.9	49.7	53.1	56.1	5.2	-0.5	6.9	5.6	4.9	3.9	7.4	6.1	6.0	5.5	6.1	6.6	5.9	8.3	8.5	2.5
North Africa	10.2	13.9	18.8	17.1	18.5	19.6	1.8	-9.1	8.2	6.2	2.4	3.6	9.8	6.6	6.4	7.6	4.4	7.5	12.7	12.6	7.7	1.2
Subsaharan Africa	16.0	20.9	31.2	32.6	34.7	36.5	3.4	4.6	6.2	5.2	5.8	4.1	5.7	5.8	5.8	4.4	6.8	6.3	3.4	5.9	9.1	3.1
<i>Middle East</i>	24.1	36.3	58.2	54.7	51.8	51.9	4.8	-6.1	-5.2	0.3	18.9	10.2	-20.6	-6.8	-19.8	-12.8	-4.5	0.5	6.3	-8.3	-17.1	-6.1

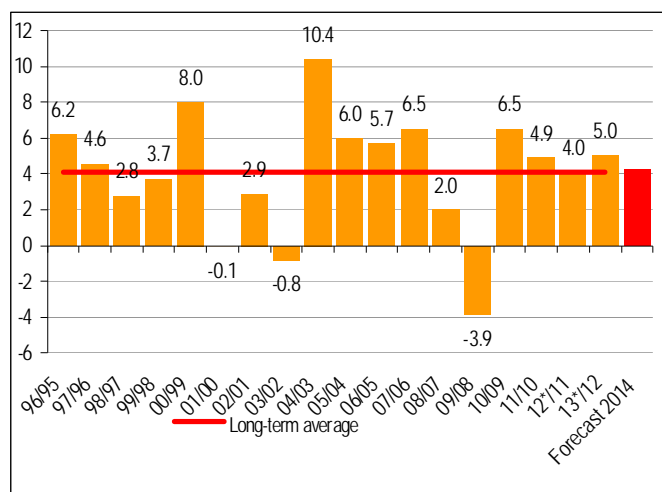
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 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.

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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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.

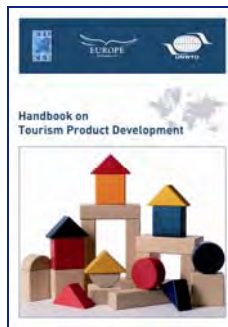
Available in English



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.

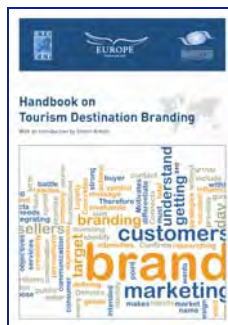
Available in English



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.

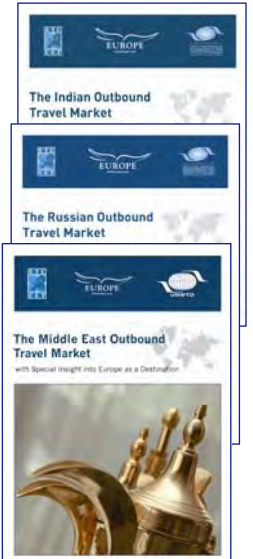
Available in English



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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