



World Tourism Organization

# UNWTO

## Tourism Towards 2030 Global Overview

Advance edition presented at UNWTO 19th General Assembly – 10 October 2011

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# Tourism Towards 2030 / Global Overview

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The report was prepared with the collaboration of futures consultancy the Trajectory Partnership, which set the basis for the econometric model used for the forecasting. UNWTO collaborator Ms. Valeria Croce contributed with text drafting, revision and technical input.

The members of the UNWTO Tourism Trends and Marketing Strategies team who contributed at different stages of the report are: Ms. Maria Diana Predosanu, Ms. Sofia Zervou, Ms. Young-Hee Kim, Mr. Fahad Nawaz, Mr. Fernando Alonso, Mr. Michel Julian and Mr. John Kester. We would like to thank Ms. Sandra Carvão, UNWTO Communications Coordinator, who has been involved in the 2030 project since its early beginnings.

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# Foreword

Taleb Rifai / UNWTO Secretary-General



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Following three years of intensive research, we are pleased to present the results of UNWTO's new long term forecast for international tourism – *Tourism Towards 2030*. We trust that the conclusions of this landmark report will assist UNWTO Members and all tourism stakeholders in understanding changes and trends and formulating the appropriate policies and strategies to build a more competitive and sustainable tourism sector.

The last six decades have seen extraordinary growth for tourism. In spite of the multiple changes and shocks –from man-made crises, to natural disasters and economic crises, from which the world is still recovering– tourism, although vulnerable, has always bounced back, proving its resilience and capacity to rebound.

The next two decades will be of sustained growth for the tourism sector. International tourist arrivals are set to increase by an average 43 million a year between 2010 and 2030.

At the projected pace of growth, we will surpass the 1 billion mark by 2012, up from 940 million in 2010. By 2030, the number is anticipated to reach 1.8 billion meaning that in two decades' time, 5 million people will cross international borders for leisure, business or other purposes such as visiting friends and family every day, besides the four times as many tourists traveling domestically.

There will also be much change beyond the numbers. Future arrivals will be spread more widely across the globe; the share of international tourism to emerging economies

will surpass that to advanced ones, and many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East.

The future brings enormous opportunities for tourism to take centre stage in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for our sector to take the lead in mitigating its potential negative impacts on host communities and the environment.

Tourism has evolved into a global phenomenon – one of the most important economic sectors and social activities of our time. Today, it contributes directly to 5% of the world's GDP, one in 12 jobs globally and is a major export sector for many countries, both in the developing and developed world.

The next 20 years will be of continued growth for the sector. They can also be years of leadership: tourism leading economic growth, social progress and environmental sustainability. To make this possible we need to make tourism a priority in national policy decisions, foster competitive and responsible business models and practises and increase cooperation between the public and private sectors.

Benjamin Franklin said "by failing to prepare, you are preparing to fail". *Tourism Towards 2030* aims to help prepare us in the most effective way to make the most out of the opportunities for the tourism sector and take a leadership role in the path towards fairer, stronger and more sustainable growth. ◀

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# Introduction

## Background and Objectives

*Tourism Towards 2030* is a broad research project in continuation of UNWTO's work in the area of long-term forecasting initiated in the 1990s. It aims at the following objectives:

- Assisting UNWTO Members in formulating policies and long-term strategic plans;
- Providing a global reference on tourism future development;
- Reinforcing UNWTO's role in agenda setting for tourism-related subjects;
- Constituting a reference for UNWTO strategic documents, programme of work and activities.

The latest UNWTO project in this area was *Tourism 2020 Vision*, elaborated in the late 1990s and published in 2001, with 1995 as base year. This study has since become a worldwide reference in terms of international tourism forecast for UNWTO Members (Member States, associate and affiliate Members), the international tourism community (including local governments, private sector, academia, consultant firms and others), media and the public at large.

The aim of *Tourism Towards 2030* is to update projections through 2030, and to enrich forecasts with an overview of the social, political, economic, environmental and technological factors, which shaped tourism in the past, and are expected to lead development and growth in the future.

## What and how do we forecast: modelling tourism demand

For the quantitative forecast, a causal model has been constructed with international tourist arrivals as the dependent variable and using growth of Gross Domestic Product (GDP), a proxy for traveller affluence and business travel potential, and cost of transport as independent variables.

International tourist arrivals (international visitors that stay overnight) as reported by destination countries are used as the key indicator for tourism demand. This is one of the very few tourism indicators with long, consistent series for all (sub)regions (which is not the case for other series such as domestic arrivals, nights, etc.). This series can be broken down by trip characteristics such as destination, origin, mode of transport and purpose of visit. Economic data such as receipts generally cannot be broken down

and are difficult to project because of exchange rate fluctuations and inflation.

The independent variables well capture structural underlying trends of potential demand at the macro-level. The model is kept simple on purpose, in obedience to the principle of parsimony that recommends choosing a simple model over a more complex one if it fits the past equally well.

As the focus is on demand, projections are made only at the aggregate level and not for individual destination countries. Projecting the latter is a more complex exercise as the extent to which a destination succeeds in tapping into its potential depends to a fair degree on the effort put into developing tourism and attracting visitors by that destination.

As the basis for the projection a matrix of data series has been used with regard to international tourist arrivals as reported by destination countries around the world for the period 1980-2010. The matrix consists of the following three dimensions:

- 17 subregions of destination (5 of which can be broken down into advanced and emerging economies, making a total of 22 flows);
- 5 regions of origin;
- 2 means of transport: air and surface.

As a result,  $22 \times 5 \times 2 = 220$  flows with data for 31 years are potentially available to be used in generating forecasts. As some flows are negligible (i.e. surface travel between most regions), a total of 140 separate flows are forecast, which can be presented in various ways: by (sub)region of destination; by region of origin; advanced vs. emerging economies; mode of transport (air vs. surface); within region vs. between regions, and crossings of these.

In addition to the matrix described above, there is also a separate table of international tourist arrivals by subregion of destination and purpose of visit that is used to explore the evolution of the latter.

Forecasts are produced using a two-tier model. The first level explains the total number of international arrivals generated by each of the five regions of origin (Africa, Americas, Asia and the Pacific, Europe and the Middle East). The second level explains the breakdown by the sub-regions of destination and transport mode. For each outbound region, the projected overall number of arrivals originating from this region is divided over all the categories of the breakdown based on extrapolation of past trends.

The number of arrivals generated by each of the five regions of origin is modelled by looking at historical data over the past three decades 1980–2010, relating departure trends in each region to a number of ‘explanatory’ factors. The key predictors of international tourist arrivals used in the model are:

- A measure of traveller affluence and business travel potential, for which Gross Domestic Product (GDP) measured in purchasing power parity (PPP) in constant dollar terms is used as proxy, as this incorporates drivers such as demographic growth, increase of living standards, change of economic structure, spread of education, urbanisation, etc.;
- A measure of the cost of transport, accounting for both the cost of air and surface travel;
- One-off factors, in this case in particular external shocks such as the 9/11 terrorist attack and the SARS outbreak.

The model has been fitted with historical data, establishing the specific relationship between predictors and the dependent variable.

## Assumptions used in the model

In order to project future trends it is necessary to use a set of assumptions about the development of predictor variables.

Gross Domestic Product (GDP): For the central projection, assumptions for GDP growth up to 2016 reflect the

projections of the International Monetary Fund (IMF), while GDP growth rates as forecast by Oxford Economics are used to estimate regional GDP growth thereafter, up to 2030. All values are expressed in real terms, and countries weighted according to purchasing power parity (PPP).

For the period 2010 to 2030, economic output in each of the five regions is expected to continue growing at a very similar pace observed over the past decades. Asia (+5.7% a year) will lead, tripling output. Africa (+4.8%) and Middle East (+4.3%) will also achieve healthy growth rates and more than double their current output level. The Americas and Europe (both at +2.6%) will grow at a much more moderate rate. (Note that the values of the last decade do include the impact of the 2008-2009 'Great Recession'.)

For the world, this results in an average annual growth of 4.0%. Because the weight of emerging economies in the total is increasing, this is slightly higher than the rate achieved in the period 1995-2010. Increases will be more moderate in the first years and pick up in the middle of the decade 2010-2020, after which they will gradually slowdown.

Transport costs: In order to assess the likely development in transport costs these are broken down into air and surface transport. After taking these elements into account, in summary the following assumptions are applied:

- The cost of air transport will cease declining, and is assumed to grow at an average annual rate of 1.1% per year from 2010 to 2030;
- The cost of surface travel will continue to increase faster than the cost of air travel, with the rate of increase accelerating from 2024 onwards;

- The total weighted cost of transport is assumed to grow at an average annual rate of 1.4% per year from 2010 to 2030.

For surface transport, the main consideration is changes in the marginal cost of driving a motor vehicle (largely, but not exclusively, the petrol price).

The steady decline in the cost of travelling by air in real terms over the past half century is unlikely to continue in the coming decades. Fuel costs are set to rise, as a result of expected increases in both the price of oil (as it becomes a scarcer resource) and taxation on aviation fuel. Technology innovation and a further increase of fuel efficiency of the fleet by some 1% per year – compared to 1.5% per year over the past 20 years – can only partly offset this. The rate at which air transport has become cheaper has already slowed in recent years; it is assumed that the factors mentioned above will combine to push the cost of air travel up from around 2012 onwards.

Real cost increases are assumed to be relatively gradual to 2020 (no more than 1% real growth per year on average), before increasing more quickly between 2020 and 2030. This reflects the likelihood of more stringent policies towards the use of fossil fuels with a resulting increase in the average real cost of travelling by air of between 1.5% and 2% each year.

Based on these assumptions, forecasts are generated for the number of arrivals originating from each of the five regions.

To verify different hypotheses (e.g. slower GDP growth, higher transport cost due to higher fuel prices, etc.), alternative assumptions have been drawn and tested in the sensitivity analysis. ◀



**Further reading => Handbook on Tourism Forecasting Methodologies, UNWTO 2008**



## Key results

This section highlights the projections for international tourism flows in the two decades 2010-2030. Results are obtained with the quantitative forecast model developed by UNWTO, using as basis the series of international tourist arrivals reported by destination countries around the world. As in any forecasting exercise, the results presented here should not be read as precise and perfect predictions, but as likely outcomes indicating the direction (increasing, decreasing or stationary) and magnitude of change.



### Global growth in international tourist arrivals will continue, but at a more moderate pace

The number of international tourist arrivals worldwide is forecast to increase by 3.3% a year, on average, in the period 2010-2030, compared to an average of 3.9% a year in the period 1995-2010.

Over time, the rate of growth is slowing down gradually, from 3.8% in 2011 to 2.5% in 2030. This is the result of a combination of four factors:

- The base volumes are higher, so smaller increases still add substantial numbers;
- Lower GDP growth, as economies mature;
- A lower elasticity of travel to GDP;
- A shift from falling transport costs to increasing ones.

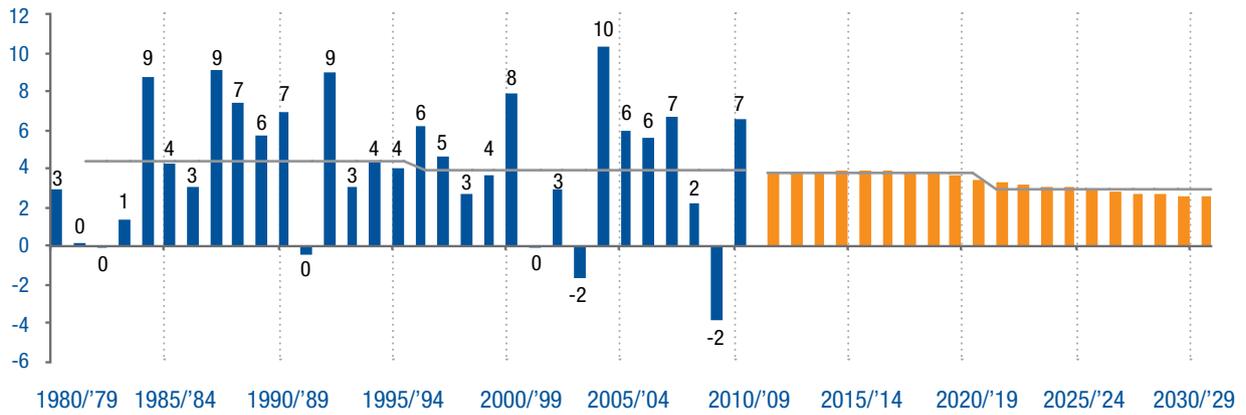
It should be understood that all forecasts presented here treat about long-term average rates. Thus, in many years growth will be faster, as in practice strong years alternate with weak ones.

### International tourist arrivals will increase by 43 million a year on average between 2010 and 2030

It is important to consider all forecasts presented here in absolute terms, rather than just in terms of an average annual growth rate. As the base volume is increasing, a lower pace of growth still signifies a greater growth in absolute numbers. The projected rate of growth in the period 2010-2030 represents an increase of some 43 million international tourist arrivals a year on average, compared to an average increase of 28 million a year in the period 1995-2010. This increase of 43 million a year is equivalent to the total international tourist arrivals in a major destination like Italy in 2010.

## International tourism, World

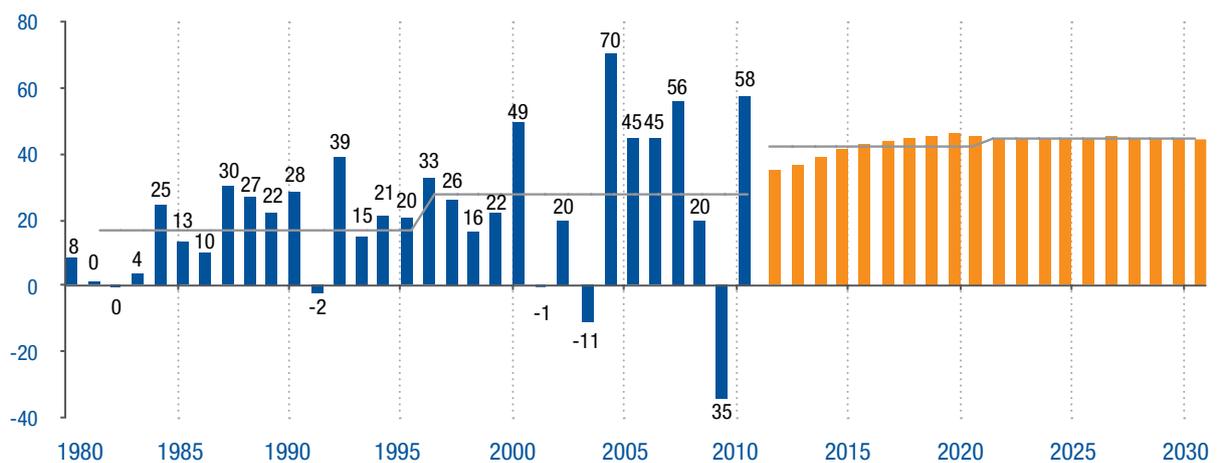
International Tourist Arrivals, % change over previous year



Source: World Tourism Organization (UNWTO) ©

## International tourism, World

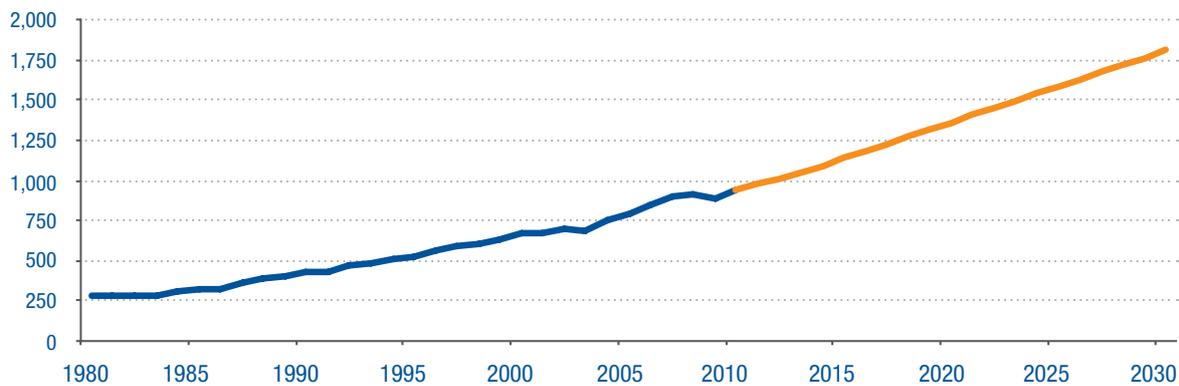
International Tourist Arrivals, absolute change over previous year, million



Source: World Tourism Organization (UNWTO) ©

## International tourism, World

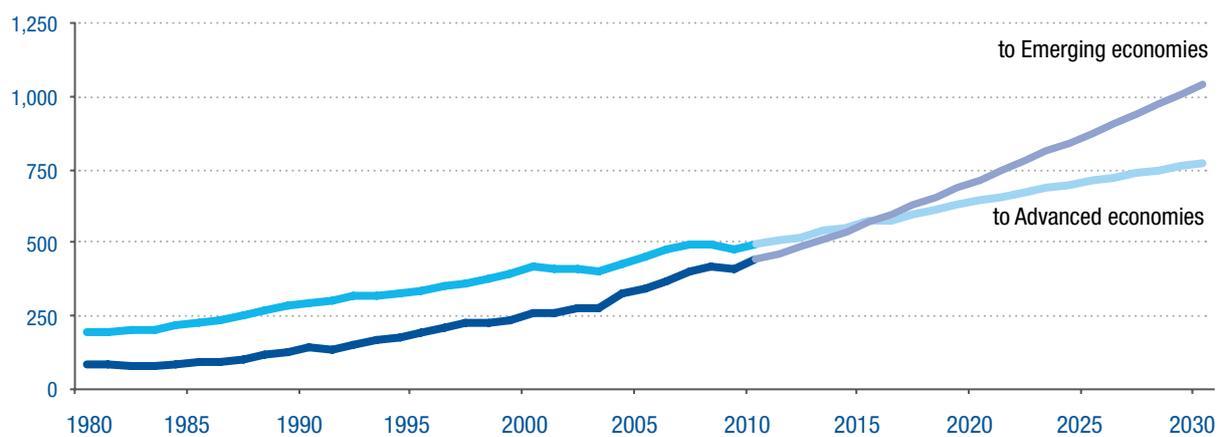
### International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism, advanced and emerging economies

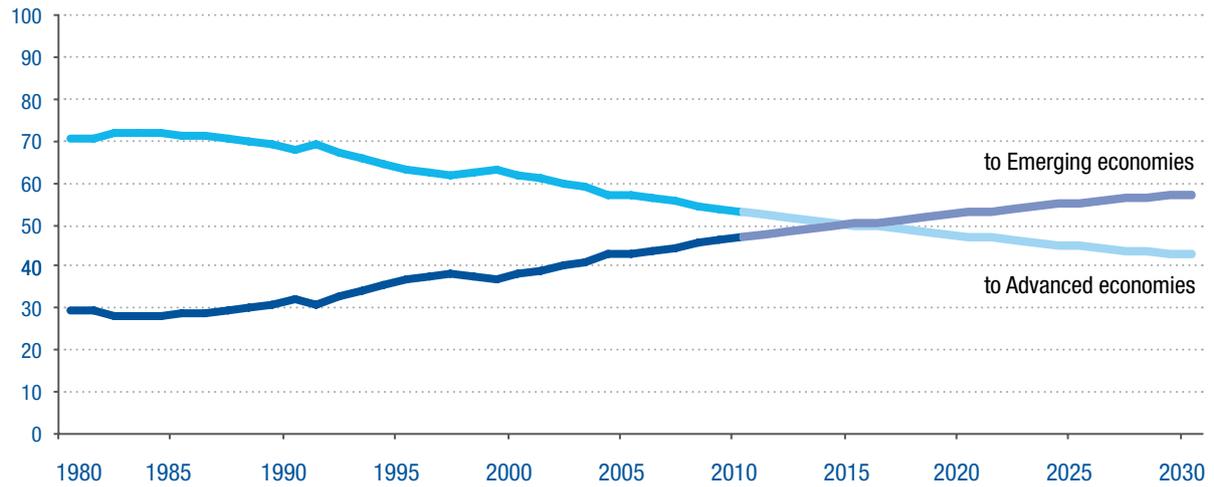
### International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism, advanced and emerging economies

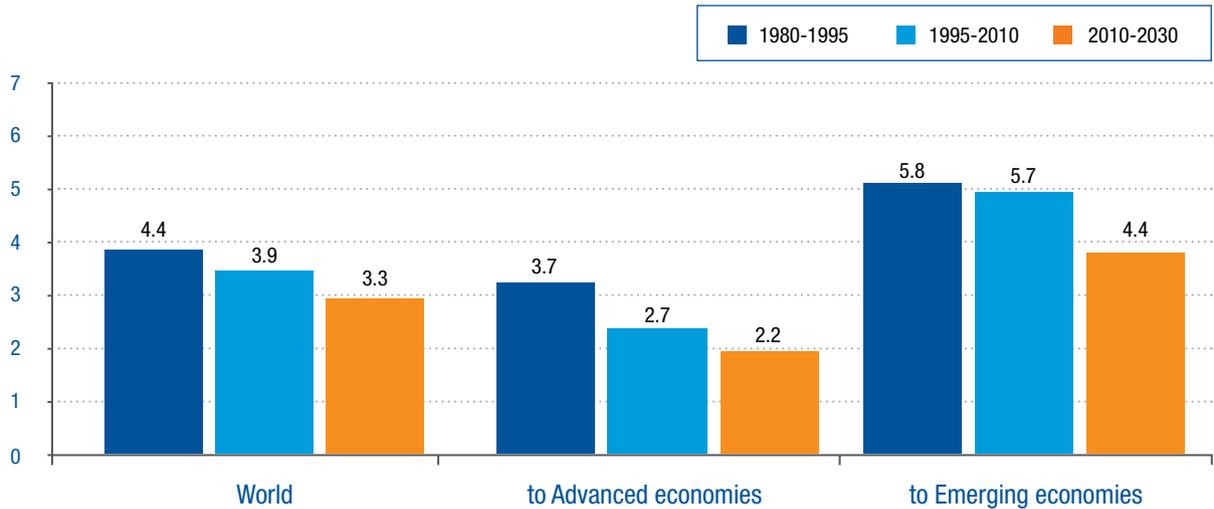
International Tourist Arrivals, share, %



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism, advanced and emerging economies

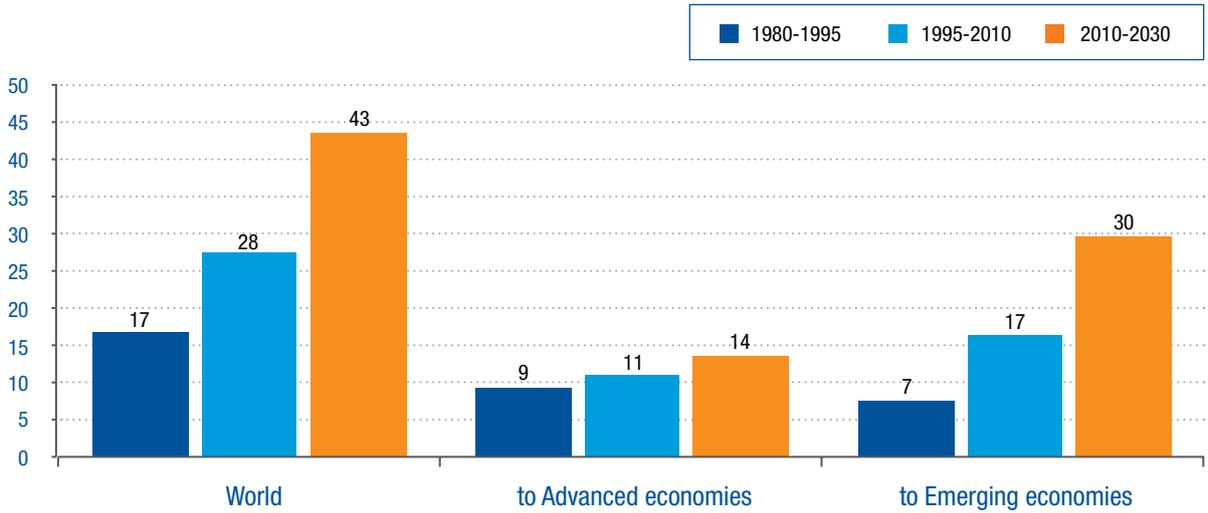
International Tourist Arrivals, average annual growth rate, %



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism, advanced and emerging economies

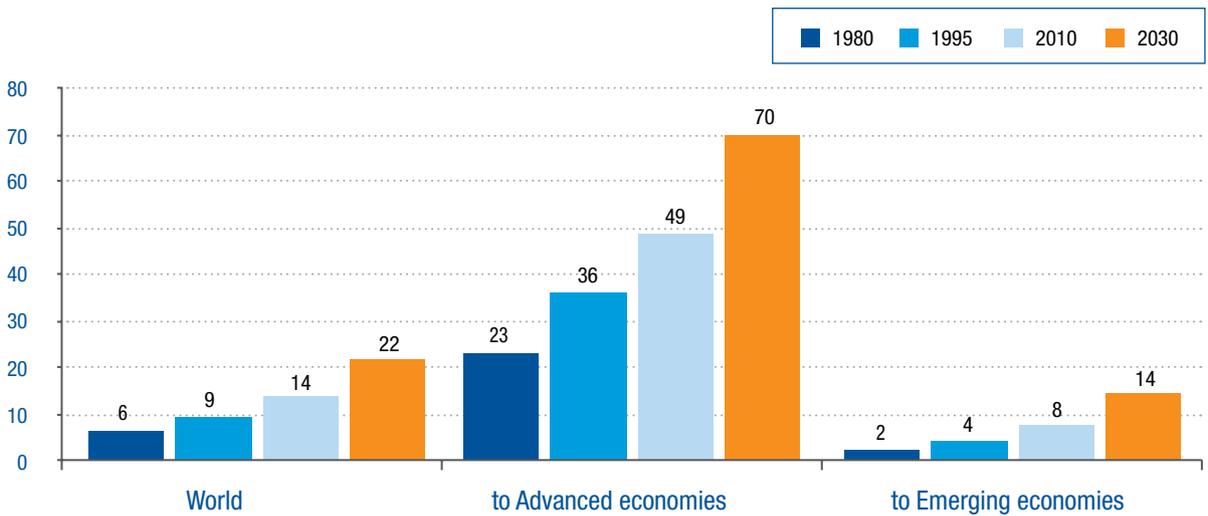
International Tourist Arrivals, absolute change over previous year, million



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism, advanced and emerging economies

International Tourist Arrivals, received per 100 population



Source: World Tourism Organization (UNWTO) ©

## International tourist arrivals will reach 1.8 billion by 2030

At the projected pace of growth, international tourist arrivals worldwide are to surpass 1 billion by 2012, up from the 940 million of 2010. By 2020 the number is expected to reach close to 1.4 billion. The 1.5 billion mark will be in sight by 2023 and 1.8 billion by 2030.

## Emerging economy destinations expected to surpass advanced economy destinations in international arrivals in 2015

International arrivals in emerging economy destinations are expected to keep growing at double the pace (+4.4% year) of advanced economy ones (+2.2% a year). In absolute terms emerging economies will add on average 30 million arrivals a year, compared to 14 million by advanced economies. As a result, from 2015 emerging economies will receive more international tourist arrivals than advanced

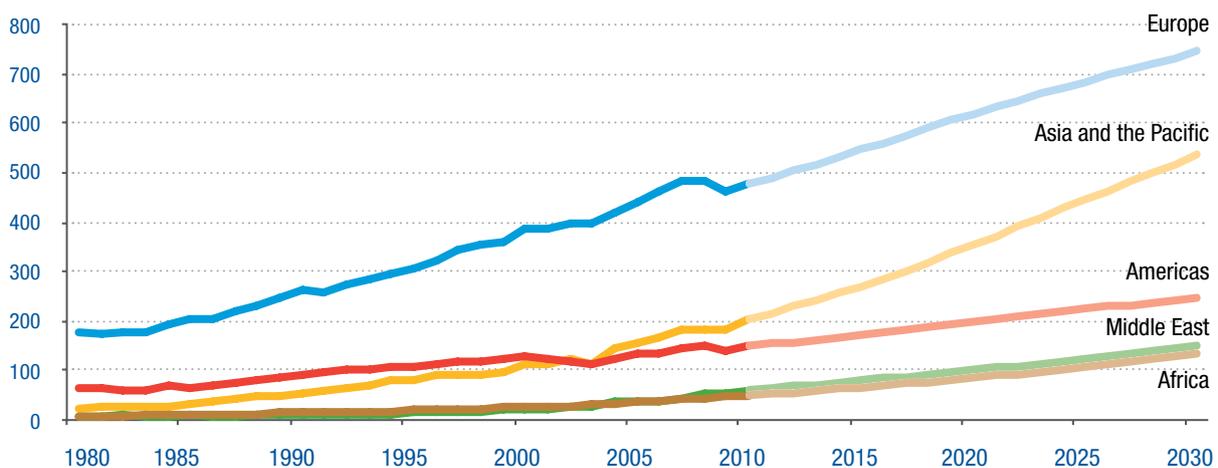
economies and will surpass 1 billion arrivals by 2030. In 1980, 70% of international arrivals were recorded in the traditional destinations of the advanced, industrialised and diversified economies of North America, Europe, and Asia and the Pacific.

In 2030, 58% will be recorded in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa (based on the classification by IMF, see Statistical Appendix at [www.imf.org/external/pubs/ft/weo/2011/02](http://www.imf.org/external/pubs/ft/weo/2011/02)).

## The number of international arrivals received in emerging economies is still modest compared to the size of their population

In terms of the number of international tourist arrivals received per 100 of population there is still a large distance between advanced and emerging economies,

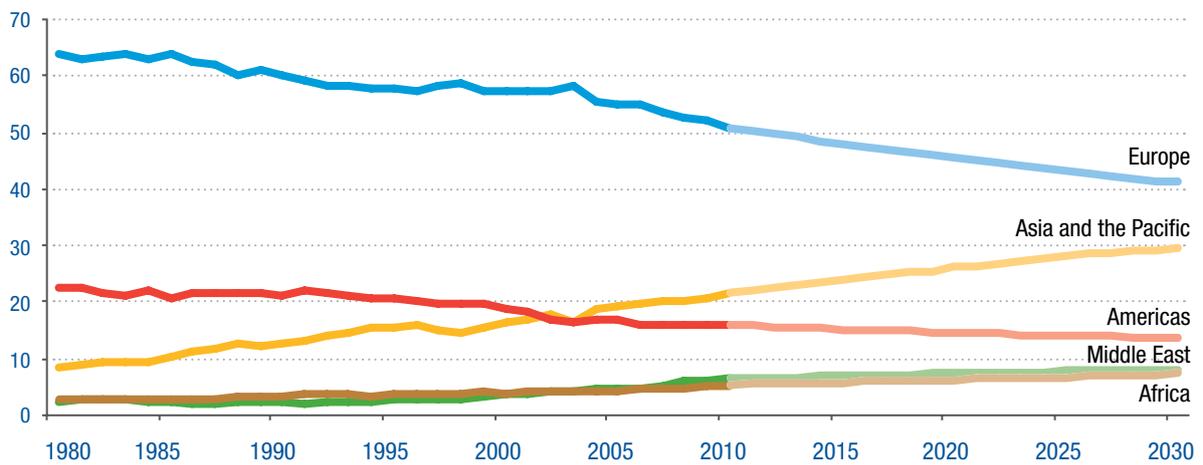
### Inbound tourism by region of destination International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism by region of destination

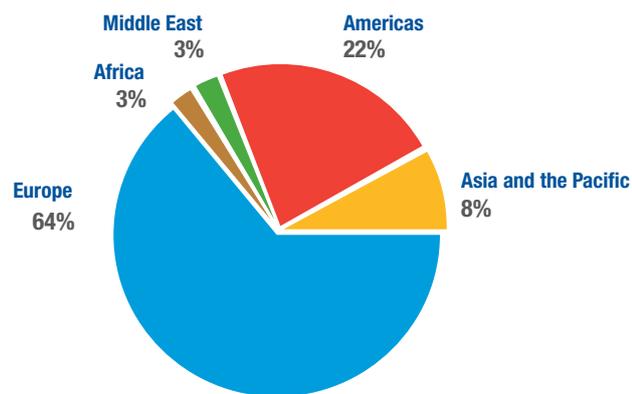
International Tourist Arrivals, share, %



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism by region of destination

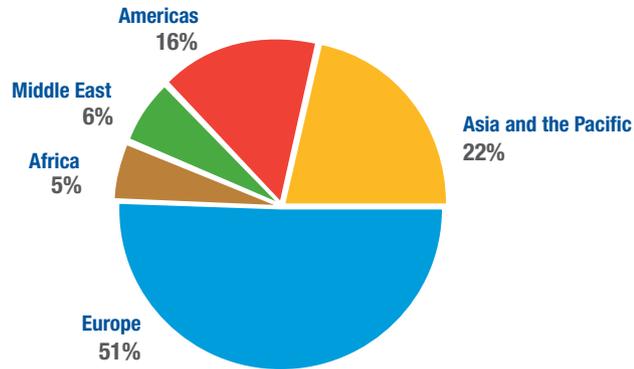
International Tourist Arrivals in 1980, share, %



Source: World Tourism Organization (UNWTO) ©

## International Tourism by region of destination

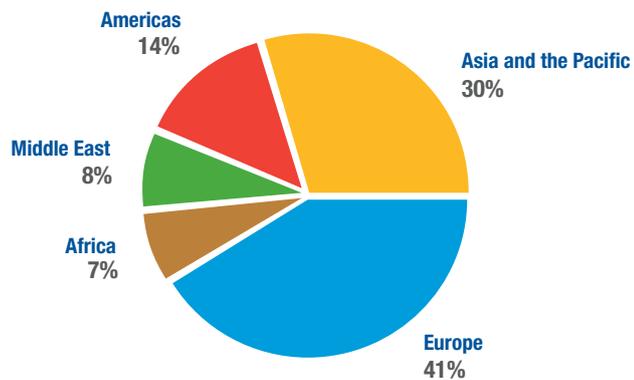
International Tourist Arrivals in 2010, share, %



Source: World Tourism Organization (UNWTO) ©

## Inbound tourism by region of destination

International Tourist Arrivals in 2030, share, %



Source: World Tourism Organization (UNWTO) ©

as the majority of humanity (85% in 2010 and 87% in 2030) lives in emerging economies. While the number of arrivals in advanced economies is set to rise from 49 to 70 per 100 of population between 2010 and 2030, in emerging economies the number will rise from 8 to 14 per 100 of population.

### **Asia and the Pacific will gain most of the new arrivals**

International tourist arrivals to Asia and the Pacific are projected to increase by 331 million in two decades, from 204 million in 2010 to 535 million in 2030.

The Middle East and Africa are also expected to more than double their arrivals in this period, respectively from 61 million to 149 million and from 50 million to 134 million. Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) grow comparatively less.

As a consequence, there will be increases in the global market shares of Asia and the Pacific (to 30% in 2030, up from 22% in 2010), the Middle East (to 8%, from 6%) and Africa (to 7%, from 5%), and further declines in the shares of Europe (to 41%, from 51%) and the Americas (to 14%, from 16%), mostly because of the slower growth of North America, Northern Europe and Western Europe.

### **South Asia will be the subregion with the fastest growth in international arrivals**

South Asia will be the fastest growing subregion in relative terms (+6.0% a year), but from a low base.

West and Central Africa (+5.9% a year), East Africa (+5.8% a year) and Central America (+5.2% a year) also show fast growth on comparatively moderate bases, while South-East Asia (+5.1% a year) and North-East Asia (+4.9% a year) continue growing at a fast pace, adding to already substantial base volumes. South America, North Africa and the Middle East are projected to grow at or slightly above 4.5% a year on average. By contrast, North America (+1.7% a year) will show the slowest growth.

### **North-East Asia will be the most visited subregion in 2030**

In absolute numbers North-East Asia is the fastest growing subregion, adding almost 9 million arrivals a year. By 2030 it will become the subregion to receive the most international arrivals, with 293 million, surpassing Southern and Mediterranean Europe (264 million) and Western Europe (222 million). South-East Asia (187 million) will become the fourth most visited subregion, followed by Central and Eastern Europe (176 million), the Middle East (149 million) and North America (138 million).

### **Future arrivals will be more evenly spread over destinations**

The difference in growth rates between subregions will produce a significant shift in their shares in the total of international tourist arrivals. As more and more destinations have been investing in tourism development, the traditional concentration of international tourist arrivals in a relative few destinations will be further reduced. Almost all of the less visited subregions are gaining share at the expense of the most visited ones.

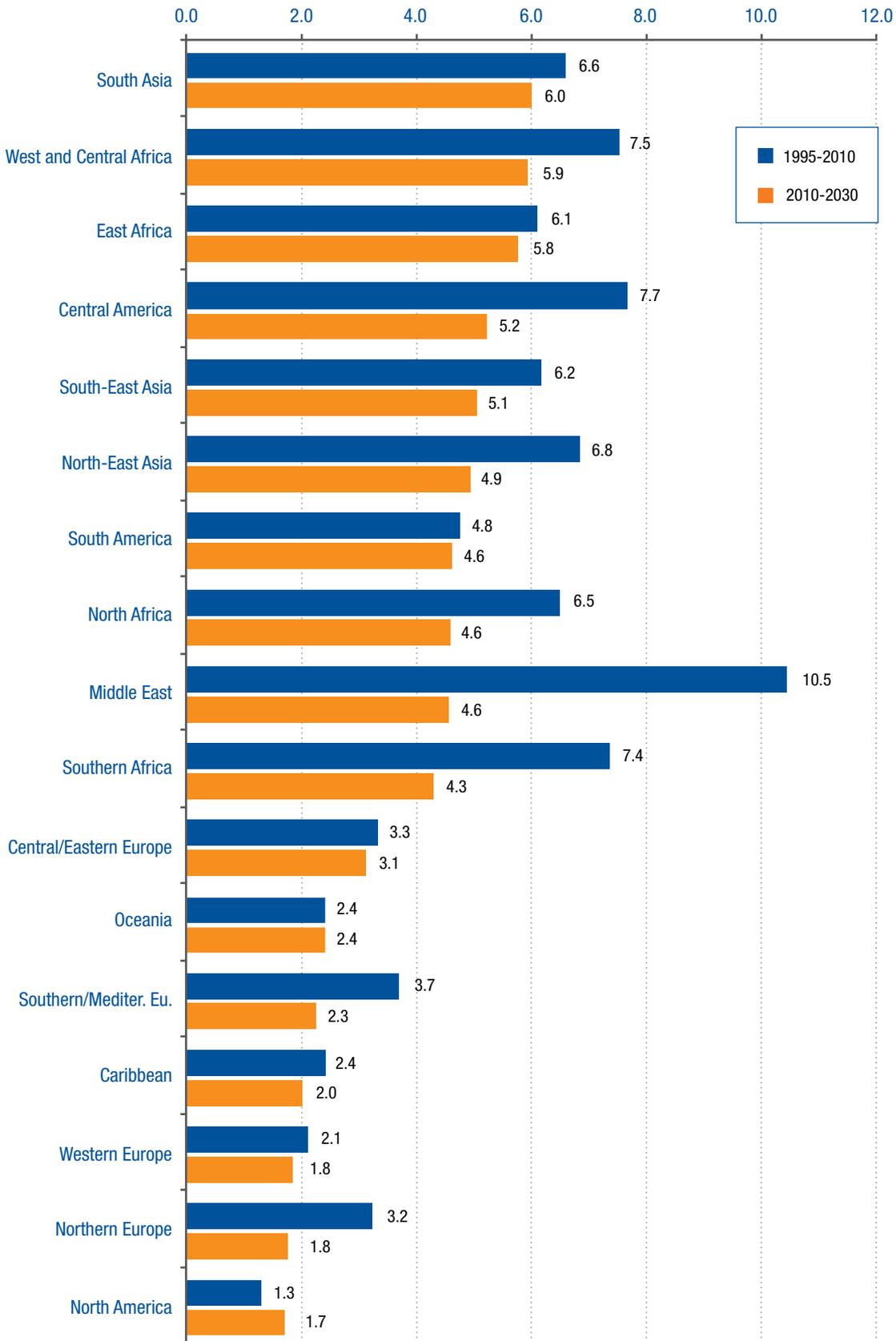
By 2030, North East Asia will be the most visited subregion, representing 16% of total arrivals (up from 12% in 2010), taking over from Southern and Mediterranean Europe, with a share of 18% in 2010 (down to 15% in 2030). In 2010, West and Central Africa was the least visited subregion with a share of 0.7%, but this will rise to 1.2% in 2030, while Oceania will be the least visited subregion in 2030 with a share of 1.0%, down from 1.2% in 2010.

### **Europe will continue to lead in international arrivals received per 100 of population**

Western Europe, Southern and Mediterranean Europe, and Northern Europe continue to lead in terms of the number of international arrivals received in relation to population size. They are projected to receive respectively 114, 103 and 80 arrivals per 100 of population in 2030. The Caribbean

# International tourism by (sub)region of destination

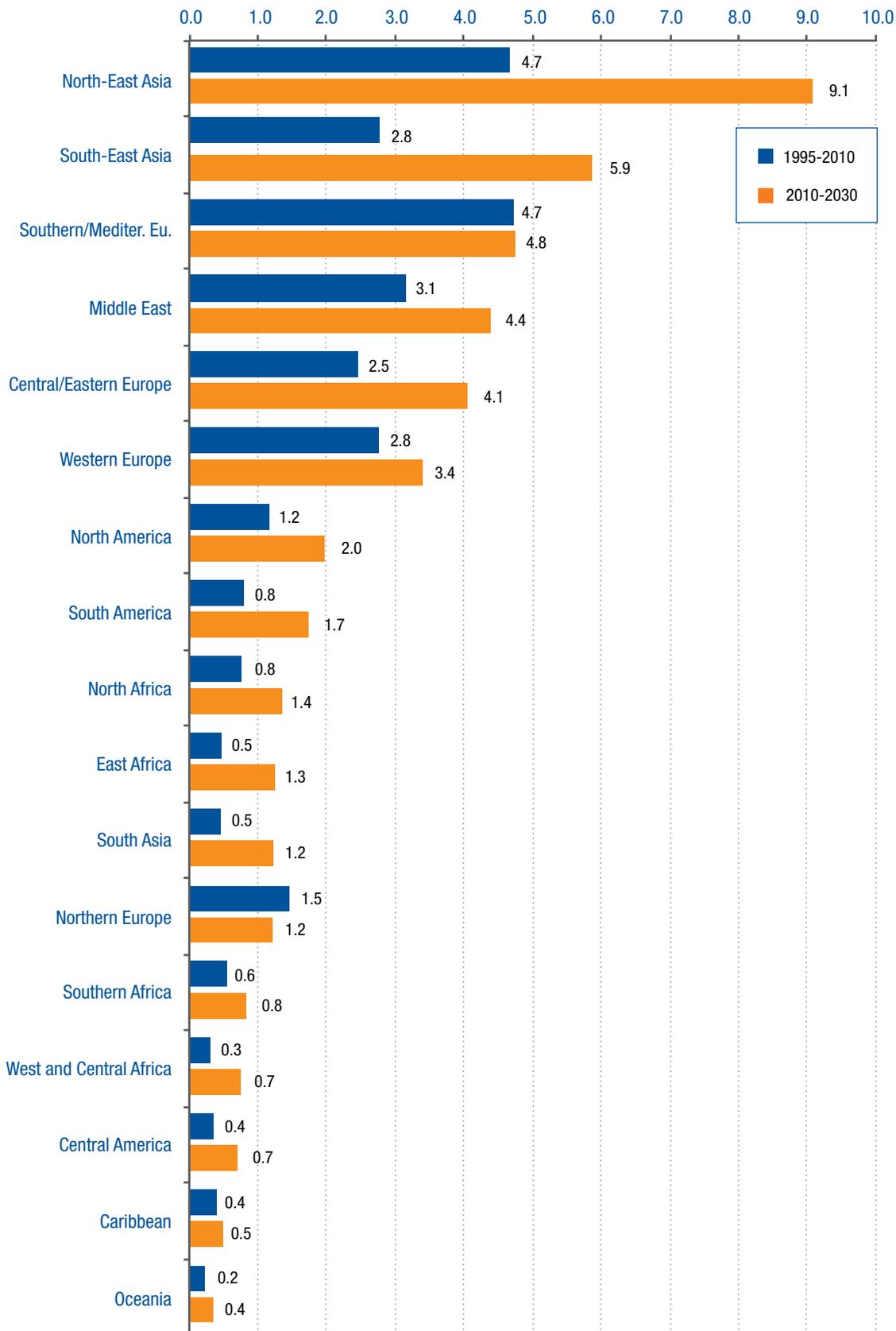
International tourist arrivals, average annual growth, %



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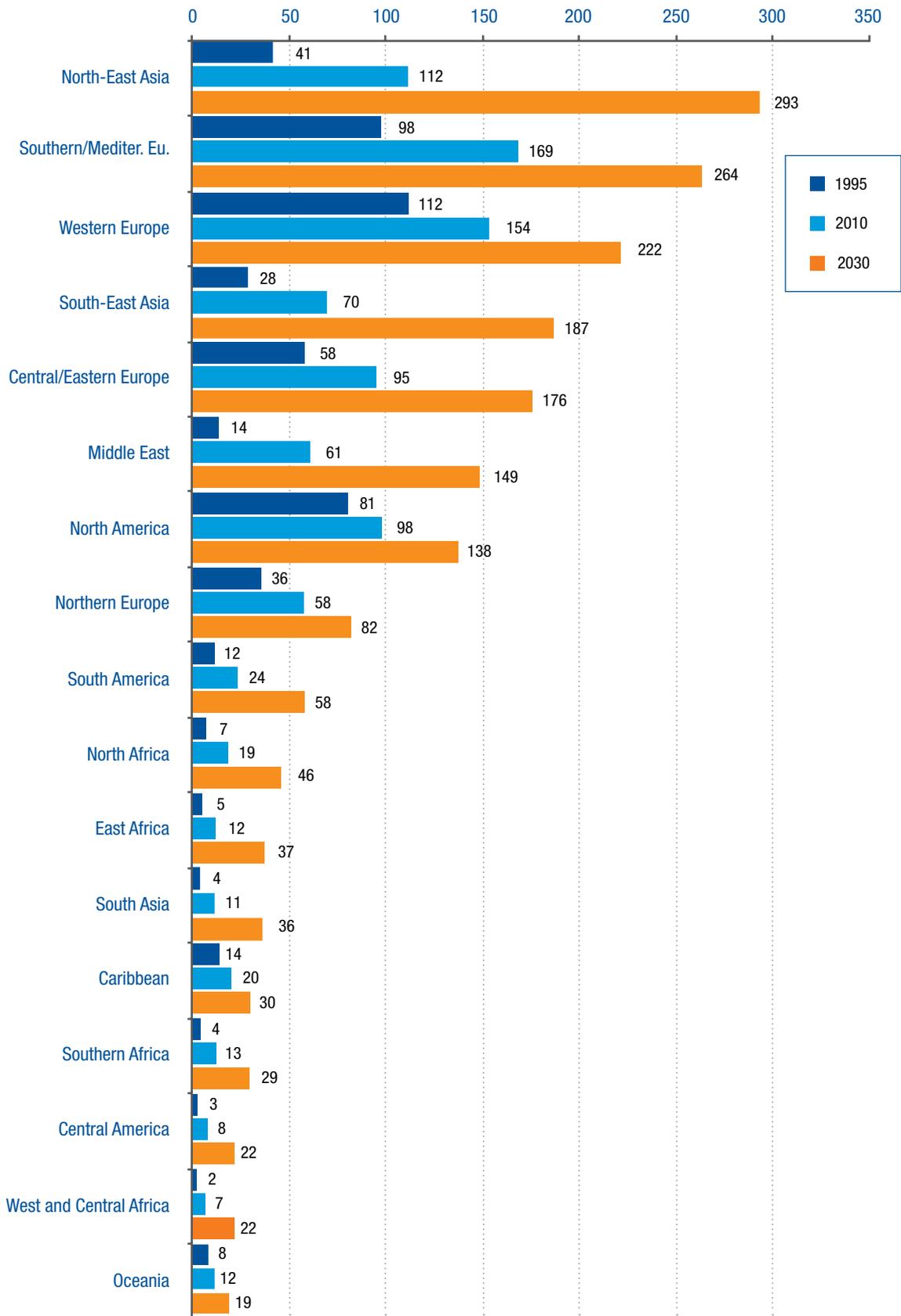
## International tourism by (sub)region of destination

International tourist arrivals, average absolute change over previous year, million



# International tourism by (sub)region of destination

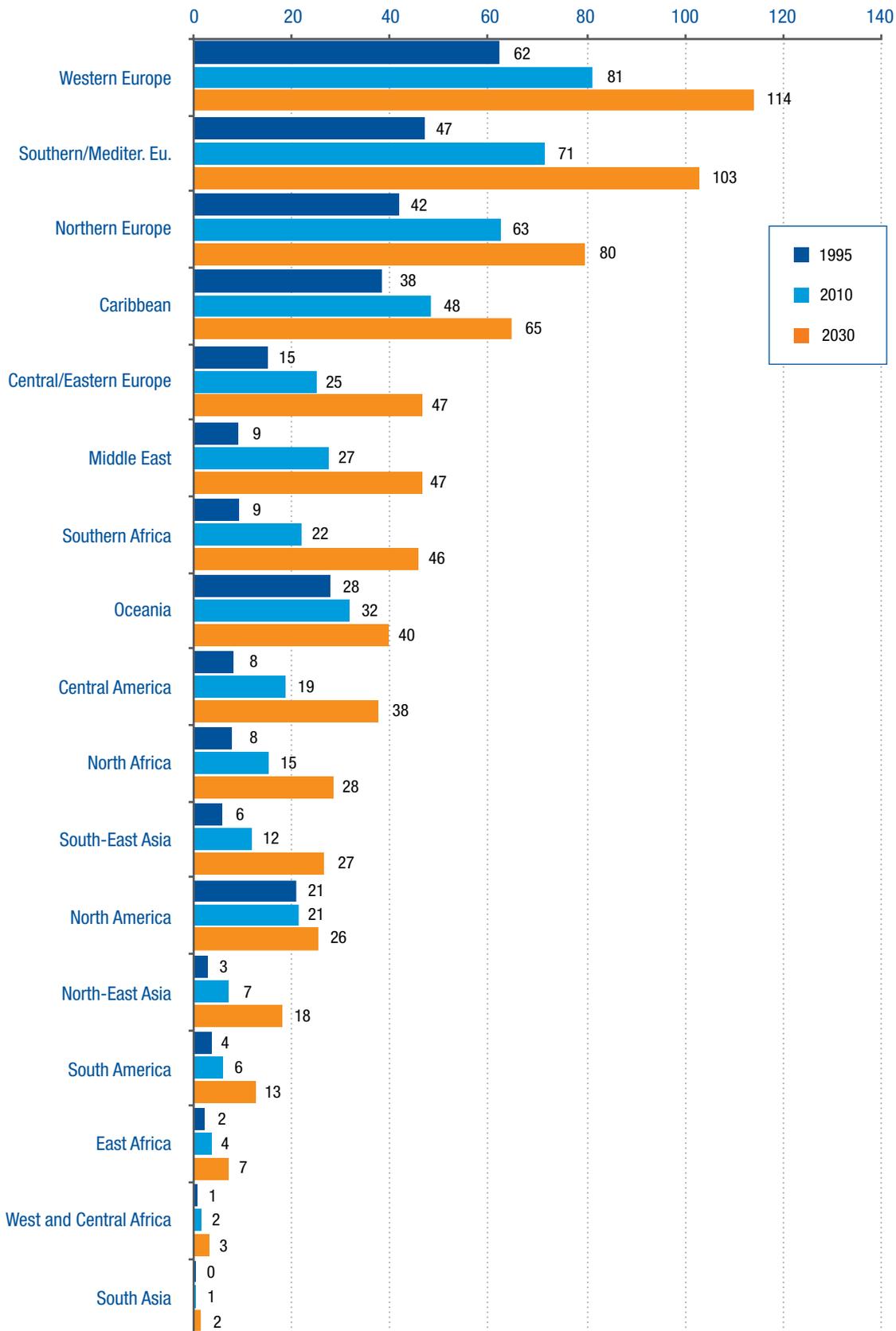
International tourist arrivals, million



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## International tourism by (sub)region of destination

International tourist arrivals received per 100 of population



follows with 65 arrivals per 100 of population in 2030. All four subregions are comprised of comparatively many smaller and well established destination countries. Runners-up in the list are the less mature destinations of Central and Eastern Europe, the Middle East and Southern Africa with arrivals around or just below 50 per 100 of population.

### Asia and the Pacific will also be the outbound region that grows most

A large portion of the new arrivals in the two decades 2010-2030 will originate from the countries of Asia and the Pacific. Africa, however, records the highest rate of growth at an average of 5.7% a year, with Asia and the Pacific following at 5.0% a year.

As the base volume of Africa is small, in absolute numbers Asia and the Pacific is the region that grows most, generating on average an additional 17 million international arrivals every year.

Europe follows with an average of 16 million extra arrivals a year, resulting from a much more moderate growth rate (+2.5% a year), but on top of a much larger base.

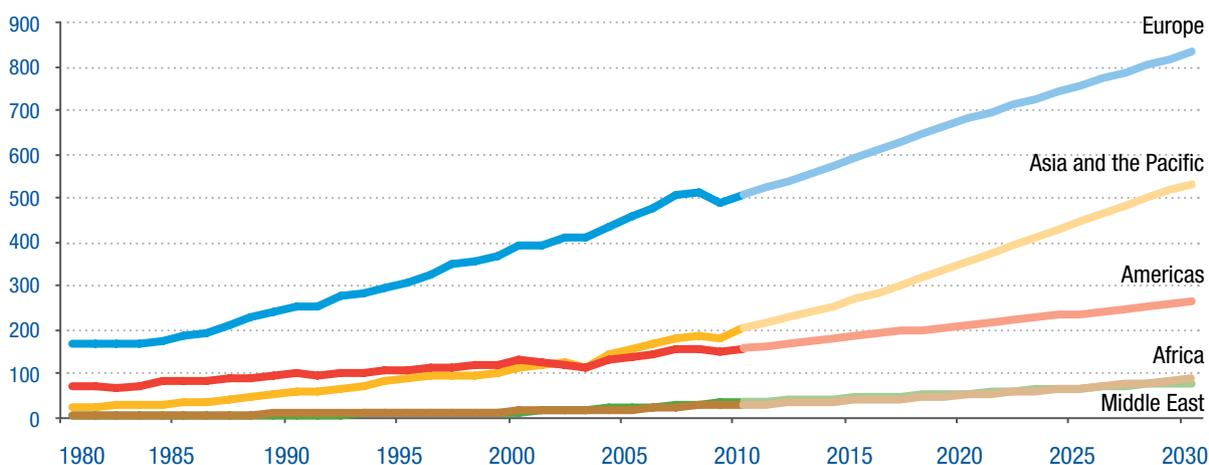
The remaining 10 million additional yearly arrivals are generated by the Americas (5 million), Africa (3 million) and the Middle East (2 million).

In 2030, Europe will generate a projected 832 million international arrivals, followed by Asia and the Pacific with 581 million, the Americas with 264 million, Africa with 90 million and the Middle East with 81 million.

### Outbound tourism participation is highest in Europe and still low in Asia and the Pacific

Per 100 of population, the number of international tourist arrivals generated in the world is set to increase from 14 per 100 in 2010 to 22 in 2030. By region there is quite a wide variation. Europe has the highest participation, which is expected to increase from 57 arrivals per 100 of

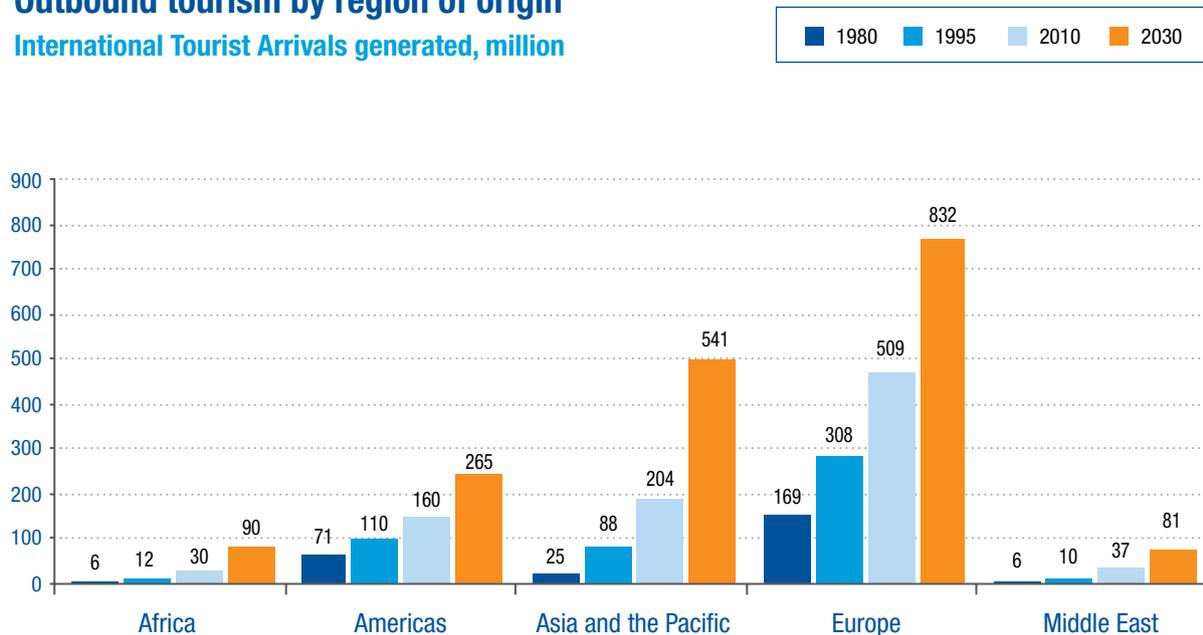
**Outbound tourism by region of origin**  
International Tourist Arrivals generated, million



Source: World Tourism Organization (UNWTO) ©

## Outbound tourism by region of origin

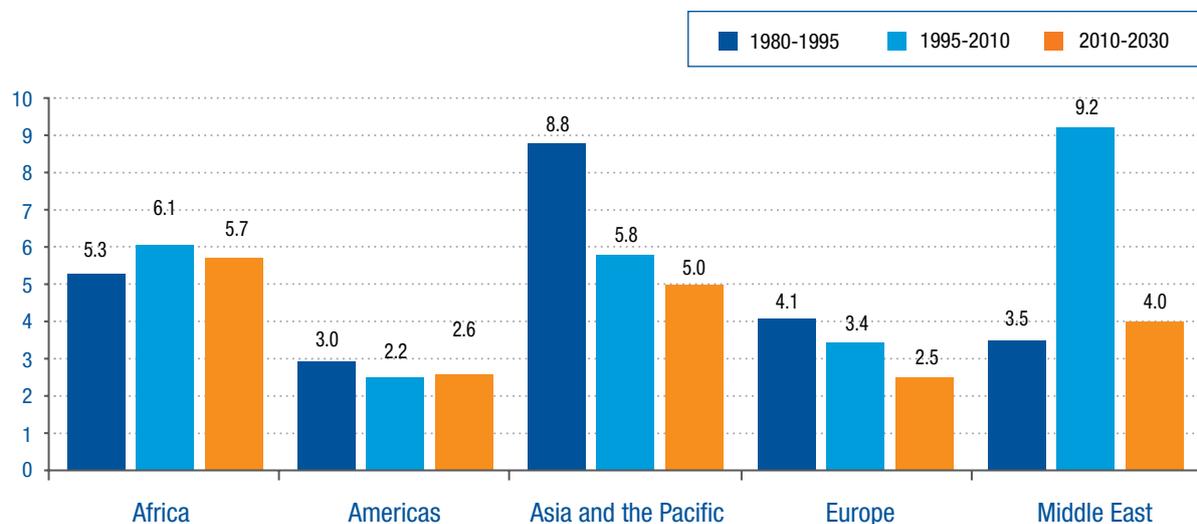
International Tourist Arrivals generated, million



Source: World Tourism Organization (UNWTO) ©

## Outbound tourism by region of origin

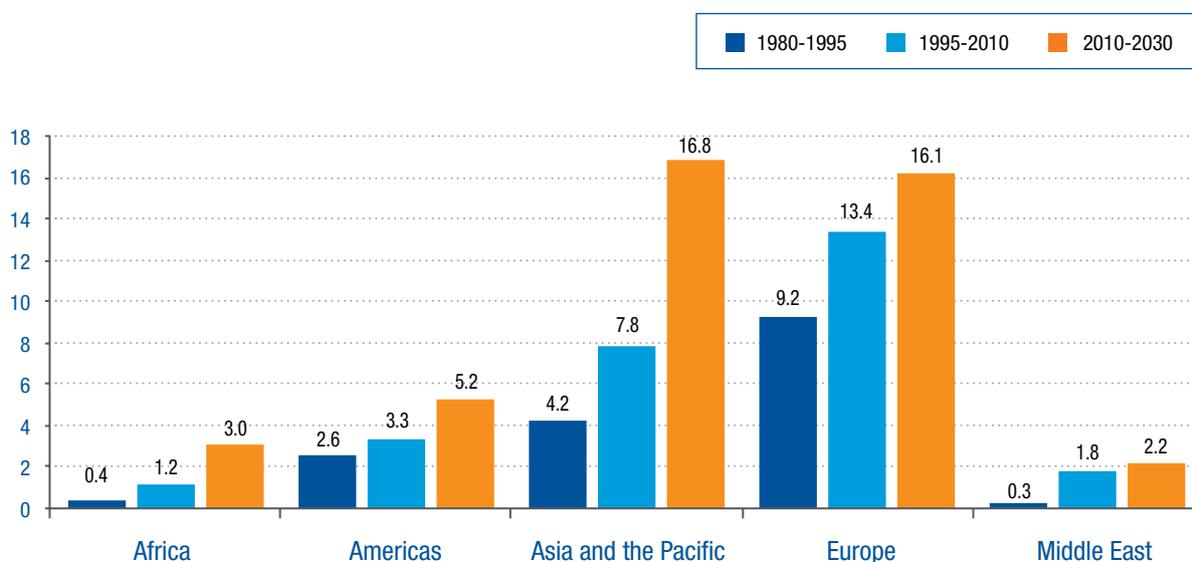
International Tourist Arrivals generated, average annual growth rate, %



Source: World Tourism Organization (UNWTO) ©

## Outbound tourism by region of origin

International Tourist Arrivals generated, absolute change over previous year, million



Source: World Tourism Organization (UNWTO) ©

population in 2010 to 89 in 2030. In Asia and the Pacific the number is much lower, as the region has a very large population that has only just started to take part in international tourism. Between 2010 and 2030 Asia and the Pacific will more than double its arrivals generated per 100 population, from 5 to 12. Africa has the lowest number of international arrivals generated per 100 of population and is expected to double numbers from 3 to 6 in two decades. In the Americas the number of arrivals generated per 100 of population will grow from 17 to 24 and in the Middle East from 17 to 25.

### Travel between regions will continue to grow slightly faster than travel within the same region

The large majority of arrivals in 2030 originate from the same region: 1.4 billion (78%) compared with 0.4 billion

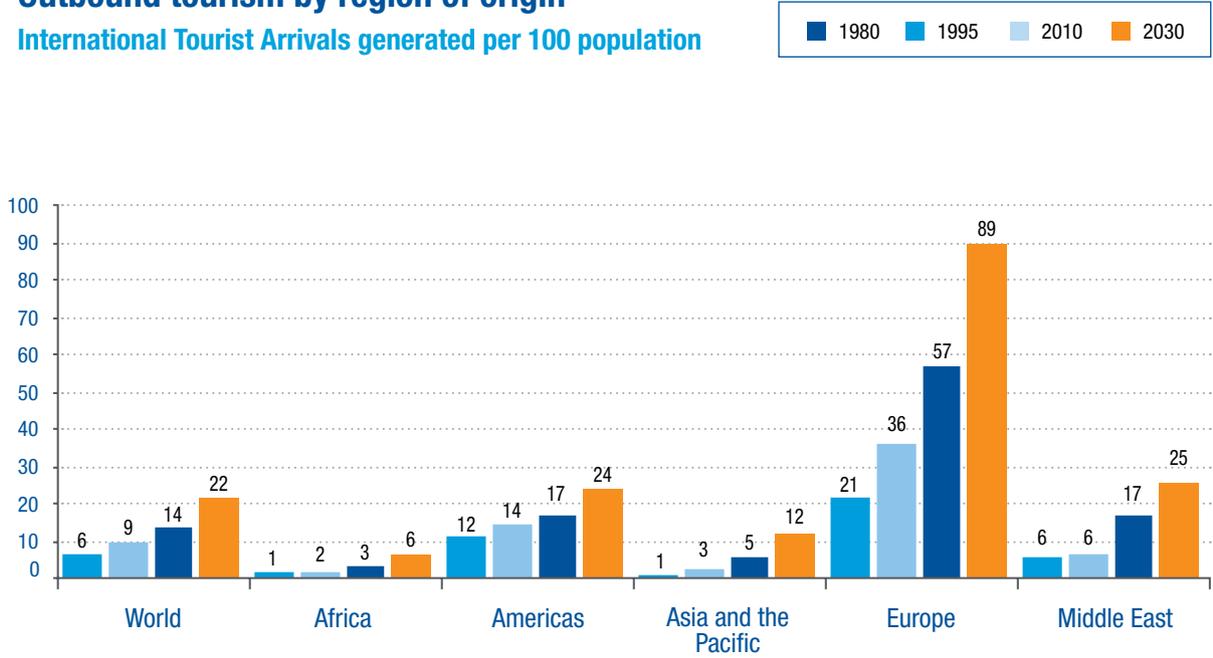
from another region (22%). As growth rates vary, in fast growing outbound regions such as Asia and the Pacific the share of arrivals from within the region will still rise somewhat (from 78% in 2010 to 80% in 2030), while in slower growing outbound regions such as Europe it will be going down (from 87% in 2010 to 86% in 2030).

### Air transport will continue to increase its market share, but at a much slower pace

Over the past three decades travel by air has outgrown travel over the surface (road, rail, water) by a considerable margin, respectively at a rate of 5.2% a year versus 3.4% a year. Since 2006 more international arrivals have been reaching their destination by air than over the surface, compared to 38% in 1980. Air transport is expected to continue to grow at a slightly faster pace

## Outbound tourism by region of origin

### International Tourist Arrivals generated per 100 population



Source: World Tourism Organization (UNWTO) ©

of 3.4% a year, versus 3.2% a year for transport over the surface. By 2030 52% of international arrivals are expected to arrive by air versus 48% over the surface.



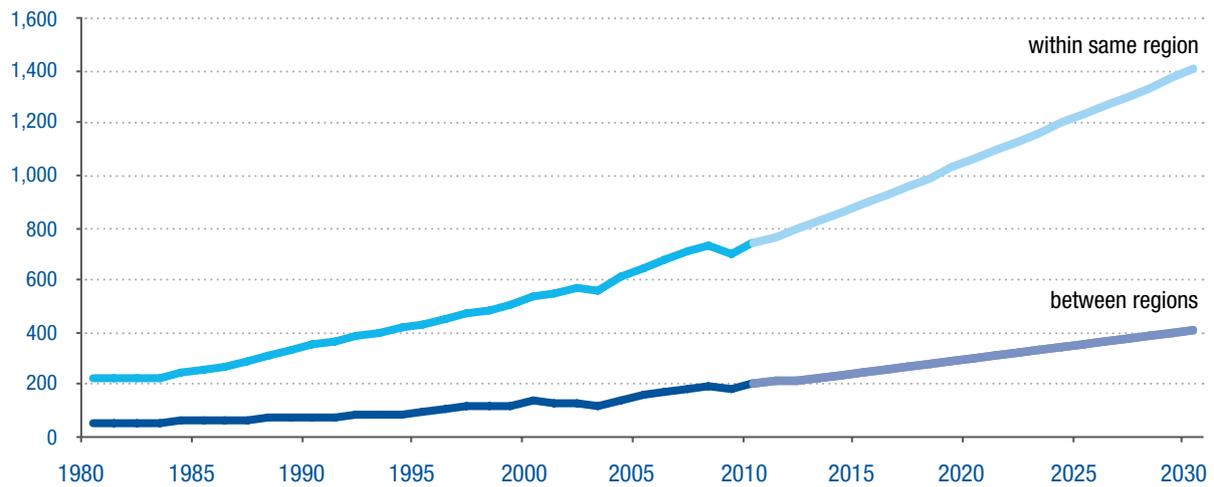
## Arrivals for VFR, health, religion and other purposes grow slightly faster than arrivals for leisure or business

The breakdown of arrivals by purpose of visit is not expected to vary substantially over time. Arrivals for leisure, recreation and holidays will grow at the same rate as the total of arrivals (3.3% a year), while arrivals for the purpose of visiting friends and relatives (VFR), health, religion and other will grow slightly faster, at 3.5% a year, and arrivals for business and professional purposes slightly slower, at 3.1% a year.

By 2030, VFR, health, religion and other purposes will represent 31% of all international arrivals, leisure, recreation and holidays 54%, and business and professional 15%. ◀

## International tourism by region of destination and origin

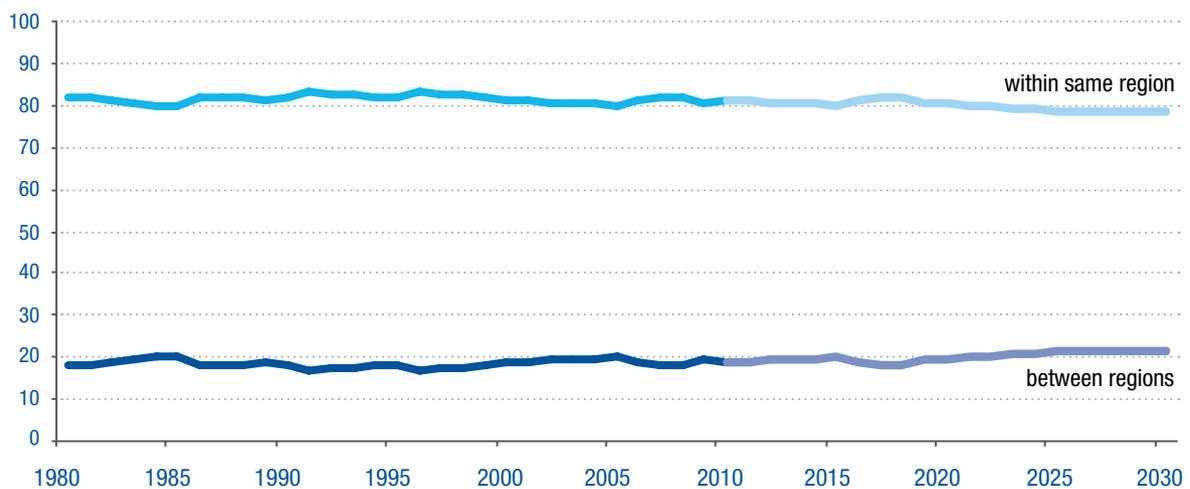
International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## International tourism by region of destination and origin

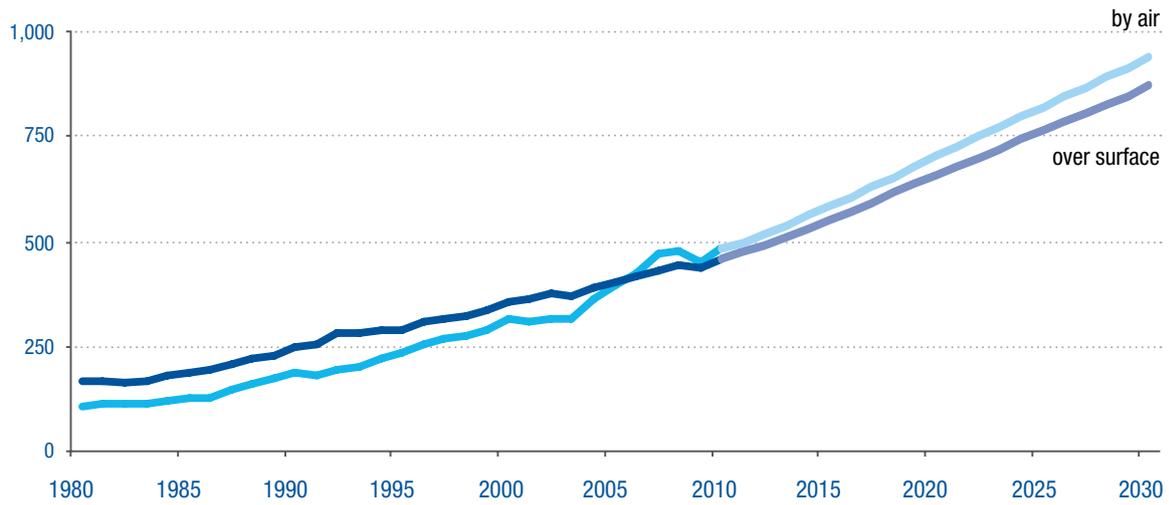
International Tourist Arrivals, share, %



Source: World Tourism Organization (UNWTO) ©

## International tourism by means of transport

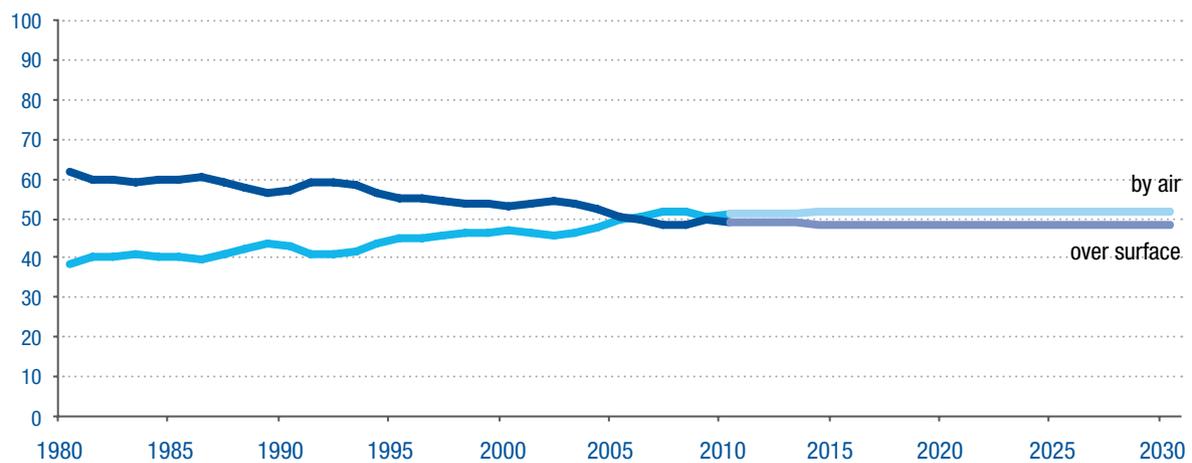
International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## International tourism by means of transport

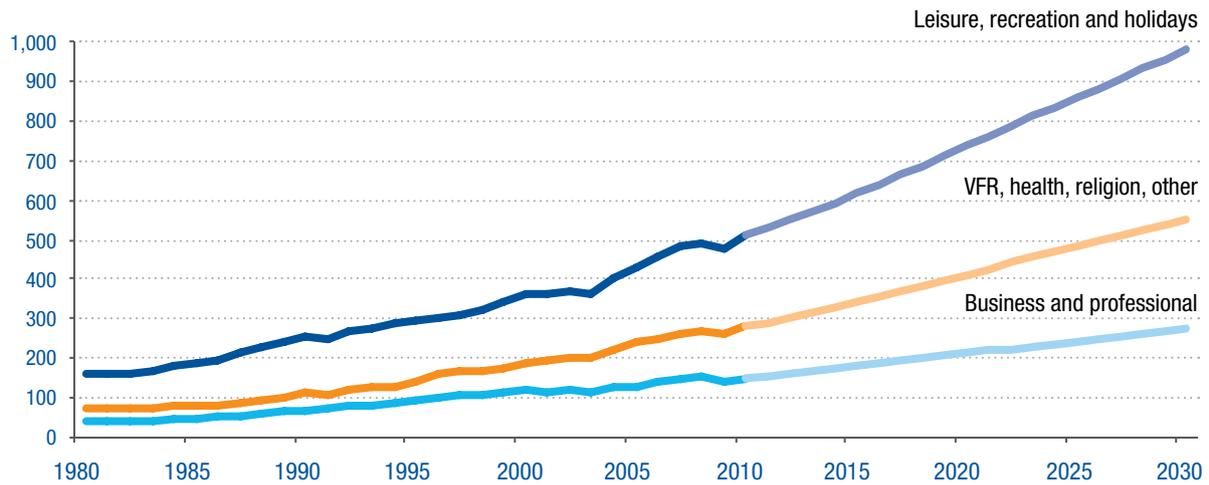
International Tourist Arrivals, share, %



Source: World Tourism Organization (UNWTO) ©

## International tourism by purpose of visit

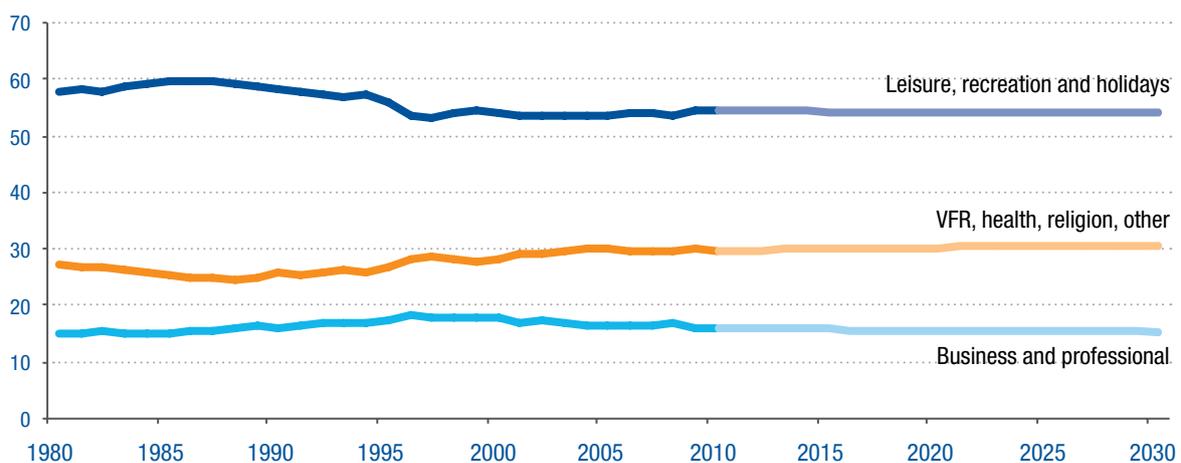
International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

## International tourism by purpose of visit

International Tourist Arrivals in Europe, share, %



Source: World Tourism Organization (UNWTO) ©



## What if assumptions change?

Sensitivity analysis has been conducted looking at the impact on the forecasts of using alternative scenarios, varying assumptions with regard to economic growth and the evolution of transport cost. The results show that economic growth is a much more influential variable than transport cost. How would variations in the key drivers affect the pace of growth of international tourist arrivals? What happens if world Gross Domestic Product (GDP) growth slows down or transport cost increases more rapidly? To understand the potential impacts of such variations in key drivers, a sensitivity analysis has been performed on three alternative scenarios:

- **Scenario 1: slower than expected recovery from the 2008-2009 crisis in the short term, and lower growth in global GDP into the medium term;**
- **Scenario 2: transport costs increase at a faster rate than in the central projection;**
- **Scenario 3: transport costs continue their decline, at a similar rate to that has occurred over the past 20 years.**

In the central scenario, international tourist arrivals worldwide are expected to grow at an average annual rate of 3.3% and to reach 1.8 billion by 2030. In alternative scenarios, international tourist arrivals development would be as follows:

- **A slower-than-expected economic recovery and future growth (Scenario 1): If world GDP annual average growth should turn out to be lower than in the central scenario (2.8% instead of 4.0% per year (weighted at purchasing power parity (PPP))), international tourists arrivals would grow at an average annual rate of 2.0% to 1.4 billion in 2030 – approximately 22% less than in the central scenario. The reduction would be stronger if GDP growth slows down only in Europe, Asia or Africa, where travel demand elasticity to GDP is higher. Vice versa, a lower than**

**expected GDP growth in the Middle East and Americas would generate a more modest reduction in world demand for tourism.**

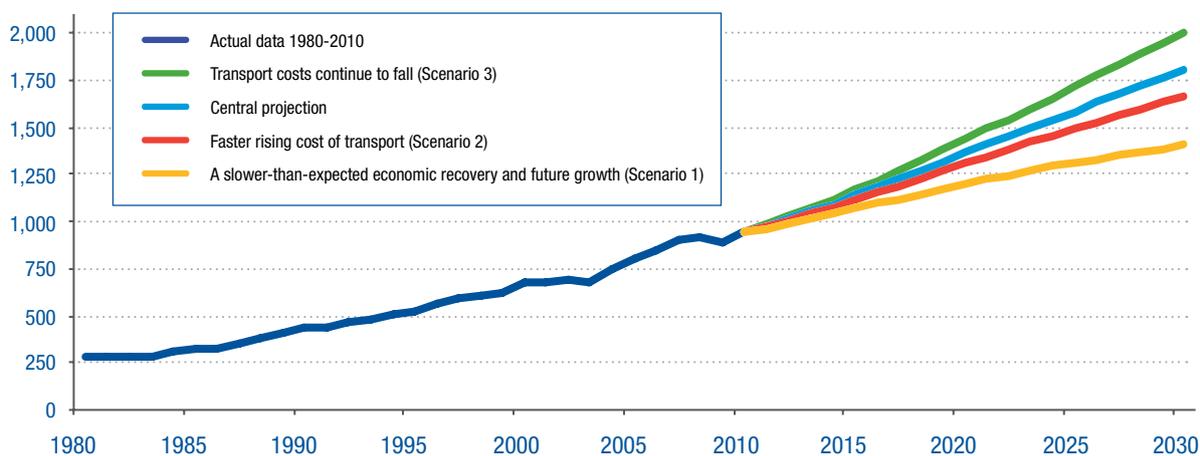
- **Faster rising cost of transport (Scenario 2): An increase in transport costs of 1% generates a decrease in international tourist arrivals of 0.6%. In a scenario where transport costs growth would be steeper than in the central scenario (2.1% instead of 1.4% per year), international tourist arrivals would grow at an average annual rate of 2.9%, to 1.66 billion by 2030 (approximately 8% less than in the central scenario).**
- **Transport costs continue to fall (Scenario 3): Similarly, if transport costs should continue decreasing at a rate of 0.9% each year, international tourist arrivals would grow at an average annual rate of 3.9%, to 2.0 billion by 2030 (approximately 11% more than in the central scenario).**

Compared to economic growth, transport cost has a more limited impact on the overall number of arrivals. However, variation in transport costs will influence trip characteristics such as distance travelled, destination choice, length of stay and mode of transport. Transport cost does not so much determine whether one will travel, but where and how one travels. A faster than assumed rise of transport costs would encourage staying closer to home and would decrease travel between regions, while a slower rise or even further decrease would do the opposite.

In this sensitivity analysis the impact of variations of both variables are assessed separately. However, in practice there might be a mitigating effect as to some extent both variables are interrelated inversely. Strong economic growth would boost demand for energy and drive up its price and consequently transport costs, while weak growth would have a moderating effect on transport costs. ◀

## Tourism Towards 2030: global projection and sensitivity analysis

### International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©



# Epilogue

Over the past half century tourism has developed into a key driver of socio-economic progress through the creation of jobs and enterprises, infrastructure development and the export revenues earned, both for advanced and emerging economies. *Tourism Towards 2030* shows that there is still a substantial potential for further expansion in coming decades. Existing as well as new destinations can benefit from this opportunity, provided they do the necessary to shape the adequate conditions with regard to business environment, infrastructure and facilitation.

Along with this opportunity challenges also arise in maximising social and economic benefits and minimising negative impacts. In other words, all tourism development needs to be guided by the principles of sustainable development. Expressed simply, sustainable tourism can be defined as: 'Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'.

## UNWTO definition of sustainable tourism:

Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Thus, sustainable tourism should:

- 1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity.
- 2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

Conceptual Definition, in: *Making Tourism More Sustainable - A Guide for Policy Makers*; UNWTO-UNEP 2004

*Tourism Towards 2030* - Regional Reports will be prepared in the course of the coming half year to be presented at the regional commission meetings: (Africa and the Middle-East, Americas, Asia and the Pacific, and Europe): a series of 4 studies about tourism development through 2030 at regional level, with synthetic information about trends and forecasts at global level, detailed illustration of regional projections and key trends, and the analysis of opportunities and challenges for each region.

# Annex: Comprehensive Statistical Tables

## International tourism by (sub)region of destination

|                                | International Tourist Arrivals received (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |             |                     |            |            | Market share (%) |             |             |             |             |
|--------------------------------|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|-------------|---------------------|------------|------------|------------------|-------------|-------------|-------------|-------------|
|                                | actual data                                       |              |              |              |              |              | projections  |              | actual data               |            |             | projections         |            |            | actual data      |             |             | projections |             |
|                                | 1980  | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |             | 2010-2030, of which |            |            | 1980             | 1995        | 2010        | 2020        | 2030        |
|                                |   |              |              |              |              |              |              |              | 1980-'95                  | '95-2010   |             | 2010-'20            | 2020-'30   |            |                  |             |             |             |             |
| <b>World</b>                   | <b>277</b>  | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b>  | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b>  | <b>100</b>  | <b>100</b>  | <b>100</b>  |
| to Advanced economies          | 194   | 296          | 334          | 417          | 453          | 498          | 643          | 772          | 3.2                       | 3.7        | 2.7         | 2.2                 | 2.6        | 1.8        | 70               | 63          | 53          | 47          | 43          |
| to Emerging economies          | 83  | 139          | 193          | 257          | 345          | 442          | 717          | 1,037        | 5.8                       | 5.8        | 5.7         | 4.4                 | 4.9        | 3.8        | 30               | 37          | 47          | 53          | 57          |
| <b>By UNWTO regions:</b>       |   |              |              |              |              |              |              |              |                           |            |             |                     |            |            |                  |             |             |             |             |
| <b>Africa</b>                  | <b>7.2</b>  | <b>14.8</b>  | <b>18.9</b>  | <b>26.5</b>  | <b>35.4</b>  | <b>50.3</b>  | <b>85</b>    | <b>134</b>   | <b>6.7</b>                | <b>6.7</b> | <b>6.7</b>  | <b>5.0</b>          | <b>5.4</b> | <b>4.6</b> | <b>2.6</b>       | <b>3.6</b>  | <b>5.3</b>  | <b>6.3</b>  | <b>7.4</b>  |
| North Africa                   | 4.0   | 8.4          | 7.3          | 10.2         | 13.9         | 18.7         | 31           | 46           | 5.3                       | 4.1        | 6.5         | 4.6                 | 5.2        | 4.0        | 1.4              | 1.4         | 2.0         | 2.3         | 2.5         |
| West Africa and Central Africa | 1.0   | 1.7          | 2.3          | 3.1          | 4.4          | 6.8          | 13           | 22           | 6.7                       | 5.9        | 7.5         | 5.9                 | 6.5        | 5.4        | 0.4              | 0.4         | 0.7         | 0.9         | 1.2         |
| East Africa                    | 1.2   | 2.8          | 5.0          | 6.6          | 8.5          | 12.1         | 22           | 37           | 8.1                       | 10.1       | 6.1         | 5.8                 | 6.2        | 5.4        | 0.4              | 0.9         | 1.3         | 1.6         | 2.1         |
| Southern Africa                | 1.0   | 1.9          | 4.3          | 6.5          | 8.6          | 12.6         | 20           | 29           | 8.7                       | 10.1       | 7.4         | 4.3                 | 4.5        | 4.1        | 0.4              | 0.8         | 1.3         | 1.4         | 1.6         |
| <b>Americas</b>                | <b>62.3</b>                                       | <b>92.8</b>  | <b>109.0</b> | <b>128.2</b> | <b>133.3</b> | <b>149.7</b> | <b>199</b>   | <b>248</b>   | <b>3.0</b>                | <b>3.8</b> | <b>2.1</b>  | <b>2.6</b>          | <b>2.9</b> | <b>2.2</b> | <b>22.5</b>      | <b>20.7</b> | <b>15.9</b> | <b>14.6</b> | <b>13.7</b> |
| North America                  | 48.3  | 71.7         | 80.7         | 91.5         | 89.9         | 98.2         | 120          | 138          | 2.4                       | 3.5        | 1.3         | 1.7                 | 2.0        | 1.4        | 17.5             | 15.3        | 10.4        | 8.8         | 7.6         |
| Caribbean                      | 6.7   | 11.4         | 14.0         | 17.1         | 18.8         | 20.1         | 25           | 30           | 3.7                       | 5.0        | 2.4         | 2.0                 | 2.4        | 1.7        | 2.4              | 2.7         | 2.1         | 1.9         | 1.7         |
| Central America                | 1.5   | 1.9          | 2.6          | 4.3          | 6.3          | 7.9          | 14           | 22           | 5.7                       | 3.8        | 7.7         | 5.2                 | 6.0        | 4.5        | 0.5              | 0.5         | 0.8         | 1.0         | 1.2         |
| South America                  | 5.8   | 7.7          | 11.7         | 15.3         | 18.3         | 23.6         | 40           | 58           | 4.8                       | 4.8        | 4.8         | 4.6                 | 5.3        | 3.9        | 2.1              | 2.2         | 2.5         | 2.9         | 3.2         |
| <b>Asia and the Pacific</b>    | <b>22.8</b>                                       | <b>55.8</b>  | <b>82.0</b>  | <b>110.1</b> | <b>153.6</b> | <b>204.0</b> | <b>355</b>   | <b>535</b>   | <b>7.6</b>                | <b>8.9</b> | <b>6.3</b>  | <b>4.9</b>          | <b>5.7</b> | <b>4.2</b> | <b>8.2</b>       | <b>15.5</b> | <b>21.7</b> | <b>26.1</b> | <b>29.6</b> |
| North-East Asia                | 10.1  | 26.4         | 41.3         | 58.3         | 85.9         | 111.5        | 195          | 293          | 8.3                       | 9.9        | 6.8         | 4.9                 | 5.7        | 4.2        | 3.6              | 7.8         | 11.9        | 14.3        | 16.2        |
| South-East Asia                | 8.2   | 21.2         | 28.4         | 36.1         | 48.5         | 69.9         | 123          | 187          | 7.4                       | 8.7        | 6.2         | 5.1                 | 5.8        | 4.3        | 3.0              | 5.4         | 7.4         | 9.1         | 10.3        |
| Oceania                        | 2.3   | 5.2          | 8.1          | 9.6          | 11.0         | 11.6         | 15           | 19           | 5.5                       | 8.7        | 2.4         | 2.4                 | 2.9        | 2.0        | 0.8              | 1.5         | 1.2         | 1.1         | 1.0         |
| South Asia                     | 2.2   | 3.2          | 4.2          | 6.1          | 8.1          | 11.1         | 21           | 36           | 5.5                       | 4.3        | 6.6         | 6.0                 | 6.8        | 5.3        | 0.8              | 0.8         | 1.2         | 1.6         | 2.0         |
| <b>Europe</b>                  | <b>177.3</b>                                      | <b>261.5</b> | <b>304.1</b> | <b>385.1</b> | <b>438.7</b> | <b>475.3</b> | <b>620</b>   | <b>744</b>   | <b>3.3</b>                | <b>3.7</b> | <b>3.0</b>  | <b>2.3</b>          | <b>2.7</b> | <b>1.8</b> | <b>64.1</b>      | <b>57.6</b> | <b>50.6</b> | <b>45.6</b> | <b>41.1</b> |
| Northern Europe                | 20.4  | 28.6         | 35.8         | 43.7         | 57.3         | 57.7         | 72           | 82           | 3.5                       | 3.8        | 3.2         | 1.8                 | 2.2        | 1.4        | 7.4              | 6.8         | 6.1         | 5.3         | 4.5         |
| Western Europe                 | 68.3  | 108.6        | 112.2        | 139.7        | 141.7        | 153.7        | 192          | 222          | 2.7                       | 3.4        | 2.1         | 1.8                 | 2.3        | 1.4        | 24.7             | 21.3        | 16.3        | 14.1        | 12.3        |
| Central/Eastern Europe         | 26.6  | 33.9         | 58.1         | 69.3         | 87.5         | 95.0         | 137          | 176          | 4.3                       | 5.3        | 3.3         | 3.1                 | 3.7        | 2.5        | 9.6              | 11.0        | 10.1        | 10.1        | 9.7         |
| Southern/Mediter. Eu.          | 61.9  | 90.3         | 98.0         | 132.5        | 152.3        | 168.9        | 219          | 264          | 3.4                       | 3.1        | 3.7         | 2.3                 | 2.6        | 1.9        | 22.4             | 18.6        | 18.0        | 16.1        | 14.6        |
| <b>Middle East</b>             | <b>7.1</b>  | <b>9.6</b>   | <b>13.7</b>  | <b>24.1</b>  | <b>36.3</b>  | <b>60.9</b>  | <b>101</b>   | <b>149</b>   | <b>7.4</b>                | <b>4.5</b> | <b>10.5</b> | <b>4.6</b>          | <b>5.2</b> | <b>4.0</b> | <b>2.6</b>       | <b>2.6</b>  | <b>6.5</b>  | <b>7.4</b>  | <b>8.2</b>  |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by economic development stage and region of destination

|                              | International Tourist Arrivals received (million) |       |       |       |       |       |             |          | Average annual growth (%) |          |      |                     |     |          | Market share (%) |      |      |             |      |  |
|------------------------------|---|-------|-------|-------|-------|-------|-------------|----------|---------------------------|----------|------|---------------------|-----|----------|------------------|------|------|-------------|------|--|
|                              | actual data                                       |       |       |       |       |       | projections |          | actual data               |          |      | projections         |     |          | actual data      |      |      | projections |      |  |
|                              | 1980  | 1990  | 1995  | 2000  | 2005  | 2010  | 2020        | 2030     | 1980-2010, of which       |          |      | 2010-2030, of which |     |          | 1980             | 1995 | 2010 | 2020        | 2030 |  |
|                              |   |       |       |       |       |       |             | 1980-'95 |                           | '95-2010 |      | 2010-'20            |     | 2020-'30 |                  |      |      |             |      |  |
| <b>World</b>                 | 277   | 435   | 528   | 674   | 797   | 940   | 1,360       | 1,809    | 4.2                       | 4.4      | 3.9  | 3.3                 | 3.8 | 2.9      | 100              | 100  | 100  | 100         | 100  |  |
| <b>to Advanced economies</b> | 194.1   | 296.0 | 334.2 | 417.4 | 452.6 | 497.8 | 643         | 772      | 3.2                       | 3.7      | 2.7  | 2.2                 | 2.6 | 1.8      | 70.1             | 63.3 | 52.9 | 47.3        | 42.7 |  |
| <b>In</b>                    |   |       |       |       |       |       |             |          |                           |          |      |                     |     |          |                  |      |      |             |      |  |
| Americas                     | 35.4  | 54.6  | 60.4  | 70.9  | 68.0  | 75.9  | 91          | 104      | 2.6                       | 3.6      | 1.5  | 1.6                 | 1.9 | 1.3      | 12.8             | 11.4 | 8.1  | 6.7         | 5.7  |  |
| Asia and the Pacific         | 10.3  | 23.7  | 32.2  | 39.5  | 53.3  | 72.6  | 121         | 176      | 6.7                       | 7.9      | 5.6  | 4.5                 | 5.2 | 3.8      | 3.7              | 6.1  | 7.7  | 8.9         | 9.7  |  |
| Europe                       | 148.4   | 217.7 | 241.6 | 307.1 | 331.2 | 349.4 | 431         | 492      | 2.9                       | 3.3      | 2.5  | 1.7                 | 2.1 | 1.3      | 53.6             | 45.8 | 37.2 | 31.7        | 27.2 |  |
| <b>to Emerging economies</b> | 82.6  | 138.6 | 193.5 | 256.6 | 344.7 | 442.4 | 717         | 1,037    | 5.8                       | 5.8      | 5.7  | 4.4                 | 4.9 | 3.8      | 29.9             | 36.7 | 47.1 | 52.7        | 57.3 |  |
| <b>In</b>                    |   |       |       |       |       |       |             |          |                           |          |      |                     |     |          |                  |      |      |             |      |  |
| Africa                       | 7.2   | 14.8  | 18.9  | 26.5  | 35.4  | 50.3  | 85          | 134      | 6.7                       | 6.7      | 6.7  | 5.0                 | 5.4 | 4.6      | 2.6              | 3.6  | 5.3  | 6.3         | 7.4  |  |
| Americas                     | 26.9  | 38.2  | 48.6  | 57.3  | 65.3  | 73.9  | 108         | 144      | 3.4                       | 4.0      | 2.8  | 3.4                 | 3.8 | 3.0      | 9.7              | 9.2  | 7.9  | 7.9         | 8.0  |  |
| Asia and the Pacific         | 12.5  | 32.2  | 49.8  | 70.6  | 100.3 | 131.5 | 234         | 358      | 8.2                       | 9.7      | 6.7  | 5.1                 | 5.9 | 4.4      | 4.5              | 9.4  | 14.0 | 17.2        | 19.8 |  |
| Europe                       | 28.9  | 43.7  | 62.5  | 78.1  | 107.5 | 126.0 | 189         | 252      | 5.0                       | 5.3      | 4.8  | 3.5                 | 4.2 | 2.9      | 10.4             | 11.8 | 13.4 | 13.9        | 13.9 |  |
| Middle East                  | 7.1   | 9.6   | 13.7  | 24.1  | 36.3  | 60.9  | 101         | 149      | 7.4                       | 4.5      | 10.5 | 4.6                 | 5.2 | 4.0      | 2.6              | 2.6  | 6.5  | 7.4         | 8.2  |  |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by (sub)region of destination per 100 of population

|                             | International Tourist Arrivals received per 100 of population |           |           |           |           |           |             |           | Average annual growth (%) |            |                     |             |            |            |
|-----------------------------|---|-----------|-----------|-----------|-----------|-----------|-------------|-----------|---------------------------|------------|---------------------|-------------|------------|------------|
|                             | actual data   |           |           |           |           |           | projections |           | actual data               |            |                     | projections |            |            |
|                             | 1980  | 1990      | 1995      | 2000      | 2005      | 2010      | 2020        | 2030      | 1980-2010, of which       |            | 2010-2030, of which |             |            |            |
|                             |   |           |           |           |           |           |             |           | 1980-'95                  | '95-2010   |                     | 2010-'20    | 2020-'30   |            |
| <b>World</b>                | <b>6</b>  | <b>8</b>  | <b>9</b>  | <b>11</b> | <b>12</b> | <b>14</b> | <b>18</b>   | <b>22</b> | <b>2.7</b>                | <b>2.7</b> | <b>2.6</b>          | <b>2.4</b>  | <b>2.7</b> | <b>2.0</b> |
| to Advanced economies       | 23  | 33        | 36        | 44        | 46        | 49        | 60          | 70        | 2.5                       | 3.0        | 2.0                 | 1.8         | 2.1        | 1.5        |
| to Emerging economies       | 2   | 3         | 4         | 5         | 6         | 8         | 11          | 14        | 4.1                       | 3.9        | 4.3                 | 3.3         | 3.8        | 2.8        |
| <b>By UNWTO regions:</b>    |   |           |           |           |           |           |             |           |                           |            |                     |             |            |            |
| <b>Africa</b>               | <b>2</b>  | <b>3</b>  | <b>3</b>  | <b>4</b>  | <b>4</b>  | <b>5</b>  | <b>7</b>    | <b>9</b>  | <b>4.0</b>                | <b>3.8</b> | <b>4.2</b>          | <b>2.8</b>  | <b>3.0</b> | <b>2.5</b> |
| North Africa                | 6   | 10        | 8         | 10        | 12        | 15        | 22          | 28        | 3.1                       | 1.5        | 4.7                 | 3.2         | 3.6        | 2.7        |
| West and Central Africa     | 1   | 1         | 1         | 1         | 1         | 2         | 2           | 3         | 3.9                       | 3.0        | 4.8                 | 3.4         | 3.8        | 3.1        |
| East Africa                 | 1   | 1         | 2         | 3         | 3         | 4         | 5           | 7         | 5.2                       | 7.1        | 3.4                 | 3.2         | 3.5        | 3.0        |
| Southern Africa             | 3   | 4         | 9         | 13        | 16        | 22        | 32          | 46        | 6.7                       | 7.5        | 6.0                 | 3.8         | 3.9        | 3.6        |
| <b>Americas</b>             | <b>10</b>   | <b>13</b> | <b>14</b> | <b>15</b> | <b>15</b> | <b>16</b> | <b>19</b>   | <b>22</b> | <b>1.5</b>                | <b>2.2</b> | <b>0.9</b>          | <b>1.7</b>  | <b>1.9</b> | <b>1.5</b> |
| North America               | 15  | 20        | 21        | 22        | 21        | 21        | 24          | 26        | 1.2                       | 2.2        | 0.2                 | 0.9         | 1.1        | 0.7        |
| Caribbean                   | 23  | 33        | 38        | 44        | 47        | 48        | 57          | 65        | 2.6                       | 3.6        | 1.5                 | 1.5         | 1.8        | 1.2        |
| Central America             | 6   | 7         | 8         | 12        | 16        | 19        | 28          | 38        | 3.6                       | 1.5        | 5.7                 | 3.6         | 4.2        | 3.0        |
| South America               | 2   | 3         | 4         | 4         | 5         | 6         | 9           | 13        | 3.1                       | 2.8        | 3.4                 | 3.8         | 4.3        | 3.2        |
| <b>Asia and the Pacific</b> | <b>1</b>  | <b>2</b>  | <b>3</b>  | <b>3</b>  | <b>4</b>  | <b>5</b>  | <b>8</b>    | <b>12</b> | <b>6.0</b>                | <b>7.0</b> | <b>5.0</b>          | <b>4.2</b>  | <b>4.8</b> | <b>3.6</b> |
| North-East Asia             | 1   | 2         | 3         | 4         | 6         | 7         | 12          | 18        | 7.3                       | 8.4        | 6.2                 | 4.8         | 5.4        | 4.2        |
| South-East Asia             | 2   | 5         | 6         | 7         | 9         | 12        | 19          | 27        | 5.6                       | 6.5        | 4.8                 | 4.1         | 4.8        | 3.5        |
| Oceania                     | 10  | 19        | 28        | 31        | 33        | 32        | 37          | 40        | 3.9                       | 7.0        | 0.9                 | 1.1         | 1.5        | 0.8        |
| South Asia                  | 0   | 0         | 0         | 0         | 1         | 1         | 1           | 2         | 3.4                       | 2.0        | 4.9                 | 4.8         | 5.4        | 4.2        |
| <b>Europe</b>               | <b>22</b>   | <b>31</b> | <b>35</b> | <b>44</b> | <b>50</b> | <b>53</b> | <b>67</b>   | <b>80</b> | <b>2.9</b>                | <b>3.1</b> | <b>2.8</b>          | <b>2.1</b>  | <b>2.4</b> | <b>1.7</b> |
| Northern Europe             | 25  | 34        | 42        | 50        | 64        | 63        | 73          | 80        | 3.1                       | 3.6        | 2.7                 | 1.2         | 1.6        | 0.9        |
| Western Europe              | 40  | 62        | 62        | 76        | 76        | 81        | 100         | 114       | 2.4                       | 3.0        | 1.8                 | 1.7         | 2.1        | 1.3        |
| Central/Eastern Europe      | 7   | 9         | 15        | 18        | 23        | 25        | 36          | 47        | 4.1                       | 4.8        | 3.5                 | 3.2         | 3.7        | 2.6        |
| Southern/Mediter. Eu.       | 33  | 45        | 47        | 61        | 67        | 71        | 88          | 103       | 2.6                       | 2.3        | 2.8                 | 1.8         | 2.1        | 1.6        |
| <b>Middle East</b>          | <b>7</b>  | <b>7</b>  | <b>9</b>  | <b>14</b> | <b>19</b> | <b>27</b> | <b>37</b>   | <b>47</b> | <b>4.6</b>                | <b>1.5</b> | <b>7.7</b>          | <b>2.7</b>  | <b>3.1</b> | <b>2.3</b> |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by means of transport and (sub)region of destination

|                                | International Tourist Arrivals received (million) |             |              |              |              |              |              |              | Average annual growth (%) |            |             |                     |            |            | Market share (%) |             |             |             |             |
|--------------------------------|---|-------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|-------------|---------------------|------------|------------|------------------|-------------|-------------|-------------|-------------|
|                                | actual data                                       |             |              |              |              |              | projections  |              | actual data               |            |             | projections         |            |            | actual data      |             |             | projections |             |
|                                | 1980  | 1990        | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |             | 2010-2030, of which |            |            | 1980             | 1995        | 2010        | 2020        | 2030        |
|                                |   |             |              |              |              |              |              |              | 1980-'95                  | '95-2010   |             | 2010-'20            | 2020-'30   |            |                  |             |             |             |             |
| <b>World</b>                   | <b>277</b>  | <b>435</b>  | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b>  | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b>  | <b>100</b>  | <b>100</b>  | <b>100</b>  |
| <b>by air</b>                  | 106   | 188         | 238          | 317          | 397          | 481          | 702          | 939          | 5.2                       | 5.5        | 4.8         | 3.4                 | 3.8        | 2.9        | 38               | 45          | 51          | 52          | 52          |
| <b>to:</b>                     |   |             |              |              |              |              |              |              |                           |            |             |                     |            |            |                  |             |             |             |             |
| <b>Africa</b>                  | <b>4.5</b>  | <b>7.2</b>  | <b>9.5</b>   | <b>13.9</b>  | <b>18.0</b>  | <b>24.5</b>  | <b>41</b>    | <b>61</b>    | <b>5.8</b>                | <b>5.2</b> | <b>6.5</b>  | <b>4.7</b>          | <b>5.3</b> | <b>4.0</b> | <b>1.6</b>       | <b>1.8</b>  | <b>2.6</b>  | <b>3.0</b>  | <b>3.4</b>  |
| North Africa                   | 2.2   | 3.2         | 4.0          | 6.3          | 7.9          | 11.0         | 18           | 26           | 5.5                       | 4.1        | 6.9         | 4.4                 | 5.1        | 3.8        | 0.8              | 0.8         | 1.2         | 1.3         | 1.4         |
| West Africa and Central Africa | 0.8   | 1.4         | 1.9          | 2.6          | 3.6          | 5.0          | 9            | 14           | 6.2                       | 5.7        | 6.8         | 5.4                 | 6.0        | 4.8        | 0.3              | 0.4         | 0.5         | 0.7         | 0.8         |
| East Africa                    | 0.8   | 1.8         | 2.3          | 3.2          | 4.1          | 5.3          | 9            | 13           | 6.3                       | 6.8        | 5.8         | 4.5                 | 5.2        | 3.9        | 0.3              | 0.4         | 0.6         | 0.6         | 0.7         |
| Southern Africa                | 0.6   | 0.7         | 1.3          | 1.9          | 2.4          | 3.3          | 5            | 8            | 6.0                       | 5.6        | 6.3         | 4.3                 | 4.9        | 3.8        | 0.2              | 0.3         | 0.4         | 0.4         | 0.4         |
| <b>Americas</b>                | <b>26.4</b>                                       | <b>44.1</b> | <b>56.5</b>  | <b>73.9</b>  | <b>77.6</b>  | <b>86.4</b>  | <b>115</b>   | <b>141</b>   | <b>4.0</b>                | <b>5.2</b> | <b>2.9</b>  | <b>2.5</b>          | <b>2.9</b> | <b>2.1</b> | <b>9.5</b>       | <b>10.7</b> | <b>9.2</b>  | <b>8.4</b>  | <b>7.8</b>  |
| North America                  | 17.0  | 28.6        | 36.0         | 48.0         | 45.4         | 50.6         | 62           | 72           | 3.7                       | 5.1        | 2.3         | 1.8                 | 2.1        | 1.4        | 6.1              | 6.8         | 5.4         | 4.6         | 4.0         |
| Caribbean                      | 6.0   | 10.9        | 13.1         | 16.1         | 17.7         | 18.6         | 23           | 27           | 3.9                       | 5.4        | 2.4         | 2.0                 | 2.3        | 1.6        | 2.2              | 2.5         | 2.0         | 1.7         | 1.5         |
| Central America                | 0.8   | 1.1         | 1.7          | 2.3          | 3.5          | 4.5          | 8            | 11           | 6.0                       | 5.4        | 6.5         | 4.7                 | 5.5        | 4.0        | 0.3              | 0.3         | 0.5         | 0.6         | 0.6         |
| South America                  | 2.6   | 3.4         | 5.6          | 7.4          | 11.0         | 12.7         | 21           | 31           | 5.4                       | 5.3        | 5.6         | 4.5                 | 5.2        | 3.8        | 0.9              | 1.1         | 1.4         | 1.5         | 1.7         |
| <b>Asia and the Pacific</b>    | <b>15.6</b>                                       | <b>35.8</b> | <b>52.4</b>  | <b>66.8</b>  | <b>84.7</b>  | <b>116.8</b> | <b>198</b>   | <b>294</b>   | <b>6.9</b>                | <b>8.4</b> | <b>5.5</b>  | <b>4.7</b>          | <b>5.4</b> | <b>4.0</b> | <b>5.6</b>       | <b>9.9</b>  | <b>12.4</b> | <b>14.6</b> | <b>16.3</b> |
| North-East Asia                | 5.7   | 14.8        | 21.7         | 28.8         | 39.1         | 53.0         | 92           | 139          | 7.7                       | 9.3        | 6.1         | 4.9                 | 5.7        | 4.2        | 2.1              | 4.1         | 5.6         | 6.8         | 7.7         |
| South-East Asia                | 6.2   | 13.3        | 19.2         | 24.0         | 28.7         | 43.6         | 75           | 111          | 6.7                       | 7.8        | 5.6         | 4.8                 | 5.5        | 4.0        | 2.2              | 3.6         | 4.6         | 5.5         | 6.1         |
| Oceania                        | 2.3   | 5.1         | 8.0          | 9.6          | 10.9         | 11.5         | 15           | 19           | 5.5                       | 8.8        | 2.4         | 2.4                 | 2.9        | 2.0        | 0.8              | 1.5         | 1.2         | 1.1         | 1.0         |
| South Asia                     | 1.5   | 2.6         | 3.5          | 4.4          | 6.1          | 8.7          | 16           | 26           | 6.1                       | 6.1        | 6.2         | 5.6                 | 6.3        | 5.0        | 0.5              | 0.7         | 0.9         | 1.2         | 1.4         |
| <b>Europe</b>                  | <b>55.5</b>                                       | <b>95.3</b> | <b>112.3</b> | <b>149.6</b> | <b>196.6</b> | <b>217.8</b> | <b>286</b>   | <b>346</b>   | <b>4.7</b>                | <b>4.8</b> | <b>4.5</b>  | <b>2.3</b>          | <b>2.8</b> | <b>1.9</b> | <b>20.1</b>      | <b>21.3</b> | <b>23.2</b> | <b>21.0</b> | <b>19.2</b> |
| Northern Europe                | 11.7  | 18.9        | 23.2         | 30.2         | 40.4         | 40.8         | 50           | 57           | 4.2                       | 4.6        | 3.8         | 1.7                 | 2.1        | 1.3        | 4.2              | 4.4         | 4.3         | 3.7         | 3.2         |
| Western Europe                 | 14.0  | 26.8        | 26.2         | 33.9         | 45.1         | 51.2         | 65           | 77           | 4.4                       | 4.3        | 4.6         | 2.1                 | 2.4        | 1.7        | 5.1              | 5.0         | 5.5         | 4.8         | 4.3         |
| Central/Eastern Europe         | 8.2   | 9.5         | 7.1          | 10.5         | 16.4         | 22.5         | 35           | 47           | 3.4                       | -0.9       | 8.0         | 3.7                 | 4.4        | 3.1        | 3.0              | 1.4         | 2.4         | 2.5         | 2.6         |
| Southern/Mediterr. Eu.         | 21.6  | 40.1        | 55.8         | 75.0         | 94.7         | 103.3        | 136          | 165          | 5.4                       | 6.5        | 4.2         | 2.4                 | 2.8        | 2.0        | 7.8              | 10.6        | 11.0        | 10.0        | 9.1         |
| <b>Middle East</b>             | <b>4.4</b>  | <b>5.2</b>  | <b>7.0</b>   | <b>12.4</b>  | <b>19.8</b>  | <b>35.8</b>  | <b>63</b>    | <b>96</b>    | <b>7.3</b>                | <b>3.2</b> | <b>11.5</b> | <b>5.0</b>          | <b>5.8</b> | <b>4.3</b> | <b>1.6</b>       | <b>1.3</b>  | <b>3.8</b>  | <b>4.6</b>  | <b>5.3</b>  |

(to be continued)

## International tourism by means of transport and (sub)region of destination (continued)

|                                | International Tourist Arrivals received (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |             |             |             |             |
|--------------------------------|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|-------------|-------------|-------------|-------------|
|                                | actual data                                       |              |              |              |              |              | projections  |              | actual data               |            |            | projections         |            |            | actual data      |             |             | projections |             |
|                                | 1980  | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995        | 2010        | 2020        | 2030        |
|                                |   |              |              |              |              |              |              |              | 1980-'95                  | '95-2010   |            |                     |            |            |                  |             |             |             |             |
| <b>World</b>                   | <b>277</b>  | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b>  | <b>100</b>  | <b>100</b>  | <b>100</b>  |
| <b>over surface</b>            | <b>170</b>  | <b>247</b>   | <b>290</b>   | <b>357</b>   | <b>401</b>   | <b>459</b>   | <b>658</b>   | <b>870</b>   | <b>3.4</b>                | <b>3.6</b> | <b>3.1</b> | <b>3.2</b>          | <b>3.7</b> | <b>2.8</b> | <b>62</b>        | <b>55</b>   | <b>49</b>   | <b>48</b>   | <b>48</b>   |
| <b>to:</b>                     |   |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |             |             |             |             |
| <b>Africa</b>                  | <b>2.7</b>  | <b>7.6</b>   | <b>9.4</b>   | <b>12.5</b>  | <b>17.4</b>  | <b>25.7</b>  | <b>44</b>    | <b>73</b>    | <b>7.8</b>                | <b>8.7</b> | <b>6.9</b> | <b>5.4</b>          | <b>5.6</b> | <b>5.1</b> | <b>1.0</b>       | <b>1.8</b>  | <b>2.7</b>  | <b>3.3</b>  | <b>4.0</b>  |
| North Africa                   | 1.8   | 5.2          | 3.2          | 4.0          | 6.0          | 7.7          | 13           | 20           | 5.0                       | 4.1        | 5.9        | 4.8                 | 5.3        | 4.3        | 0.6              | 0.6         | 0.8         | 0.9         | 1.1         |
| West Africa and Central Africa | 0.2   | 0.3          | 0.4          | 0.5          | 0.7          | 1.9          | 4            | 8            | 8.5                       | 6.9        | 10.0       | 7.2                 | 7.6        | 6.8        | 0.1              | 0.1         | 0.2         | 0.3         | 0.4         |
| East Africa                    | 0.3   | 1.0          | 2.7          | 3.4          | 4.4          | 6.8          | 13           | 24           | 10.8                      | 15.3       | 6.4        | 6.6                 | 6.9        | 6.2        | 0.1              | 0.5         | 0.7         | 1.0         | 1.3         |
| Southern Africa                | 0.4   | 1.1          | 3.0          | 4.6          | 6.2          | 9.3          | 14           | 22           | 10.7                      | 13.6       | 7.8        | 4.3                 | 4.3        | 4.2        | 0.2              | 0.6         | 1.0         | 1.0         | 1.2         |
| <b>Americas</b>                | <b>35.9</b>                                       | <b>48.7</b>  | <b>52.5</b>  | <b>54.3</b>  | <b>55.7</b>  | <b>63.3</b>  | <b>85</b>    | <b>106</b>   | <b>1.9</b>                | <b>2.6</b> | <b>1.3</b> | <b>2.6</b>          | <b>2.9</b> | <b>2.3</b> | <b>13.0</b>      | <b>10.0</b> | <b>6.7</b>  | <b>6.2</b>  | <b>5.9</b>  |
| North America                  | 31.3  | 43.1         | 44.6         | 43.5         | 44.5         | 47.5         | 57           | 66           | 1.4                       | 2.4        | 0.4        | 1.6                 | 1.9        | 1.3        | 11.3             | 8.5         | 5.1         | 4.2         | 3.6         |
| Caribbean                      | 0.7   | 0.4          | 0.9          | 1.0          | 1.1          | 1.4          | 2            | 3            | 2.3                       | 1.4        | 3.1        | 2.8                 | 3.2        | 2.4        | 0.3              | 0.2         | 0.2         | 0.1         | 0.1         |
| Central America                | 0.7   | 0.8          | 0.9          | 2.0          | 2.8          | 3.5          | 7            | 11           | 5.5                       | 1.5        | 9.6        | 5.8                 | 6.6        | 5.0        | 0.3              | 0.2         | 0.4         | 0.5         | 0.6         |
| South America                  | 3.2   | 4.3          | 6.1          | 7.8          | 7.3          | 10.9         | 19           | 28           | 4.2                       | 4.5        | 3.9        | 4.8                 | 5.5        | 4.1        | 1.1              | 1.2         | 1.2         | 1.4         | 1.5         |
| <b>Asia and the Pacific</b>    | <b>7.2</b>  | <b>20.0</b>  | <b>29.6</b>  | <b>43.4</b>  | <b>68.9</b>  | <b>87.2</b>  | <b>157</b>   | <b>240</b>   | <b>8.7</b>                | <b>9.9</b> | <b>7.5</b> | <b>5.2</b>          | <b>6.0</b> | <b>4.4</b> | <b>2.6</b>       | <b>5.6</b>  | <b>9.3</b>  | <b>11.5</b> | <b>13.3</b> |
| North-East Asia                | 4.4   | 11.6         | 19.6         | 29.5         | 46.9         | 58.5         | 103          | 154          | 9.0                       | 10.5       | 7.6        | 5.0                 | 5.8        | 4.1        | 1.6              | 3.7         | 6.2         | 7.5         | 8.5         |
| South-East Asia                | 2.0   | 7.9          | 9.2          | 12.1         | 19.9         | 26.2         | 49           | 76           | 9.0                       | 10.9       | 7.2        | 5.5                 | 6.4        | 4.6        | 0.7              | 1.8         | 2.8         | 3.6         | 4.2         |
| Oceania                        | 0.0   | 0.0          | 0.1          | 0.1          | 0.1          | 0.1          | 0            | 0            | 2.4                       | 1.4        | 3.5        | 3.7                 | 4.4        | 3.0        | 0.0              | 0.0         | 0.0         | 0.0         | 0.0         |
| South Asia                     | 0.8   | 0.6          | 0.7          | 1.7          | 2.1          | 2.4          | 5            | 10           | 3.8                       | -0.7       | 8.4        | 7.2                 | 8.3        | 6.1        | 0.3              | 0.1         | 0.3         | 0.4         | 0.5         |
| <b>Europe</b>                  | <b>121.8</b>                                      | <b>166.2</b> | <b>191.8</b> | <b>235.5</b> | <b>242.1</b> | <b>257.5</b> | <b>334</b>   | <b>397</b>   | <b>2.5</b>                | <b>3.1</b> | <b>2.0</b> | <b>2.2</b>          | <b>2.6</b> | <b>1.7</b> | <b>44.0</b>      | <b>36.3</b> | <b>27.4</b> | <b>24.6</b> | <b>22.0</b> |
| Northern Europe                | 8.7   | 9.7          | 12.7         | 13.4         | 16.8         | 17.0         | 21           | 25           | 2.3                       | 2.5        | 2.0        | 1.9                 | 2.3        | 1.4        | 3.1              | 2.4         | 1.8         | 1.6         | 1.4         |
| Western Europe                 | 54.3  | 81.8         | 86.0         | 105.8        | 96.6         | 102.4        | 127          | 144          | 2.1                       | 3.1        | 1.2        | 1.7                 | 2.2        | 1.3        | 19.6             | 16.3        | 10.9        | 9.3         | 8.0         |
| Central/Eastern Europe         | 18.5  | 24.4         | 51.0         | 58.8         | 71.1         | 72.5         | 102          | 129          | 4.7                       | 7.0        | 2.4        | 2.9                 | 3.5        | 2.3        | 6.7              | 9.7         | 7.7         | 7.5         | 7.1         |
| Southern/Mediter. Eu.          | 40.4  | 50.3         | 42.2         | 57.4         | 57.6         | 65.6         | 84           | 99           | 1.6                       | 0.3        | 3.0        | 2.1                 | 2.5        | 1.7        | 14.6             | 8.0         | 7.0         | 6.1         | 5.5         |
| <b>Middle East</b>             | <b>2.8</b>  | <b>4.5</b>   | <b>6.7</b>   | <b>11.7</b>  | <b>16.5</b>  | <b>25.0</b>  | <b>38</b>    | <b>53</b>    | <b>7.6</b>                | <b>6.1</b> | <b>9.1</b> | <b>3.8</b>          | <b>4.3</b> | <b>3.3</b> | <b>1.0</b>       | <b>1.3</b>  | <b>2.7</b>  | <b>2.8</b>  | <b>2.9</b>  |

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(Data as collected by UNWTO September 2011)

## International tourism by economic development stage and means of transport

|                              | International Tourist Arrivals received (million) |            |            |            |            |            |              |              | Average annual growth (%) |            |                   |                     |            |            | Market share (%) |            |            |             |            |
|------------------------------|---|------------|------------|------------|------------|------------|--------------|--------------|---------------------------|------------|-------------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|
|                              | actual data                                       |            |            |            |            |            | projections  |              | actual data               |            |                   | projections         |            |            | actual data      |            |            | projections |            |
|                              | 1980  | 1990       | 1995       | 2000       | 2005       | 2010       | 2020         | 2030         | 1980-2010, of which       |            |                   | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |
|                              |   |            |            |            |            |            |              |              | 1980-'95                  | '95-2010   | 2010-'20 2020-'30 |                     |            |            |                  |            |            |             |            |
| <b>World</b>                 | <b>277</b>  | <b>435</b> | <b>528</b> | <b>674</b> | <b>797</b> | <b>940</b> | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b>        | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                       | 106   | 188        | 238        | 317        | 397        | 481        | 702          | 939          | 5.2                       | 5.5        | 4.8               | 3.4                 | 3.8        | 2.9        | 38               | 45         | 51         | 52          | 52         |
| over surface                 | 170   | 247        | 290        | 357        | 401        | 459        | 658          | 870          | 3.4                       | 3.6        | 3.1               | 3.2                 | 3.7        | 2.8        | 62               | 55         | 49         | 48          | 48         |
| <b>to Advanced economies</b> | <b>194</b>  | <b>296</b> | <b>334</b> | <b>417</b> | <b>453</b> | <b>498</b> | <b>643</b>   | <b>772</b>   | <b>3.2</b>                | <b>3.7</b> | <b>2.7</b>        | <b>2.2</b>          | <b>2.6</b> | <b>1.8</b> | <b>70</b>        | <b>63</b>  | <b>53</b>  | <b>47</b>   | <b>43</b>  |
| by air                       | 70  | 127        | 157        | 204        | 239        | 263        | 343          | 415          | 4.5                       | 5.6        | 3.5               | 2.3                 | 2.7        | 1.9        | 25               | 30         | 28         | 25          | 23         |
| over surface                 | 124   | 169        | 177        | 213        | 214        | 234        | 300          | 357          | 2.1                       | 2.4        | 1.9               | 2.1                 | 2.5        | 1.8        | 45               | 34         | 25         | 22          | 20         |
| <b>to Emerging economies</b> | <b>83</b>   | <b>139</b> | <b>193</b> | <b>257</b> | <b>345</b> | <b>442</b> | <b>717</b>   | <b>1,037</b> | <b>5.8</b>                | <b>5.8</b> | <b>5.7</b>        | <b>4.4</b>          | <b>4.9</b> | <b>3.8</b> | <b>30</b>        | <b>37</b>  | <b>47</b>  | <b>53</b>   | <b>57</b>  |
| by air                       | 37  | 60         | 81         | 112        | 158        | 218        | 359          | 524          | 6.1                       | 5.4        | 6.9               | 4.5                 | 5.1        | 3.9        | 13               | 15         | 23         | 26          | 29         |
| over surface                 | 46  | 78         | 113        | 144        | 187        | 224        | 358          | 513          | 5.4                       | 6.2        | 4.7               | 4.2                 | 4.8        | 3.7        | 17               | 21         | 24         | 26          | 28         |

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(Data as collected by UNWTO September 2011)

## International tourism by region of destination and origin

|                             | International Tourist Arrivals received (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |             |                     |            |            | Market share (%) |            |            |             |            |  |
|-----------------------------|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|-------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|--|
|                             | actual data                                       |              |              |              |              |              | projections  |              | actual data               |            |             | projections         |            |            | actual data      |            |            | projections |            |  |
|                             | 1980  | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |             | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |  |
|                             |   |              |              |              |              |              |              |              |                           | 1980-'95   | '95-2010    |                     |            |            |                  |            |            |             |            |  |
| <b>World</b>                | <b>277</b>  | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b>  | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 227   | 355          | 429          | 539          | 641          | 738          | 1,060        | 1,403        | 4.0                       | 4.3        | 3.7         | 3.3                 | 3.7        | 2.8        | 82               | 82         | 81         | 80          | 79         |  |
| from other regions          | 49  | 80           | 99           | 135          | 156          | 202          | 300          | 405          | 4.8                       | 4.7        | 4.9         | 3.5                 | 4.0        | 3.1        | 18               | 18         | 19         | 20          | 21         |  |
| <b>Advanced economies</b>   | <b>194.1</b>                                      | <b>296.0</b> | <b>334.2</b> | <b>417.4</b> | <b>452.6</b> | <b>497.8</b> | <b>643</b>   | <b>772</b>   | <b>3.2</b>                | <b>3.7</b> | <b>2.7</b>  | <b>2.2</b>          | <b>2.6</b> | <b>1.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 155.1   | 239.8        | 268.5        | 333.2        | 366.8        | 401.4        | 519          | 623          | 3.2                       | 3.7        | 2.7         | 2.2                 | 2.6        | 1.8        | 80               | 81         | 80         | 81          | 81         |  |
| from other regions          | 39.0  | 56.1         | 65.8         | 84.2         | 85.7         | 96.4         | 124          | 149          | 3.1                       | 3.6        | 2.6         | 2.2                 | 2.6        | 1.9        | 20               | 19         | 20         | 19          | 19         |  |
| <b>Emerging economies</b>   | <b>82.6</b>                                       | <b>138.6</b> | <b>193.5</b> | <b>256.6</b> | <b>344.7</b> | <b>442.4</b> | <b>717</b>   | <b>1,037</b> | <b>5.8</b>                | <b>5.8</b> | <b>5.7</b>  | <b>4.4</b>          | <b>4.9</b> | <b>3.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 67.3  | 112.4        | 156.2        | 199.7        | 265.7        | 328.2        | 529          | 766          | 5.4                       | 5.8        | 5.1         | 4.3                 | 4.9        | 3.8        | 81               | 81         | 81         | 77          | 74         |  |
| from other regions          | 15.3  | 26.2         | 37.3         | 56.9         | 79.0         | 114.2        | 188          | 271          | 6.9                       | 6.1        | 7.8         | 4.4                 | 5.1        | 3.8        | 19               | 19         | 19         | 23          | 26         |  |
| <b>to:</b>                  |   |              |              |              |              |              |              |              |                           |            |             |                     |            |            |                  |            |            |             |            |  |
| <b>Africa</b>               | <b>7.2</b>  | <b>14.8</b>  | <b>18.9</b>  | <b>26.5</b>  | <b>35.4</b>  | <b>50.3</b>  | <b>85</b>    | <b>134</b>   | <b>6.7</b>                | <b>6.7</b> | <b>6.7</b>  | <b>5.0</b>          | <b>5.4</b> | <b>4.6</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 2.3   | 6.4          | 8.7          | 10.8         | 14.8         | 22.5         | 40           | 69           | 8.0                       | 9.4        | 6.6         | 5.8                 | 5.9        | 5.6        | 31               | 43         | 46         | 42          | 45         |  |
| from other regions          | 4.9   | 8.4          | 10.2         | 15.7         | 20.6         | 27.8         | 45           | 65           | 5.9                       | 5.0        | 6.9         | 4.3                 | 5.0        | 3.6        | 69               | 57         | 54         | 58          | 55         |  |
| <b>Americas</b>             | <b>62.3</b>                                       | <b>92.8</b>  | <b>109.0</b> | <b>128.2</b> | <b>133.3</b> | <b>149.7</b> | <b>199</b>   | <b>248</b>   | <b>3.0</b>                | <b>3.8</b> | <b>2.1</b>  | <b>2.6</b>          | <b>2.9</b> | <b>2.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 52.7  | 73.9         | 82.5         | 94.2         | 99.2         | 112.0        | 149          | 186          | 2.5                       | 3.0        | 2.1         | 2.6                 | 2.9        | 2.3        | 85               | 80         | 76         | 74          | 75         |  |
| from other regions          | 9.6   | 18.9         | 26.5         | 34.0         | 34.1         | 37.7         | 50           | 62           | 4.7                       | 7.0        | 2.4         | 2.5                 | 2.9        | 2.1        | 15               | 20         | 24         | 26          | 25         |  |
| <b>Asia and the Pacific</b> | <b>22.8</b>                                       | <b>55.8</b>  | <b>82.0</b>  | <b>110.1</b> | <b>153.6</b> | <b>204.0</b> | <b>355</b>   | <b>535</b>   | <b>7.6</b>                | <b>8.9</b> | <b>6.3</b>  | <b>4.9</b>          | <b>5.7</b> | <b>4.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 15.7  | 42.6         | 63.7         | 85.5         | 121.4        | 160.5        | 289          | 444          | 8.1                       | 9.8        | 6.4         | 5.2                 | 6.0        | 4.4        | 69               | 76         | 78         | 79          | 79         |  |
| from other regions          | 7.1   | 13.2         | 18.4         | 24.7         | 32.2         | 43.6         | 66           | 90           | 6.2                       | 6.5        | 5.9         | 3.7                 | 4.3        | 3.2        | 31               | 24         | 22         | 21          | 21         |  |
| <b>Europe</b>               | <b>177.3</b>                                      | <b>261.5</b> | <b>304.1</b> | <b>385.1</b> | <b>438.7</b> | <b>475.3</b> | <b>620</b>   | <b>744</b>   | <b>3.3</b>                | <b>3.7</b> | <b>3.0</b>  | <b>2.3</b>          | <b>2.7</b> | <b>1.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 153.0   | 226.7        | 267.8        | 337.9        | 387.9        | 415.6        | 540          | 643          | 3.4                       | 3.8        | 3.0         | 2.2                 | 2.7        | 1.8        | 86               | 87         | 88         | 88          | 87         |  |
| from other regions          | 24.3  | 34.7         | 36.2         | 47.2         | 50.8         | 59.7         | 80           | 100          | 3.0                       | 2.7        | 3.4         | 2.6                 | 3.0        | 2.3        | 14               | 13         | 12         | 12          | 13         |  |
| <b>Middle East</b>          | <b>7.1</b>  | <b>9.6</b>   | <b>13.7</b>  | <b>24.1</b>  | <b>36.3</b>  | <b>60.9</b>  | <b>101</b>   | <b>149</b>   | <b>7.4</b>                | <b>4.5</b> | <b>10.5</b> | <b>4.6</b>          | <b>5.2</b> | <b>4.0</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| from same region            | 3.7   | 5.1          | 6.5          | 10.9         | 18.0         | 27.6         | 43           | 61           | 7.0                       | 3.9        | 10.1        | 4.0                 | 4.5        | 3.6        | 52               | 53         | 47         | 50          | 45         |  |
| from other regions          | 3.4   | 4.5          | 7.2          | 13.2         | 18.3         | 33.3         | 58           | 88           | 7.9                       | 5.1        | 10.7        | 5.0                 | 5.7        | 4.2        | 48               | 47         | 53         | 50          | 55         |  |

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(Data as collected by UNWTO September 2011)

## International tourism by region of origin and destination

|                             | International Tourist Arrivals generated (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |            |            |             |            |
|-----------------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|
|                             | actual data  |              |              |              |              |              | projections  |              | actual data               |            |            | projections         |            |            | actual data      |            |            | projections |            |
|                             | 1980   | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |
|                             |  |              |              |              |              |              |              |              | 1980-'95                  | '95-2010   |            |                     | 2010-'20   | 2020-'30   |                  |            |            |             |            |
| <b>World</b>                | <b>277</b>   | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| from same region            | 227  | 355          | 429          | 539          | 641          | 738          | 1,060        | 1,403        | 4.0                       | 4.3        | 3.7        | 3.3                 | 3.7        | 2.8        | 82               | 82         | 81         | 80          | 79         |
| from other regions          | 49   | 80           | 99           | 135          | 156          | 202          | 300          | 405          | 4.8                       | 4.7        | 4.9        | 3.5                 | 4.0        | 3.1        | 18               | 18         | 19         | 20          | 21         |
| <b>from:</b>                |  |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |
| <b>Africa</b>               | <b>5.7</b>   | <b>10.6</b>  | <b>12.3</b>  | <b>15.7</b>  | <b>20.6</b>  | <b>29.9</b>  | <b>53</b>    | <b>90</b>    | <b>5.7</b>                | <b>5.3</b> | <b>6.1</b> | <b>5.7</b>          | <b>5.8</b> | <b>5.5</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| to same region              | 2.3  | 6.4          | 8.7          | 10.8         | 14.8         | 22.5         | 40           | 69           | 8.0                       | 9.4        | 6.6        | 5.8                 | 5.9        | 5.6        | 39               | 60         | 70         | 72          | 75         |
| to other regions            | 3.5  | 4.2          | 3.7          | 4.9          | 5.8          | 7.5          | 13           | 21           | 2.6                       | 0.4        | 4.8        | 5.4                 | 5.5        | 5.3        | 61               | 40         | 30         | 28          | 25         |
| <b>Americas</b>             | <b>71.1</b>  | <b>100.5</b> | <b>110.1</b> | <b>132.5</b> | <b>139.8</b> | <b>159.9</b> | <b>212</b>   | <b>265</b>   | <b>2.7</b>                | <b>3.0</b> | <b>2.5</b> | <b>2.6</b>          | <b>2.9</b> | <b>2.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| to same region              | 52.7   | 73.9         | 82.5         | 94.2         | 99.2         | 112.0        | 149          | 186          | 2.5                       | 3.0        | 2.1        | 2.6                 | 2.9        | 2.3        | 74               | 73         | 75         | 71          | 70         |
| to other regions            | 18.3   | 26.7         | 27.5         | 38.3         | 40.5         | 47.8         | 63           | 79           | 3.2                       | 2.7        | 3.8        | 2.5                 | 2.8        | 2.2        | 26               | 27         | 25         | 29          | 30         |
| <b>Asia and the Pacific</b> | <b>24.7</b>  | <b>59.7</b>  | <b>87.6</b>  | <b>115.7</b> | <b>154.7</b> | <b>204.5</b> | <b>358</b>   | <b>541</b>   | <b>7.3</b>                | <b>8.8</b> | <b>5.8</b> | <b>5.0</b>          | <b>5.7</b> | <b>4.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| to same region              | 15.7   | 42.6         | 63.7         | 85.5         | 121.4        | 160.5        | 289          | 444          | 8.1                       | 9.8        | 6.4        | 5.2                 | 6.0        | 4.4        | 63               | 71         | 73         | 78          | 78         |
| to other regions            | 9.1  | 17.0         | 23.9         | 30.2         | 33.3         | 44.0         | 69           | 97           | 5.4                       | 6.7        | 4.1        | 4.0                 | 4.6        | 3.4        | 37               | 29         | 27         | 22          | 22         |
| <b>Europe</b>               | <b>169.2</b>                                       | <b>255.2</b> | <b>307.8</b> | <b>395.3</b> | <b>458.3</b> | <b>508.7</b> | <b>681</b>   | <b>832</b>   | <b>3.7</b>                | <b>4.1</b> | <b>3.4</b> | <b>2.5</b>          | <b>3.0</b> | <b>2.0</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| to same region              | 153.0  | 226.7        | 267.8        | 337.9        | 387.9        | 415.6        | 540          | 643          | 3.4                       | 3.8        | 3.0        | 2.2                 | 2.7        | 1.8        | 90               | 89         | 87         | 85          | 82         |
| to other regions            | 16.2   | 28.4         | 40.0         | 57.3         | 70.4         | 93.1         | 140          | 188          | 6.0                       | 6.2        | 5.8        | 3.6                 | 4.2        | 3.0        | 10               | 11         | 13         | 15          | 18         |
| <b>Middle East</b>          | <b>5.9</b>   | <b>8.6</b>   | <b>9.9</b>   | <b>14.8</b>  | <b>23.9</b>  | <b>37.2</b>  | <b>57</b>    | <b>81</b>    | <b>6.3</b>                | <b>3.5</b> | <b>9.2</b> | <b>4.0</b>          | <b>4.4</b> | <b>3.5</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| to same region              | 3.7  | 5.1          | 6.5          | 10.9         | 18.0         | 27.6         | 43           | 61           | 7.0                       | 3.9        | 10.1       | 4.0                 | 4.5        | 3.6        | 62               | 60         | 65         | 75          | 74         |
| to other regions            | 2.3  | 3.4          | 3.4          | 3.9          | 6.0          | 9.7          | 15           | 21           | 5.0                       | 2.8        | 7.2        | 3.9                 | 4.3        | 3.4        | 38               | 40         | 35         | 25          | 26         |

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(Data as collected by UNWTO September 2011)

## International tourism by region of origin

|                              | International Tourist Arrivals generated (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |            |            |             |            |
|------------------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|
|                              | actual data  |              |              |              |              |              | projections  |              | actual data               |            |            | projections         |            |            | actual data      |            |            | projections |            |
|                              | 1980   | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |
|                              |  |              |              |              |              |              |              |              | 1980-'95                  | '95-2010   |            | 2010-'20            | 2020-'30   |            |                  |            |            |             |            |
| <b>World</b>                 | <b>277</b>   | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| <b>from:</b>                 |  |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |
| Africa                       | 5.7  | 10.6         | 12.3         | 15.7         | 20.6         | 29.9         | 53           | 90           | 5.7                       | 5.3        | 6.1        | 5.7                 | 5.8        | 5.5        | 2.1              | 2.3        | 3.2        | 3.9         | 5.0        |
| Americas                     | 71.1   | 100.5        | 110.1        | 132.5        | 139.8        | 159.9        | 212          | 265          | 2.7                       | 3.0        | 2.5        | 2.6                 | 2.9        | 2.2        | 25.7             | 20.9       | 17.0       | 15.6        | 14.6       |
| Asia and the Pacific         | 24.7   | 59.7         | 87.6         | 115.7        | 154.7        | 204.5        | 358          | 541          | 7.3                       | 8.8        | 5.8        | 5.0                 | 5.7        | 4.2        | 8.9              | 16.6       | 21.7       | 26.3        | 29.9       |
| Europe                       | 169.2  | 255.2        | 307.8        | 395.3        | 458.3        | 508.7        | 681          | 832          | 3.7                       | 4.1        | 3.4        | 2.5                 | 3.0        | 2.0        | 61.2             | 58.3       | 54.1       | 50.0        | 46.0       |
| Middle East                  | 5.9  | 8.6          | 9.9          | 14.8         | 23.9         | 37.2         | 57           | 81           | 6.3                       | 3.5        | 9.2        | 4.0                 | 4.4        | 3.5        | 2.1              | 1.9        | 4.0        | 4.2         | 4.5        |
| <b>to Advanced economies</b> | <b>194.1</b>                                       | <b>296.0</b> | <b>334.2</b> | <b>417.4</b> | <b>452.6</b> | <b>497.8</b> | <b>643</b>   | <b>772</b>   | <b>3.2</b>                | <b>3.7</b> | <b>2.7</b> | <b>2.2</b>          | <b>2.6</b> | <b>1.8</b> | <b>70</b>        | <b>63</b>  | <b>53</b>  | <b>47</b>   | <b>43</b>  |
| <b>from:</b>                 |  |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |
| Africa                       | 2.8  | 3.3          | 2.6          | 3.1          | 3.6          | 4.3          | 7            | 10           | 1.4                       | -0.5       | 3.4        | 4.5                 | 4.5        | 4.4        | 1.0              | 0.5        | 0.5        | 0.5         | 0.6        |
| Americas                     | 43.9   | 62.9         | 62.7         | 76.7         | 76.2         | 84.1         | 101          | 114          | 2.2                       | 2.4        | 2.0        | 1.5                 | 1.8        | 1.3        | 15.9             | 11.9       | 8.9        | 7.4         | 6.3        |
| Asia and the Pacific         | 14.2   | 30.9         | 43.0         | 51.8         | 63.8         | 83.2         | 135          | 193          | 6.1                       | 7.7        | 4.5        | 4.3                 | 5.0        | 3.6        | 5.1              | 8.2        | 8.8        | 9.9         | 10.7       |
| Europe                       | 131.4  | 197.6        | 224.2        | 283.9        | 306.8        | 323.1        | 396          | 448          | 3.0                       | 3.6        | 2.5        | 1.7                 | 2.1        | 1.2        | 47.5             | 42.5       | 34.4       | 29.1        | 24.8       |
| Middle East                  | 1.8  | 1.4          | 1.7          | 1.9          | 2.1          | 3.1          | 4            | 5            | 1.9                       | -0.3       | 4.3        | 2.7                 | 3.0        | 2.4        | 0.6              | 0.3        | 0.3        | 0.3         | 0.3        |
| <b>to Emerging economies</b> | <b>82.6</b>  | <b>138.6</b> | <b>193.5</b> | <b>256.6</b> | <b>344.7</b> | <b>442.4</b> | <b>717</b>   | <b>1,037</b> | <b>5.8</b>                | <b>5.8</b> | <b>5.7</b> | <b>4.4</b>          | <b>4.9</b> | <b>3.8</b> | <b>30</b>        | <b>37</b>  | <b>47</b>  | <b>53</b>   | <b>57</b>  |
| <b>from:</b>                 |  |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |
| Africa                       | 2.9  | 7.3          | 9.7          | 12.5         | 16.9         | 25.6         | 46           | 80           | 7.5                       | 8.4        | 6.7        | 5.9                 | 6.0        | 5.7        | 1.0              | 1.8        | 2.7        | 3.4         | 4.4        |
| Americas                     | 27.2   | 37.7         | 47.4         | 55.8         | 63.5         | 75.8         | 111          | 150          | 3.5                       | 3.8        | 3.2        | 3.5                 | 3.9        | 3.0        | 9.8              | 9.0        | 8.1        | 8.2         | 8.3        |
| Asia and the Pacific         | 10.5   | 28.8         | 44.6         | 63.9         | 90.8         | 121.3        | 222          | 348          | 8.5                       | 10.1       | 6.9        | 5.4                 | 6.3        | 4.6        | 3.8              | 8.4        | 12.9       | 16.4        | 19.2       |
| Europe                       | 37.8   | 57.6         | 83.6         | 111.4        | 151.5        | 185.6        | 284          | 383          | 5.4                       | 5.4        | 5.5        | 3.7                 | 4.4        | 3.0        | 13.7             | 15.8       | 19.7       | 20.9        | 21.2       |
| Middle East                  | 4.2  | 7.2          | 8.2          | 13.0         | 21.9         | 34.1         | 53           | 76           | 7.3                       | 4.7        | 9.9        | 4.1                 | 4.5        | 3.6        | 1.5              | 1.6        | 3.6        | 3.9         | 4.2        |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by region of origin per 100 population

|                          | International Tourist Arrivals generated per 100 of population |      |      |      |      |      |             |      | Average annual growth (%) |          |                     |             |          |     |
|--------------------------|--|------|------|------|------|------|-------------|------|---------------------------|----------|---------------------|-------------|----------|-----|
|                          | actual data  |      |      |      |      |      | projections |      | actual data               |          |                     | projections |          |     |
|                          | 1980   | 1990 | 1995 | 2000 | 2005 | 2010 | 2020        | 2030 | 1980-2010, of which       |          | 2010-2030, of which |             |          |     |
|                          |  |      |      |      |      |      |             |      | 1980-'95                  | '95-2010 | 2010-'20            |             | 2020-'30 |     |
| <b>World</b>             | 6  | 8    | 9    | 11   | 12   | 14   | 18          | 22   | 2.7                       | 2.7      | 2.6                 | 2.4         | 2.7      | 2.0 |
| <b>By UNWTO regions:</b> |  |      |      |      |      |      |             |      |                           |          |                     |             |          |     |
| Africa                   | 1  | 2    | 2    | 2    | 2    | 3    | 4           | 6    | 4.0                       | 3.8      | 4.2                 | 3.4         | 3.4      | 3.4 |
| Americas                 | 12   | 14   | 14   | 16   | 16   | 17   | 21          | 24   | 1.5                       | 2.2      | 0.9                 | 1.7         | 1.9      | 1.5 |
| Asia and the Pacific     | 1  | 2    | 3    | 3    | 4    | 5    | 8           | 12   | 6.0                       | 7.0      | 5.0                 | 4.2         | 4.8      | 3.6 |
| Europe                   | 21   | 30   | 36   | 46   | 52   | 57   | 74          | 89   | 2.9                       | 3.1      | 2.8                 | 2.3         | 2.7      | 1.9 |
| Middle East              | 6  | 6    | 6    | 9    | 12   | 17   | 21          | 25   | 4.6                       | 1.5      | 7.7                 | 2.1         | 2.3      | 1.9 |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by means of transport and region of origin

|                      | International Tourist Arrivals generated (million) |            |            |            |            |            |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |            |            |             |            |  |
|----------------------|--|------------|------------|------------|------------|------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|--|
|                      | actual data  |            |            |            |            |            | projections  |              | actual data               |            |            | projections         |            |            | actual data      |            |            | projections |            |  |
|                      | 1980   | 1990       | 1995       | 2000       | 2005       | 2010       | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |  |
|                      |  |            |            |            |            |            |              |              |                           | 1980-'95   | '95-2010   |                     |            | 2010-'20   | 2020-'30         |            |            |             |            |  |
| <b>World</b>         | <b>277</b>   | <b>435</b> | <b>528</b> | <b>674</b> | <b>797</b> | <b>940</b> | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| <b>by air:</b>       | <b>106</b>   | <b>188</b> | <b>238</b> | <b>317</b> | <b>397</b> | <b>481</b> | <b>702</b>   | <b>939</b>   | <b>5.2</b>                | <b>5.5</b> | <b>4.8</b> | <b>3.4</b>          | <b>3.8</b> | <b>2.9</b> | <b>38</b>        | <b>45</b>  | <b>51</b>  | <b>52</b>   | <b>52</b>  |  |
| <b>from:</b>         |  |            |            |            |            |            |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |  |
| Africa               | 4.6  | 5.3        | 5.2        | 6.4        | 8.3        | 10.8       | 19           | 32           | 2.9                       | 0.9        | 5.0        | 5.6                 | 5.7        | 5.5        | 1.6              | 1.0        | 1.2        | 1.4         | 1.8        |  |
| Americas             | 35.2   | 51.9       | 57.6       | 78.2       | 84.1       | 96.5       | 128          | 158          | 3.4                       | 3.3        | 3.5        | 2.5                 | 2.8        | 2.2        | 12.7             | 10.9       | 10.3       | 9.4         | 8.7        |  |
| Asia and the Pacific | 16.9   | 38.8       | 56.8       | 70.2       | 83.2       | 112.4      | 192          | 286          | 6.5                       | 8.4        | 4.6        | 4.8                 | 5.5        | 4.1        | 6.1              | 10.8       | 12.0       | 14.1        | 15.8       |  |
| Europe               | 45.9   | 87.8       | 114.6      | 157.5      | 213.1      | 247.7      | 341          | 427          | 5.8                       | 6.3        | 5.3        | 2.8                 | 3.2        | 2.3        | 16.6             | 21.7       | 26.3       | 25.1        | 23.6       |  |
| Middle East          | 3.8  | 3.8        | 3.5        | 4.3        | 8.1        | 14.0       | 23           | 35           | 4.4                       | -0.6       | 9.7        | 4.7                 | 5.2        | 4.2        | 1.4              | 0.7        | 1.5        | 1.7         | 1.9        |  |
| <b>over surface</b>  | <b>170</b>   | <b>247</b> | <b>290</b> | <b>357</b> | <b>401</b> | <b>459</b> | <b>658</b>   | <b>870</b>   | <b>3.4</b>                | <b>3.6</b> | <b>3.1</b> | <b>3.2</b>          | <b>3.7</b> | <b>2.8</b> | <b>62</b>        | <b>55</b>  | <b>49</b>  | <b>48</b>   | <b>48</b>  |  |
| <b>from:</b>         |  |            |            |            |            |            |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |  |
| Africa               | 1.2  | 5.3        | 7.1        | 9.3        | 12.2       | 19.1       | 34           | 58           | 9.8                       | 12.8       | 6.8        | 5.7                 | 5.9        | 5.6        | 0.4              | 1.4        | 2.0        | 2.5         | 3.2        |  |
| Americas             | 35.9   | 48.7       | 52.5       | 54.3       | 55.7       | 63.3       | 85           | 106          | 1.9                       | 2.6        | 1.3        | 2.6                 | 2.9        | 2.3        | 13.0             | 10.0       | 6.7        | 6.2         | 5.9        |  |
| Asia and the Pacific | 7.9  | 20.9       | 30.8       | 45.5       | 71.5       | 92.1       | 166          | 255          | 8.5                       | 9.5        | 7.6        | 5.2                 | 6.1        | 4.4        | 2.8              | 5.8        | 9.8        | 12.2        | 14.1       |  |
| Europe               | 123.3  | 167.4      | 193.2      | 237.8      | 245.2      | 261.0      | 340          | 404          | 2.5                       | 3.0        | 2.0        | 2.2                 | 2.7        | 1.8        | 44.6             | 36.6       | 27.8       | 25.0        | 22.4       |  |
| Middle East          | 2.1  | 4.8        | 6.4        | 10.6       | 15.9       | 23.3       | 34           | 46           | 8.3                       | 7.7        | 9.0        | 3.5                 | 3.9        | 3.1        | 0.8              | 1.2        | 2.5        | 2.5         | 2.6        |  |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2011)

## International tourism by region of destination and purpose of visit

|                                  | International Tourist Arrivals received (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |            |            |             |            |  |
|----------------------------------|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|--|
|                                  | actual data                                       |              |              |              |              |              | projections  |              | actual data               |            |            | projections         |            |            | actual data      |            |            | projections |            |  |
|                                  | 1980  | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |  |
|                                  |   |              |              |              |              |              |              |              | 1980-'95                  |            | '95-2010   |                     | 2010-'20   |            | 2020-'30         |            |            |             |            |  |
| <b>World</b>                     | <b>277</b>  | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| Leisure, recreation and holidays | 159   | 252          | 295          | 364          | 427          | 512          | 737          | 979          | 4.0                       | 4.2        | 3.7        | 3.3                 | 3.7        | 2.9        | 58               | 56         | 54         | 54          | 54         |  |
| Business and professional        | 42  | 69           | 91           | 121          | 131          | 150          | 212          | 276          | 4.3                       | 5.3        | 3.4        | 3.1                 | 3.5        | 2.7        | 15               | 17         | 16         | 16          | 15         |  |
| VFR, health, religion, other     | 75  | 113          | 141          | 190          | 239          | 279          | 412          | 554          | 4.5                       | 4.3        | 4.7        | 3.5                 | 4.0        | 3.0        | 27               | 27         | 30         | 30          | 31         |  |
| <b>Advanced economies</b>        | <b>194.1</b>                                      | <b>296.0</b> | <b>334.2</b> | <b>417.4</b> | <b>452.6</b> | <b>497.8</b> | <b>643</b>   | <b>772</b>   | <b>3.2</b>                | <b>3.7</b> | <b>2.7</b> | <b>2.2</b>          | <b>2.6</b> | <b>1.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| Leisure, recreation and holidays | 117.4   | 177.0        | 197.5        | 241.0        | 261.7        | 294.9        | 381          | 458          | 3.1                       | 3.5        | 2.7        | 2.2                 | 2.6        | 1.9        | 60               | 59         | 59         | 59          | 59         |  |
| Business and professional        | 31.7  | 53.0         | 62.1         | 81.3         | 80.0         | 84.9         | 107          | 125          | 3.3                       | 4.6        | 2.1        | 2.0                 | 2.3        | 1.6        | 16               | 19         | 17         | 17          | 16         |  |
| VFR, health, religion, other     | 45.0  | 66.0         | 74.6         | 95.1         | 110.8        | 118.0        | 155          | 188          | 3.3                       | 3.4        | 3.1        | 2.4                 | 2.8        | 1.9        | 23               | 22         | 24         | 24          | 24         |  |
| <b>Emerging economies</b>        | <b>82.6</b>                                       | <b>138.6</b> | <b>193.5</b> | <b>256.6</b> | <b>344.7</b> | <b>442.4</b> | <b>717</b>   | <b>1,037</b> | <b>5.8</b>                | <b>5.8</b> | <b>5.7</b> | <b>4.4</b>          | <b>4.9</b> | <b>3.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |  |
| Leisure, recreation and holidays | 42.1  | 75.3         | 97.9         | 122.6        | 165.6        | 216.6        | 356          | 521          | 5.6                       | 5.8        | 5.4        | 4.5                 | 5.1        | 3.9        | 51               | 51         | 49         | 50          | 50         |  |
| Business and professional        | 10.4  | 16.3         | 29.3         | 39.6         | 50.6         | 65.3         | 105          | 151          | 6.3                       | 7.2        | 5.5        | 4.3                 | 4.8        | 3.7        | 13               | 15         | 15         | 15          | 15         |  |
| VFR, health, religion, other     | 30.1  | 47.0         | 66.2         | 94.4         | 128.5        | 160.6        | 256          | 365          | 5.7                       | 5.4        | 6.1        | 4.2                 | 4.8        | 3.6        | 36               | 34         | 36         | 36          | 35         |  |

(to be continued)

## International tourism by region of destination and purpose of visit (continued)

|                                  | International Tourist Arrivals received (million) |              |              |              |              |              |             |            | Average annual growth (%) |            |             |                     |            |            | Market share (%) |            |            |             |            |
|----------------------------------|---|--------------|--------------|--------------|--------------|--------------|-------------|------------|---------------------------|------------|-------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|
|                                  | actual data                                       |              |              |              |              |              | projections |            | actual data               |            |             | projections         |            |            | actual data      |            |            | projections |            |
|                                  | 1980  | 1990         | 1995         | 2000         | 2005         | 2010         | 2020        | 2030       | 1980-2010, of which       |            |             | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |
|                                  |   |              |              |              |              |              |             |            | 1980-'95                  | '95-2010   |             | 2010-'20            | 2020-'30   |            |                  |            |            |             |            |
| <b>Africa</b>                    | <b>7.2</b>  | <b>14.8</b>  | <b>18.9</b>  | <b>26.5</b>  | <b>35.4</b>  | <b>50.3</b>  | <b>85</b>   | <b>134</b> | <b>6.7</b>                | <b>6.7</b> | <b>6.7</b>  | <b>5.0</b>          | <b>5.4</b> | <b>4.6</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| Leisure, recreation and holidays | 3.6   | 7.8          | 10.7         | 14.8         | 18.6         | 26.0         | 42          | 63         | 6.8                       | 7.5        | 6.1         | 4.5                 | 4.9        | 4.2        | 51               | 57         | 52         | 49          | 47         |
| Business and professional        | 1.2   | 2.0          | 3.1          | 4.2          | 4.8          | 7.3          | 13          | 22         | 6.2                       | 6.4        | 5.9         | 5.6                 | 6.0        | 5.2        | 17               | 16         | 15         | 15          | 16         |
| VFR, health, religion, other     | 2.3   | 5.0          | 5.1          | 7.6          | 12.0         | 17.0         | 30          | 49         | 6.9                       | 5.4        | 8.3         | 5.5                 | 6.0        | 4.9        | 32               | 27         | 34         | 36          | 37         |
| <b>Americas</b>                  | <b>62.3</b>                                       | <b>92.8</b>  | <b>109.0</b> | <b>128.2</b> | <b>133.3</b> | <b>149.7</b> | <b>199</b>  | <b>248</b> | <b>3.0</b>                | <b>3.8</b> | <b>2.1</b>  | <b>2.6</b>          | <b>2.9</b> | <b>2.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| Leisure, recreation and holidays | 30.0  | 46.5         | 55.0         | 67.7         | 70.8         | 80.4         | 109         | 137        | 3.3                       | 4.1        | 2.6         | 2.7                 | 3.1        | 2.4        | 48               | 50         | 54         | 55          | 55         |
| Business and professional        | 10.5  | 16.9         | 21.2         | 24.3         | 21.8         | 24.8         | 32          | 38         | 2.9                       | 4.8        | 1.0         | 2.2                 | 2.5        | 1.8        | 17               | 19         | 17         | 16          | 15         |
| VFR, health, religion, other     | 21.8  | 29.4         | 32.8         | 36.3         | 40.7         | 44.6         | 59          | 73         | 2.4                       | 2.7        | 2.1         | 2.5                 | 2.8        | 2.2        | 35               | 30         | 30         | 29          | 29         |
| <b>Asia and the Pacific</b>      | <b>22.8</b>                                       | <b>55.8</b>  | <b>82.0</b>  | <b>110.1</b> | <b>153.6</b> | <b>204.0</b> | <b>355</b>  | <b>535</b> | <b>7.6</b>                | <b>8.9</b> | <b>6.3</b>  | <b>4.9</b>          | <b>5.7</b> | <b>4.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| Leisure, recreation and holidays | 13.1  | 32.3         | 47.9         | 61.2         | 83.1         | 113.7        | 202         | 310        | 7.5                       | 9.0        | 5.9         | 5.1                 | 5.9        | 4.4        | 57               | 58         | 56         | 57          | 58         |
| Business and professional        | 3.2   | 9.2          | 15.1         | 20.9         | 30.0         | 36.9         | 61          | 88         | 8.5                       | 10.9       | 6.1         | 4.4                 | 5.1        | 3.7        | 14               | 18         | 18         | 17          | 16         |
| VFR, health, religion, other     | 6.5   | 14.4         | 19.0         | 28.0         | 40.5         | 53.5         | 92          | 137        | 7.3                       | 7.4        | 7.1         | 4.8                 | 5.6        | 4.1        | 29               | 23         | 26         | 26          | 26         |
| <b>Europe</b>                    | <b>177.3</b>                                      | <b>261.5</b> | <b>304.1</b> | <b>385.1</b> | <b>438.7</b> | <b>475.3</b> | <b>620</b>  | <b>744</b> | <b>3.3</b>                | <b>3.7</b> | <b>3.0</b>  | <b>2.3</b>          | <b>2.7</b> | <b>1.8</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| Leisure, recreation and holidays | 110.3   | 160.9        | 175.9        | 208.2        | 237.6        | 261.8        | 335         | 395        | 2.9                       | 3.2        | 2.7         | 2.1                 | 2.5        | 1.7        | 62               | 58         | 55         | 54          | 53         |
| Business and professional        | 26.2  | 40.4         | 50.5         | 69.0         | 68.6         | 72.7         | 91          | 105        | 3.5                       | 4.5        | 2.5         | 1.9                 | 2.3        | 1.4        | 15               | 17         | 15         | 15          | 14         |
| VFR, health, religion, other     | 40.8  | 60.2         | 77.7         | 107.9        | 132.5        | 140.9        | 195         | 243        | 4.2                       | 4.4        | 4.0         | 2.8                 | 3.3        | 2.3        | 23               | 26         | 30         | 31          | 33         |
| <b>Middle East</b>               | <b>7.1</b>  | <b>9.6</b>   | <b>13.7</b>  | <b>24.1</b>  | <b>36.3</b>  | <b>60.9</b>  | <b>101</b>  | <b>149</b> | <b>7.4</b>                | <b>4.5</b> | <b>10.5</b> | <b>4.6</b>          | <b>5.2</b> | <b>4.0</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| Leisure, recreation and holidays | 2.5   | 4.8          | 6.0          | 11.8         | 17.3         | 29.6         | 50          | 74         | 8.6                       | 6.1        | 11.2        | 4.7                 | 5.3        | 4.0        | 35               | 44         | 49         | 49          | 50         |
| Business and professional        | 1.0   | 0.9          | 1.5          | 2.6          | 5.3          | 8.5          | 15          | 23         | 7.5                       | 3.0        | 12.3        | 5.1                 | 5.8        | 4.4        | 14               | 11         | 14         | 15          | 16         |
| VFR, health, religion, other     | 3.7   | 4.0          | 6.2          | 9.7          | 13.7         | 22.7         | 36          | 51         | 6.3                       | 3.6        | 9.0         | 4.2                 | 4.8        | 3.6        | 51               | 45         | 37         | 36          | 35         |

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## International tourism by region of origin and mean of transport

|                             | International Tourist Arrivals generated (million) |              |              |              |              |              |              |              | Average annual growth (%) |            |            |                     |            |            | Market share (%) |            |            |             |            |
|-----------------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|------------|------------|---------------------|------------|------------|------------------|------------|------------|-------------|------------|
|                             | actual data  |              |              |              |              |              | projections  |              | actual data               |            |            | projections         |            |            | actual data      |            |            | projections |            |
|                             | 1980   | 1990         | 1995         | 2000         | 2005         | 2010         | 2020         | 2030         | 1980-2010, of which       |            |            | 2010-2030, of which |            |            | 1980             | 1995       | 2010       | 2020        | 2030       |
|                             |  |              |              |              |              |              |              |              | 1980-'95                  | '95-2010   |            | 2010-'20            | 2020-'30   |            |                  |            |            |             |            |
| <b>World</b>                | <b>277</b>   | <b>435</b>   | <b>528</b>   | <b>674</b>   | <b>797</b>   | <b>940</b>   | <b>1,360</b> | <b>1,809</b> | <b>4.2</b>                | <b>4.4</b> | <b>3.9</b> | <b>3.3</b>          | <b>3.8</b> | <b>2.9</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 106  | 188          | 238          | 317          | 397          | 481          | 702          | 939          | 5.2                       | 5.5        | 4.8        | 3.4                 | 3.8        | 2.9        | 38               | 45         | 51         | 52          | 52         |
| over surface                | 170  | 247          | 290          | 357          | 401          | 459          | 658          | 870          | 3.4                       | 3.6        | 3.1        | 3.2                 | 3.7        | 2.8        | 62               | 55         | 49         | 48          | 48         |
| <b>from:</b>                |  |              |              |              |              |              |              |              |                           |            |            |                     |            |            |                  |            |            |             |            |
| <b>Africa</b>               | <b>5.7</b>   | <b>10.6</b>  | <b>12.3</b>  | <b>15.7</b>  | <b>20.6</b>  | <b>29.9</b>  | <b>53</b>    | <b>90</b>    | <b>5.7</b>                | <b>5.3</b> | <b>6.1</b> | <b>5.7</b>          | <b>5.8</b> | <b>5.5</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 4.6  | 5.3          | 5.2          | 6.4          | 8.3          | 10.8         | 19           | 32           | 2.9                       | 0.9        | 5.0        | 5.6                 | 5.7        | 5.5        | 80               | 42         | 36         | 36          | 36         |
| over surface                | 1.2  | 5.3          | 7.1          | 9.3          | 12.2         | 19.1         | 34           | 58           | 9.8                       | 12.8       | 6.8        | 5.7                 | 5.9        | 5.6        | 20               | 58         | 64         | 64          | 64         |
| <b>Americas</b>             | <b>71.1</b>  | <b>100.5</b> | <b>110.1</b> | <b>132.5</b> | <b>139.8</b> | <b>159.9</b> | <b>212</b>   | <b>265</b>   | <b>2.7</b>                | <b>3.0</b> | <b>2.5</b> | <b>2.6</b>          | <b>2.9</b> | <b>2.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 35.2   | 51.9         | 57.6         | 78.2         | 84.1         | 96.5         | 128          | 158          | 3.4                       | 3.3        | 3.5        | 2.5                 | 2.8        | 2.2        | 49               | 52         | 60         | 60          | 60         |
| over surface                | 35.9   | 48.7         | 52.5         | 54.3         | 55.7         | 63.3         | 85           | 106          | 1.9                       | 2.6        | 1.3        | 2.6                 | 2.9        | 2.3        | 51               | 48         | 40         | 40          | 40         |
| <b>Asia and the Pacific</b> | <b>24.7</b>  | <b>59.7</b>  | <b>87.6</b>  | <b>115.7</b> | <b>154.7</b> | <b>204.5</b> | <b>358</b>   | <b>541</b>   | <b>7.3</b>                | <b>8.8</b> | <b>5.8</b> | <b>5.0</b>          | <b>5.7</b> | <b>4.2</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 16.9   | 38.8         | 56.8         | 70.2         | 83.2         | 112.4        | 192          | 286          | 6.5                       | 8.4        | 4.6        | 4.8                 | 5.5        | 4.1        | 68               | 65         | 55         | 54          | 53         |
| over surface                | 7.9  | 20.9         | 30.8         | 45.5         | 71.5         | 92.1         | 166          | 255          | 8.5                       | 9.5        | 7.6        | 5.2                 | 6.1        | 4.4        | 32               | 35         | 45         | 46          | 47         |
| <b>Europe</b>               | <b>169.2</b>                                       | <b>255.2</b> | <b>307.8</b> | <b>395.3</b> | <b>458.3</b> | <b>508.7</b> | <b>681</b>   | <b>832</b>   | <b>3.7</b>                | <b>4.1</b> | <b>3.4</b> | <b>2.5</b>          | <b>3.0</b> | <b>2.0</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 45.9   | 87.8         | 114.6        | 157.5        | 213.1        | 247.7        | 341          | 427          | 5.8                       | 6.3        | 5.3        | 2.8                 | 3.2        | 2.3        | 27               | 37         | 49         | 50          | 51         |
| over surface                | 123.3  | 167.4        | 193.2        | 237.8        | 245.2        | 261.0        | 340          | 404          | 2.5                       | 3.0        | 2.0        | 2.2                 | 2.7        | 1.8        | 73               | 63         | 51         | 50          | 49         |
| <b>Middle East</b>          | <b>5.9</b>   | <b>8.6</b>   | <b>9.9</b>   | <b>14.8</b>  | <b>23.9</b>  | <b>37.2</b>  | <b>57</b>    | <b>81</b>    | <b>6.3</b>                | <b>3.5</b> | <b>9.2</b> | <b>4.0</b>          | <b>4.4</b> | <b>3.5</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b> |
| by air                      | 3.8  | 3.8          | 3.5          | 4.3          | 8.1          | 14.0         | 23           | 35           | 4.4                       | -0.6       | 9.7        | 4.7                 | 5.2        | 4.2        | 64               | 35         | 38         | 40          | 43         |
| over surface                | 2.1  | 4.8          | 6.4          | 10.6         | 15.9         | 23.3         | 34           | 46           | 8.3                       | 7.7        | 9.0        | 3.5                 | 3.9        | 3.1        | 36               | 65         | 62         | 60          | 57         |

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