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Report of the Secretary-General

Part I: Tourism trends and activities

(a) International tourism in 2015 and 2016

I. International tourism in 2015

- International tourism in 2015:** Demand for international tourism remained strong in 2015 according to the January 2016 issue of the *UNWTO World Tourism Barometer*. The number of international tourists (overnight visitors) reached 1,184 million, 50 million more than in 2014. With an increase of 4.4%, this was the sixth 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.
- As in recent years, the growth in **international tourism receipts** in 2015 is expected to have followed that of arrivals fairly closely (the 2015 results for international tourism receipts will be released at the end of April 2016).
- Europe** (+5%) led growth in absolute and relative terms supported by a weaker euro vis-à-vis the US dollar and other main currencies. Arrivals reached 609 million, or 29 million more than in 2014. Central and Eastern Europe (+6%) rebounded from last year's decrease in arrivals. Northern Europe (+6%), Southern Mediterranean Europe (+5%) and Western Europe (+4%) also recorded sound results, especially considering the many mature destinations they comprise.
- Asia and the Pacific** (+5%) recorded 13 million more international tourist arrivals last year to reach 277 million, with uneven results across destinations. Oceania (+7%) and South-East Asia (+5%) led growth, while South Asia and North-East Asia recorded an increase of 4%.
- International tourist arrivals in the **Americas** (+5%) grew 9 million to reach 191 million, consolidating the strong results of 2014. The appreciation of the US dollar stimulated outbound travel from the United States, benefiting the Caribbean and Central America, both recording 7% growth. Results in South America and North America (both at +4%) were close to the average.



6. International tourist arrivals in the **Middle East** grew by an estimated 3% to a total of 54 million, consolidating the recovery initiated in 2014.
7. Limited available data for **Africa** points to a 3% decrease in international arrivals, reaching a total of 53 million. In North Africa arrivals declined by 8% and in Sub-Saharan Africa by 1%, though the latter returned to positive growth in the second half of the year. (Results for both Africa and the Middle East should be read with caution as they are based on limited available data)
8. As for **outbound tourism as measured by international tourism expenditure**, available data for 2015 indicates that a few leading source markets, namely China, the USA and the UK, drove tourism expenditure in 2015 supported by their strong currencies and economies.
9. Among the world's top source markets, China, with double-digit growth in expenditure every year since 2004, continues to lead global outbound travel, benefitting Asian destinations such as Japan and Thailand, as well as the United States and various European destinations.
10. By contrast, expenditure from the previously very dynamic source markets of the Russian Federation and Brazil declined significantly, reflecting the economic constraints in both countries and the depreciation of the ruble and the real against virtually all other currencies.
11. As for the traditional advanced-economy source markets, expenditure from the United States (+9%), the world's second largest source market, and the United Kingdom (+6%) was boosted by their strong currencies and rebounding economies. Spending from Germany, Italy and Australia grew at a slower rate (all at +2%), while demand from Canada and France was rather weak.

II. International tourism in 2016

12. **International tourism in 2016:** For 2016, UNWTO forecasts international tourist arrivals to grow between 3.5% and 4.5% in view of current trends and the results from the UNWTO Confidence Index, which remain largely positive for 2016, though at a slightly lower level as compared to the previous two years.
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 (+3.5% to +4.5%). The projections for Africa (+2% to 5%) and the Middle East (+2% to +5%) are positive, though with a larger degree of uncertainty and volatility.
14. Several factors add increased volatility to current prospects, including ongoing geopolitical tensions, security concerns, strong currency fluctuations, unexpected stock market and financial flow movements, significant drops in commodity prices, including oil, and slower-than-expected growth, namely in emerging economies.
15. Considering that this document was prepared in March 2016, updated information about international tourism results in 2016 will be provided verbally to the Executive Council during its 103rd session.

III. Actions to be taken by the Executive Council

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