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Report of the Secretary-General

Part I: Current situation and activities

(a) International tourism in 2014 and 2015

I. International tourism in 2014

1. **International tourism in 2014:** Demand for international tourism remained strong in 2014 according to the January issue of the *UNWTO World Tourism Barometer*. The number of international tourists (overnight visitors) reached 1,138 million, 51 million more than in 2013. With an increase of 4.7%, this was the fifth consecutive year of above-average growth since the 2009 global economic crisis. Advanced economies (+5.7%) have outperformed emerging economies (+3.6%), as was already the case in 2013.

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

3. As in recent years, the growth in **international tourism receipts** in 2014 is expected to have followed that of arrivals fairly closely (the 2014 results for international tourism receipts will be released at the end of April 2015). In 2013, international tourism receipts reached US\$ 1,197 billion, US\$ 230 billion more than in the pre-crisis year of 2008.

4. **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.

5. 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.



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

7. International tourism in the **Middle East** (+4%) showed signs of rebound after three consecutive years of decline in the number of arrivals, with good results in most destinations. The region attracted an additional 2 million arrivals, bringing the total to 50 million.

8. **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 virus 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.

9. As for **outbound tourism as measured by international tourism expenditure**, available data for 2014 shows that the recovery of traditional source markets compensated for the slowdown of the large emerging markets, which had been driving tourism growth in previous years.

10. Expenditure from China, the first source market in the world in expenditure, was up by 28% in 2014. Among the other two main emerging markets, the Russian Federation (-6% in the first three quarters) lost strength in 2014, while Brazil still grew by 2.5%, despite the appreciation of the US dollar against the Brazilian real and slower economic growth. Beyond the top ten, some smaller emerging markets saw expenditure grow substantially, with Saudi Arabia, India, the Philippines and Qatar all reporting increases of 30% or over.

11. Expenditure from the United States, the second largest outbound market in the world, grew by 6%. Noteworthy is also the rebound of France (+11%), Italy (+6%) and the United Kingdom (+4% in the first three quarters). Expenditure from Germany, the third largest outbound market, by contrast was rather flat (+1%).

II. International tourism in 2015

12. **International tourism in 2015:** For 2015, UNWTO forecasts international tourist arrivals to grow between 3% and 4% in line with the foreseen global economic growth of 3.5% as estimated by the International Monetary Fund (IMF).

13. **By region**, growth is expected to be stronger in Asia and the Pacific (+4% to +5%) and the Americas (+4% to +5%), followed by Europe (+3% to +4%). Arrivals are expected to increase by +3% to +5% in Africa and by +2% to +5% in the Middle East.

14. The positive outlook for 2015 is confirmed by the UNWTO Confidence Index. According to the 300 tourism experts consulted worldwide for the Index by early 2015, tourism performance is expected to improve in 2015, though expectations are less upbeat than a year ago.

15. The decline in oil prices is expected to lower transport costs and support economic growth by lifting purchasing power and private demand. International tourism flows are expected to continue being impacted by ongoing geopolitical tensions, currency shifts, a slower than expected growth in emerging economies and in Europe as well as changes in business models spurred by the advances of technology.

16. Considering that this document was prepared in March 2015, information about international tourism results in 2015 will be provided to the Executive Council during its 100th session.

III. Actions to be taken by the Executive Council

17. The Executive Council is invited to take note of the report of the Secretary-General on the current situation and prospects for international tourism.