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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 2014 based on preliminary data for international overnight visitors reported by destinations around the world. This analysis is complemented by data on receipts from international tourism reported by destinations around the world, as well on international tourism expenditure data for source markets for the first part of 2014.

Furthermore, this issue includes an outlook for 2015 based on current trends and the assessment by the UNWTO Panel of Tourism Experts. Members of the Panel evaluated tourism development in their destination or business for the full year 2014 as well as the last four months of the year, and assessed their prospects for the full year 2015 and the first four months. Finally, it presents an overview of air transport trends in 2014 based on ICAO and IATA, as well as booking trends for the first four months of 2015 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.

Over 1.1 billion tourists travelled abroad in 2014

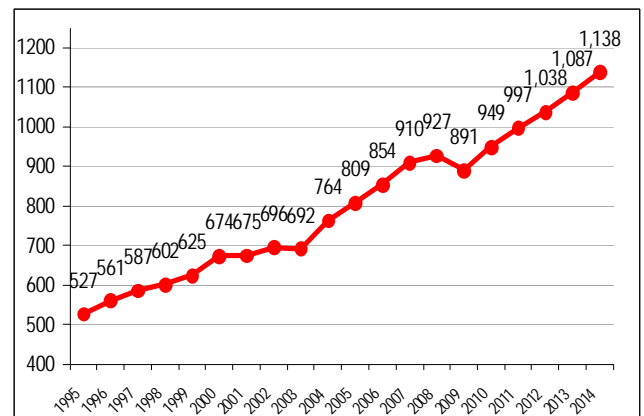
International tourist arrivals reported by destinations around the world reached 1,138 million in 2014, a 4.7% increase over the previous year, according to the data analysed in this issue of the *UNWTO World Tourism Barometer*. Overall demand was robust with 51 million more tourists travelling the world. For 2015, UNWTO forecasts international tourism to grow by 3% to 4%, further contributing to the global economic recovery.

The number of international tourists (overnight visitors) reached 1,138 million in 2014, 51 million more than in 2013. With a 4.7% increase, 2014 marks the fifth consecutive year of robust growth above the long term average since the financial crisis of 2009. International tourism has gained 211 million arrivals since the pre-crisis year of 2008.

World: Inbound Tourism

International Tourist Arrivals

(million)



Source: World Tourism Organization (UNWTO) ©

“Over the past years, tourism has proven to be a surprisingly strong and resilient economic activity and a fundamental contributor to the economic recovery by generating billions of dollars in exports and creating millions of jobs. This has been true for destinations all around the world, but particularly for Europe, as the region struggles to consolidate its way out of one of the worst economic periods in its history,” said UNWTO Secretary-General, Taleb Rifai.

By region, the strongest growth in 2014 was registered in the Americas (+7%) and Asia and the Pacific (+5%), while Europe (+4%), the Middle East (+4%) and Africa (+2%) grew at a slightly more modest pace. By subregion, North America (+8%) recorded the best results, followed by North-East Asia, South Asia, Southern and Mediterranean Europe, Northern Europe and the Caribbean, all increasing by 7%.

Growth in receipts expected to follow growth in international arrivals

Receipts in destinations from international tourism reached US\$ 1,197 billion in 2013, US\$ 230 billion more compared to the pre-crisis year 2008. As the majority of countries compile receipts data on a quarterly basis and reporting tends to lag about two months behind arrivals data, UNWTO will analyse 2014 data in the coming months and release 2014 results for international tourism receipts in the next issue of the *UNWTO World Tourism Barometer* of April 2015. As in recent years, growth in receipts is expected to have followed growth in arrivals fairly closely.

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. 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 915678198 / 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 January 2015.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published April 2015.

The UNWTO World Tourism Barometer is developed as a service for UNWTO Members and published six times a year in English, French, Spanish and Russian. 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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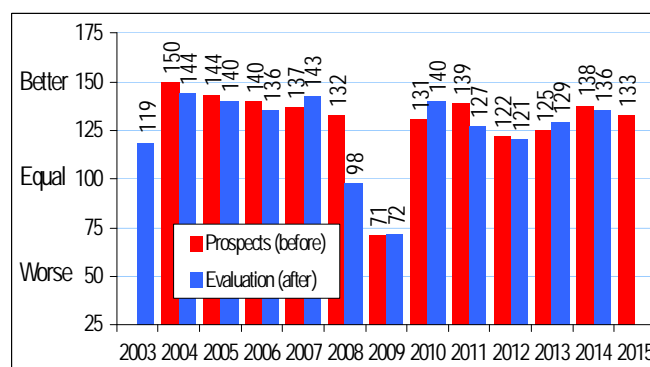
Favourable prospects for 2015

Looking ahead, the UNWTO Confidence Index – based on feedback from over 300 tourism experts worldwide – suggests tourism growth will continue in 2015. Experts expect tourism performance to be better in 2015, though they are not as upbeat as a year ago with regard to their expectations for 2014.

Based on current trends and the UNWTO Confidence Index, UNWTO forecasts international tourist arrivals to grow between 3% and 4% in 2015. By region, growth is expected to be strongest in the Americas and in Asia and the Pacific (both +4% to +5%), and somewhat more moderate in Europe (+3% to +4%). Africa (+3% to +5%) and the Middle East (+2% to +5%) are two regions with a larger degree of uncertainty and volatility.

“We expect demand to continue growing in 2015 as the global economic situation improves even though there are still plenty of challenges ahead. On the positive side, oil prices have declined to a level not seen since 2009. This will lower transport costs and boost economic growth by lifting purchasing power and private demand in oil importing economies. Yet, it could also negatively impact some of the oil exporting countries which have emerged as strong tourism source markets,” added Mr Rifai.

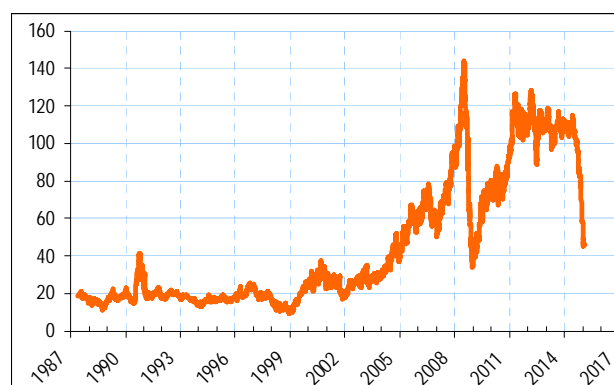
UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

Crude Oil Spot Price Brent (daily)

(US\$ per barrel)

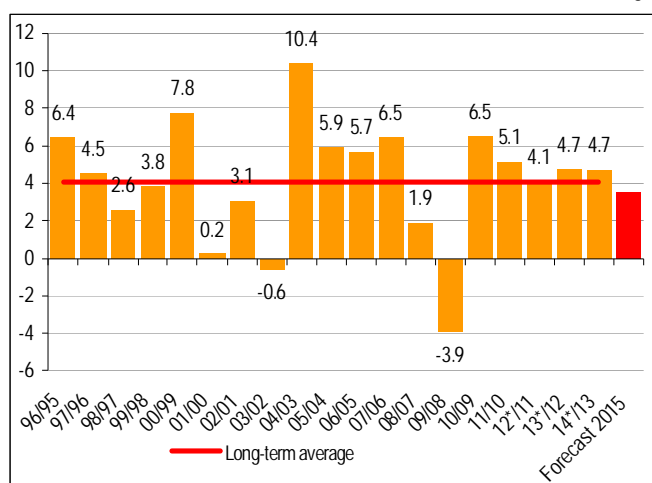


Source: US Department of Energy, Energy Information Administration

All world regions shared in growth in 2014

Europe (+4%), the most visited region with over half of the world's international tourists, saw an increase of 22 million arrivals in 2014, reaching a total of 588 million. Thanks to these results, tourism has been a major contributor to the European economic recovery. Northern Europe and Southern and Mediterranean Europe led growth (both +7%), while results were more modest in Western Europe (+2%). Arrivals in Central and Eastern Europe (0%) stagnated after three years of strong growth. The 28 countries of the European Union together recorded 457 million international arrivals in 2014, an increase of 5%, higher than in 2013 (+4%).

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014*	projection 2014*	average	projection 2015*
	real, change						projection 2014*	average	projection 2015*
	full year					Jan.-Dec.	(issued January)	a year	between
							between	2005-2013	between
World	-3.9%	6.5%	5.1%	4.1%	4.7%	4.7%	+4% and +4.5%	3.8%	+3% and +4%
Europe	-5.0%	3.1%	6.6%	3.7%	5.0%	3.9%	+3% and +4%	2.8%	+3% and +4%
Asia and the Pacific	-1.6%	13.1%	6.5%	6.9%	6.8%	5.4%	+5% and +6%	6.2%	+4% and +5%
Americas	-4.7%	6.5%	3.5%	4.4%	3.5%	7.4%	+3% and +4%	2.9%	+4% and +5%
Africa	3.4%	8.9%	-0.1%	5.2%	4.8%	2.3%	+4% and +6%	5.8%	+3% and +5%
Middle East	-5.4%	13.1%	-3.5%	-5.6%	-3.4%	4.4%	+0% and +5%	4.6%	+2% and +5%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2015)

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	2012	2013	2014*		12/11	13/12	14*/13	2014*				2013							
	(million)										Q1	Q2	Q3	Q4	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	674	809	949	1,038	1,087	1,138	100	4.1	4.7	4.7	3.9	5.8	4.3	4.9	3.9	5.8	4.1	4.6	6.3	4.3	4.1	4.1
Advanced economies ¹	419	463	510	555	582	615	54.0	3.8	4.8	5.6	4.8	7.6	4.9	5.4	4.9	7.1	4.9	3.9	4.7	3.8	5.3	5.6
Emerging economies ¹	255	346	439	482	505	523	46.0	4.4	4.7	3.6	3.1	3.6	3.5	4.3	2.6	4.3	3.4	5.2	7.8	5.0	2.5	2.6
<i>By UNWTO regions:</i>																						
<i>Europe</i>	386.4	452.9	488.3	539.6	566.3	588.4	51.7	3.7	5.0	3.9	2.9	5.1	3.7	3.6	3.3	4.5	2.9	3.1	5.7	4.2	4.7	4.9
Northern Europe	44.8	59.8	62.7	65.3	68.0	72.6	6.4	1.4	4.1	6.9	8.9	8.6	5.9	4.5	7.2	3.8	5.4	4.6	3.4	2.5	4.7	6.0
Western Europe	139.7	141.7	154.4	167.3	171.8	175.6	15.4	3.6	2.7	2.2	-0.5	4.9	1.3	2.8	1.7	3.8	2.0	2.2	2.8	1.3	3.2	3.7
Central/Eastern Eu.	69.3	95.1	97.9	116.7	125.6	125.1	11.0	8.5	7.6	-0.4	1.6	-0.5	-1.8	0.4	-1.9	0.4	0.1	0.8	11.8	7.4	6.5	2.8
Southern/Mediterr. Eu.	132.6	156.4	173.3	190.4	201.0	215.2	18.9	1.9	5.6	7.0	5.1	7.5	7.7	6.4	6.6	7.5	5.0	5.8	5.4	5.4	5.0	7.2
- of which EU-28	330.5	367.8	383.7	416.7	433.7	456.6	40.1	2.8	4.1	5.3	3.3	6.6	5.0	5.5	5.5	6.4	4.9	4.7	3.6	3.0	4.6	5.4
<i>Asia and the Pacific</i>	110.3	154.0	205.4	233.8	249.8	263.0	23.1	6.9	6.8	5.3	5.0	5.6	4.0	6.9	4.1	7.3	5.6	7.9	8.3	6.1	7.6	5.5
North-East Asia	58.3	85.9	111.5	122.8	127.0	136.0	11.9	6.0	3.4	7.1	5.2	8.6	6.4	9.0	6.2	8.8	8.8	9.4	3.7	1.6	4.4	4.1
South-East Asia	36.3	49.0	70.5	84.7	94.3	96.6	8.5	8.7	11.3	2.4	4.5	0.6	-0.4	4.7	0.6	5.3	1.7	6.7	14.8	12.1	11.7	7.2
Oceania	9.6	10.9	11.4	11.9	12.5	13.2	1.2	4.2	4.6	5.9	4.9	8.3	4.7	6.0	4.5	6.5	6.7	5.2	4.9	4.1	4.3	5.0
South Asia	6.1	8.1	12.0	14.4	16.0	17.1	1.5	5.9	11.4	7.1	5.9	7.8	9.5	5.4	6.7	6.9	2.9	6.5	10.6	13.2	15.4	7.7
<i>Americas</i>	128.2	133.3	150.5	162.5	168.1	180.6	15.9	4.4	3.5	7.4	5.3	11.8	6.6	6.3	4.2	8.9	5.7	4.6	3.1	1.9	4.0	4.5
North America	91.5	89.9	99.5	106.4	110.5	119.5	10.5	4.1	3.9	8.2	6.9	13.3	6.4	6.3	3.6	9.7	6.8	2.7	4.4	2.9	4.3	3.8
Caribbean	17.1	18.8	19.5	20.6	21.1	22.5	2.0	3.1	2.8	6.6	3.7	7.5	7.5	8.4	8.1	11.9	8.3	6.5	1.0	-0.2	1.8	6.5
Central America	4.3	6.3	7.9	8.9	9.1	9.6	0.8	7.3	2.6	5.7	3.8	9.3	4.4	5.9	5.5	3.5	3.4	9.5	3.2	0.6	2.2	3.9
South America	15.3	18.3	23.5	26.7	27.4	29.0	2.5	5.8	2.7	5.7	2.4	9.6	7.4	4.9	4.4	5.5	1.0	7.5	0.8	0.0	4.2	6.0
<i>Africa</i>	26.2	34.8	49.7	52.2	54.7	56.0	4.9	5.2	4.8	2.3	6.3	2.4	2.0	-0.9	-1.3	-2.8	0.1	0.1	3.1	2.5	5.7	5.7
North Africa	10.2	13.9	18.8	18.5	19.6	19.7	1.7	8.7	6.0	0.5	8.5	2.1	1.3	-8.2	-4.4	-9.3	-6.0	-8.8	0.1	0.7	7.1	4.8
Subsaharan Africa	16.0	20.9	30.9	33.7	35.1	36.3	3.2	3.4	4.2	3.3	5.5	2.6	2.5	2.5	0.6	0.8	2.5	3.8	4.4	3.7	4.6	6.2
<i>Middle East</i>	22.4	33.7	54.7	49.8	48.2	50.3	4.4	-5.6	-3.4	4.4	0.3	0.0	13.2	7.1	23.1	10.6	6.0	3.2	14.3	6.9	-23.2	-11.9

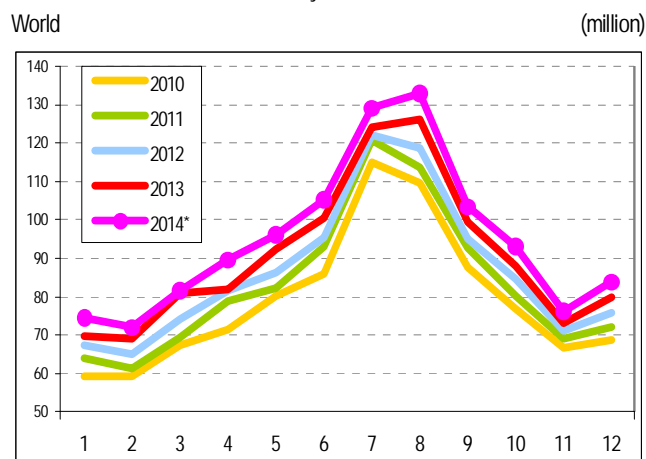
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2015)

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.

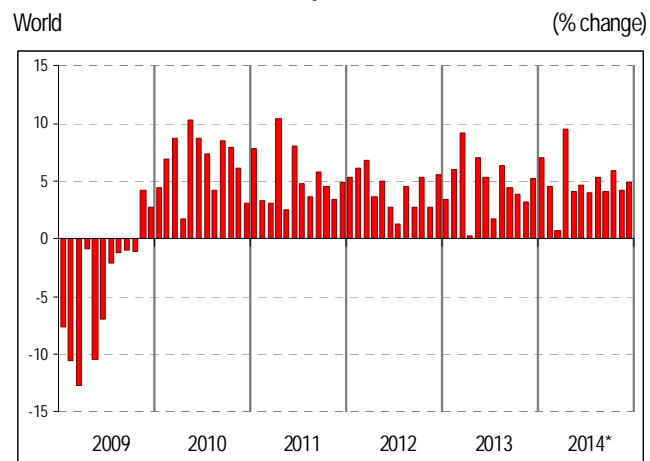
See box at page 'Annex-1' for explanation of abbreviations and signs used

International Tourist Arrivals, monthly evolution



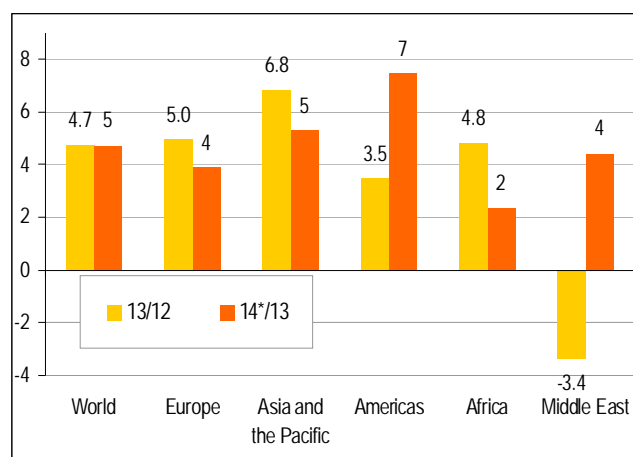
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

International tourist arrivals in Asia and the Pacific (+5%) increased by 13 million to 263 million. The best performance was recorded in North-East Asia and South Asia (both +7%). Arrivals in Oceania grew by 6%, while growth slowed down in South-East Asia (+2%) as compared to previous years.

The Americas was the best performing region in relative terms with a growth of 7%, welcoming an additional 13 million international tourists and raising the total to 181 million. Growth was driven by North America (+8%), where Mexico posted a double-digit increase, and the Caribbean (+7%). Arrivals to Central America and South America (both +6%) also grew at double the rate recorded in 2013 and well above the world average.

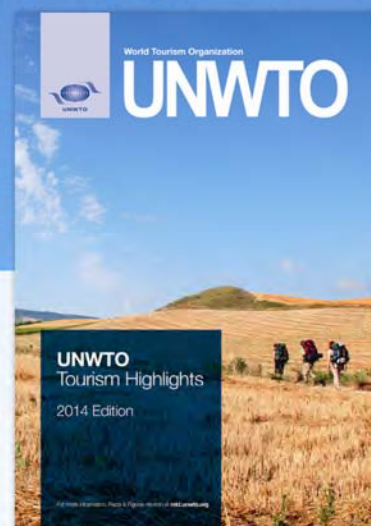
International tourism in the Middle East (+4%) shows signs of rebound with good results in most destinations. The region attracted an additional 2 million arrivals, bringing the total to 50 million. Africa's international tourist numbers grew by an estimated 2%, equivalent to an increase of one million arrivals. The region reached 56 million tourists. While arrivals to North Africa were weak (+1%), Sub-Saharan Africa saw international tourist numbers rise by 3% despite the Ebola Disease Outbreak in a few West African countries. Data for Africa and the Middle East should be read with caution as it is based on limited and volatile data.

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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UNWTO Tourism Highlights 2014 Edition

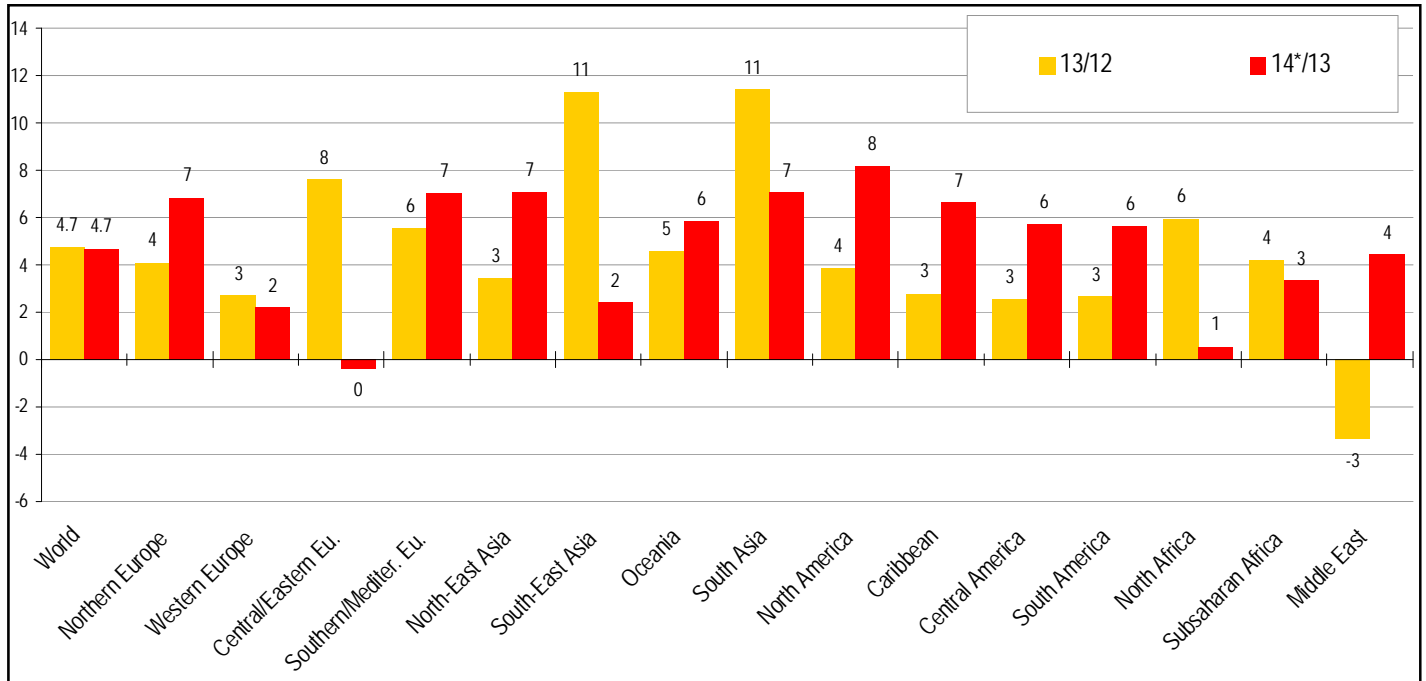
UNWTO has released its *UNWTO Tourism Highlights, 2014 Edition*, presenting a concise overview of international tourism in the world based on the results for the year 2013.

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>

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

UNWTO activities at ITB 2015
 Berlin, Germany, 4 March – 8 March
www2.unwto.org/event/itb-2015

SAVE THE DATE!
 Berlin, Germany
 (4-8 March 2015)



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.

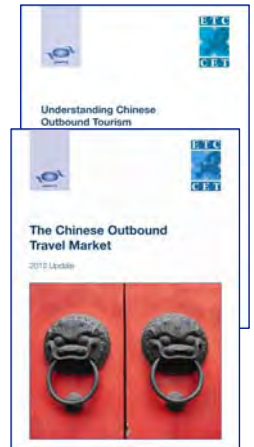
Available in English, French, Spanish and Russian



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.

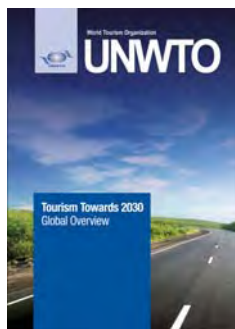
Available in English



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.

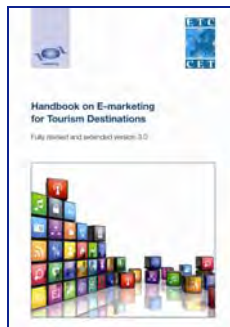
Available in English



Handbook on E-Marketing for Tourism Destinations

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, 2015 Edition. Data 2009–2013

Statistical information on tourism's multiple facets is pivotal in advancing knowledge of the sector, monitoring progress, promoting results-focused management, and highlighting strategic issues for policy decisions. The Compendium provides statistical 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 2015 edition presents data for 203 countries with methodological notes in English, French and Spanish.

Yearbook of Tourism Statistics, 2015 Edition. Data 2009–2013

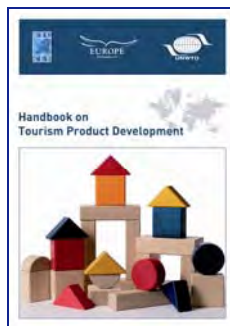
Understanding, for each country, where its inbound tourism is generated is essential for analysing international tourism flows and devising marketing strategies, such as those related to the positioning of national markets abroad. Deriving from the most comprehensive statistical database available on the tourism sector, the Yearbook of Tourism Statistics focuses on data related to inbound tourism (total arrivals and overnight stays), broken down by country of origin. The 2015 edition presents data for 198 countries 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 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



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