World Tourism Trends

8th UNWTO/PATA Forum on Tourism Trends and Outlook

Guilin, China
13-15 October 2014 – day 1

Michel Julian
UNWTO Tourism Market Trends Programme
First UNWTO/PATA Tourism Trends and Research Conference

首届联合国世界旅游组织和亚太旅游协会旅游趋势与研究大会
The World Tourism Organization (UNWTO)

- a specialized agency of the United Nations (UN) and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how.

- plays a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, paying particular attention to the interests of developing countries.

- intergovernmental organization with membership includes 162 countries and territories and over 400 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

- encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.


www2.unwto.org/en/content/who-we-are-0
1. International Tourism: Latest Results
2. Long-Term Perspectives
3. Connectivity and Related Issues
Inbound tourism: World

International tourist arrivals, 1995-2013* (million)

Source: World Tourism Organization (UNWTO)
Results 2013

International tourist arrivals
1087 million
+4.8%

International tourism receipts
(BOP Travel)
US$ 1159 billion (euro 900 bn)
+5.0% (real terms)

International passenger transport
(BOP Transport, passenger)
US$ 214 billion (euro 161 bn)

www.unwto.org/facts
Asia and the Pacific 2013
Inbound tourism: Asia and the Pacific 2013

International tourist arrivals, 1995-2013* (million)

US$ 359 bn

249 mn

26 million arrivals more than in 2012

Source: World Tourism Organization (UNWTO)
Inbound tourism: Asia and the Pacific 2013
South-East Asia grows most in arrivals

International tourist arrivals, 1995-2013* (million)

North-East Asia
South-East Asia
South Asia
Oceania

Source: World Tourism Organization (UNWTO)
Inbound tourism: Asia and the Pacific 2013
North-East Asia grows most in receipts

International tourism receipts, 1995-2013* (US$ billion)

Source: World Tourism Organization (UNWTO)
International tourism up by 5% in the first half of the year

International tourist arrivals grew by 4.6% in the first half of 2014 according to the data included in this issue of the UNWTO World Tourism Barometer. Destinations worldwide received some 617 million international tourists (overnight visitors) between January and June 2014, 22 million more than in the same period of 2013. Growth was strongest in the Americas (+9%) followed by Asia and the Pacific and Europe (+7%). Asia and the Pacific, South Asia and Eastern Europe (+8%) were the best performers, together with North-East Asia and Southern and Mediterranean Europe (+7%).

Growth of arrivals in the Americas (+9%)

The Americas leads the growth

Growth picked up significantly in the Americas (+9%). All four subregions benefited, with North America, boosted by Mexico, Central America and South America all increasing by 6% and the Caribbean by 5%. In South America (+4%), the hosting of the Football World Cup in Brazil contributed to the positive results in the subregion - receipts from International tourism in Brazil grew by 16% in the first seven months of the year with a 60% increase in June and July.

Europa (+5%)

Europe (+5%), the most visited region in the world, continued the strong pace of growth of 2013, driven so far this year by Northern Europe (+9%) and Southern and Mediterranean Europe (+7%). These results reflect improved consumer confidence in Europe and the rebound of important traditional European source markets.

The UNWTO World Tourism Barometer is developed as a service for UNWTO Members and published three times a year in English, French and Spanish. 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 own a UNWTO Membe, you can subscribe to the next three issues for € 70 (print version delivered electronically) or € 100 (print plus hard copy).

To place your order, please contact the International Tourism Division of our organization or contact us by telephone.
International tourism maintains strength

Source: World Tourism Organization (UNWTO) ©
517 million intnl tourist arrivals through June, 22 million more than in the same period of 2013

Source: World Tourism Organization (UNWTO) ©
Asia and the Pacific going steady

-3.9%  +13.2%  +6.5%  +6.9%  +6.3%  +5.4%
First half 2014: Americas, Asia and the Pacific and Europe lead growth.
Confidence still positive, but slightly declining
AP confidence remains positive

UNWTO Panel of Tourism Experts: Asia and the Pacific

Prospects (before) vs. Evaluation (after)

Source: World Tourism Organization (UNWTO) ©
Outlook: World

International tourist arrivals

Forecast
2013: 4% to 4.5%

Source: World Tourism Organization (UNWTO)
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+4.8%</td>
<td>+4.6%</td>
<td>+4% to +4.5%</td>
</tr>
<tr>
<td>Europe</td>
<td>+4.8%</td>
<td>+4.8%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+6.5%</td>
<td>+5.4%</td>
<td>+5% to +6%</td>
</tr>
<tr>
<td>Americas</td>
<td>+3.4%</td>
<td>+6.2%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Africa</td>
<td>+5.6%</td>
<td>+3.3%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-0.6%</td>
<td>-4.4%</td>
<td>+0% to +5%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Outbound markets
China became number 1 outbound market in 2012 and strong growth continues.
Major outbound markets
Emerging markets remain hot

International Tourism Expenditure
(% change of same period year before, local currencies current prices)

13*/12  2014* YTD
Tourism Towards 2030: Key Results
International tourist arrivals to reach 1.8 billion by 2030
Asia and the Pacific, the Middle East and Africa to increase their shares
Asia and the Pacific: Intl tourist arrivals still to grow from 200 mn to over 500 mn

International Tourism, Asia and the Pacific

Source: World Tourism Organization (UNWTO) ©
Asia and the Pacific will gain most of the new arrivals

Inbound tourism by region of destination

International Tourist Arrivals, million

source: World Tourism Organization (UNWTO) ©
Asia and the Pacific towards 2030

17 million additional international tourist arrivals on average a year of the 43 million worldwide
### Asia and the Pacific: how to make it possible

**Opportunities**
- natural resources
- cultural resources
- human resources
- price competitiveness
- large populations
- fuelling intrareg. travel
- economic dynamism
- travel facilitation
- planning & product development

**Challenges**
- infrastructure development
- sustainability / greening
- congestion management
- quality
- marketing and promotion
- e-marketing
- image building and branding
- coordination, cooperation, collaboration
Visa facilitation
Tourism in the global agenda

- **G20** recognizes for the first time Travel and Tourism as a vehicle for job creation, economic growth and development, and commits to work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth. (G20 Declaration - June 2012)

- **Rio+20** recognizes the significant contribution of sustainable tourism to the three dimensions of sustainable development, its linkages to other sectors and its capacity to create decent jobs and trade opportunities.
Visa Facilitation - Openness Index Situation 2012

% of world population that do not need visa to enter country*

- 0 - 10
- 11 - 23
- 24 - 39
- 40 - 69
- 70 - 100

* visa upon arrival weighted 0.7, e-visa 0.5
UNWTO jointly with partners is working closely with stakeholders to move agenda forward

A number of meetings have taken place and various reports have been prepared taking stock of and analysing the current situation:

For more information and download of reports, see http://rcm.unwto.org/en/content/facilitation-tourist-travel
Visa facilitation in ASEAN Member States

Under current visa policies:

- 10.4% of expected international tourists over the period 2014-2016 would be required to obtain a traditional visa prior to travel under current visa policies.

By implementing facilitative policies:

- The ASEAN region could gain up to 10 million international tourist arrivals by 2016.
- Additional US$12 billion international tourism receipts and 650 thousand jobs.

For more information and download of reports, see http://rcm.unwto.org/en/content/facilitation-tourist-travel
Intelligent Taxation:
- Airport fees
- Duties
- Taxation policies

Pieter Brueghel the Younger
Paying the Tax (The Tax Collector)
oil on panel, 1620-1640
Connectivity

1) 51% of international tourists arrive at their destination by air → transport and tourism are closely interconnected

2) Opportunity for increased cooperation between tourism and aviation authorities
Air transport will continue to increase market share, but at a slower pace.

source: World Tourism Organization (UNWTO) ©
Connectivity, in the view of the Department of Tourism of the Republic of the Philippines, is not merely about making flight plans. It is not just about cooperation. It is, in a very real sense, about friendship. It is actually about understanding each other’s needs and trusting in the sincerity behind those needs and those demands. And finally, tourism is about trusting in the unity of goals and what makes each other happy.

Tourism Secretary Ramon R Jimenez, Jr
Speech at the APEC 2020 Conference on Enhancing Tourism and Air Transport Connectivity in the Asia-Pacific Region
(February 2012 Manila)
Thank you very much for your attention!

World Tourism Organization (UNWTO)
www.unwto.org