Tourism Towards 2030
Preview of findings

54th meeting of the UNWTO Commission for the Americas

11 September 2012
Quito, Ecuador

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Regional Director for the Americas
World Tourism Organization
International Tourism

Arrivals 2011: 990 million (+5%)
Receipts 2011: 1,03 billion $

World Tourism Organization | a specialized Agency of the United Nations

Source: World Tourism Organization (UNWTO)  *Preliminary results

Does not include:
• Non-overnight visitors: cruises, day trips, etc.
• Domestic trips
World: International tourist arrivals, monthly change

15 consecutive months of negative growth

Source: World Tourism Organization (UNWTO)
International tourist arrivals: 2010, 2011 and 1st half of 2012, by subregion

Source: World Tourism Organization (UNWTO)
Inbound tourism: Americas 2011

International tourist arrivals, 1995-2011* (million)

Source: World Tourism Organization (UNWTO)
The Americas: International tourist arrivals, monthly change

Source: World Tourism Organization (UNWTO)
The Americas: inbound tourism in arrivals 1995 - 2011

International tourist arrivals, 1995-2011* (million)

- North America: 102 million
- South America: 26 million
- Caribbean: 21 million
- Central America: 8 million

Source: World Tourism Organization (UNWTO)
The Americas: inbound tourism in receipts 1995 - 2011

North America: 145 billion $.
Caribbean: 24 bn $.
South America: 23 bn $.
Central America: 7 bn $.

Source: World Tourism Organization (UNWTO)
Growth outlook for 2012
1st half of 2012: +5%

- The Americas region +5%
- South America +6%

<table>
<thead>
<tr>
<th>Region</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>Forecast 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>2.1%</td>
<td>-3.9%</td>
<td>6.4%</td>
<td>4.6%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>0.5%</td>
<td>-5.1%</td>
<td>2.8%</td>
<td>6.1%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>1.1%</td>
<td>-1.6%</td>
<td>12.9%</td>
<td>6.1%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Americas</td>
<td>2.8%</td>
<td>-4.9%</td>
<td>6.3%</td>
<td>4.2%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Africa</td>
<td>3.1%</td>
<td>3.4%</td>
<td>8.5%</td>
<td>0.8%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>20.8%</td>
<td>-4.2%</td>
<td>14.6%</td>
<td>-8.4%</td>
<td>+0% to +5%</td>
</tr>
</tbody>
</table>
Principal generating countries

### International tourism expenditure

<table>
<thead>
<tr>
<th>Country</th>
<th>2011 (millions of $)</th>
<th>2010/11 %</th>
<th>YTD 12 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>84,300</td>
<td>+ 2.8</td>
<td>+11.8</td>
</tr>
<tr>
<td>USA</td>
<td>78,700</td>
<td>+ 4.2</td>
<td>+9</td>
</tr>
<tr>
<td>China</td>
<td>72,600</td>
<td>+ 2.2</td>
<td>+25</td>
</tr>
<tr>
<td>UK</td>
<td>51,000</td>
<td>- 1.6</td>
<td>+1.5</td>
</tr>
<tr>
<td>France</td>
<td>44,100</td>
<td>+ 7.6</td>
<td>-18.3</td>
</tr>
<tr>
<td>Canada</td>
<td>33,100</td>
<td>+ 7.5</td>
<td>+7.1</td>
</tr>
<tr>
<td>Russia</td>
<td>32,500</td>
<td>+22.1</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>28,700</td>
<td>+ 0.8</td>
<td>- 4.7</td>
</tr>
<tr>
<td>Japan</td>
<td>27,200</td>
<td>- 11.2</td>
<td>+ 7.1</td>
</tr>
<tr>
<td>Australia</td>
<td>26,900</td>
<td>+ 8</td>
<td>+8.4</td>
</tr>
</tbody>
</table>

More than 70% of international arrivals are intra-regional

Source: World Tourism Organization (UNWTO)
### Other important generating countries in the world

<table>
<thead>
<tr>
<th>Country</th>
<th>Expenditure (millions of $)</th>
<th>Var. 11/10 %</th>
<th>YTD 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>22,200</td>
<td>+ 12.0</td>
<td>- 21.6</td>
</tr>
<tr>
<td>Brazil</td>
<td>21,300</td>
<td>+ 29.5</td>
<td>+ 7.7</td>
</tr>
<tr>
<td>Netherlands</td>
<td>20,500</td>
<td>- 0.4</td>
<td>+ 4.8</td>
</tr>
<tr>
<td>Rep. of Korea</td>
<td>19,500</td>
<td>+ 3.6</td>
<td>- 2.4</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>19,100</td>
<td>+ 9.6</td>
<td>+ 7.2</td>
</tr>
<tr>
<td>China (Hong Kong)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>17,300</td>
<td>- 1.9</td>
<td>- 3.9</td>
</tr>
<tr>
<td>India</td>
<td>13,700</td>
<td>+32.9</td>
<td>+ 12.4</td>
</tr>
<tr>
<td>Mexico</td>
<td>7,800</td>
<td>+ 8</td>
<td>+ 2.7</td>
</tr>
<tr>
<td>Argentina</td>
<td>5,500</td>
<td>+13</td>
<td>+ 13</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Long-term research project that continues the work initiated by the UNWTO in 1990

- **Objectives:**
  - **To assist** the member of the UNWTO in the development of long-term policies and strategic plans
  - **To offer** a global reference on the future development of tourism
  - **To strengthen** the role of the UNWTO in the definition of agendas on tourism-related issues
  - **To constitute** the reference for the UNWTO’s strategic documents, programme of work and activities

- The study is based on the projections of international tourism flows in the next two decades
Projected average annual growth: 3.3 %

International tourism, World

International Tourist Arrivals, % change over previous year

Source: World Tourism Organization (UNWTO)
Average growth 2010-2030: 43 million tourists per year

Source: World Tourism Organization (UNWTO)
In 2012 the mark of 1 billion arrivals will be reached. 2030 arrivals will reach 1.8 billion.
The emerging economies will pass the advanced destinations in 2015

Source: World Tourism Organization (UNWTO)
The world market share is changing gradually.

**1980 (277 mn)**
- Europe: 63%
- Americas: 23%
- Asia and the Pacific: 8%
- Middle East: 3%
- Africa: 3%

**2010 (940 mn)**
- Europe: 51%
- Americas: 16%
- Asia and the Pacific: 22%
- Middle East: 6%
- Africa: 5%

**2030 (1.8 bn)**
- Europe: 41%
- Asia and the Pacific: 30%
- Middle East: 8%
- Africa: 7%
- Americas: 14%

Source: World Tourism Organization (UNWTO)
Purpose of visit will not undergo major changes

International Tourism by Purpose of Visit

- Leisure, recreation and holidays
- VFR, health, religion, other
- Business and professional

Source: World Tourism Organization (UNWTO)
Air transport's share will continue to grow, but at a slower pace

Source: World Tourism Organization (UNWTO)
The Americas
Americas: average annual growth of 2.6% in international tourism

Source: World Tourism Organization (UNWTO)
Americas: nearly 5 million annual increase in international arrivals

International Tourism, Americas

International tourist arrivals, absolute change over previous year, million

Source: World Tourism Organization (UNWTO)
## The Americas: nearly 250 million arrivals in 2030

<table>
<thead>
<tr>
<th>Region</th>
<th>International Tourist Arrivals received (million)</th>
<th>Average annual growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>actual data</td>
<td>projections</td>
</tr>
<tr>
<td></td>
<td>1980-2010, of which</td>
<td>2010-30, of which</td>
</tr>
<tr>
<td>World</td>
<td></td>
<td></td>
</tr>
<tr>
<td>to Advanced economies</td>
<td>2000-2010</td>
<td></td>
</tr>
<tr>
<td>To Emerging economies</td>
<td>1990-2010</td>
<td></td>
</tr>
<tr>
<td>By UNWTO regions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Africa</td>
<td>277</td>
<td>435</td>
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<tr>
<td>Americas</td>
<td>194</td>
<td>296</td>
</tr>
<tr>
<td>North America</td>
<td>83</td>
<td>139</td>
</tr>
<tr>
<td>Caribbean</td>
<td>6.7</td>
<td>11.4</td>
</tr>
<tr>
<td>Central America</td>
<td>1.5</td>
<td>1.9</td>
</tr>
<tr>
<td>South America</td>
<td>5.8</td>
<td>7.7</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>22.8</td>
<td>55.8</td>
</tr>
<tr>
<td>Europe</td>
<td>177.3</td>
<td>261.5</td>
</tr>
<tr>
<td>Middle East</td>
<td>7.1</td>
<td>9.6</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
The Americas by subregion

**Americas: Inbound tourism by subregion of destination**

- **North America**
- **South America**
- **Caribbean**
- **Central America**

**International Tourist Arrivals, million**

- 0
- 20
- 40
- 60
- 80
- 100
- 120
- 140
- 160

**Source:** World Tourism Organization (UNWTO)
The Americas’ share of the world inbound tourism market declined due to lower growth in North America.

Source: World Tourism Organization (UNWTO)
The Americas

Opportunities
- Natural resources
- Cultural resources
- Human resources
- Price competitiveness
- Authenticity, novelty and dynamism
- Attractions in all seasons (North-South)

Challenges
- Development of infrastructures
- Planning and product
- Attraction of investments
- Security
- Travel facilitation
- Quality
- Marketing and Promotion (including e-marketing)
- Branding
Thank you very much for your attention!

World Tourism Organization (UNWTO)
www.unwto.org