

UNWTO World Tourism Barometer

Volume 12 • June 2014

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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-April 2014, based on arrivals and receipts data reported by destinations around the world. Furthermore, it includes an outlook for the period May-August based on the UNWTO Panel of Experts and air transport bookings data from 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.

Strong peak season anticipated for international tourism

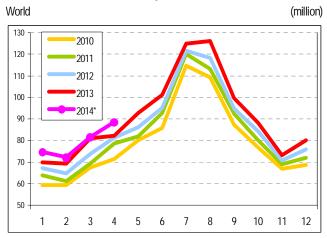
Demand for international tourism remained strong in the first four months of 2014 according to the results reported by destinations around the world included in this issue of the *UNWTO World Tourism Barometer*. International tourist arrivals worldwide grew by 5%, the same rate as during the full year 2013. Prospects for the current peak tourism season remain very positive with over 460 million tourists expected to travel abroad in the May-August 2014 period.

Destinations worldwide received some 317 million international tourists (overnight visitors) between January and April 2014, 14 million more than in the same period of 2013. This 5% growth consolidates the already strong increase registered in 2013 (+5%) and is well above the long-term trend projected by UNWTO for the period 2010-2020 (+3.8%).

Growth has been spread fairly widely with virtually all subregions recording increases in international arrivals of 4% or higher. By region, the strongest growth was registered in Asia and the Pacific and the Americas (both +6%), followed closely by Europe and Africa (both at +5%). By subregion, Northern Europe, Southern and Mediterranean Europe, North Africa and South Asia (all +8%) were the star performers.

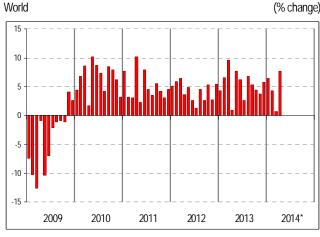
"The encouraging start to 2014 and the overall positive sentiment in the sector raise high expectations for the current peak tourism season, benefiting destinations from both advanced and emerging economies," said UNWTO Secretary-General, Taleb Rifai. "The 5% growth in the number of international tourists crossing borders in the first months of 2014 further reflects the impact of the increase in public support to the sector as well as the immense capacity of tourism companies to adapt to changing markets," he added.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Most destinations share in growth

Asia and the Pacific (+6%) consolidated its growth of recent years, with South Asia (+8%) and North-East Asia (+7%) in the lead.

Growth picked up in the Americas (+6%), with all four subregions showing significant improvement over 2013.

Europe, the most visited region in the world, maintained the strength showed in 2013 with international tourist arrivals

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 upto-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.

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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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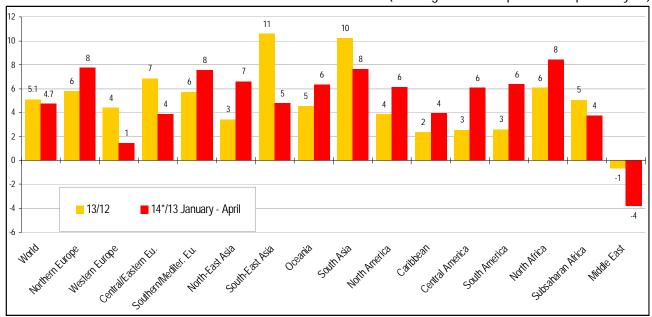
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Data collection for this issue was closed end of June 2014.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published September 2014.

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

growing by 5% through April. Northern Europe and Southern Mediterranean Europe (+8% each) led growth.

Africa's international tourist numbers grew by 5% as the recovery was consolidated further in North Africa (+8%).

International tourist arrivals in the Middle East are estimated to be down by 4%, though this figure should be taken with caution as it is based on limited available data for the period from the region.

With regard to source markets, international tourism expenditure data for the first part of 2014 indicates that the growth in demand continues to be strong out of emerging markets, in particular from China, the Russian Federation, Saudi Arabia and India. Moreover, demand from advanced markets is strengthening as the economic situation gradually improves, with encouraging growth registered in expenditure from Italy, Australia, the Republic of Korea, the Netherlands, Norway and Sweden.

Over 460 million international tourist arrivals expected worldwide in the current May-August peak season

Various indicators point to a strong Northern Hemisphere summer peak season. Over 460 million tourists are expected to travel abroad during the four months May to August, which account on average for 41% of all international tourist arrivals registered in one year. The sound results of the Easter month of April as well as the growth of destinations in the Mediterranean and the Caribbean, including Mexico, indicate strong demand for leisure travel. The pace of growth might moderate slightly, as shoulder seasons tend to show faster growth than the peak season.

According to the UNWTO Confidence Index, prospects remain very positive for the period May-August 2014. Confidence has picked up, particularly among the private sector, and improved further in Europe, the Americas, Asia and the Pacific and the Middle East.

Data on international air travel reservations from business intelligence tool Forwardkeys support this outlook with bookings for May-August up by 8% compared to the same period last year, with intraregional and interregional travel equally strong. The highest growth in bookings was recorded in international flight reservations from Asian source markets, followed by the Americas (+8%).

For the full year 2014, international tourist arrivals are expected to increase by 4% to 4.5%, somewhat above UNWTO's long-term forecast of 3.8% per year for the period 2010 to 2020.



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International Tourist Arrivals by (Sub)region

	Full year	r					Share	Chang	e		Monthl	y/quarte	erly da	ta seri	es					
								(percentage change over same period of the p						f the pre	evious	year)				
	2000	2005	2010	2011	2012	2013*	2013*	11/10	12/11	13*/12	2014*	2014*					2013			
	•				(1	million)	(%)			(%)	YTD	Q1	Jan	Feb	Mar	Apr	Q1	Q2	Q3	Q4
World	676	807	948	995	1,035	1,087	100	4.9	4.0	5.1	4.7	3.6	6.5	4.3	0.7	7.7	6.9	5.1	4.8	4.7
Advanced economies ¹	419	459	506	531	551	581	53.4	4.9	3.8	5.5	5.7	2.9	4.6	3.9	0.3	6.6	5.3	4.8	6.5	6.4
Emerging economies ¹	256	348	442	464	484	507	46.6	4.9	4.3	4.7	3.8	2.9	4.6	3.9	0.3	6.6	8.1	5.7	2.9	3.6
By UNWTO regions:																				
Europe	387.1	448.9	484.4	515.6	<i>534.1</i>	563.8	51.8	6.4	3.6	5.6	4.7	3.5	6.8	3.7	0.5	7.7	6.6	5.4	6.0	6.1
Northern Europe	45.5	60.4	62.7	64.5	65.1	68.9	6.3	2.9	0.9	5.8	7.7	8.2	11.2	10.0	4.2	6.6	4.7	4.2	6.5	7.6
Western Europe	139.7	141.7	154.4	161.5	167.2	174.5	16.1	4.6	3.5	4.4	1.4	-0.1	5.2	-0.1	-4.0	5.6	4.9	4.3	6.3	5.9
Central/Eastern Eu.	69.3	90.4	94.1	102.7	111.4	119.1	10.9	9.2	8.4	6.9	3.9	4.0	5.0	4.1	2.9	3.7	11.8	7.4	6.8	3.7
Southern/Mediter. Eu.	132.6	156.4	173.3	186.9	190.4	201.4	18.5	7.9	1.9	5.7	7.6	5.0	8.3	5.3	2.4	12.6	5.4	5.7	5.2	7.4
- of which EU-28	331.2	363.8	379.6	400.8	411.7	432.6	39.8	5.6	2.7	5.1	5.1	3.6	7.7	3.7	0.3	8.5	4.5	4.4	6.2	6.5
Asia and the Pacific	110.1	<i>153.5</i>	204.9	218.5	233.5	248.7	22.9	6.6	6.9	6.5	6.0	5.0	8.4	5.3	1.7	8.8	7.9	5.8	7.3	5.2
North-East Asia	58.3	85.9	111.5	115.8	122.8	127.0	11.7	3.8	6.0	3.4	6.6	5.2	7.1	6.7	2.2	10.7	3.7	1.6	4.4	4.1
South-East Asia	36.1	48.5	70.0	77.5	84.2	93.1	8.6	10.7	8.7	10.6	4.8	4.6	9.9	3.3	0.7	5.5	13.9	11.4	11.1	6.4
Oceania	9.6	10.9	11.4	11.5	11.9	12.5	1.1	0.7	4.1	4.5	6.3	4.7	11.1	4.4	-0.7	12.5	4.9	4.0	4.2	4.8
South Asia	6.1	8.1	12.0	13.8	14.6	16.1	1.5	14.5	6.2	10.2	7.6	6.9	7.2	7.7	5.7	10.4	9.6	12.0	15.1	6.5
Americas	128.2	133.3	150.6	156.1	162.7	168.2	15.5	3.6	4.3	3.4	5.8	4.5	6.7	5.8	1.4	10.1	3.0	2.0	3.9	4.4
North America	91.5	89.9	99.5	102.2	106.4	110.5	10.2	2.7	4.1	3.9	6.1	5.1	7.4	5.8	2.7	8.9	4.4	2.9	4.3	3.8
Caribbean	17.1	18.8	19.5	20.1	20.7	21.2	2.0	3.0	3.1	2.4	4.0	3.1	6.7	4.6	-1.1	7.0	1.0	-0.3	1.7	6.3
Central America	4.3	6.3	7.9	8.3	8.9	9.1	0.8	4.4	7.3	2.6	6.1	3.7	4.2	7.2	0.2	14.2	3.2	0.6	2.2	3.9
South America	15.3	18.3	23.6	25.5	26.7	27.4	2.5	7.8	5.0	2.6	6.4	4.0	5.7	6.0	-0.4	16.8	0.5	0.5	3.8	5.8
Africa	26.2	34.8	49.9	49.7	53.0	55.9	5.1	-0.3	6.5	5.4	5.1	4.6	4.8	6.6	2.5	6.6	5.2	2.7	5.0	5.4
North Africa	10.2	13.9	18.8	17.1	18.5	19.6	1.8	-9.1	8.2	6.1	8.4	8.2	13.7	16.5	-2.7	9.1	0.1	0.7	7.1	4.8
Subsaharan Africa	16.0	20.9	31.2	32.7	34.5	36.3	3.3	4.9	5.6	5.1	3.8	3.2	1.8	3.1	4.8	5.4	7.2	3.9	3.5	5.7
Middle East	24.1	36.3	58.2	54.7	51.1	50.8	4.7	-5.9	-6.6	-0.6	-3.8	-4.1	-3.4	-2.7	-6.0	-2.7	19.3	10.1	-21.8	-8.6

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2014)

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

Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014	Average	2014*		
				a year	projection					
			full year	JanApril	2005-2013	between				
World	-3.8%	6.5%	4.9%	4.0%	5.1% 4.7% 3.8%			+4% and +4.5%		
Europe	-4.9%	3.1%	6.4%	3.6%	5.6%	4.7%	2.9%	+3% and +4%		
Asia and the Pacific	-1.6%	13.2%	6.6%	6.9%	6.5%	6.0%	6.2%	+5% and +6%		
Americas	-4.7%	6.5%	3.6%	4.3%	3.4%	5.8%	3.0%	+3% and +4%		
Africa	3.4%	9.3%	-0.3%	6.5%	5.4%	5.1%	6.1%	+4% and +6%		
Middle East	-4.9%	11.5%	-5.9%	-6.6%	-0.6%	-3.8%	4.3%	+0% and +5%		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2014)

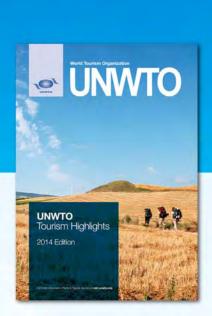
The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the complimentary excerpt of this document.

The full document is available in electronic format for sale and free of charge for UNWTO members and subscribed institutions through the UNWTO elibrary at www.e-unwto.org/content/w83v37.

For more information on the *UNWTO World Tourism Barometer*, please refer to the Facts & Figures section on the UNWTO website at www.unwto.org/facts.

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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.



UNWTO Tourism Highlights 2014 Edition

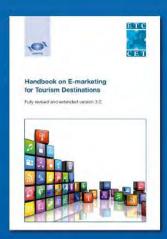
UNWTO has just released its *UNWTO Tourism Highlights, 2014 Edition,* presenting a concise overview of international tourism in the world based on the results for the year 2013.

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 2014 Edition presents in 16 pages a snapshot of international tourism in the world for 2013 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.

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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 shortterm 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.

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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 (revised version)**

This UNWTO/ETC fully revised and extended version 3.0 covers all essential aspects of an e-marketing strategy including strategic planning, branding measures, contentbuilding, 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**

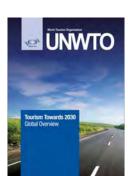
The UNWTO/ETC Handbook on Tourism Product Development outlines the essential elements in the process of tourism product development planning and implementation. It demonstrates a range of successful approaches and case studies from around the world and sets out best practice examples and benchmarks by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

Available in English

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





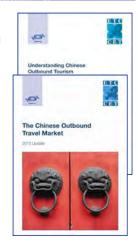




The Chinese Outbound Travel Market and **Understanding Chinese Outbound Tourism**

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



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

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.





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