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This issue of the *UNWTO World Tourism Barometer* and its accompanying Statistical Annex include an analysis of results for international tourism for the first eight months of 2014 based on arrivals and receipts data reported by destinations around the world, as well on international tourism expenditure data for source markets. Furthermore, it includes an evaluation of the May-August period and an outlook for the period September-December 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.

## International tourism shows continued strength

International tourist arrivals worldwide grew by 5% during the first eight months of 2014 according to the data included in this issue of the *UNWTO World Tourism Barometer*. Despite geopolitical challenges and a lingering economic recovery, tourism demand was strong during the northern hemisphere high season of June to August.

International tourists (overnight visitors) travelling the world between January and August 2014 reached 781 million, 36 million more than in the same period of 2013. With an increase of close to 5%, international tourism continued to grow well above the long-term trend projected by UNWTO for the period 2010-2020 (+3.8%). The peak months of June, July and August, which account for about one third of the annual total, saw an increase of over 4% compared to the same months of 2013.

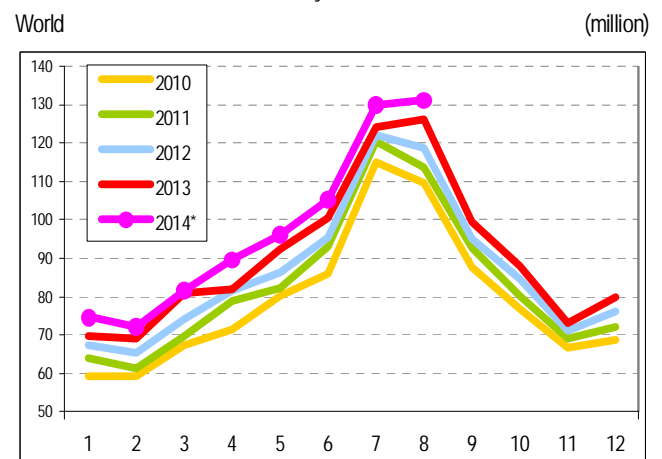
By region, the strongest growth was registered in the Americas (+8%), followed by Asia and the Pacific (+5%) and Europe (+4%). By subregion, North America (+9%) and South Asia (+8%) were the star performers, followed by Southern and Mediterranean Europe, Northern Europe, North-East Asia and South America (all +7%).

## Sustained growth despite challenges

"International tourism continues to grow above expectations despite rising global challenges," said UNWTO Secretary-General, Taleb Rifai. "Yet, increasing geopolitical uncertainties and the fact that the global economy shows signs of weaker and uneven growth require our attention," he added.

Commenting on the possible impact of the Ebola outbreak in West Africa on tourism, Mr. Rifai said "Although it is premature to assess the full impact of the outbreak on the tourism sector, at this point we do not expect a major effect on the sector globally."

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

"International tourism in countries where there is widespread transmission (Liberia, Guinea and Sierra Leone) represents less than 1% of all international arrivals to African destinations. Yet we have to be aware that misperception about the outbreak is affecting the whole of Africa. On the upside, and according to information gathered from our African Member States and key tour operators and associations in major source markets, there are no significant cancellations to report, despite a certain slowdown in bookings."

Mr. Rifai recalled that the 3rd meeting of the International Health Regulations Emergency Committee regarding the 2014 Ebola outbreak in West Africa convened by the World Health Organization (WHO) on 23 October 2014 "reiterated its recommendation that there should be no general ban on international travel or trade."

"Most importantly, we need to urgently step up international efforts to support affected countries to contain the outbreak, ensure that WHO recommendations are implemented and provide, at all moments, transparent and timely information to fight misperception and fear, and minimise the spillover effects on the whole region," he added.

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 Market Trends 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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Data collection for this issue was closed end of October 2014.

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

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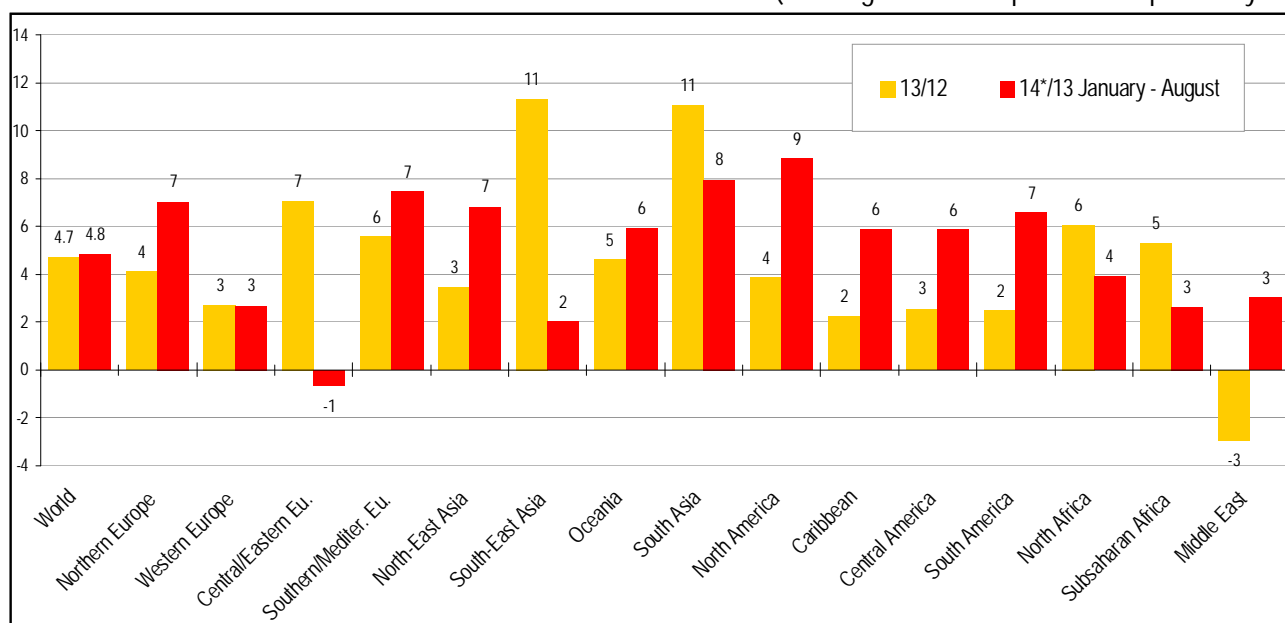
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International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

*The Americas leading growth in 2014*

The Americas (+8%) led growth during the first eight months of 2014, rebounding on last year's subdued results. All four subregions – North America, Caribbean, Central America and South America – doubled the growth rates registered in 2013.

International arrivals in Asia and the Pacific increased by 5%, consolidating the growth of recent years, with South Asia (+8%) and North-East Asia (+7%) in the lead, followed by Oceania (+6%). On the other hand, growth in arrivals slowed in South-East Asia (+2%) compared to the strong results registered in 2012 and 2013.

Europe, the most visited region in the world, posted 4% growth in international tourist arrivals through August, with strong results in Northern Europe and Southern Mediterranean Europe (+7% each). By contrast, international tourism grew at a more modest pace in Western Europe (+3%) and was stagnant in Central and Eastern Europe (-1%).

Africa's international tourist numbers grew by 3% with North Africa consolidating its recovery (+4%). Subsaharan Africa's arrivals were up by 3%.

International tourist arrivals in the Middle East are estimated to be up by 3%, though this figure should be read with caution as it is based on limited available data for the region.

*China reinforces its position as leading source market*

Data on expenditure on travel abroad for the first six to nine months of 2014 indicates that growth among the world's top ten source markets was highest in China (+16%), while France (+10%), Italy (+8%), the United States of America (+6%), Brazil (+5%) and the Russian Federation (+4%) also reported robust growth. Among the top 25 source markets in expenditure, double-digit growth rates were registered in India (+31%), Saudi Arabia

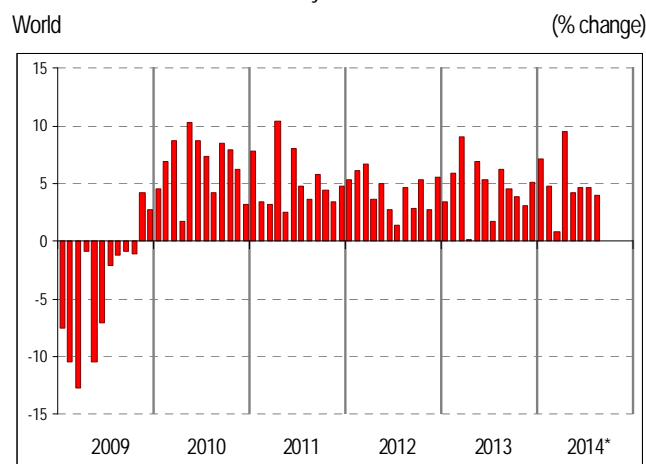
(+30%), Norway (+22%), Sweden (+12%), Taiwan (pr. of China) (+11%) and the Republic of Korea (+10%).

*2014 to close above expectations*

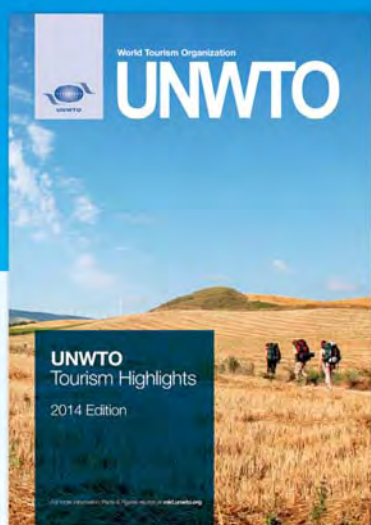
For the full year 2014, international tourist arrivals are expected to increase by 4% to 4.5%, slightly above UNWTO's long-term forecast of 3.8% per year for the period 2010 to 2020.

Although the UNWTO Confidence Index shows some weaker levels due to current geopolitical and health risks, results remain positive as 51% of respondents see prospects for the period September-December 2014 as "much better or better" as against 35% who rate them as "equal" and 14% as "much worse or worse".

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©



## UNWTO Tourism Highlights 2014 Edition

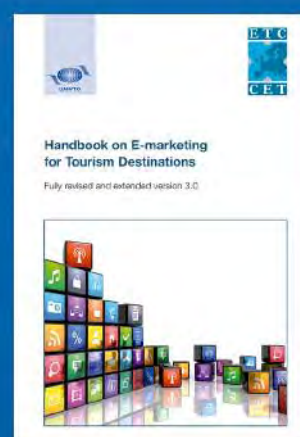
UNWTO has just released its *UNWTO Tourism Highlights, 2014 Edition*, presenting a concise overview of international tourism in the world based on the results for the year 2013.

*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.

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



## NEW PUBLICATIONS



### Handbook on E-marketing for Tourism Destinations

Fully revised and extended version 3.0

This handbook covers all essential aspects of an e-marketing strategy and valuable information on how to use e-marketing as a way to collaborate with the travel trade and the media alongside recommendations for crisis communication. 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.

Printed version: [www.unwto.org/infoshop](http://www.unwto.org/infoshop)

Electronic version: [www.e-unwto.org](http://www.e-unwto.org)

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## International Tourist Arrivals by (Sub)region

	Full year						Share	Change	Monthly/quarterly data series													
									(percentage change over same period of the previous year)													
	2000	2005	2010	2011	2012	2013*			2013*	12/11	13*/12	2014*	2014*								2013	
(million)						(%)	(%)	YTD	Q1	Q2	Mar	Apr	May	Jun	Jul	Aug	Q1	Q2	Q3	Q4		
World	674	809	949	997	1,038	1,087	100	4.1	4.7	4.8	4.1	5.9	0.8	9.5	4.1	4.7	4.6	4.0	6.2	4.2	4.1	4.1
Advanced economies <sup>1</sup>	419	463	510	535	556	582	53.5	3.8	4.8	5.8	4.8	7.6	1.2	12.9	4.5	6.6	4.5	4.8	4.7	3.8	5.3	5.5
Emerging economies <sup>1</sup>	255	346	439	462	483	505	46.5	4.4	4.6	3.7	3.4	3.9	0.5	5.9	3.7	2.2	4.8	2.9	7.7	5.0	2.7	3.1
<i>By UNWTO regions:</i>																						
Europe	386.4	452.9	488.4	520.4	539.7	565.7	52.0	3.7	4.8	4.2	3.0	5.0	0.2	9.1	1.5	5.4	3.6	4.5	5.7	4.2	4.7	4.9
Northern Europe	44.8	59.8	62.7	64.4	65.3	68.0	6.2	1.4	4.1	7.0	8.9	8.5	5.0	7.8	7.1	10.4	3.2	5.8	3.4	2.5	4.6	6.0
Western Europe	139.7	141.7	154.4	161.5	167.3	171.8	15.8	3.6	2.7	2.7	-0.1	5.2	-3.9	14.8	-1.6	5.0	1.3	3.0	2.8	1.4	3.1	3.6
Central/Eastern Eu.	69.3	95.1	97.9	107.6	116.7	124.9	11.5	8.5	7.1	-0.7	1.5	-1.3	0.4	-1.5	-1.9	-0.4	-1.3	-2.2	11.7	7.1	6.3	3.3
Southern/Mediterr. Eu.	132.6	156.4	173.3	186.9	190.4	201.0	18.5	1.9	5.6	7.4	5.1	7.4	2.6	12.7	4.2	7.0	8.4	8.6	5.4	5.4	5.1	7.0
- of which EU-28	330.5	367.8	383.7	405.2	416.7	433.7	39.9	2.8	4.1	5.2	3.5	6.5	0.3	11.9	2.0	6.8	4.1	5.7	3.6	3.1	4.6	5.3
Asia and the Pacific	110.3	154.0	205.4	218.9	234.0	250.0	23.0	6.9	6.8	5.0	5.1	5.9	1.8	8.7	7.0	1.9	4.6	3.0	8.3	6.1	7.6	5.5
North-East Asia	58.3	85.9	111.5	115.8	122.8	127.0	11.7	6.0	3.4	6.8	5.2	8.6	2.2	10.6	10.0	5.3	7.9	5.2	3.7	1.6	4.4	4.1
South-East Asia	36.3	49.0	70.5	77.9	84.7	94.3	8.7	8.7	11.3	2.0	4.9	1.3	1.0	5.1	2.8	-3.8	-1.4	-1.3	14.8	12.1	11.7	7.2
Oceania	9.6	10.9	11.4	11.5	11.9	12.5	1.1	4.1	4.6	5.9	4.9	8.4	-0.7	12.5	10.1	2.8	7.3	1.7	4.9	4.1	4.2	5.0
South Asia	6.1	8.1	12.0	13.7	14.6	16.2	1.5	6.2	11.1	8.0	6.1	8.1	5.2	11.5	5.0	7.6	10.8	11.1	10.2	13.1	15.5	7.8
Americas	128.2	133.3	150.6	156.1	162.8	168.2	15.5	4.3	3.4	7.9	5.3	11.9	2.0	15.3	11.2	9.5	7.8	4.9	3.1	2.0	3.9	4.5
North America	91.5	89.9	99.5	102.2	106.4	110.5	10.2	4.1	3.9	8.8	6.9	13.3	3.5	17.3	12.9	10.3	7.4	4.1	4.5	2.9	4.3	3.7
Caribbean	17.1	18.8	19.5	20.1	20.8	21.2	2.0	3.1	2.3	5.9	3.7	7.3	-0.5	9.2	7.0	5.7	7.1	8.1	1.1	-0.1	1.8	6.4
Central America	4.3	6.3	7.9	8.3	8.9	9.1	0.8	7.3	2.6	5.9	3.7	9.2	0.2	14.2	10.7	2.7	5.3	4.6	3.2	0.6	2.2	3.9
South America	15.3	18.3	23.6	25.5	26.7	27.4	2.5	5.0	2.5	6.6	2.6	10.5	-0.6	13.1	7.3	11.0	10.8	6.9	0.6	-0.1	4.2	6.1
Africa	26.2	34.8	49.9	49.7	52.9	55.9	5.1	6.5	5.6	3.7	6.0	1.5	0.1	5.6	2.5	-3.2	3.9	-0.2	3.4	2.6	6.9	6.3
North Africa	10.2	13.9	18.8	17.1	18.5	19.6	1.8	8.2	6.1	3.9	8.2	1.8	-2.7	9.1	1.7	-3.6	8.7	-1.7	0.1	0.7	7.1	4.8
Subsaharan Africa	16.0	20.9	31.2	32.7	34.5	36.3	3.3	5.5	5.3	2.6	5.2	1.3	1.3	3.8	3.0	-2.9	0.3	1.0	4.7	3.8	6.7	6.9
Middle East	22.4	33.7	54.5	52.2	49.0	47.6	4.4	-6.1	-2.9	3.0	1.1	2.5	-1.3	3.9	3.3	0.5	12.8	1.8	13.4	5.0	-26.3	-13.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO October 2014)

<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

## Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014	Average a year 2005-2013	2014* projection between
	real, change							
	full year			Jan.-Aug.				
World	-3.9%	6.5%	5.1%	4.1%	4.7%	4.8%	3.8%	+4% and +4.5%
Europe	-5.0%	3.1%	6.6%	3.7%	4.8%	4.2%	2.8%	+3% and +4%
Asia and the Pacific	-1.6%	13.1%	6.6%	6.9%	6.8%	5.0%	6.2%	+5% and +6%
Americas	-4.7%	6.5%	3.7%	4.3%	3.4%	7.9%	2.9%	+3% and +4%
Africa	3.4%	9.3%	-0.4%	6.5%	5.6%	3.1%	6.1%	+4% and +6%
Middle East	-5.2%	13.0%	-4.2%	-6.1%	-2.9%	3.0%	4.4%	+0% and +5%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO October 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.

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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



## 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.

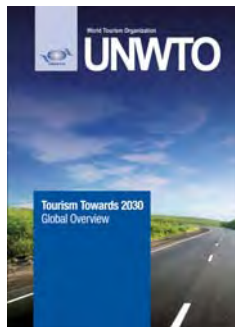
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## Tourism Towards 2030

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



## 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.

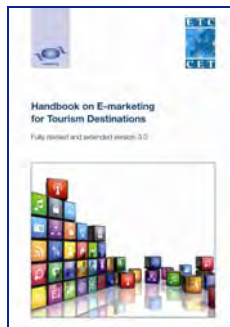
Available in English



## 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, 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



## Compendium of Tourism Statistics, 2014 Edition, Data 2008–2012

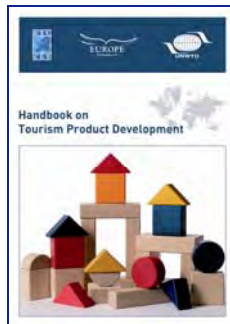
The Compendium of Tourism Statistics provides data and indicators on inbound, outbound and domestic tourism, as well as on the number and types of tourism industries, the number of employees by tourism industries, and macroeconomic indicators related to international tourism. The 2014 edition presents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



## 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



## 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.



## 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



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