



Robust results in 2015, but more mixed than usual across destinations

This issue of the *UNWTO World Tourism Barometer* and the accompanying Statistical Annex presents an update and a more comprehensive analysis of the 2015 international tourism results included in the January 2016 Advance Release. At this moment in time 125 destinations around the world have reported full year results for international visitors, while data on international tourism receipts reported by destinations and data on international tourism expenditure by source markets is currently available for over 70 countries. Furthermore, this issue includes an analysis of air transport and hospitality markets in 2015.

In summary, international tourist arrivals (overnight visitors) reached a total of 1,184 million in 2015, 50 million more than in the previous year (+4.4%). 2015 marks the 6th consecutive year of above-average growth following the 2009 global economic crisis, with international arrivals increasing by 4% or more every year since 2010.

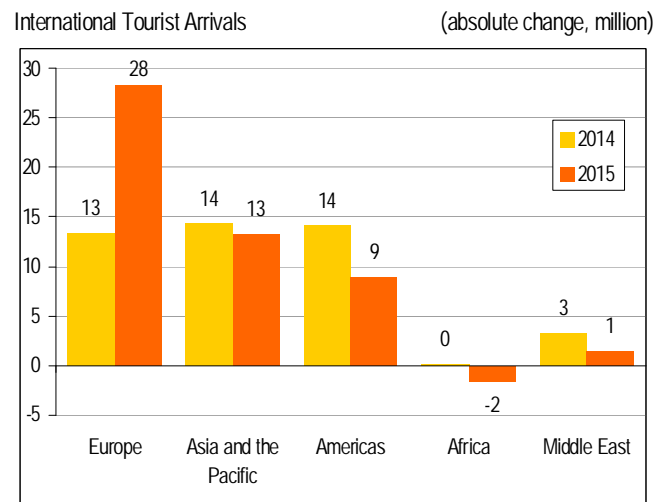
Demand was robust overall, although results were more mixed than usual across destinations. Three major factors directed tourism flows in 2015: the unusually strong exchange rate fluctuations, the decline in the price of oil and other commodities, which increased disposable income in importing countries but weakened tourism demand in exporters, as well as increased concern about safety and security.

By region, Europe, the Americas and Asia and the Pacific all recorded 5% growth in international tourist arrivals. The Middle East increased international arrivals by 3%, while in Africa limited data available points to an estimated 3% decline, mostly due to weak results in North Africa. By subregion, the best results were for Oceania, the Caribbean, Central America and Northern Europe (all +7%), followed by Central and Eastern Europe and South-East Asia (both +6%).

Europe was the fastest growing region in absolute terms

Europe, the most visited region in the world, was also the fastest growing one in absolute terms, welcoming 28 million more international tourists in 2015, to reach a total of 609 million. Inbound tourism to Europe has been supported by a weaker euro vis-à-vis the US dollar and other main currencies. The ongoing recovery of many European economies has fuelled intraregional demand, while increased strength from long-haul markets such as the United States and China also added to the results. By subregion, Southern Mediterranean Europe added 10 million more international tourists than in 2014 (+5%) in its third consecutive year of strong growth. Northern Europe (+7%) and

Central and Eastern Europe (+6%) saw the highest relative growth, adding 5 million and 7 million arrivals respectively, while Western Europe (+3%) recorded an increase of 6 million arrivals in 2015.



Source: World Tourism Organization (UNWTO) ©

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This issue of the *UNWTO World Tourism Barometer* and the accompanying Statistical Annex presents an update of the preliminary results for international tourism in 2015 included in the January 2016 Advance Release. Furthermore, this issue includes an analysis of air transport and hospitality markets in 2015.

This release is available only in electronic format. The full document can be downloaded free of charge for members and subscribed institutions through the UNWTO elibrary at www.e-unwto.org/toc/wtobarometereng/current. The release is available in English only, while the Statistical Annex is provided in four languages through the UNWTO elibrary at:
English version: www.e-unwto.org/content/w83v37
French version: www.e-unwto.org/content/t73863
Spanish version: www.e-unwto.org/content/rn1422
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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) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

UNWTO's membership includes 157 countries, six Associate Members, two Permanent Observers, and over 480 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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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

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Data collection for this Advance Release was closed mid March 2016.

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

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.

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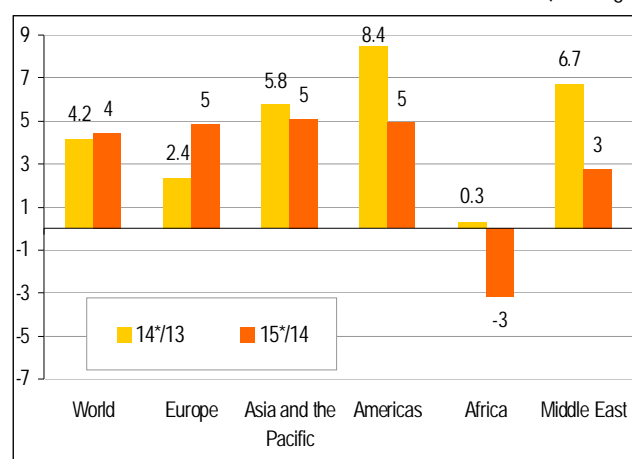
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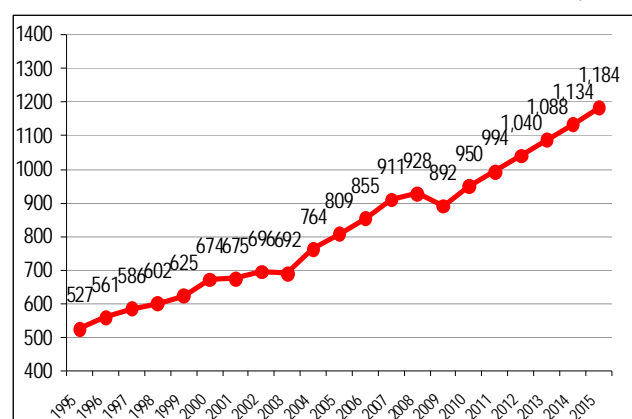
International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

World: Inbound Tourism

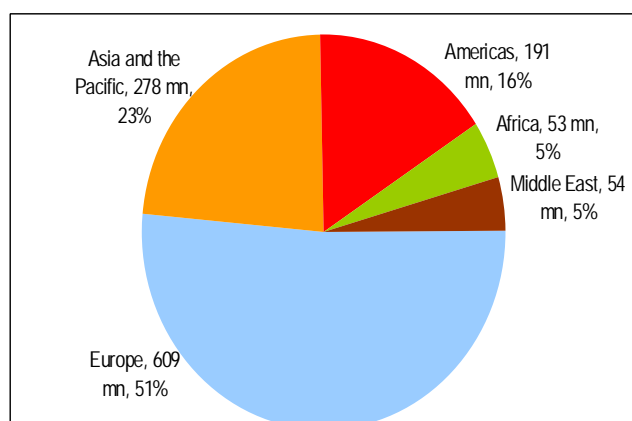
International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism

International Tourist Arrivals, 2015* (million)



Source: World Tourism Organization (UNWTO) ©

International tourist arrivals in the Americas (+5%) grew by 9 million in 2015 to reach 191 million (16% of the world's total), consolidating the strong results of 2014 when arrivals grew by 8%. A strong US dollar and robust economy fuelled outbound travel from the United States, contributing to higher inbound

volumes in many destinations across the Americas and beyond. By subregion, the Caribbean and Central America (both +7%) led growth, both exceeding their previous year's growth rates, while South America recorded 5% more arrivals and North America 4%.

Asia and the Pacific (+5%) welcomed 278 million international tourists, 13 million more than in 2014, with uneven results across destinations. Oceania saw the strongest results (+7%), followed by South-East Asia (+6%), while North-East Asia, the largest subregion, and South Asia both recorded +4%.

International arrivals in the Middle East grew by an estimated 3% in 2015 to 54 million. The region is consolidating the recovery that started in 2014, when international arrivals increased 7%, following three years of declines.

Comparatively limited data available for Africa points to a decrease of 3% in international arrivals in 2015. In North Africa, arrivals declined by 8%, while Subsaharan Africa (0%) saw flat growth. Overall, tourism demand in Africa is gradually returning to growth, after picking up in the last four months of 2015. In absolute numbers, Africa welcomed a total of 53 million international tourists in 2015 or 5% of the world's total. (Results for both Africa and the Middle East should be read with caution as they are based on limited available data).

International passenger traffic shows continued strength

Preliminary data released by the International Civil Aviation Organization (ICAO), the International Air Transport Association (IATA) and the Airports Council International (ACI) shows that 2015 has been a good year for air transport, with strong results in passenger traffic for carriers and airports across all world regions with few exceptions. Increased passenger demand coupled with moderate growth in capacity and lower oil prices, boosted airline profitability in 2015.

Total airline passengers on international and domestic services increased 6.4% in 2015, to reach 3.5 billion (persons travelling one flight segment). Passenger traffic measured in revenue passenger-kilometres (RPKs) was up 6.5% globally, with domestic and international traffic growing at about the same rate. Passenger traffic through airports grew 6.1% in 2015, with also equal growth for international and domestic passengers.

These indicators are consistent with the positive trend seen in international tourist arrivals, which grew 4.4% last year. As air travel is used by just over half of the world's 1.2 billion international tourists, the above results indicate that air travel grew faster than surface travel last year.

Accommodation: strongest results overall for Europe

Performance in the global hospitality industry was rather mixed across the regions and destinations in 2015. According to STR Global, Europe and the Americas recorded positive results in all three key measures – average occupancy, average daily room rate (ADR) and revenue per available room (RevPAR). The European hotel industry closed 2015 with the strongest results overall. Asia and the Pacific and Africa & the Middle East on the

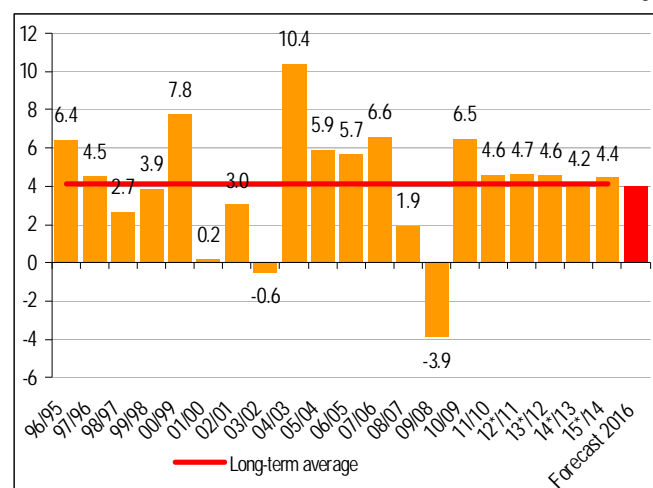
other hand showed weaker results, maintaining occupancy and the two other measures at about the same or slightly lower level, with some subregions bucking the trend.

Positive prospects for 2016

Based on current trends and industry expectations, UNWTO forecasts international tourist arrivals to grow between 3.5% and 4.5% in 2016, after a 4.4% increase in 2015. The projection reflects sustained growth in an increasingly dynamic global tourism market, though at a somewhat more moderate pace of growth than in the past six years. This is in line with the 3.8% growth average projected for the decade 2010-2020 by UNWTO in its long-term forecast report *UNWTO Tourism Towards 2030*.

Note: All results presented in this issue are based on preliminary data as reported by the various destinations around the world and UNWTO assessment of data still missing. UNWTO will continue to collect data to be added in future issues.

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

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	2014	2015*		2015*	14/13				15*/14							
	(million)									(%)	(%)	Q1	Q2	Q3	Q4	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	674	809	950	994	1,040	1,088	1,134	1,184	100	4.2	4.4	5.3	3.8	4.8	4.0	4.8	3.8	3.2	3.1	5.6	3.4	4.9
Advanced economies ¹	420	466	513	538	559	585	619	648	54.8	5.8	4.8	4.8	4.9	4.5	4.5	5.6	4.3	3.4	4.6	7.6	4.7	6.1
Emerging economies ¹	254	343	437	456	481	503	515	536	45.2	2.3	4.1	5.8	2.6	5.1	3.4	3.7	3.2	3.1	1.8	3.2	1.5	3.6
<i>By UNWTO regions:</i>																						
Europe	386.6	453.2	489.4	520.6	541.1	566.8	580.2	608.6	51.4	2.4	4.9	5.9	4.4	5.5	3.6	4.5	3.7	2.2	1.7	3.4	1.5	2.4
Northern Europe	44.8	59.9	62.8	64.5	65.6	67.2	70.8	75.6	6.4	5.3	6.8	4.2	5.4	8.0	9.2	13.3	5.6	7.7	5.7	7.8	4.6	3.0
Western Europe	139.7	141.7	154.4	160.4	166.2	170.8	174.5	180.4	15.2	2.2	3.4	4.1	3.8	5.0	-0.8	1.9	-0.3	-4.4	-0.7	4.7	1.1	3.6
Central/Eastern Eur.	69.6	95.3	98.9	108.8	118.9	127.9	120.1	127.4	10.8	-6.0	6.1	8.2	5.1	6.6	4.9	4.7	4.4	5.6	-1.0	-7.1	-11.2	-4.3
Southern/Medit. Eur.	132.6	156.4	173.3	186.9	190.4	201.0	214.8	225.0	19.0	6.9	4.7	6.6	4.1	4.6	4.4	3.8	5.6	4.0	5.0	7.3	7.6	6.3
- of which EU-28	330.5	367.9	384.3	404.8	417.0	433.2	454.1	478.8	40.4	4.8	5.4	5.6	5.6	5.7	4.4	5.5	4.5	2.9	2.4	6.0	4.5	5.2
Asia and the Pacific	110.4	154.0	205.5	218.3	233.8	249.9	264.3	277.6	23.4	5.8	5.0	4.3	5.2	5.0	5.8	5.2	6.3	5.9	6.0	6.6	4.0	6.2
North-East Asia	58.3	85.9	111.5	115.8	122.8	127.0	136.3	142.1	12.0	7.3	4.3	4.5	4.6	1.6	6.4	8.0	6.6	4.5	5.2	8.6	6.4	9.0
South-East Asia	36.3	49.0	70.5	77.8	84.9	94.5	97.3	103.1	8.7	3.0	6.0	3.8	6.4	9.6	5.1	1.7	5.6	7.4	5.7	1.6	0.6	3.7
Oceania	9.6	10.9	11.4	11.5	11.9	12.5	13.2	14.2	1.2	6.0	7.4	8.5	5.6	6.7	8.5	6.8	9.2	9.2	5.1	8.5	4.7	6.0
South Asia	6.1	8.2	12.1	13.2	14.2	15.9	17.5	18.2	1.5	9.9	3.9	3.4	2.9	5.9	3.7	1.0	5.3	4.6	13.9	18.7	2.5	-0.3
Americas	128.2	133.3	150.2	155.6	162.6	167.6	181.7	190.7	16.1	8.4	4.9	5.8	5.1	4.6	4.3	4.8	3.8	4.1	4.7	13.5	6.5	9.7
North America	91.5	89.9	99.5	102.2	106.4	110.2	120.9	126.2	10.7	9.7	4.3	5.1	5.6	3.7	3.2	3.8	2.8	3.1	8.4	14.0	6.2	10.9
Caribbean	17.1	18.8	19.5	19.9	20.6	21.1	22.2	23.8	2.0	4.9	7.4	7.7	7.2	8.2	6.6	9.0	6.5	5.2	2.7	6.4	6.7	7.1
Central America	4.3	6.3	7.9	8.3	8.9	9.1	9.6	10.3	0.9	5.6	7.2	6.8	6.1	8.5	7.3	7.1	8.1	6.8	3.3	9.7	3.3	6.4
South America	15.3	18.3	23.2	25.2	26.8	27.2	29.1	30.4	2.6	7.1	4.7	6.3	0.9	5.5	5.5	6.1	4.5	5.8	-4.0	19.3	9.2	8.2
Africa	26.2	34.8	50.4	50.1	52.4	54.7	54.9	53.3	4.5	0.3	-2.9	-2.0	-5.0	-3.6	-1.8	-4.1	-0.9	-0.3	5.4	2.9	-0.2	-2.7
North Africa	10.2	13.9	19.7	18.0	19.6	20.7	20.4	18.9	1.6	-1.4	-7.7	-1.6	-10.4	-9.0	-7.8	-13.8	-5.8	-2.6	5.4	0.4	-0.9	-9.6
Subsaharan Africa	16.0	20.9	30.8	32.1	32.8	34.0	34.4	34.4	2.9	1.4	-0.1	-2.1	-1.5	0.8	0.9	1.2	1.1	0.6	5.3	4.6	0.4	0.7
Middle East	22.4	33.7	54.7	49.5	50.6	49.1	52.4	53.9	4.6	6.7	2.8	11.4	-4.3	2.6	1.8	13.4	-5.6	-2.9	-6.5	4.6	32.4	12.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO March 2016)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2015, page 150, at www.imf.org/external/ns/cs.aspx?id=29.

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

Outlook for International Tourist Arrivals

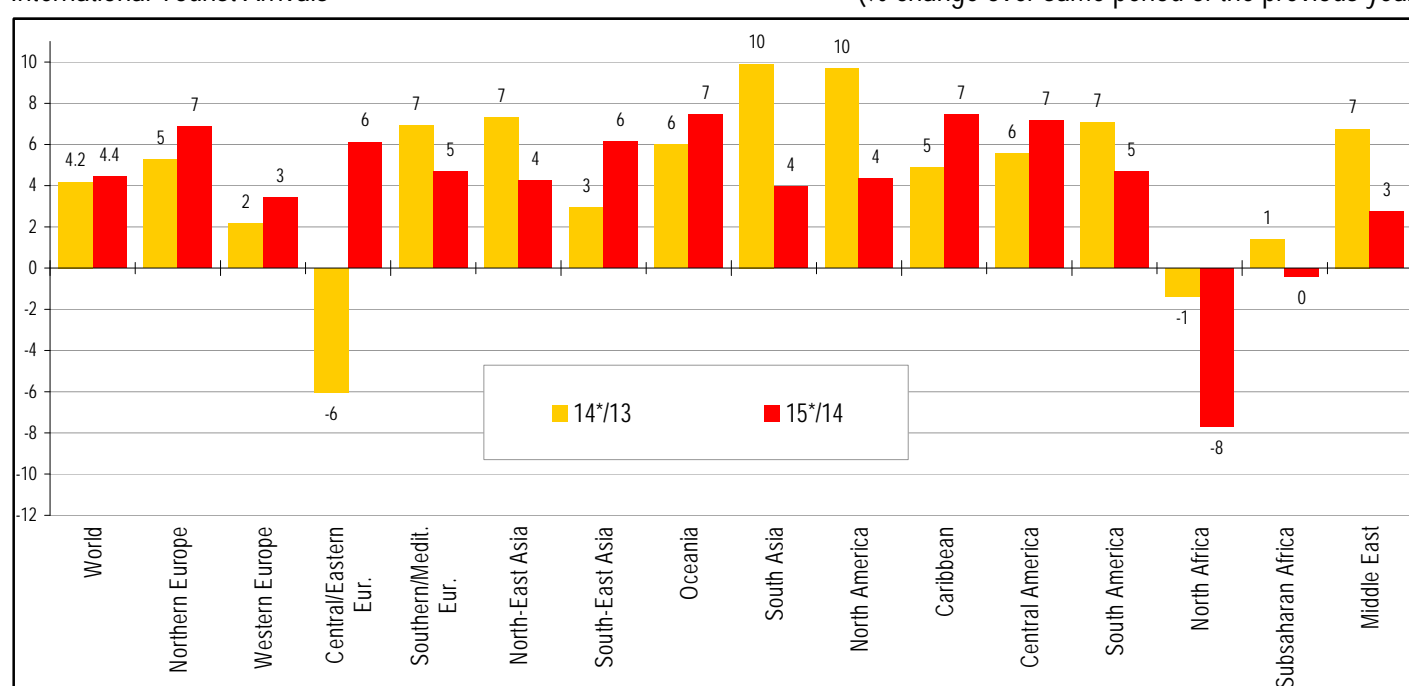
	2008	2009	2010	2011	2012	2013	2014	2015	average a year	projection 2016*
									2005-2014	between
World	1.9%	-3.9%	6.5%	4.6%	4.7%	4.6%	4.2%	4.4%	3.8%	+3.5% and +4.5%
Europe	0.3%	-5.1%	3.1%	6.4%	3.9%	4.8%	2.4%	4.9%	2.8%	+3.5% and +4.5%
Asia and the Pacific	1.1%	-1.6%	13.2%	6.2%	7.1%	6.9%	5.8%	5.0%	6.2%	+4% and +5%
Americas	2.7%	-4.7%	6.3%	3.6%	4.5%	3.1%	8.4%	4.9%	3.5%	+4% and +5%
Africa	2.9%	4.6%	9.3%	-0.7%	4.6%	4.4%	0.3%	-2.9%	5.2%	+2% and +5%
Middle East	20.0%	-5.4%	13.1%	-9.6%	2.2%	-2.9%	6.7%	2.8%	5.1%	+2% and +5%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO March 2016)

International Tourist Arrivals

(% change over same period of the previous year)



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* and accompanying Statistical Annex provides tourism stakeholders with up-to-date statistics and analysis in a timely fashion. The information is updated six times a year, covering short-term tourism trends, a retrospective and prospective evaluation by the UNWTO Panel of Experts of current tourism performance, and a summary of economic data relevant for tourism.

Available in English, with the Statistical Annex also in French, Spanish and Russian.



Tourism in the Mediterranean, 2015 edition

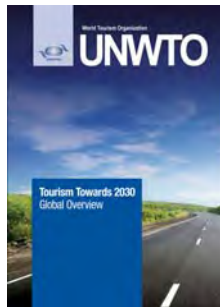
The new UNWTO Tourism Trends Snapshot provides a closer look at a selected tourism topic with each edition. The first edition *"Tourism in the Mediterranean, 2015 edition"* provides insight into the general trends in arrivals and receipts in the Mediterranean region, the performance of the individual destinations, the long-term trends until 2030 as well as the opportunities and challenges.

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.



Marketing Handbooks:

E-Marketing for Tourism Destinations Tourism Product Development Tourism Destination Branding

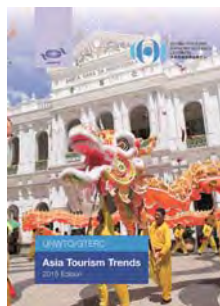
These series cover crucial topics on tourism development providing tools and fresh insight for tourism destinations. E-Marketing for Tourism Destination outlines all necessary aspects of an e-marketing strategy, practical information on latest trends and developments in mobile marketing and social media. Tourism Product Development covers the essential elements in the process of tourism product development planning and implementation with a range of successful approaches and case studies. Tourism Destination Branding presents a step-by-step guide to the branding process, accompanied by strategies for brand management illustrating case studies and best practices.



UNWTO/GTERC Asia Tourism Trends

This second edition includes an analysis of the recent tourism trends of Asia, with emphasis on international tourist arrivals and receipts as well as outbound tourism and expenditure. It also includes an analysis of the links between Asian and Latin American markets. The report also elaborates on city tourism, including selected case studies and a section on Macao's tourism product diversification.

Available in English.



Outbound Travel Market studies:

Key Outbound Tourism Markets in South-East Asia The Indian Outbound Travel Market The Russian Outbound Travel Market The Middle East Outbound Travel Market The Chinese Outbound Travel Market

The outbound travel market series offers a unique insight into trends and travel behaviour in fast-growing source markets in the world. UNWTO jointly with the European Travel Commission (ETC) have covered the key outbound markets of China, Brazil, the Russian Federation, India and the Middle East, and with Tourism Australia key South-East Asian markets Indonesia, Malaysia, Singapore, Thailand and Vietnam.

Available in English.

Understanding Russian Outbound Tourism Understanding Brazilian Outbound Tourism Understanding Chinese Outbound Tourism

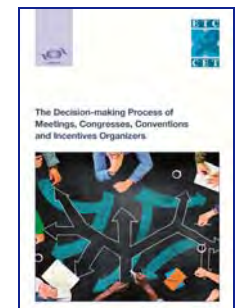
The innovative UNWTO/ETC *Understanding Outbound Tourism ethnographic* series explores the behaviour and mind-set of outbound travellers based on internet and social media activity.

Available in English.



The Decision-making Process of Meetings, Congresses, Conventions and Incentives Organizers

This ETC/UNWTO study aims at providing a better understanding of the Meetings Industry and the way meeting and event organizers make decisions. Aimed at DMOs, NTOs and NTAs, the study offers wide-ranging overview of the MCCI segments as well as a comprehensive analysis of planners' needs and expectations with respect to destination and venues choice. It also includes several best-practice examples of National Convention Bureaux. Available in English.



Compendium of Tourism Statistics, 2016 Edition. Data 2010-2014

The Compendium provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on tourism industries, employment and macroeconomic indicators related to international tourism. The 2016 edition presents data for 200 countries with methodological notes in English, French and Spanish.

Yearbook of Tourism Statistics, 2016 Edition. Data 2010-2014

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 2016 edition presents data for 196 countries with methodological notes in English, French and Spanish.



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