International tourism trends in EU-28 member states

Current situation and forecasts for 2020-2025-2030

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Prepared by the:
World Tourism Organization (UNWTO), the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism
Tourism Market Trends Programme
John Kester, Director,
with the assistance of Fernando Alonso, Julia Baunemann, Jennifer Iduh, Michel Julian, Baeho Kim and Javier Ruescas

Explanation of abbreviations and signs used

* = provisional figure or data
.. = figure or data not (yet) available
| = change of series
n/a = not applicable
mn = million (1,000,000)
bn billion (1,000,000,000) [note in French 'milliard', in Spanish 'miles de millones']
tn = trillion (1,000,000,000,000) [note in French 'billion', in Spanish 'billones']

Series International Tourist Arrivals
TF: International tourist arrivals at frontiers (excluding same-day visitors);
VF: International visitor arrivals at frontiers (tourists and same-day visitors);
THS: International tourist arrivals at hotels and similar establishments;
TCE: International tourist arrivals at collective tourism establishments;
NHS: Nights of international tourists in hotels and similar establishments;
NCE: Nights of international tourists in collective tourism establishments.

Series International Tourism Receipts and Expenditure
All percentages are derived from non-seasonally adjusted series in local currencies, unless otherwise indicated: $: US$; €: euro; sa: seasonally adjusted series.

For main concepts, definitions and classifications for the measurement of tourism, please see the International Recommendations for Tourism Statistics 2008 (IRTS 2008) at <statistics.unwto.org/content/irts-2008>.

Note that due to changes in the historical data series, the data in this report may vary slightly from that in *UNWTO Tourism Towards 2030*.

Contents

Executive summary

Past and current situation

- International tourism has shown exceptional development in the post World War II era. International tourist arrivals (overnight visitors) worldwide grew from a mere 25 million in 1950 to 1,087 million in 2013. Over the same period international tourism receipts increased from US$ 2 billion to US$ 1,159 billion (euro 873 billion).
- The current 28 member countries of the European Union saw their tourism grow from 153 million international tourist arrivals in 1980 to 433 million in 2013. Over the same time span international tourism receipts increased from ECU[†] 39 billion (US$ 55 billion) to euro 303 billion (US$ 403 billion).
- EU-28 countries accounted for 40% of international tourist arrivals worldwide in 2013 and for 35% of the global total of international tourism receipts.
- In recent years, the EU-28 has seen annual growth in international arrivals above the long-term trend, although this is characteristic of a post-crisis recovery scenario. It should be seen primarily as compensation for the losses incurred in 2008-2009 and not as a real shift in trends, since underlying demand patterns have not changed significantly.
- In most years, the real growth in receipts matches the growth in international arrivals fairly closely, underscoring the strong correlation between the two key measures as indicators of international tourism trends.
- Both worldwide and in the EU-28, international tourism receipts have grown faster than overall economic output (Gross Domestic Product) in recent years.
- Tourism has proved to be resilient, recovering fairly rapidly in the years following the shocks of 9/11 and SARS in the early 2000s and the great recession of 2009.
- While most of the traditional outbound markets have recovered and exceeded pre-crisis levels, emerging economies have really driven the growth in international tourism demand. Three source markets – China, the Russian Federation and Brazil – have contributed close to half of all worldwide growth (as measured in expenditure) in recent years. For EU destinations, all three markets are highly relevant, both in terms of volume growth and opportunities for investment.

Projection 2010 to 2020-2025-2030

- For the group of 28 EU member countries, projections are made in this report for international tourism flows in the two decades 2010-2030 in line with the forecast in the *UNWTO Tourism Towards 2030* long-term outlook.
- International tourist arrivals to destinations of the EU-28 are expected to grow by 2.1% a year on average until 2025, compared with an average of 2.4% in the period 1995-2010. Worldwide international arrivals will grow by 3.5% a year on average through 2025.
- The projected rate of growth in the period 2010-2025 represents an increase of some 9 million international tourist arrivals a year on average in the EU-28, compared with an increase of 8 million a year in the period 1995-2010. At this rate, international tourist arrivals in the EU-28 will exceed half a billion by 2023, reaching 520 million in 2025 and 557 million in 2030, up from 2010's 380 million.
- The seven emerging economy destinations in the EU-28 (Bulgaria, Croatia, Hungary, Latvia, Lithuania, Poland and Romania) are expected to grow faster, at 3.7% a year on average through 2025, than the 21 advanced economy destinations (1.9% a year).
- By subregion, the EU-28 destinations in Central and Eastern Europe are expected to grow fastest at 3.4% a year on average through 2025. The more mature

[†] European Currency Unit, precursor to the euro, a former basket of the currencies of the European Community. On 1 January 1999, the euro replaced the ECU, at the value of euro 1 = 1 ECU.

destinations in Western Europe (+2.0% a year), Northern Europe (+2.0% a year) and Southern and Mediterranean Europe (+1.8% a year) will grow at virtually the same rate in relative terms.

- Tourism density in Europe in general and in the EU-28 in particular is the highest in the world. EU-28 countries accounted for a combined population of 505 million in 2010 (7% of the world) and 380 million international arrivals (40%), averaging 75 arrivals per 100 of population. This is expected to increase to 107 arrivals per 100 of population in 2030, about five times the world average.
- Air transport has increasingly become the preferred mode of transport for international travel, increasing from 38% of international arrivals worldwide in 1980 to 51% in 2010. However, in Europe with its many comparatively small countries with good infrastructure for travel by car, coach or train, surface travel is still the dominant mode of travel with a 54% share in 2010, versus 46% for air travel.
- The majority of international arrivals in EU-28 destinations were for the purpose of leisure, recreation and holidays (59%) in 2010, while 16% were for business and 25% for visiting friends and relatives (VFR), health, religion or other.
- A large portion of the new arrivals in the two decades 2010-2030 will originate from emerging economy source markets in Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, Africa and the Middle East. Yet, Europe overall remains the largest outbound region with travel expected to increase by 2.7% a year on average to 834 million in 2025.
- As in most regions, for EU-28 destinations too, the large majority of international arrivals originate from the same region. Out of the 380 million arrivals in 2010, 286 million (75%) were from EU-28 source markets, while another 42 million (11%) originated from European source markets outside the EU. Some 14% of arrivals came from outside Europe (52 mn), of which most from the Americas (27 mn, 7%) and Asia and the Pacific (18 mn, 5%), while Africa (4 mn) and the Middle East (3 mn) both accounted for some 1% of the EU's arrivals.
- Arrivals in the EU from non-EU Europe and other regions combined totalled 94 million in 2010. Growth is expected to be some 2.9% a year on average, reaching 144 million in 2025.
- As other less mature regions in the world, in particular Asia and the Pacific, are growing at a faster pace both in terms of inbound and outbound tourism, the share of EU-28 destinations in the world has been decreasing gradually since 1980. By 2025 about one third of international arrivals will be in one of the EU destinations (33%), down from 40% in 2010 and 56% in 1980.

Opportunities and challenges

- UNWTO's long-term outlook *Tourism Towards 2030* shows that there is still a substantial potential for further expansion in coming decades. Both existing and new destinations can benefit from this opportunity, provided they do the necessary to ensure the right conditions with regard to the business environment, infrastructure and travel facilitation.
- For the 28 destinations of the European Union, tourism will continue to show growth, yet, its rate of growth will be modest compared with that of other regions, albeit on an already very large base.
- In order to stay competitive and tap into the potential demand, it is essential to continue creating and raising awareness and to mainstream tourism in the political agenda. Most of the EU destinations have a strong tradition in tourism and a great professionalism and can count on a highly developed tourism sector underpinned by some very strong assets.
- However, sufficient challenges remain with regard to sustainability, infrastructure, accessibility, travel facilitation, changing consumer trends and governance, and these need to be addressed to guarantee successful future tourism development.

1. Objective

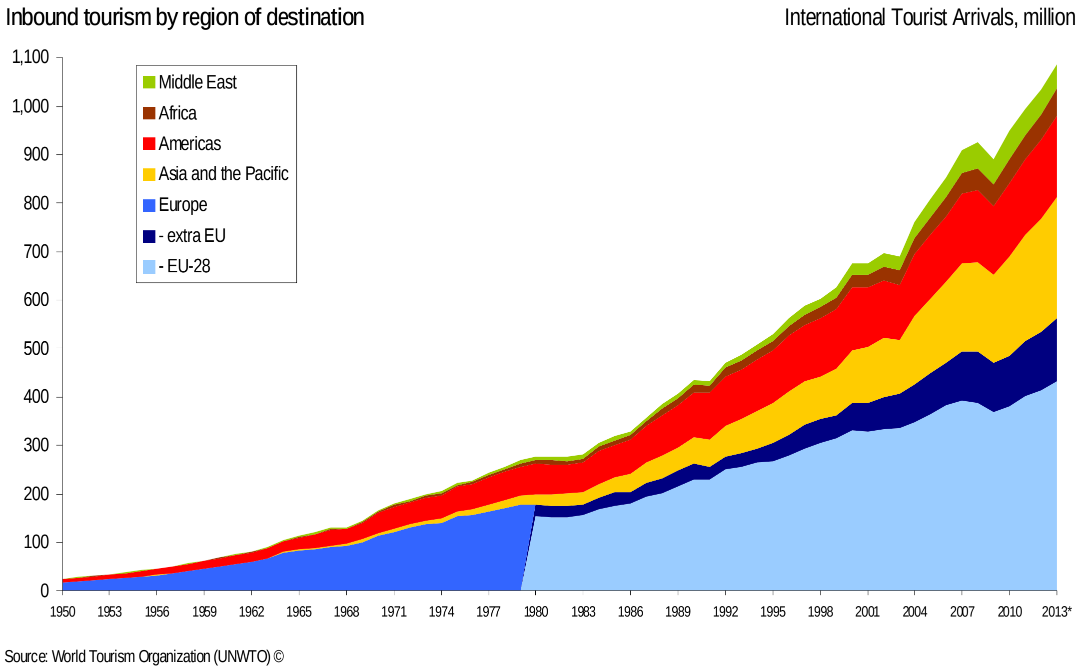
The objective of this report is to derive a consistent set of quantitative trends for the group of 28 European Union countries (EU-28) which is compatible with that in the *UNWTO Tourism Towards 2030* (TT2030) long-term outlook. As an introduction to the forecasts, this report starts with a brief overview of historical trends and the current situation.

2. Past and current situation

International tourism has shown exceptional development in the post World War II era. Worldwide, international tourist arrivals (overnight visitors) reported by destinations around the world grew from a mere 25 million in 1950 to 1,087 million in 2013. Over the same period international tourism receipts increased from US$ 2 billion to US$ 1,159 billion (euro 873 billion).

The rapid growth of modern day tourism took off in the 1950s and 1960s in North America and in Northern, Western and parts of Southern Europe. Even though expansion continues in all regions, growth in recent decades has increasingly come from emerging destinations in Asia and the Pacific, Eastern Europe, Latin America, the Middle East and Africa.

The current 28 member countries of the European Union saw their tourism grow from 153 million international tourist arrivals in 1980 to 433 million in 2013. Over the same time span international tourism receipts increased from ECU‡ 39 billion (US$ 55 billion) to euro 303 billion (US$ 403 billion). (See tables in the annex.)



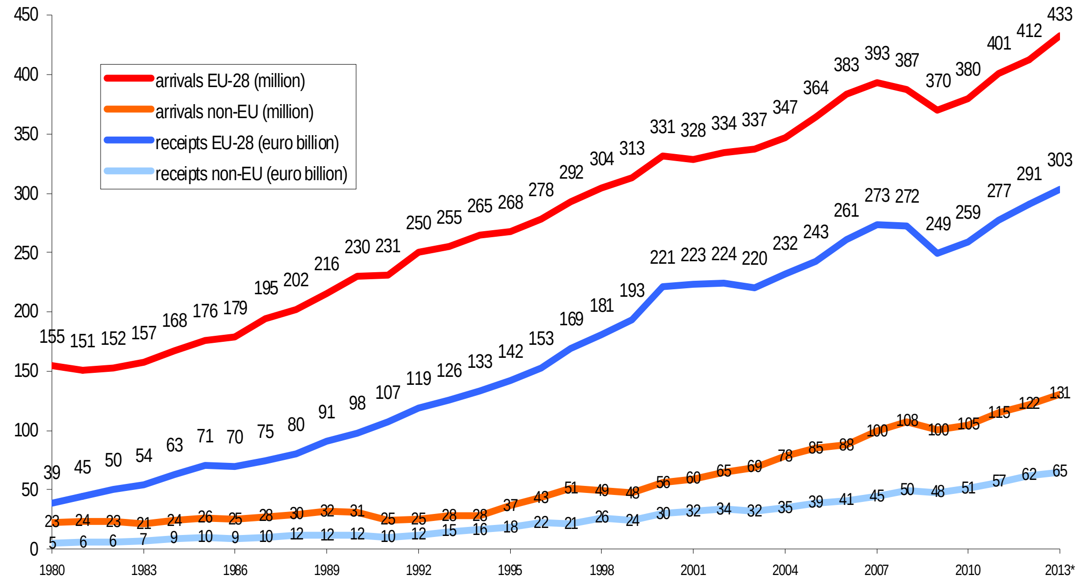
2.1 International tourist arrivals (overnight visitors) 2013

- EU-28 countries reported 433 million international tourist arrivals in 2013. Of these, 165 million were to EU-28 destinations in Western Europe, 152 million to Southern Mediterranean Europe, 63 million to Northern Europe and 52 million to Central and Eastern Europe.

‡ European Currency Unit, precursor to the euro. See further footnote on page 5.

- EU-28 countries accounted for 40% of international tourist arrivals worldwide in 2013.
- Five EU-28 countries rank among the top 10 destinations by arrivals worldwide: France (83 mn in 2012, 2013 data still to be reported), Spain (61 mn), Italy (48 mn), Germany (32 mn) and United Kingdom (31 mn).
- Of the total international arrivals in Europe in 2013, 432 million were to EU member countries and 131 million to other European destinations, taking the total for Europe to 563 million (52% of the world). Arrivals in non-EU destinations were split 67 million to destinations in Central and Eastern Europe, i.e. the Russian Federation and other CIS countries; 50 million to Southern Europe, of which the majority in Turkey; and 15 million to Northern and Western Europe (EFTA plus Liechtenstein and Monaco).

EU-28 and extra EU, international tourist arrivals and international tourism receipts



Source: World Tourism Organization (UNWTO) ©

2.2 *International tourism receipts 2013*

- EU-28 countries earned euro 303 billion in 2013 (US$ 403 bn) from expenditure by international visitors in tourism destinations on accommodation, food and drink, local transport, entertainment, shopping and other services and goods (excluding international passenger transport).
- EU-28 destinations in Western Europe earned euro 114 billion, while Southern Mediterranean Europe generated euro 112 billion, Northern Europe euro 51 billion and Central and Eastern Europe euro 26 billion.
- International tourism receipts in EU-28 destinations account for 35% of the global total. This lower share in terms of global receipts – compared with that of international arrivals (40%) – reflects the lower average expenditure per trip. With its comparatively short distances and good infrastructure, travel in the EU-28 is characterised by more frequent but shorter trips.
- EU-28 counted five destinations among the first 10 earners worldwide in 2013: Spain (euro 46 bn), France (euro 42 bn), Italy (euro 33 bn), Germany (euro 31 bn) and the United Kingdom (euro 31 bn).
- Non-EU European countries earned euro 65 billion in 2013 (7% of the world), taking the European total to euro 368 billion (42% of the world). Non-EU destinations in Southern Europe earned euro 29 billion, those in Central and

Eastern Europe 19 billion, and those in Northern and Western Europe generated euro 18 billion.

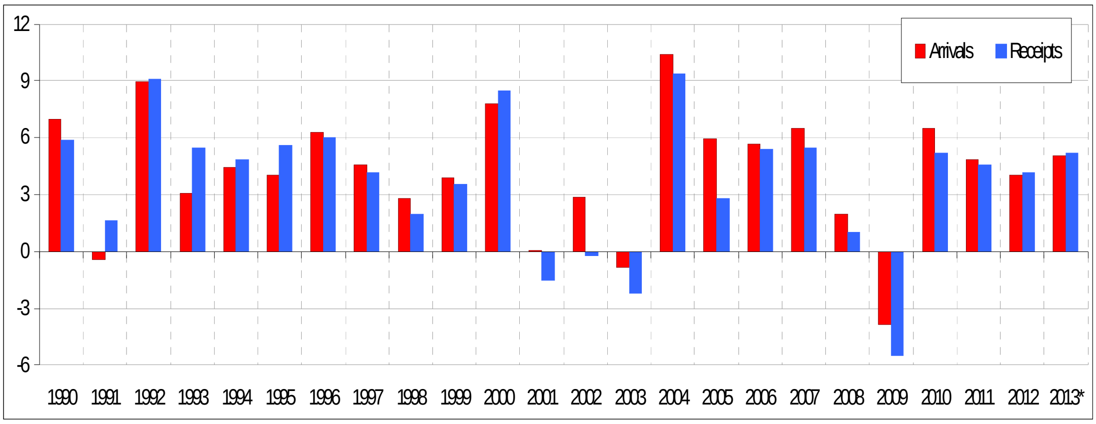
2.3 Trends in international arrivals and receipts

On an aggregate level, the growth in receipts (measured in real terms, i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) matches fairly closely the growth in arrivals, underscoring the strong correlation between the two key measures as indicators of international tourism trends. The difference between the two variables is generally less than one percentage point.

International Tourist Arrivals and Tourism Receipts (local currencies, constant prices)

World

Change over previous year (%)

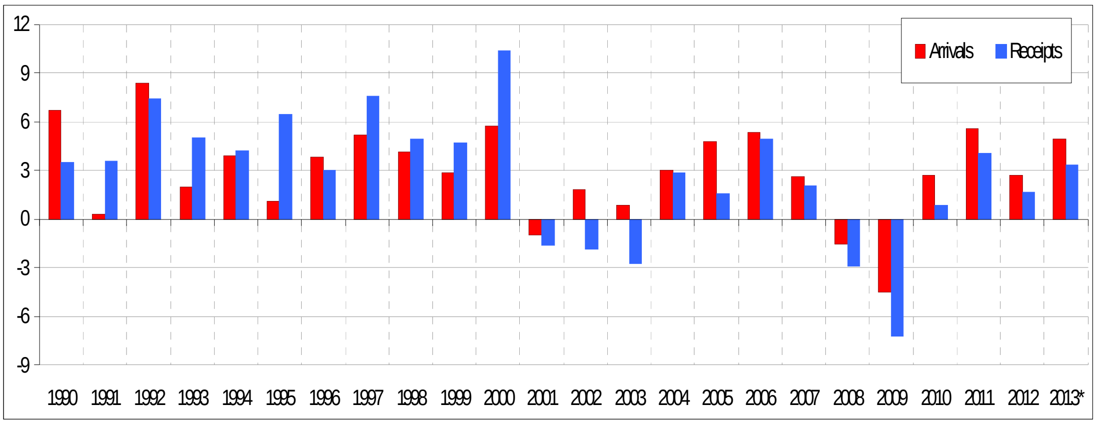


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals and Tourism Receipts (local currencies, constant prices)

EU-28

Change over previous year (%)



Source: World Tourism Organization (UNWTO) ©

The EU-28 in international arrivals in recent years has seen an annual growth above the long-term trend, although this is characteristic of a post-crisis recovery scenario. It should be seen primarily as a compensation for the losses incurred in 2008-2009 and not as a real shift in trends, since underlying demand patterns have not changed significantly. While most of the traditional outbound markets have recovered and exceed pre-crisis levels, emerging markets are the ones that have really boosted growth. In fact, China, the Russian Federation and Brazil, have driven close to half of all worldwide growth (as measured in expenditure) in recent years, although the pace of growth is inevitably going to slow as volumes increase.

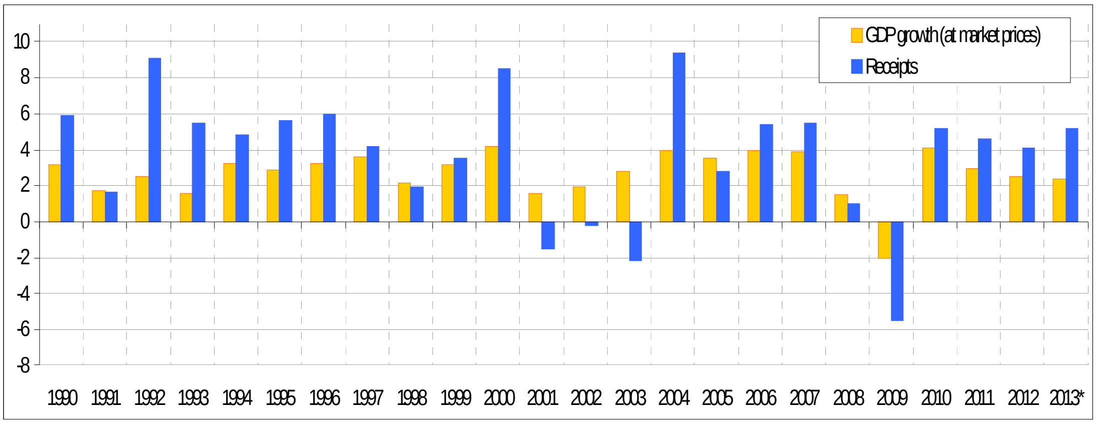
In the EU-28 the growth in receipts is still lagging somewhat behind that of arrivals – more than is reflected in the worldwide trend. This is typical for a recovery period, when arrivals tend to pick up more quickly than receipts. It is also a reflection of a still weak economic environment and a comparatively strong exchange rate. In order to stay competitive it is necessary to contain prices. By comparison, in the period 1995-2000, when European currencies where comparatively weaker, the growth in receipts did exceed that of arrivals.

2.4 International tourism and Gross Domestic Product

Both worldwide and in EU-28, international tourism receipts have grownw faster than overall economic output (Gross Domestic Product), in particular in the period 1990-2000. The period 2000-2010 was more mixed, though, with the impact of the external shocks of 9/11 and SARS in the early 2000s and the great recession of 2009. Tourism, however, has proved to be resilient, recovering fairly rapidly in the years following the shocks. It is interesting to note that the growth of tourism receipts in the last three years has been quite a bit stronger than the feeble growth of economic output, especially in the EU-28.

Gross Domestic Product (GDP) and Tourism Receipts (local currencies, constant prices)

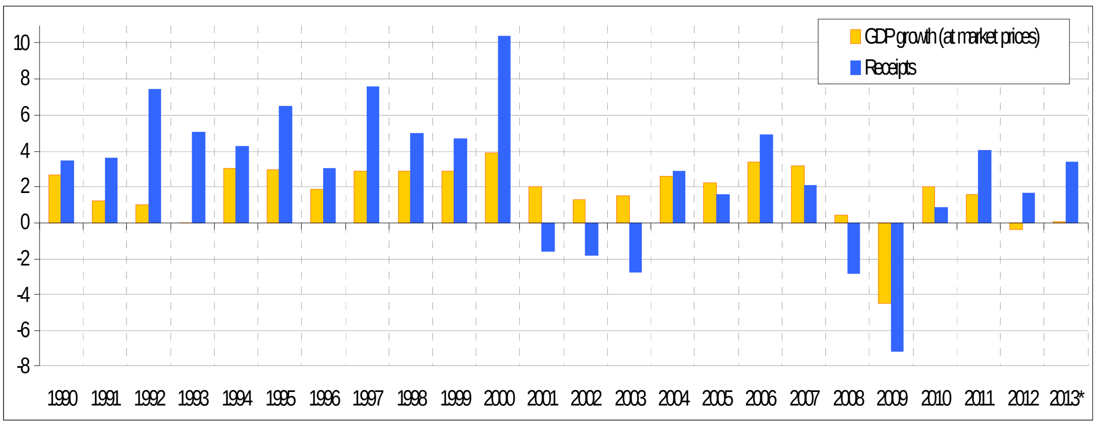
World — Change over previous year (%)



Source: World Tourism Organization (UNWTO) and International Monetary Fund (IMF)

Gross Domestic Product (GDP) and Tourism Receipts (local currencies, constant prices)

EU-28 — Change over previous year (%)



Source: World Tourism Organization (UNWTO), Eurostat and International Monetary Fund (IMF)

2.5 Source markets for EU-28 destinations

Data on arrivals and nights in accommodation establishments as collected under a EU directive by national statistics institutions and aggregated and disseminated by Eurostat, the Statistical Office of the European Union, can offer a more detailed and consistent picture of the origin of arrivals in EU countries.

EU-28 countries reported 814 million arrivals in all collective establishments (hotels, holiday and other short-stay accommodation, camping grounds, recreational vehicle parks and trailer parks) in 2011 (the latest year for which comprehensive aggregate data is available). Of these, 517 million arrivals were by domestic visitors (63% share) and 297 million were by international visitors (37%). Visitors overall spent close to 2.5 billion nights, 3 nights on average (2.7 nights per domestic visitor, 3.6 nights per international visitor). Hotels and similar establishments were the most frequented type of accommodation with 641 million visitors spending 1.6 billion nights, 2.6 nights on average.

Of the 297 million international arrivals in collective establishments in the EU-28, the large majority originated from Europe (233 million, 78% market share), of which 203 million (68%) were from intra EU-27 (Croatia not yet included) and 29 million (10%) from outside the EU. Germany was the leader among the intra EU-27 markets with 48 million international arrivals in EU countries, followed by the United Kingdom with 31 million, the Netherlands with 20 million, France with 18 million, Italy with 15 million and Spain with 11 million. Non-EU arrivals are mainly from Switzerland (10 million) and the Russian Federation (10 million to hotels and similar accommodation in 2012).

The remaining 59 million international arrivals (22%) were from interregional source markets, of which 29 million (10%) from the Americas, 24 million (8%) from Asia and the Pacific (including most of the Middle East in the Eurostat classification) and 2 million (1%) from Africa. For the remaining 2% the country of origin was not specified. According to the 2012 data on arrivals at hotels and similar accommodation available for individual countries, the most important interregional markets were the United States (17.7 million), Japan (5.4 million), China (including Hong Kong) (5.0 million), Australia (3.2 million), Canada (3.1 million) and Brazil (2.5 million). However, for some markets the actual numbers might be higher as not all destinations report all source markets separately, but rather including some of them as, for example, part of 'other Asia'.

Data by individual destination countries shows that the share of international arrivals is higher in the smaller destinations, while the larger ones Germany, France, the United Kingdom, Poland, Romania, Sweden and Finland, report comparatively large numbers of domestic visits.

In all EU destination countries, the majority of international arrivals originated from intra EU-27 markets in 2011. Malta, Belgium, Slovakia, Luxembourg, Estonia, Austria, Spain and Portugal recorded the largest shares of intra EU-27 arrivals, accounting for over three quarters of all international arrivals. By contrast, more than a quarter of international arrivals in Latvia, Finland, Sweden and Lithuania were from European countries outside the EU (chiefly Norway and the Russian Federation). The United Kingdom, Italy, Germany, France and the Netherlands attracted an above-average share of interregional visitors, reflecting their position as interregional gateways notably for travellers from North America and Asia.

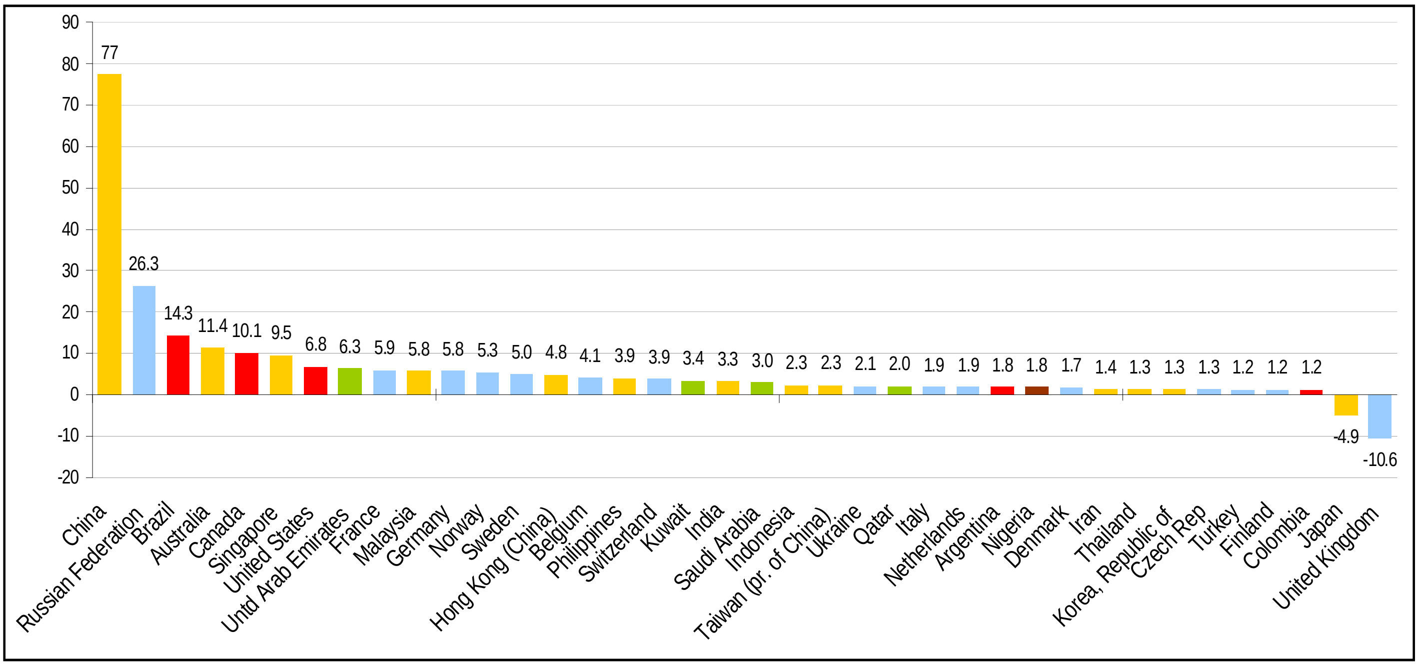
It should be noted that data on accommodation statistics reflects arrivals at establishments and not visits, and are only partially compatible with arrivals at frontiers commonly used by UNWTO (and in the projection in the continuation of this report). Unlike data on arrivals at frontiers, accommodation statistics do not take account of travellers staying in private accommodation (with friends and family, in second homes, timeshare, etc.). At the same time, travellers staying in more than one establishment during their visit tend to be double-counted. Intraregional travellers, who more often stay in private accommodation, tend to be somewhat underrepresented and inter-regional leisure travellers, who often travel round, are overrepresented.

2.6 Fastest growing source markets worldwide

Compared with the pre-crisis year 2006, expenditure on international tourism has increased substantially for almost all source markets (see graph below). Overall receipts in destinations (i.e. the result of expenditure) were up by euro 278 bn (US$ 412 billion), from euro 595 bn (US$ 747 billion) in 2006 to euro 873 bn (US$ 1159 billion) in 2013, in spite of the economic crisis in the interim years (current terms). In real terms, average growth was 2.8% a year in these seven years (including the significant decline in 2009), or for the period 2006-2013 overall an increase by 21%.

Emerging economies increasingly drive international tourism demand. Three source markets clearly stand out: China, the Russian Federation and Brazil, recording the largest increases in international tourism expenditure between 2006 and 2013 of respectively euro 77 bn, euro 26 bn and euro 14 bn. For EU destinations, all three markets are highly relevant, both in terms of volume growth and opportunities for investment. China is pertinent because of its sheer volume alone and its potential for further growth. The Russian Federation is important because it has become the second largest regional market after Germany, while the Brazilian market offers the added advantage that no visa is needed for EU destinations.

International Tourism Expenditure: increase 2006-2013 **(euro billion)**



Source: World Tourism Organization (UNWTO) ©

China has been by far the fastest growing source market in recent years and it climbed to first place in the ranking by international tourism expenditure in 2012. In 2013, China extended its lead further, increasing expenditure by a massive euro 17 billion to a record euro 97 billion (US$ 127 bn) and widening the gap in expenditure with the second and third largest spenders, the United States and Germany, to euro 32 billion. Boosted by a growing middle class and rapidly rising disposable incomes, fewer restrictions on foreign travel and an appreciating currency, Chinese tourism spending has experienced virtually exponential growth over recent decades. Chinese tourism spending increased almost sevenfold in 13 years, from euro 14 billion in 2000 to euro

97 billion in 2013. Currently, expenditure by Chinese travellers generates some 11% of receipts in destinations worldwide. Many destinations are benefitting from this expenditure, boosting in particular receipts in regional destinations such as Hong Kong (China), Macao (China), Taiwan (pr. of China), the Republic of Korea, Thailand, Singapore, Malaysia and Vietnam. Interregional destinations all around the world are also seeing Chinese expenditure soar, even though visitor numbers are obviously smaller.

The Russian Federation became the fourth largest outbound market in 2013, following a 25% increase in spending to euro 40 billion. It has been the second fastest growing market in recent years after China, thanks to annual expenditure increasing by euro 26 billion since pre-crisis year 2006. In 2000, Russians travelling abroad spent just below euro 10 billion and, since then, expenditure has increased fourfold. The Russian Federation entered the top 10 by expenditure in 2003.

Brazil has been the third fastest growing source market with yearly expenditure up by euro 14 billion since 2006. In 2013, expenditure on travel abroad by Brazilians grew by 13% to euro 19 billion and Brazil climbed into the top 10 by expenditure in 10^{th} place from 12^{th} in 2012. In 2000, Brazilians travelling abroad spent just euro 4 billion and, since then, expenditure has increased more than 4 times.

These three growth champions ranked ahead in terms of expenditure increases of the four advanced economy source markets of Australia, Canada, Singapore and the United States. In the period 2006-2013, each of the latter increased tourism expenditure by between euro 7 billion and euro 11 billion, together accounting for an additional euro 38 billion (i.e. almost equivalent to the total expenditure of the fifth largest source market, but significantly less than the increase of China and just above the increase of the Russian Federation).

Furthermore, a whole range of advanced and emerging economy source markets increased expenditure by euro 1 billion to euro 6 billion, including most of the major European source markets. Among the emerging markets the ones especially to watch are the United Arab Emirates, Kuwait, Saudi Arabia and Qatar in the Middle East, and Malaysia, Philippines, India, Indonesia, Iran and Thailand in Asia and the Pacific.

Only two countries spent substantially less in 2013 than before the crisis: the United Kingdom (euro -11 bn) and Japan (euro -5 bn).

The economic powerhouses of the 21st century

In the first half of the 21st century, a major shift in global economic power is taking place away from advanced economies towards emerging economies sustained by rapid economic development and by population size. According to the thesis first put forward by Jim O'Neill, at the time economist at Goldman Sachs, Brazil, Russia, India and China (BRICs) are expected to take their places among the leading economies in the world by 2050 given their economic potential.

China is expected to overtake the United States as the largest economy by Gross Domestic Product (GDP) in around 2025. Of the other three BRICs, India is expected to move up to 3rd place (from 10th) in the ranking of the 15 largest economies by 2030, Brazil to 4th (from 8th) and the Russian Federation to 6th (from 9th). Other large emerging economies that will gain weight are Mexico moving up to 10th place, Indonesia to 12th and Turkey to 14th. Consequently, leading advanced economies United States, Japan, Germany, France, United Kingdom, Italy, Canada, Spain and Australia, will all move down one or more places. GDP per capita is also growing fast in all the emerging economies mentioned above, but is still lower than in advanced economies as they have comparatively large populations.

Emerging economies are also expected to drive growth in tourism demand in the coming decades, as has already clearly been happening in recent years with China, the Russian Federation and Brazil.

See further:
BRICs and Beyond, Goldman Sachs Global Economics Group, 2007 (www.goldmansachs.com/our-thinking/archive/BRICs-and-Beyond.html)
EM Equity in Two Decades: A Changing Landscape, Global Economics Paper No: 204, Goldman Sachs Global Economics, Timothy Moe, Caesar Maasry and Richard Tang, September 8, 2010 (www.dasinvestment.com/fileadmin/images/pictures/0809_Global_Econ_Paper_No__204_Final.pdf).

15 largest economies in 2010 and by 2030

rank			Population million		Gross Domestic Product (GDP) (US$ billion, fixed 2010)		share in world		average % a year	GDP per capita (US$, fixed 2010)	
2010	2030		2010	2030*	2010	2030*	2010	2030*	2010-2030*	2010	2030*
2	1	China	1,341	1,393	5,633	31,731	9%	23%	9.0%	4,200	22,800
1	2	United States	310	362	14,614	22,920	24%	17%	2.3%	47,100	63,350
10	3	India	1,225	1,523	1,594	7,972	3%	6%	8.4%	1,300	5,250
8	4	Brazil	195	220	1,990	5,862	3%	4%	5.5%	10,200	26,600
3	5	Japan	127	120	4,773	5,852	8%	4%	1.0%	37,700	48,700
9	6	Russia	143	136	1,689	4,730	3%	3%	5.3%	11,800	34,650
4	7	Germany	82	79	3,640	4,441	6%	3%	1.0%	44,250	55,900
5	8	France	63	68	2,866	4,205	5%	3%	1.9%	45,650	61,400
6	9	UK	62	69	2,582	3,644	4%	3%	1.7%	41,600	52,550
14	10	Mexico	113	135	1,050	2,991	2%	2%	5.4%	9,250	22,100
7	11	Italy	61	61	2,295	2,868	4%	2%	1.1%	37,900	47,150
18	12	Indonesia	240	280	692	2,446	1%	2%	6.5%	2,900	8,750
11	13	Canada	34	40	1,583	2,346	3%	2%	2.0%	46,550	58,850
17	14	Turkey	73	87	704	2,169	1%	2%	5.8%	9,700	25,050
15	15	Rep. of Korea	48	50	1,014	2,112	2%	2%	3.7%	21,050	41,950
12	16	Spain	46	50	1,542	1,966	3%	1%	1.2%	33,450	39,300
13	17	Australia	22	28	1,191	1,802	2%	1%	2.1%	53,500	64,900

Source: compiled by UNWTO based on Goldman Sachs Global Economics, *EM Equity in Two Decades: A Changing Landscape*, Global Economics Paper No: 204, Timothy Moe, Caesar Maasry and Richard Tang, September 8, 2010, page 13

3. Projection 2010 to 2020-2025-2030

This section highlights the projections for international tourism flows in the two decades 2010-2030 for the group of countries in the EU-28. Results are obtained with the quantitative forecast model developed by UNWTO, using as a basis the series of international tourist arrivals reported by destination countries around the world (see further box below).

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.

UNWTO Tourism Towards 2030
What and how do we forecast?: Modelling tourism demand

For the quantitative forecast of *UNWTO Tourism Towards 2030*, 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 is difficult to project because of exchange rate fluctuations and inflation.

The independent variables capture well structural underlying trends of potential demand at the macro-level. The model is kept simple on purpose, respecting 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 projections, the TT2030 three-dimensional data matrix has been used of data series with regard to international tourist arrivals (overnight visitors) 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.

In total, 22*5*2=220 flows with data for 31 years are potentially available to be used in generating forecasts. As some of the 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 with 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 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 a 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.

As a result for each combination of these 3 dimensions (destination x origin x mode of transport), a series of actual or projected data is available for the period 1980-2030.

- Actual data is available for 1980-2010 (TT2030 baseline) / 2011-2013 (real data most recent years); the outlook is available for 2010-2030, with the in-between year of choice, i.e. 2020, 2025.
- Actual data can be shown by country; outlook data is only available for groups of countries.

Furthermore, arrivals by subregion of destination can also be broken down by purpose of visit (leisure, business, VFR and other).

For this specific exercise with regard to the group of countries in EU-28, the UNWTO destination region Europe is further broken down into EU-28 and non-EU.

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 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 to that observed over the past decades. Asia (+5.7% a year) will lead the growth, tripling output. Africa (+4.8%) and the 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 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 earlier years of the period and will pick up in the middle of the decade 2010-2020, after which they will gradually slow down.

Transport costs: In order to asses the likely development in transport costs these are broken down into air and surface transport. After taking these elements into account, 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).

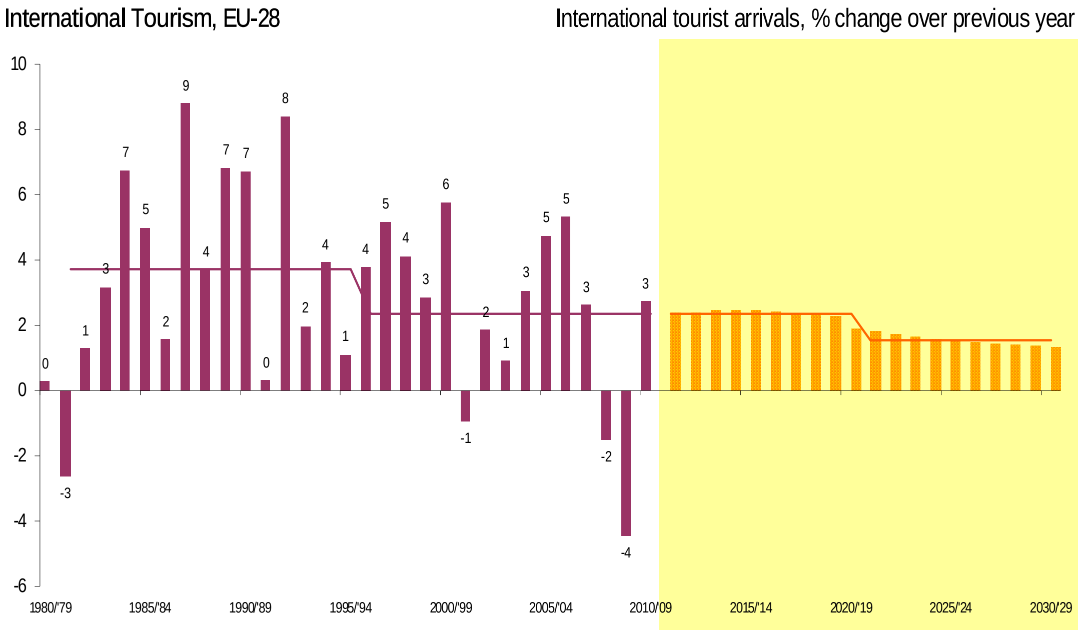
The steady decline in the cost of travelling by air in real terms over the past half century is unlikely to continue in the coming decades. Fuel costs are set to rise, as a result of expected increases in both the price of oil (as it becomes a scarcer resource) and taxation on aviation fuel. Technology innovation and a further increase in fuel efficiency of the fleet of 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.

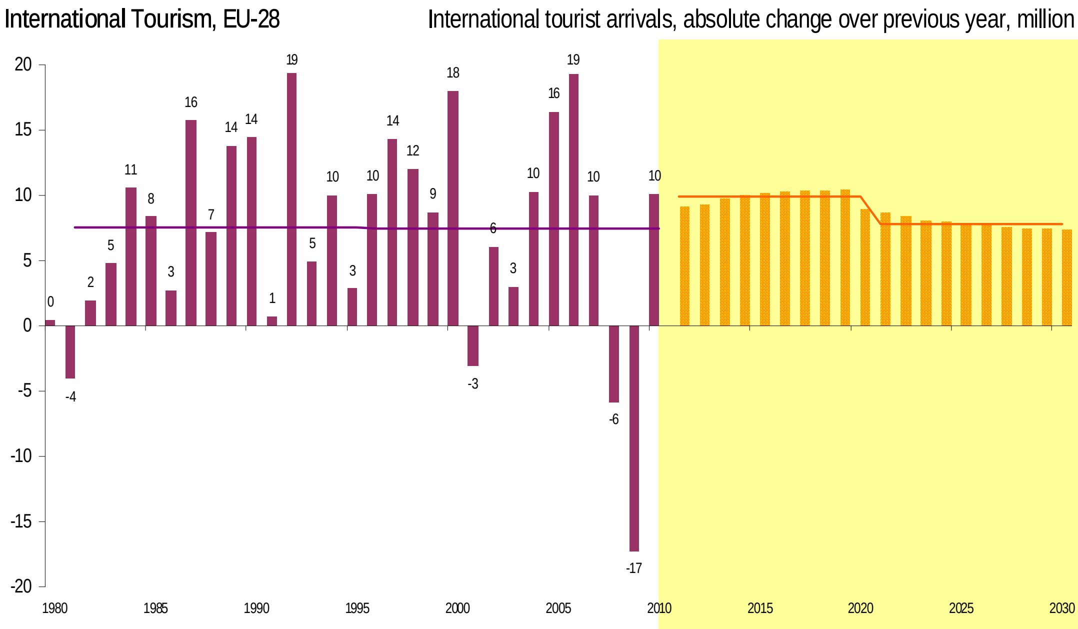
Based on these assumptions, forecasts are generated for the number of arrivals originating from each of the five regions.

3.1 Key results: International arrivals relative and absolute growth

- International tourist arrivals to destinations of the EU-28 are expected to grow by 2.1% a year on average until 2025, compared with an average of 2.4% in the period 1995-2010.
- Worldwide international arrivals will grow by 3.5% a year on average through 2025.



Source: World Tourism Organization (UNWTO) ©



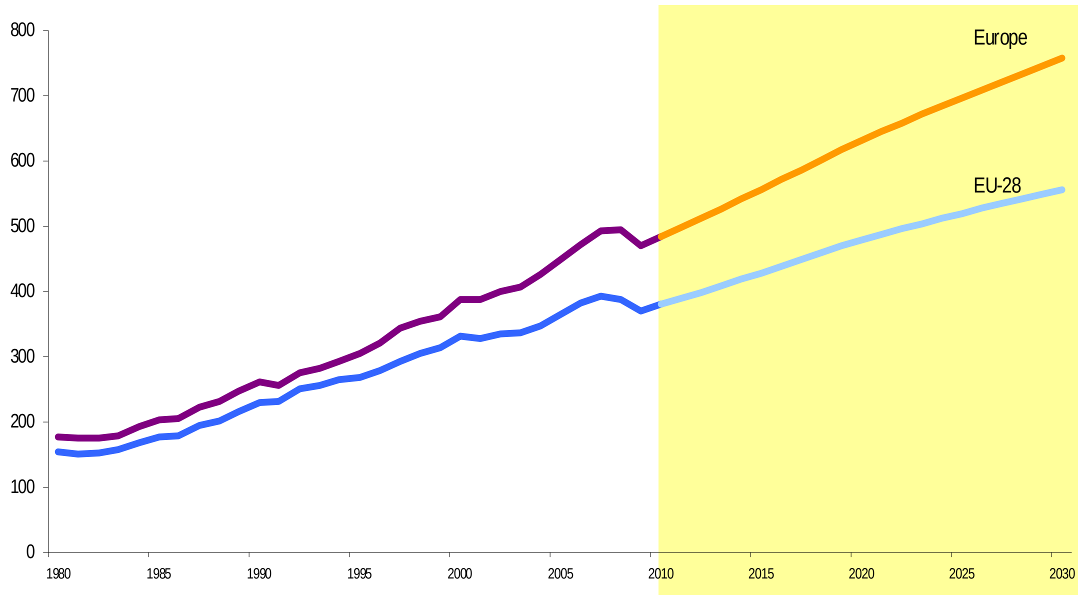
Source: World Tourism Organization (UNWTO) ©

- It is important to consider all the 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 substantial growth in absolute numbers. The projected rate of growth in the period 2010-2025 represents an increase of some 9 million international tourist arrivals a year on average in the

EU-28, compared with an average increase of 8 million a year in the period 1995-2010.

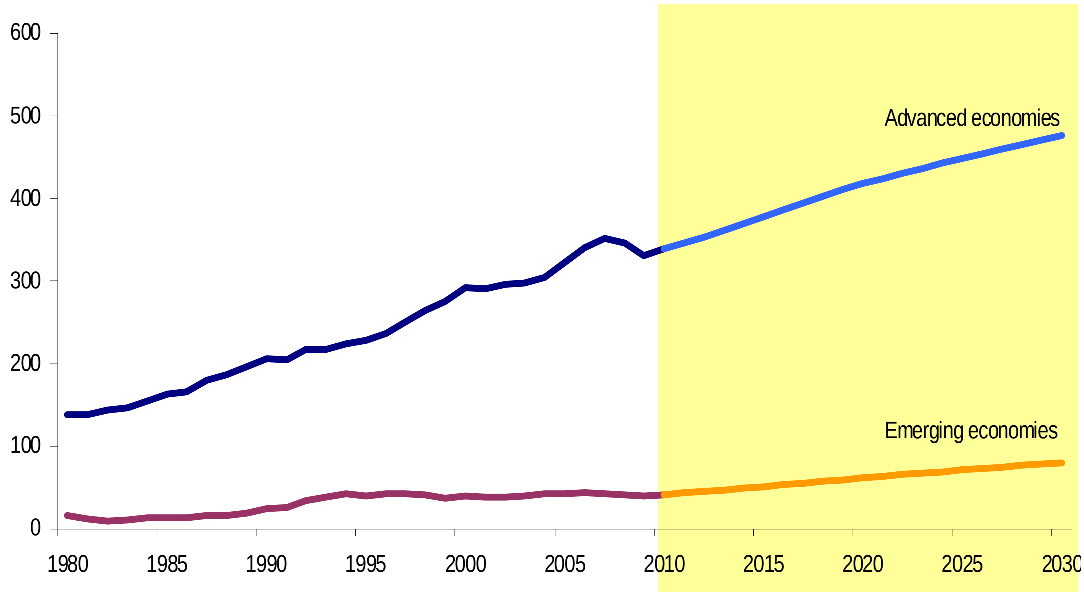
- At the projected rate of growth, international tourist arrivals in the EU-28 will exceed half a billion by 2023, reaching 520 million in 2025, up from the 380 million of 2010. By 2030 the number is expected to have reached 557 million.

International Tourism, Europe and EU-28 International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

Inbound tourism, EU-28 by advanced and emerging economies International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

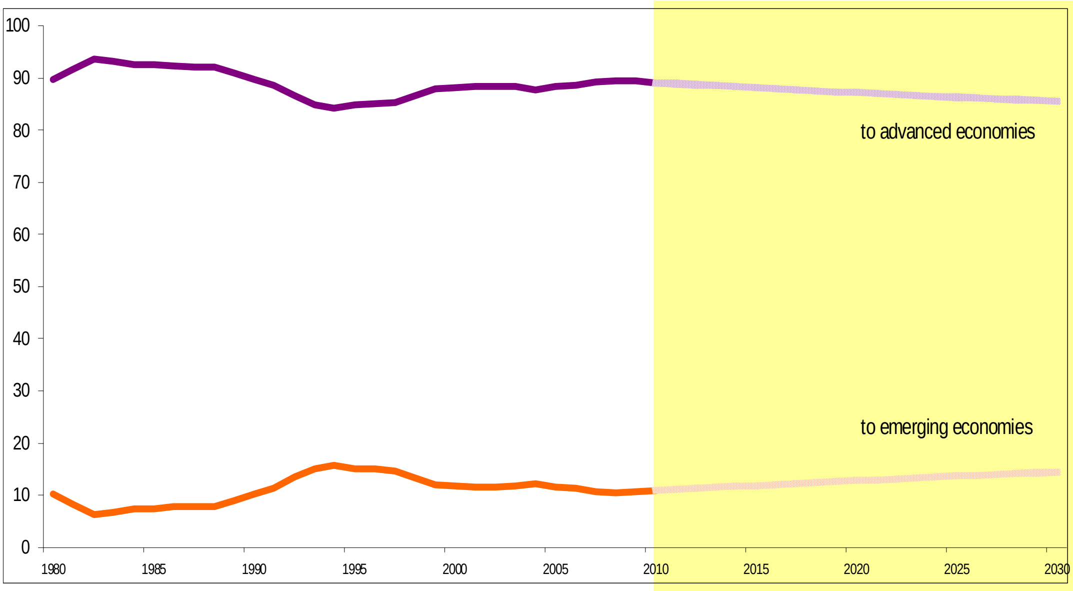
- The seven emerging economy destinations in the EU-28 (Bulgaria, Croatia, Hungary, Latvia, Lithuania, Poland and Romania) are expected to grow faster, at 3.7% a year on average through 2025, than the 21 advanced economy destinations (1.9% a year). As the advanced economies are growing from a much larger base, in absolute term they are expected to increase by 7 million a year to

449 million in 2025. The emerging economies will increase arrivals by 2 million a year, reaching 71 million in 2025.

- As a result, the share of emerging economy destinations will increase from 11% of the total of arrivals to EU-28 countries in 2010 to 14% in 2025.

Inbound tourism, EU-28 by advanced and emerging economies

International tourist arrivals, share, %

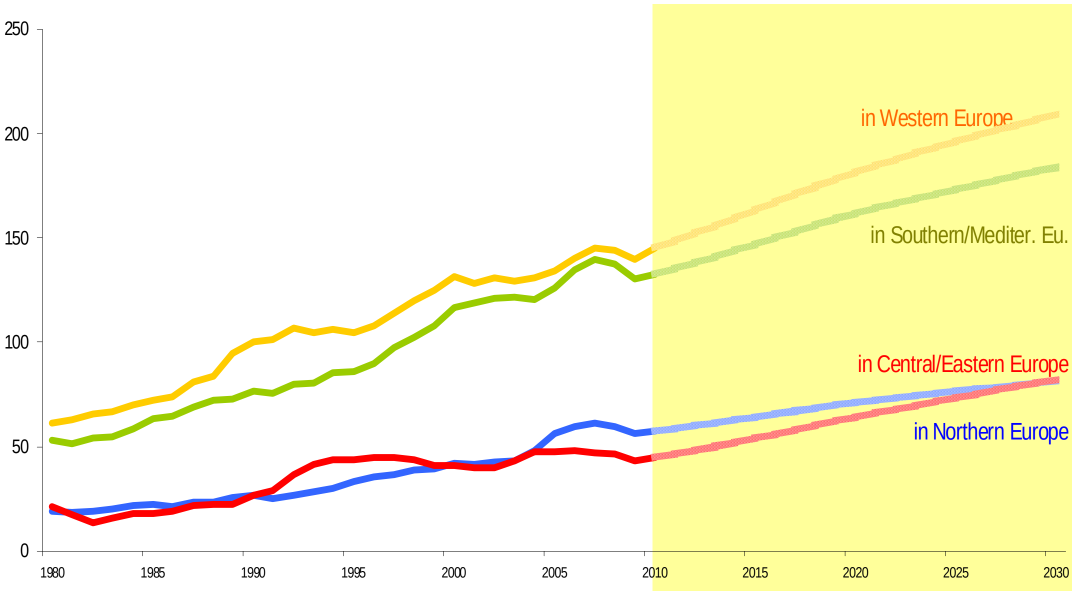


Source: World Tourism Organization (UNWTO) ©

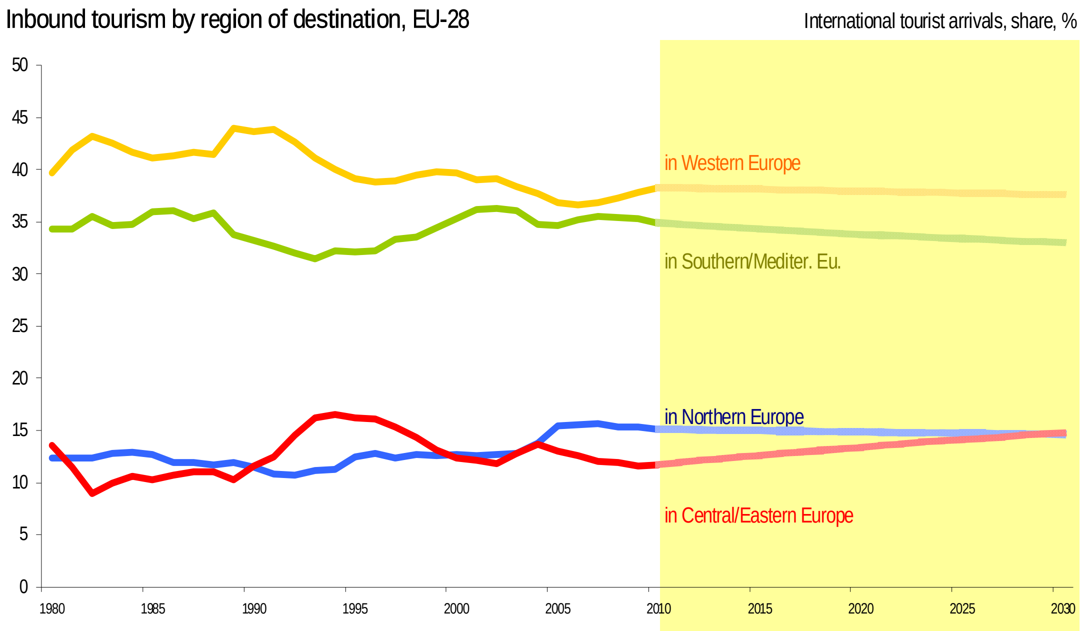
- By subregion, the EU-28 destinations in Central and Eastern Europe are expected to grow fastest at 3.4% a year on average through 2025.
- The more mature destinations in Western Europe (+2.0% a year), Northern Europe (+2.0% a year) and Southern and Mediterranean Europe (+1.8% a year) are expected to grow at virtually the same rate in relative terms.

Inbound tourism by region of destination, EU-28

International Tourist Arrivals, million

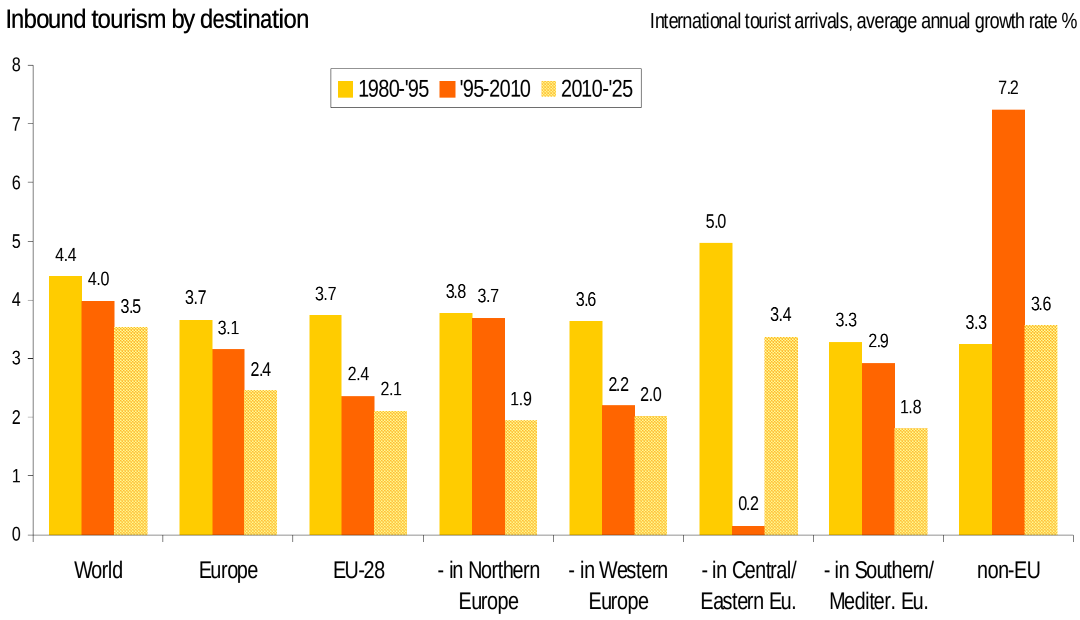


Source: World Tourism Organization (UNWTO) ©

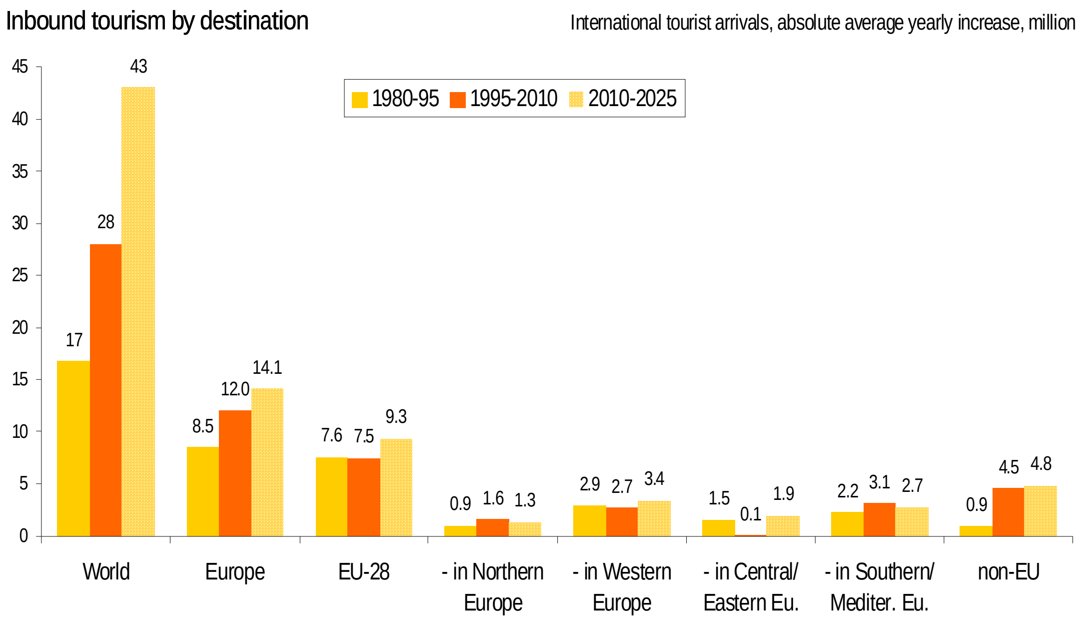


Source: World Tourism Organization (UNWTO) ©

- As the base values vary, in absolute terms destinations in Western Europe will grow by 3.4 million a year on average, to 196 million in 2025 (38% market share), destinations in Southern and Mediterranean Europe by 2.7 million, to 174 million (33%), destinations in Northern Europe by 1.3 million, to 77 million (15%) and destinations in Central and Eastern Europe by 1.9 million, to 73 million (14%).
- Destinations in Central and Eastern Europe will overtake destinations in Northern Europe in number of international arrivals by around 2029.
- Of the European destinations outside of the EU-28, those in Central and Eastern Europe are expected to grow by 3.4% a year (2.2 mn) to 82 million in 2025. Non-EU destinations in Southern and Mediterranean Europe will grow by 4.3% a year (2.4 million) to 76 million and in Northern and Western Europe at 1.8% a year (0.3 mn) to 19 million.
- Note that data before 1995 needs to be interpreted with caution. Because of the disintegration of Yugoslavia and the Soviet Union and the reunification of Germany, series for Central and Eastern Europe and Southern Europe are not fully consistent. EU-28 only includes data for new countries such as Estonia, Latvia, Lithuania, Croatia and Slovenia from the early 1990s.



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

3.2 International arrivals relative to population

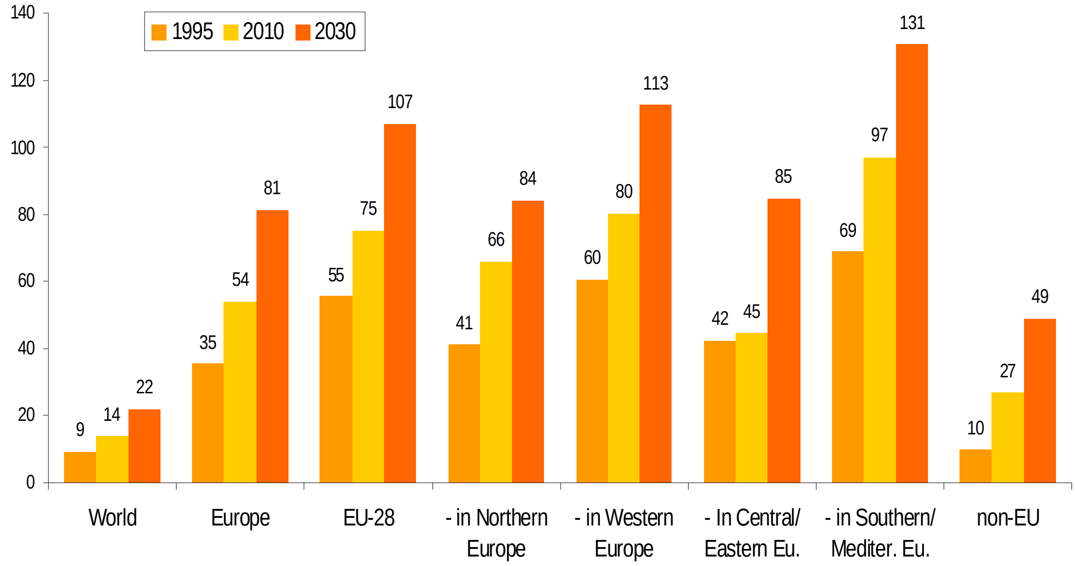
- Given the geography and economic and social development, tourism density in Europe in general and in the EU-28 in particular is the highest in the world. EU-28 countries accounted for a combined population of 505 million in 2010 (7% of the world) and 380 million international arrivals (40%), averaging 75 arrivals per 100 of population. By comparison, at the other extreme, Asia and the Pacific accounted for a 3.9 billion population (57%) and 205 million international arrivals (22%) in 2010, i.e. only 5 arrivals per 100 of population.
- In spite of the slower growth compared to other regions in the world, Europe will continue to lead in terms of international arrivals received per 100 of population.

While the average worldwide was 14 international arrivals per 100 of population in 2010, Europe had 54, almost four times as many. By 2030 this is expected to have increased to 22 and 81 respectively.

- By subregion, Western Europe, Southern and Mediterranean Europe and Northern Europe will exceed the European average receiving respectively 115, 106 and 84 international arrivals per 100 of population in 2030. Elsewhere in the world this is only followed by the Caribbean with 63 arrivals per 100 of population in 2030. In relative terms, all four subregions mentioned comprise 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 just below 50 per 100 of population.
- For the EU-28 countries the 75 arrivals per 100 of population in 2010 are expected to increase to 107 in 2030, both above the European average and five times the world average.
- In Central and Eastern Europe and in Southern and Mediterranean Europe there is a marked difference between EU and non-EU countries. Within the EU-28, Southern and Mediterranean Europe is expected to lead in tourism density in the forthcoming period with 131 international arrivals per 100 of population in 2030, up from 97 in 2010. For non-EU members in Southern and Mediterranean Europe these figures are 76 and 41 respectively. EU countries in Central and Eastern Europe received 42 arrivals per 100 in 2010 and this is expected to increase to 85 in 2030, versus 18 and 33 respectively for non-EU members.
- The highest tourism density is found in the non-EU destinations in Northern and Western Europe with 106 arrivals per 100 of population in 2010, expected to increase to 139 in 2030. However, in absolute numbers this is a small group, basically reflecting the results of the two larger destinations, Switzerland and Norway, and smaller destinations of Iceland, Liechtenstein and Monaco.

Inbound tourism by destination

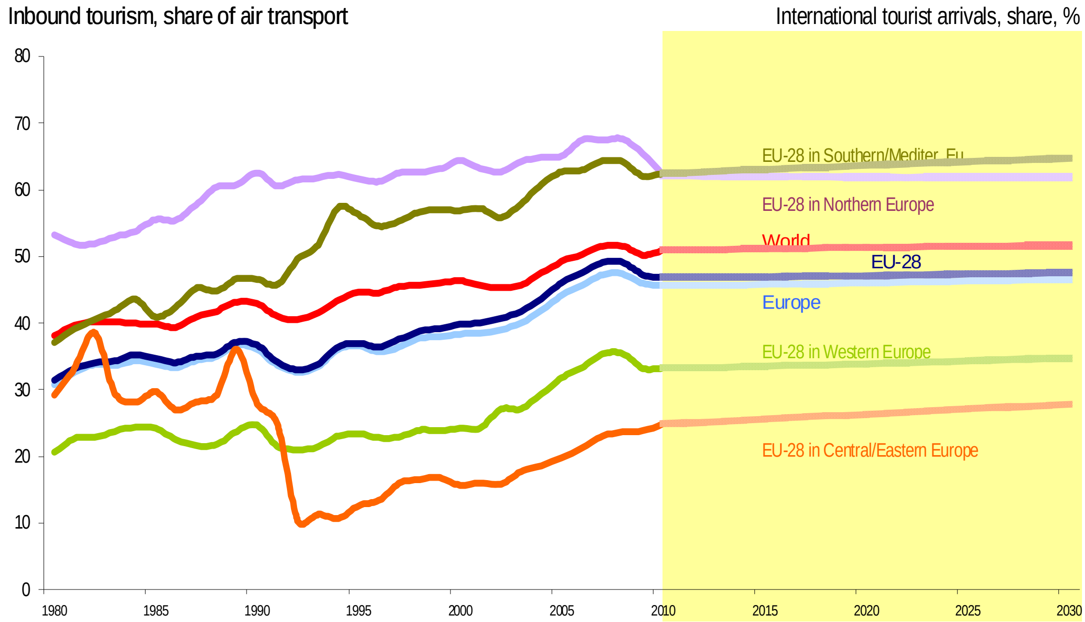
International Tourist Arrivals by destination per 100 of population



Source: World Tourism Organization (UNWTO) ©

3.3 Mode of transport

- Air transport has increasingly become the preferred mode of transport for international travel. While in the 1980s and 1990s the majority of trips were by surface travel – by road, rail or over water –, more than half of all international travellers have arrived by air since the mid 2000s. In the period 1980-2010, travel by air outgrew surface travel by a considerable margin, growing respectively at an average rate of 5.2% a year versus 3.4% a year. As a result, the share of air transport increased from 38% of international arrivals worldwide in 1980 to 51% in 2010. Over this period air transport has clearly gained share in Europe, the Americas and the Middle East. Even though the number of air travellers has grown in all regions, surface travel has grown at a faster rate in Asia and the Pacific and in Africa and thus increased share.
- The highest share of arrivals by air is found in the Middle East (59% in 2010), followed by the Americas (58%), Asia and the Pacific (57%) and Africa (50%).
- In Europe with its many comparatively small countries with good infrastructure for surface travel by car, coach or train, surface travel is still the dominant mode of travel with a 54% share in 2010, versus 46% for air travel.
- EU-28 countries do not vary much from non-EU countries with regard to mode of transport. By subregion, however, there is a marked variation, with the majority of tourists in Western Europe (67%) and Central and Eastern Europe (75%) arriving by land and/or sea in 2010, while Northern Europe and Southern Mediterranean Europe depend much more on air transport (both 62% by air in 2010, versus 38% surface travel).
- Worldwide, air transport is expected to continue to grow at a slightly faster pace 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. Air transport will continue to increase its market share, but at a much slower rate.



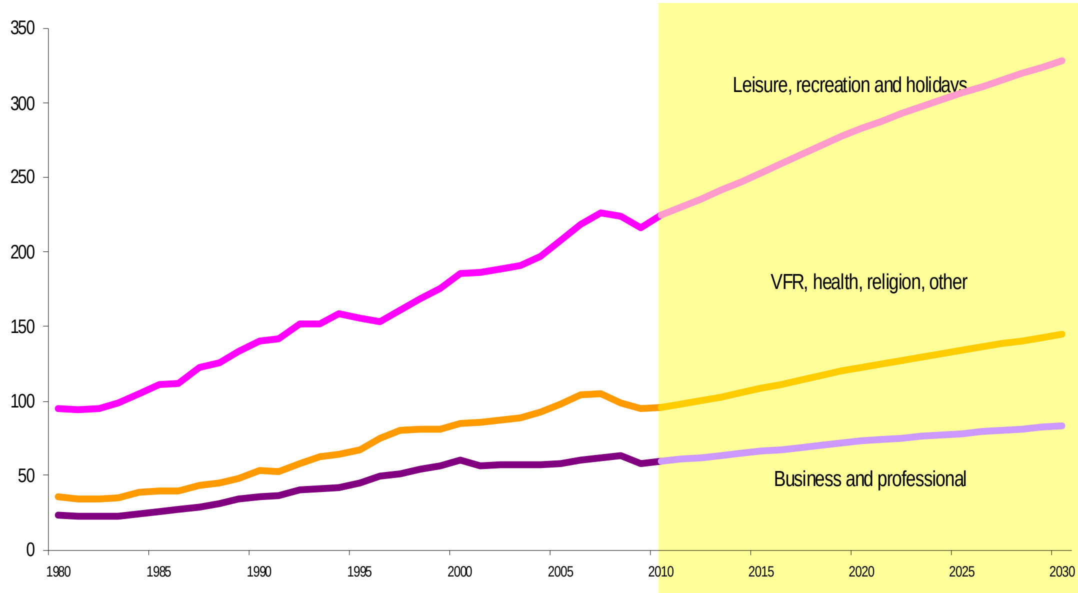
Source: World Tourism Organization (UNWTO) ©

3.4 Purpose of visit

- The majority of international arrivals in EU-28 destinations were for the purpose of leisure, recreation and holidays (59%) in 2010, while 16% were for business and 25% for visiting friends and relatives (VFR), health, religion or other.
- EU-28 destinations received comparatively more visitors for the purpose of leisure, recreation and holidays and slightly less for VFR, health, religion or other (worldwide respectively 55% and 29% in 2010).
- The share of leisure, recreation and holidays has somewhat decreased in EU-28 destinations since 1980, while VFR, health, religion and other has increased its share slightly.

EU-28, International tourism by purpose of visit

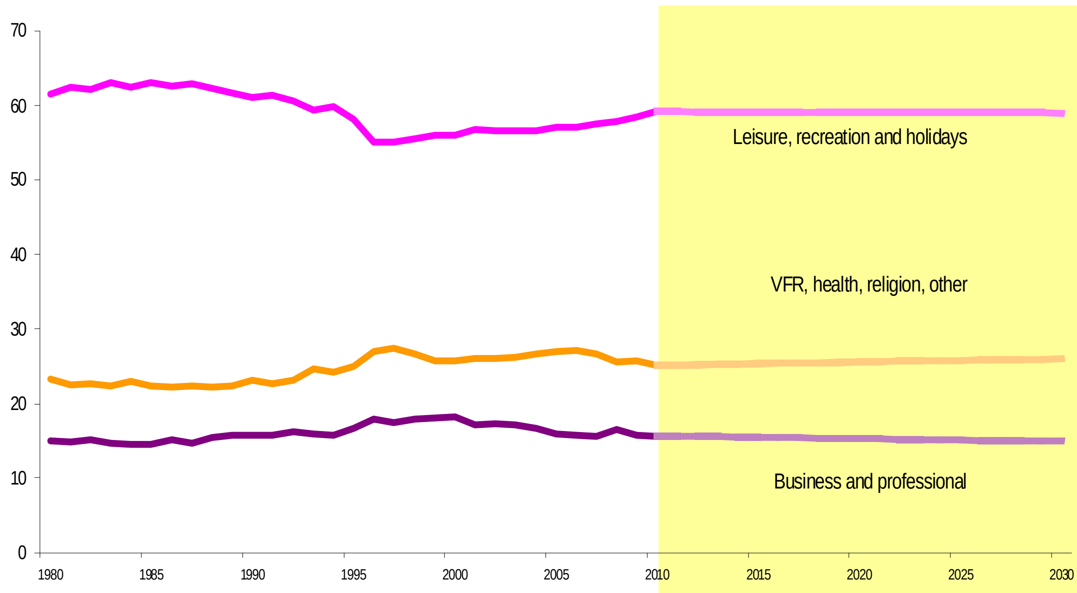
International tourist arrivals, million



Source: World Tourism Organization (UNWTO) ©

EU-28, International tourism by purpose of visit

International tourist arrivals, share, %

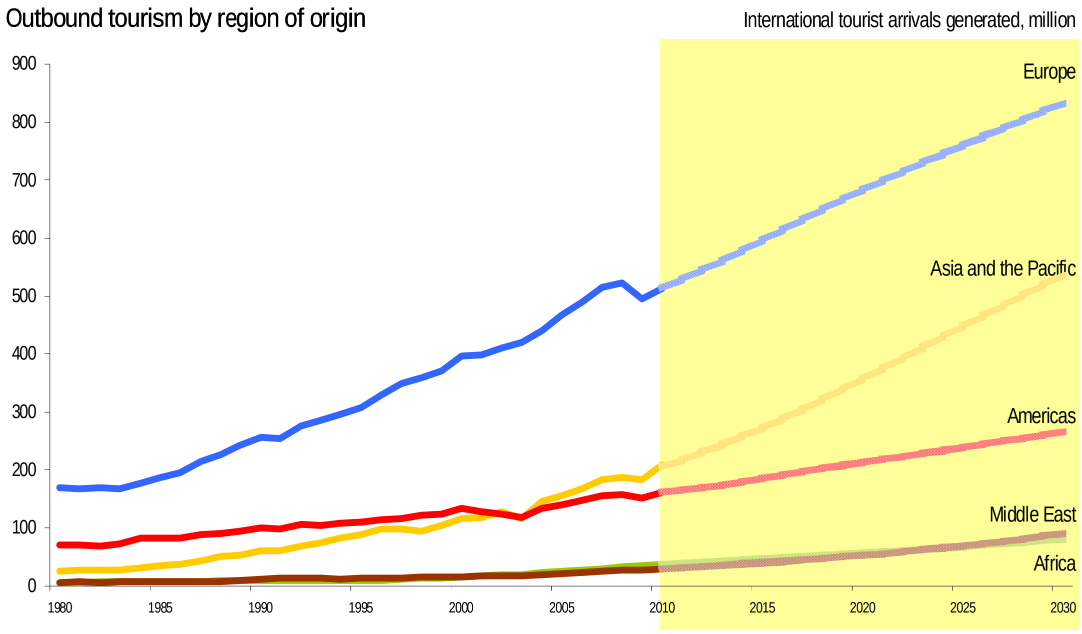


Source: World Tourism Organization (UNWTO) ©

- Since travel is expected to grow at a rather similar pace for all purposes in the period 2010-2030, the shares are not expected to vary much.
- Non-EU destinations are characterised by a much larger share of VFR, health, religion and other (43%), almost equal to the share of leisure, recreation and holidays (45%). In the period 2010-2030 these shares are not expected to vary much.

3.5 Region of origin

- A large portion of the new arrivals in the two decades 2010-2030 will originate from emerging economy source markets in Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, Africa and the Middle East.
- Europe overall remains the largest outbound region with travel expected to increase by 2.7% a year on average to 834 million in 2025. Asia and the Pacific, growing by 5.4% through 2025, is the fastest growing outbound region in absolute terms, with an increase of 17 million a year on average to reach 459 million. The Americas (+2.7% a year) will remain the third largest outbound region with 239 million in 2025. Africa is the fastest growing outbound region in relative terms (+5.7% a year), but from a low base, and is expected to reach 69 million in 2025. The Middle East (+4.1% a year) will reach 68 million in 2025.



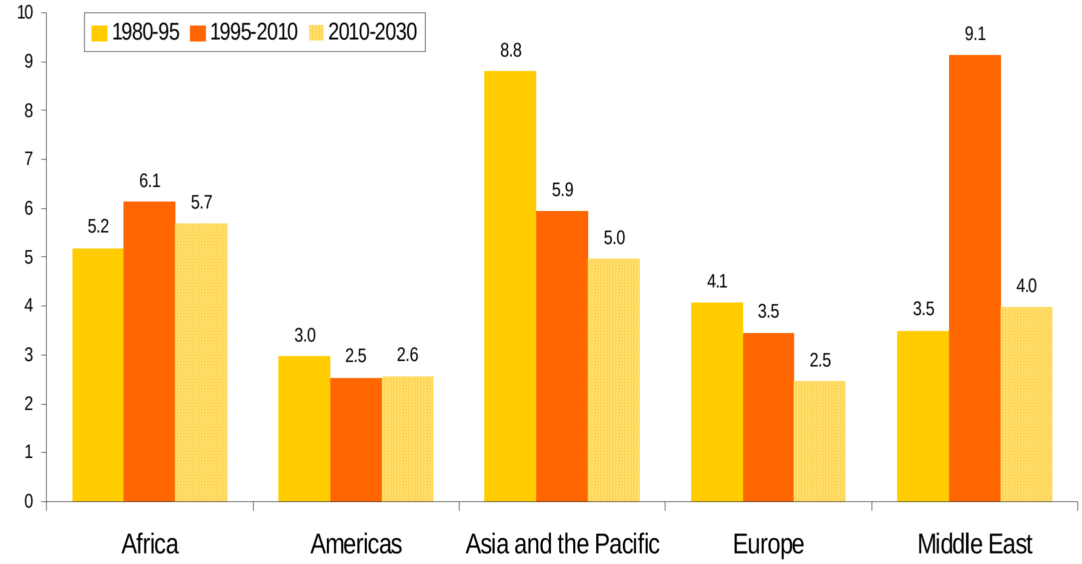
Source: World Tourism Organization (UNWTO) ©

- As the base volume of Africa is small, in absolute numbers Asia and the Pacific is the region that will grow the most, generating on average an additional 17 million international arrivals every year through 2030. Europe follows in the ranking with an average of 16 million extra arrivals a year, resulting from a much more moderate growth rate, but on top of a much larger base. The remaining 10 million additional yearly arrivals will be generated by the Americas (5 million), Africa (3 million) and the Middle East (2 million).
- 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 way of comparison, in 1980 it was only 6 per 100.

- By region there is quite a wide variation in outbound tourism participation, remaining highest in Europe and still low in Asia and the Pacific. Europe has the highest propensity to travel abroad, which is expected to increase from 57 arrivals per 100 of population in 2010 to 90 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 be attracted to international tourism. Between 2010 and 2030 Asia and the Pacific will more than double its arrivals generated per 100 of 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 over the space of 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.
-

Outbound tourism by region of origin

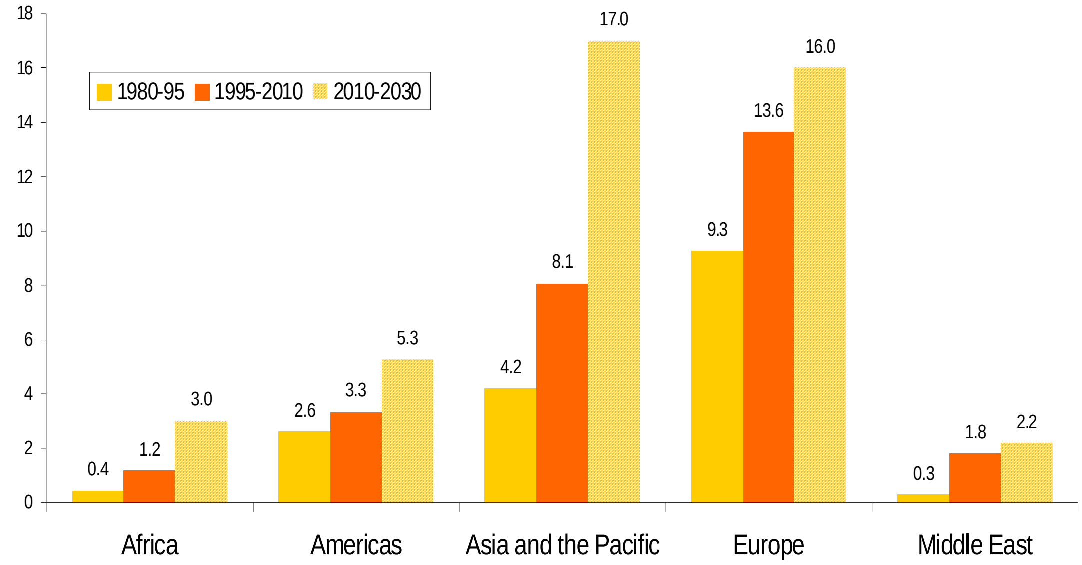
International tourist arrivals generated, average annual growth rate %



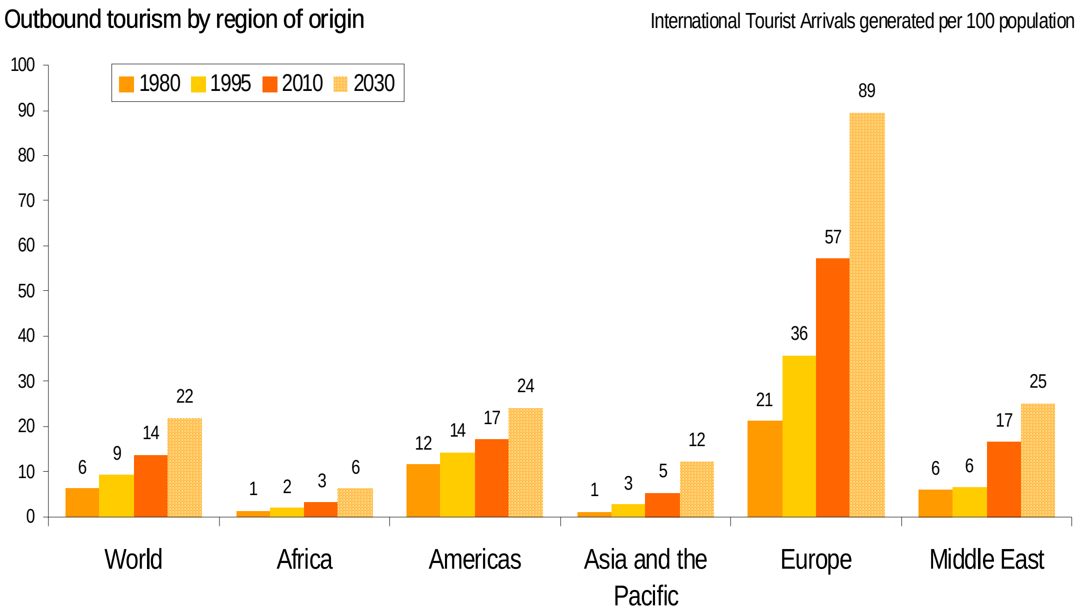
Source: World Tourism Organization (UNWTO) ©

Outbound tourism by region of origin

International tourist arrivals generated, absolute average yearly increase, million



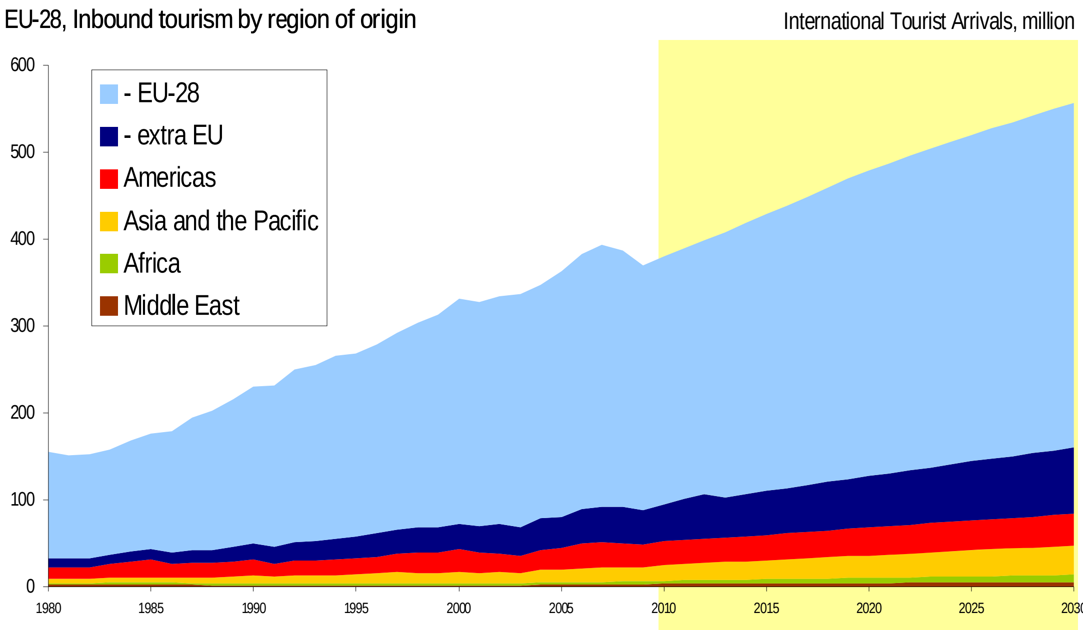
Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

3.6 EU-28 by region of origin

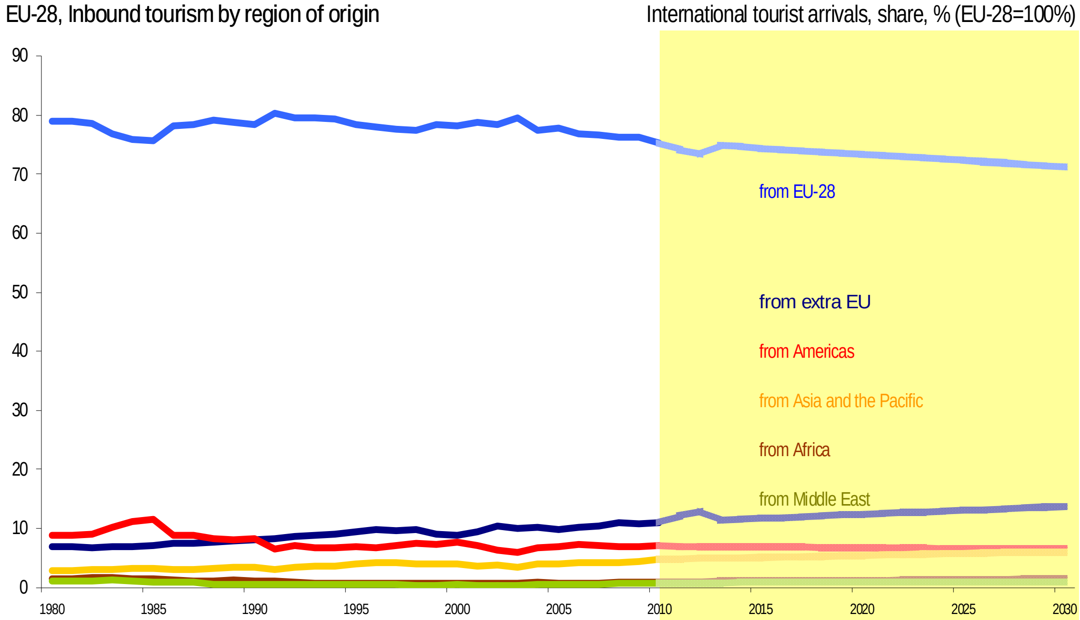
- As in most regions, proximity is key with regard to generating volume in travel flows. For EU-28 destinations too, the large majority of international arrivals originate from the same region. Of the 380 million arrivals in 2010, 286 million (75%) were from EU-28 source markets, while another 42 million (11%) originated from European source markets outside the EU.



Source: World Tourism Organization (UNWTO) ©

- Some 14% of arrivals came from outside Europe (52 mn), of which most from the Americas (27 mn, 7%) and Asia and the Pacific (18 mn, 5%), while Africa (4 mn) and the Middle East (3 mn) both accounted for some 1% of the EU's arrivals.

- Intra-EU arrivals to EU-28 destinations are expected to grow by 2.0% a year on average through 2025, non-EU European arrivals by 3.3% a year and interregional arrivals by 2.6% a year, with the fastest growth from Africa (+4.3% a year, from a low base) and Asia and the Pacific (3.4% a year), and the slowest growth from the Americas (1.6% a year).



Source: World Tourism Organization (UNWTO) ©

- Arrivals in the EU from non-EU Europe and other regions combined totalled 94 million in 2010. Growth is expected to be some 2.9% a year on average, reaching 144 million in 2025. It needs to be noted that the actual number of travellers will be somewhat lower, since part of the trips involve multiple destinations in the region, with arrivals reported by more than one country.
- By 2025, the share of intra EU-28 markets is expected to have decreased slightly to 72% (376 million), while the share of non-EU source markets in Europe will have increased to 13% (68 million) and that of the interregional source markets to 15% (76 million).

3.7 Share in the world

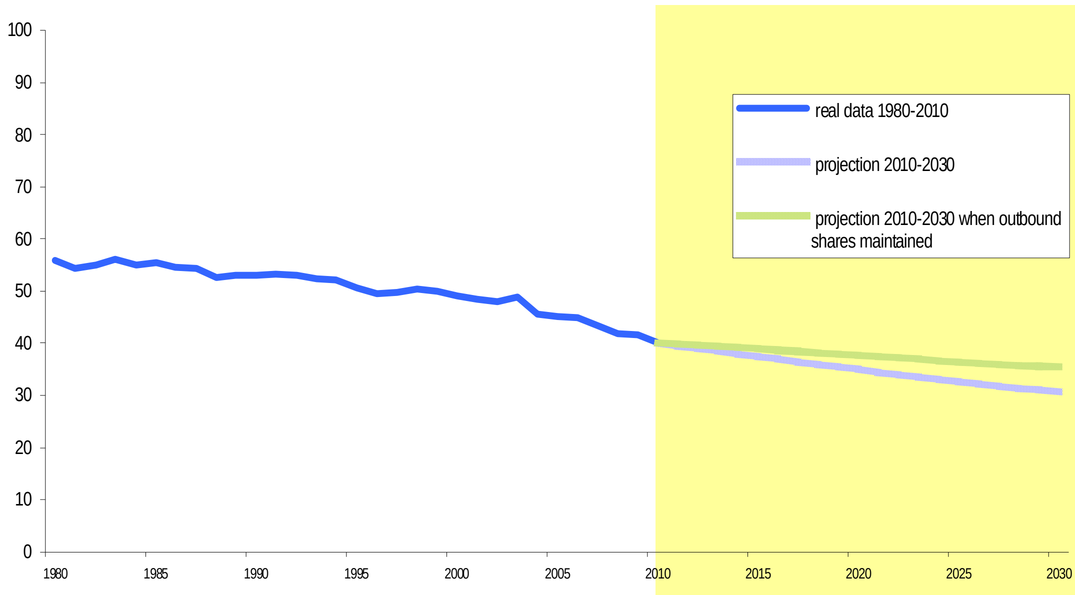
- As other less mature regions in the world, in particular Asia and the Pacific, are growing at a faster pace both in terms of inbound and outbound tourism, the share of EU-28 destinations in the world has been decreasing gradually since 1980. By 2025 about one third of international arrivals will be in one of the EU destinations (33%), down from 40% in 2010 and 56% in 1980.
- To an extent this is a natural process in line with the catching up of lesser developed destinations, and with emerging outbound markets driving growth in destinations within the same region. (Given that the majority of travellers in for instance the rapidly growing Asian outbound markets will head for intraregional destinations, Asia will grow faster than Europe, even if Europe maintained its share in this market).
- However, EU-28 destinations are also losing share in all source regions. Between 2010 and 2025 the market share of EU-28 destinations in arrivals from Europe is expected to decrease from 64% to 58%, i.e. travel from Europe to non-EU

destinations in Europe or to interregional destinations is expected to show faster growth than to EU-28 destinations. Likewise, the share in arrivals from the Americas is expected to decrease from 17% to 14%, from Africa from 12% to 10%, from Asia and the Pacific from 9% to 7% and from the Middle East from 8% to 7%.

- If Europe were to maintain its current share in all outbound markets, its share in the world in 2025 would be 36%.

International Tourism EU-28, share in the world

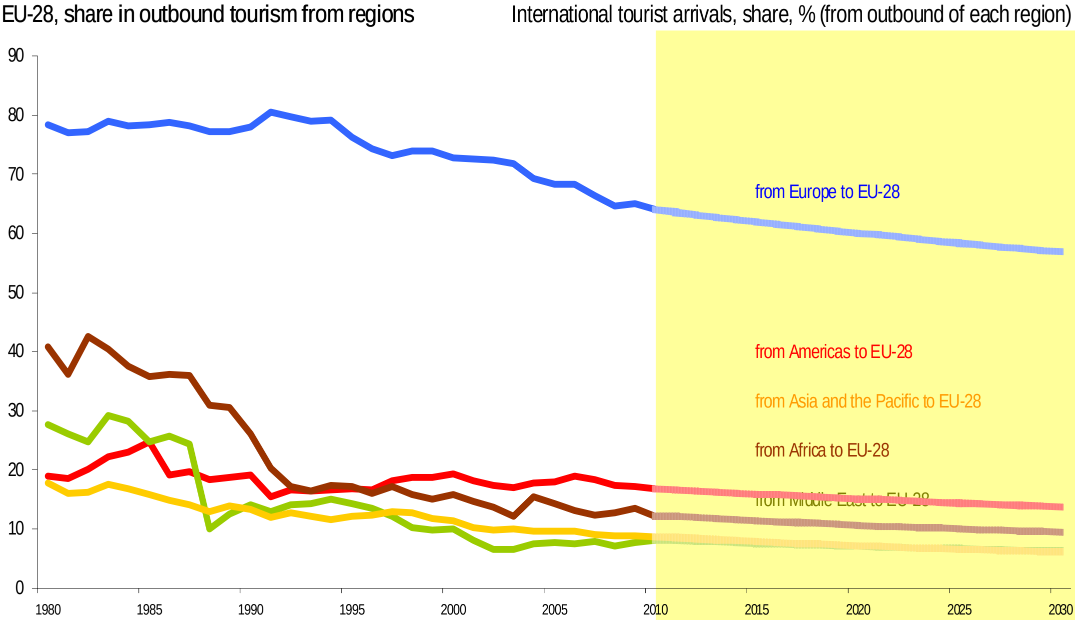
International tourist arrivals, share, %



Source: World Tourism Organization (UNWTO) ©

EU-28, share in outbound tourism from regions

International tourist arrivals, share, % (from outbound of each region)



Source: World Tourism Organization (UNWTO) ©

4. Opportunities and challenges

In the almost 70 years since the end of the Second World War, tourism has become ingrained in the life and the lifestyle of a growing part of the population of advanced economies and increasingly also for emerging economies. For economies around the world, tourism has developed into a key driver of socio-economic progress through the creation of jobs and enterprises, infrastructure development and export revenues earned.

UNWTO's long-term outlook *Tourism Towards 2030* shows that there is still a substantial potential for further expansion in coming decades. Both existing as well as new destinations can benefit from this opportunity, provided they do the necessary to ensure the right conditions with regard to the business environment, infrastructure and travel facilitation. Along with this opportunity, challenges also arise in maximising social and economic benefits and minimising negative impacts. In other words, the principles of sustainable development need to guide all tourism 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.'

For the 28 destinations of the European Union, tourism will continue to show growth according to the projection presented in this study. The rate of growth will be modest compared with that of other regions, albeit on top of an already very large base. International tourist arrivals in EU-28 destinations are projected to grow by 2.1% a year on average to 2025. In absolute numbers, the projected rate of growth corresponds to an increase of some 9 million international arrivals a year on average. At this rate, arrivals in the EU-28 will exceed half a billion by 2023, reaching 520 million in 2025, up from the 380 million of 2010. By 2030 the number is expected to have reached 557 million. By 2025, EU-28 destinations will account for one third of worldwide arrivals. Of the 520 million international arrivals projected for 2025, 376 million (72%) will originate from intra EU-28 source markets, 68 million (13%) from non-EU European source markets and 76 million (15%) from interregional source markets.

Opportunities	**Challenges**
- strong tradition and professionalism - well developed infrastructure - exceptional diversity in a comparatively small area - cultural resources - health, safety and security - borderless travel in the Schengen area - strong image and destination branding - human resources - quality	- sustainability / greening - complacency - revitalisation of aging supply - innovation - further product development and diversification of markets and segments - staffing - price competitiveness - inclusiveness, tourism for all, accessibility - demographic change - further extension of travel facilitation - e-marketing, marketing and promotion - coordination, cooperation, collaboration

In order to tap into the potential demand, it is essential to continue creating and raising awareness and to mainstream tourism in the political agenda. Most of the European Union destinations have a strong tradition in tourism and a great professionalism and can count on a highly developed tourism sector underpinned by some very strong assets. Europe has an exceptional diversity in a rather small area coupled with an advanced and highly ramified infrastructure for travel by air, road, rail and waterways. Europe is very rich in cultural resources and most destinations have a strong image and destination branding. European tourism enjoys a high standard in human resources and quality of tourism services in a healthy, safe and secure environment.

However, there is no room for complacency as there are sufficient challenges left for future development in a highly competitive environment. When addressed well, these challenges in themselves also represent opportunities. Firstly, sustainability (social, economic and environmental) is more relevant than ever, addressing issues such as energy dependency, climate change adaptation and mitigation, green economy, congestion management and risk management. Furthermore, competitiveness should be enhanced by optimising the business environment: innovation, product development, diversification of products, markets and segments, ICT and other technologies, marketing and promotion, research, monitoring and evaluation, human resources development and quality. Specifically for the newer EU members, further development of infrastructure is needed, as well as planning, product development and training.

With respect to future demand it is crucial to keep track of changing consumer trends with more experienced and demanding customers, with demographic changes (ageing, migration and diversification of family structures), changing values and lifestyles, and the shift from a service economy to an experience economy. Europe, as a tourism market with an already high participation in travel, should aim to spread tourism to all and strive for inclusiveness of less favoured groups, with special attention to accessibility for travellers with disabilities and special needs.

Lastly, governance is of major importance. For tourism to thrive it is necessary to understand that everything depends on a concerted effort in which all stakeholders throughout the full tourism value chain are involved and participate, with collaboration, cooperation and coordination between:

- tourism policy and decision makers and related policy areas, such as transport, interior, external affairs, trade, environment, etc.;
- the public and private sector;
- the various industries (transport, accommodation, restaurants and bars, attractions, etc.);
- different regional levels: EU-wide, national, regional and local.

Annex

Past and current situation

International Tourism by (Sub)region

	International Tourism Receipts										International Tourist Arrivals					
	Change			US$			euro			Share	abs.		Change			Share
	Local currencies, constant prices (%)			(billion)		per arrival	(billion)		per arrival	(%)	(million)		(%)			(%)
	11/10	12/11	13*/12	2012	2013*	2013*	2012	2013*	2013*	2013*	2012	2013*	11/10	12/11	13*/12	2013*
World	4.5	4.2	5.3	1,078	1,159	1,070	839	873	800	100	1,035	1,087	4.9	4.1	5.0	100
Advanced economies[1]	5.9	4.0	6.0	688	745	1,280	536	561	970	64.3	551	581	4.9	3.8	5.4	53.4
Emerging economies[1]	2.1	4.5	4.0	390	413	820	303	311	610	35.7	484	506	4.9	4.4	4.5	46.6
Europe	*4.9*	*1.9*	*3.8*	*454.0*	*489.3*	*870*	*353.4*	*368.4*	*650*	*42.2*	*534.4*	*563.4*	*6.4*	*3.6*	*5.4*	*51.8*
Northern Europe	2.4	3.3	7.1	67.6	74.2	1,080	52.6	55.9	810	6.4	65.1	68.9	2.9	0.9	5.8	6.3
Western Europe	3.9	2.7	1.7	157.9	167.9	960	122.9	126.4	730	14.5	167.2	174.3	4.6	3.5	4.2	16.0
Central/Eastern Europe	6.8	4.0	3.4	56.3	59.9	500	43.8	45.1	380	5.2	111.7	118.9	9.1	8.3	6.5	10.9
Southern/Mediter. Eu.	6.1	0.0	4.5	172.2	187.3	930	134.0	141.0	700	16.2	190.4	201.4	7.9	1.9	5.7	18.5
- of which EU-28	4.0	1.7	3.4	374.2	402.9	930	291.2	303.4	700	34.8	412.2	432.7	5.6	2.7	5.0	39.8
Asia and the Pacific	*8.3*	*6.7*	*8.2*	*329.1*	*358.9*	*1,450*	*256.1*	*270.3*	*1,090*	*31.0*	*233.5*	*248.1*	*6.6*	*6.9*	*6.2*	*22.8*
North-East Asia	9.2	7.9	9.3	167.2	184.7	1,450	130.1	139.0	1,090	15.9	122.8	127.0	3.8	6.0	3.5	11.7
South-East Asia	12.9	10.6	9.7	96.0	107.4	1,150	74.7	80.9	870	9.3	84.2	93.1	10.7	8.7	10.5	8.6
Oceania	-4.1	-1.3	1.9	43.0	42.6	3,410	33.4	32.0	2,570	3.7	11.9	12.5	0.8	4.0	4.7	1.1
South Asia	11.6	-0.6	5.3	22.9	24.3	1,570	17.8	18.3	1,180	2.1	14.6	15.5	14.5	6.2	6.1	1.4
Americas	*5.1*	*5.7*	*6.4*	*212.9*	*229.2*	*1,360*	*165.7*	*172.6*	*1,030*	*19.8*	*162.7*	*167.9*	*3.6*	*4.3*	*3.2*	*15.5*
North America	5.9	6.7	7.8	156.4	171.0	1,550	121.7	128.8	1,170	14.8	106.4	110.1	2.6	4.2	3.5	10.1
Caribbean	-1.5	1.2	2.1	24.2	24.8	1,170	18.8	18.7	880	2.1	20.7	21.2	3.0	3.0	2.2	1.9
Central America	9.7	7.5	3.2	8.7	9.4	1,020	6.8	7.1	770	0.8	8.9	9.2	4.4	7.3	4.2	0.8
South America	5.7	3.2	3.2	23.6	23.9	870	18.4	18.0	660	2.1	26.7	27.4	7.8	5.0	2.6	2.5
Africa	*1.7*	*7.3*	*0.0*	*34.3*	*34.2*	*610*	*26.7*	*25.8*	*460*	*3.0*	*52.9*	*55.8*	*-0.6*	*6.6*	*5.4*	*5.1*
North Africa	-5.5	9.1	-1.4	10.0	10.2	520	7.8	7.7	390	0.9	18.5	19.6	-9.1	8.2	6.1	1.8
Subsaharan Africa	5.0	6.5	0.6	24.3	24.0	660	18.9	18.1	500	2.1	34.5	36.2	4.5	5.8	5.0	3.3
Middle East	*-17.2*	*2.2*	*-1.9*	*47.5*	*47.3*	*920*	*36.9*	*35.6*	*690*	*4.1*	*51.7*	*51.6*	*-6.1*	*-5.4*	*-0.2*	*4.7*

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO April 2014)

[1] Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

International Tourism Expenditure (euro billion)

Rank '13	Rank '12		Full year euro 2000	2005	2006	2007	2008	2009	2010	2011	2012	2013* (billion)	increase 2006-2013*	Local currencies, current prices (% change over same period of the previous year) Series	07/06	08/07	09/08	10/09	11/10	12/11	13*/12
		World	515	548	595	629	642	614	702	749	839	872	278								
1	1	China	14,2	17,5	19,4	21,7	24,6	31,3	41,4	52,1	79,4	96,8	77,4	$	22,5	21,4	20,9	25,6	32,3	40,5	26,1
2	2	United States	70,8	56,2	58,1	56,3	54,7	53,1	57,0	56,2	65,0	64,9	6,8		5,7	4,4	-7,9	1,9	3,6	6,7	3,3
3	3	Germany	57,4	59,8	58,9	60,6	61,9	58,2	58,9	61,7	63,2	64,7	5,8		2,9	2,0	-5,9	1,3	4,7	2,5	2,3
4	5	Russian Federation	9,6	13,6	13,9	14,9	15,8	15,1	20,1	23,6	33,3	40,2	26,3	$	16,8	13,4	-9,3	27,0	23,3	30,1	24,9
5	4	United Kingdom	41,6	47,9	50,3	52,1	46,6	36,0	37,7	36,6	40,0	39,6	-10,6		4,1	4,4	-13,6	0,5	-1,6	2,1	3,5
6	6	France	24,5	25,6	26,0	27,9	27,9	27,5	29,2	32,3	30,4	31,9	5,9		7,4	0,1	-1,5	6,3	10,3	-5,8	4,9
7	7	Canada	13,5	14,5	16,4	18,0	18,5	17,2	22,4	24,0	27,3	26,5	10,1		12,9	8,4	-3,8	11,2	7,6	6,2	3,2
8	8	Australia	6,9	9,4	10,0	11,9	13,1	13,2	17,0	19,6	21,8	21,4	11,4		17,5	17,8	2,3	4,1	7,9	2,1	8,8
9	10	Italy	17,0	18,0	18,4	20,0	20,9	20,0	20,4	20,6	20,5	20,3	1,9		8,4	4,9	-4,3	2,0	0,8	-0,3	-1,0
10	12	Brazil	4,2	3,8	4,6	6,0	7,5	7,8	12,4	15,3	17,3	18,9	14,3	$	42,5	33,5	-0,6	50,7	29,5	4,6	12,9
11	11	Singapore	4,9	8,1	9,0	9,8	11,1	11,2	14,1	15,4	18,4	18,5	9,5		12,9	14,6	-1,5	11,8	6,0	9,3	4,1
12	9	Japan	34,5	22,0	21,4	19,3	19,0	18,0	21,0	19,5	21,7	16,6	-4,9		-0,2	-7,6	-18,4	4,0	-11,2	2,4	-3,6
13	14	Belgium	10,2	12,0	12,4	12,8	13,4	13,1	14,3	14,8	15,7	16,4	4,1		3,1	5,3	-2,3	8,7	3,5	6,5	4,5
14	13	Korea, Republic of	7,7	12,4	15,0	16,0	13,0	10,8	14,2	14,3	16,1	16,3	1,3	$	16,7	-13,2	-21,1	24,8	6,2	3,6	5,0
15	16	Hong Kong (China)	13,5	10,7	11,2	11,0	10,9	11,1	13,1	13,7	15,6	16,0	4,8		7,6	6,8	-3,8	11,9	9,8	5,2	5,7
16	15	Netherlands	13,2	13,0	13,6	13,9	14,8	14,8	14,8	14,7	15,7	15,4	1,9		2,6	6,2	0,4	-0,2	-0,4	6,5	-1,8
17	18	Norway	5,0	7,8	8,5	8,8	9,4	8,6	10,2	11,3	12,9	13,9	5,3		3,4	9,9	-2,6	7,7	8,3	8,9	12,3
18	21	Untd Arab Emirates	3,3	5,0	7,0	8,2	9,0	7,4	8,9	9,5	11,7	13,3	6,3		27,7	17,9	-22,1	14,2	11,8	14,1	17,4
19	17	Saudi Arabia	..	7,3	10,3	14,7	10,3	14,6	15,9	12,4	13,2	13,3	3,0		56	-25	35,0	3,5	-18,3	-1,4	3,7
20	19	Sweden	8,7	8,5	8,2	9,1	9,1	8,0	9,8	11,0	12,3	13,2	5,0		10,5	5,0	-3,4	9,9	5,6	7,5	7,0
21	20	Spain	6,5	12,1	13,3	14,4	13,8	12,1	12,7	12,3	11,9	12,2	-1,0		8,3	-3,7	-12,6	4,8	-2,5	-3,5	2,8
22	22	Switzerland	5,9	7,1	7,3	7,4	7,4	7,8	8,4	9,8	10,7	11,2	3,9		4,9	-2,8	0,6	-1,7	4,2	6,7	6,7
23	25	Taiwan (pr. of China)	8,8	7,0	7,0	6,6	6,2	5,6	7,1	7,3	8,3	9,3	2,3	$	3,7	0,5	-14,4	20,0	8,1	5,1	15,7
24	24	Malaysia	2,2	3,0	3,2	4,1	4,6	4,6	6,3	7,3	9,0	9,0	5,8		30,1	17,1	1,7	17,1	16,7	14,3	5,6
25	23	India	2,9	5,0	5,5	6,0	6,5	6,7	7,9	9,8	9,6	8,7	3,3		9,1	22,6	8,8	6,4	33,4	2,9	3,0
26	28	Kuwait	2,7	3,6	4,4	4,8	5,1	4,4	4,9	6,0	7,0	7,9	3,4		16,6	7,9	-12,5	3,5	25,2	9,2	17,6
27	26	Austria	6,8	7,5	7,6	7,7	7,7	7,7	7,7	7,5	7,8	7,7	0,1		0,7	0,3	0,3	-0,3	-2,4	3,9	-1,1
28	27	Denmark	5,1	5,5	6,0	6,4	6,6	6,5	6,8	7,2	7,5	7,7	1,7		8,0	2,9	-1,7	4,4	5,9	3,5	3,3
29	30	Mexico	6,0	6,1	6,5	6,2	5,8	5,2	5,5	5,6	6,6	6,9	0,4	$	4,4	1,3	-15,9	0,7	8,0	7,9	8,0
30	29	Poland	3,6	4,5	5,8	5,7	6,7	5,3	6,5	6,1	6,8	6,5	0,8		-4,5	8,4	-2,2	14,7	-3,9	14,5	0,9
31	31	Indonesia	3,5	2,9	3,2	3,6	3,8	3,8	4,8	4,5	5,3	5,5	2,3	$	21,7	13,3	-4,3	20,3	-2,2	8,2	8,2
32	34	Thailand	3,0	3,1	3,7	3,8	3,4	3,2	4,2	4,1	4,8	5,0	1,3		1,9	-5,9	-9,0	17,3	-2,1	10,9	5,7
33	38	Qatar	0,3	1,4	3,0	0,9	1,0	0,3	0,4	1,3	4,4	5,0	2,0		-66,3	15,1	-66,9	11,8	236	213	17
34	32	Iran	0,7	3,0	3,7	5,0	5,1	5,6	7,3	7,0	5,1	..	1,4	$	45,4	11,1	3,2	23,7	1,3	-33,0	..
35	33	Philippines	1,8	1,0	1,0	1,2	1,4	1,9	2,6	3,9	5,1	4,9	3,9	$	35,0	23,7	31,2	26,6	57,1	22,0	-0,5
36	36	Ireland	2,8	4,9	5,4	6,3	7,0	5,6	5,4	4,8	4,6	4,6	-0,8		15,7	11,8	-20,5	-4,4	-10,1	-4,3	-0,1
37	35	Nigeria	0,6	0,2	2,6	4,1	6,7	3,6	4,2	4,8	4,8	4,5	1,8	$	70,4	74,6	-48,5	11,2	18,1	-7,0	-4,4
38	39	Ukraine	0,5	2,3	2,3	2,4	2,7	2,4	2,8	3,2	4,0	4,3	2,1	$	16,2	22,2	-17,2	12,4	19,2	14,4	12,9
39	37	Argentina	4,8	2,2	2,5	2,9	3,1	3,2	3,7	4,0	4,6	4,3	1,8	$	26,5	16,3	-1,5	8,5	13,6	6,5	-2,9
40	40	Finland	2,0	2,5	2,7	2,9	3,1	3,1	3,3	3,5	3,8	3,9	1,2		6,8	5,0	3,1	3,3	7,7	8,6	3,7
41	43	Turkey	1,9	2,5	2,4	2,7	2,6	3,3	3,9	3,5	3,2	3,6	1,2	$	22,1	4,8	19,6	13,5	-6,0	-16,2	17,7
42	41	Czech Rep	1,4	1,9	2,2	2,6	3,2	2,9	3,1	3,3	3,3	3,5	1,3		16,2	8,9	-1,9	0,6	3,8	4,4	6,9
43	45	Portugal	2,4	2,5	2,7	2,9	2,9	2,7	3,0	3,0	2,9	3,1	0,5		7,9	2,4	-7,7	8,9	0,7	-0,9	5,9
44	46	Israel	3,0	2,3	2,5	2,7	2,5	2,4	2,8	2,8	2,9	3,0	0,4	$	15,0	0,2	-11,0	13,0	3,5	-2,2	5,6
45	42	Lebanon	..	2,3	2,4	2,3	2,4	2,9	3,7	3,0	3,2	..	0,9	$	3,6	14,5	12,6	21,5	-13,7	-0,9	..
46	47	New Zealand	1,3	2,2	2,0	2,2	2,0	1,8	2,3	2,5	2,9	2,9	0,9		6,6	1,6	-4,7	4,3	3,5	5,2	2,9
47	48	Luxembourg	1,4	2,4	2,5	2,5	2,6	2,6	2,7	2,7	2,8	2,9	0,4		1,7	1,4	0,7	4,0	1,8	2,2	2,8
48	44	South Africa	2,3	2,7	2,7	2,9	3,0	2,9	4,2	3,8	3,2	2,6	-0,1		20,7	30,0	-3,7	18,1	-6,9	-12,2	-0,9
49	50	Egypt	1,2	1,3	1,4	1,8	2,0	1,8	1,7	1,6	2,0	2,3	0,8	$	37,1	19,2	-12,9	-11,8	-1,7	18,9	15,1
50	49	Colombia	1,1	0,9	1,1	1,1	1,2	1,3	1,4	1,6	2,0	2,3	1,2	$	15,4	13,1	0,7	4,3	22,8	17,1	13,9

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO April 2014)

European Union (28)

Inbound tourism by country of destination

									Market share			Growth rate		Average annual growth	
		1995	2000	2005	2010	2011	2012	2013	1995	2005	2013	2012/11	2013/12	1995-13	2005-13
	Series	International Tourist Arrivals (1000)											%		%
World		528 mn	676 mn	807 mn	948 mn	995 mn	1,035 mn	1,087 mn	100	100	100	4.0	5.0	4.1	3.8
Europe		*305 mn*	*387 mn*	*449 mn*	*485 mn*	*516 mn*	*534 mn*	*563 mn*	*58*	*56*	*52*	*3.6*	*5.4*	*3.5*	*2.9*
Total European Union (28)		268 mn	331 mn	364 mn	380 mn	401 mn	412 mn	433 mn	51	45	40	2.7	5.0	2.7	2.2
In Northern Europe		*33,351*	*42,092*	*56,239*	*57,398*	*58,951*	*60,040*	*63,317*	*6.3*	*7.0*	*5.8*	*1.8*	*5.5*	*3.6*	*1.5*
Denmark	TCE/TF	..	3,535	9,178	8,744	7,864	8,068	..	..	1.1	..	2.6	..	..	-1.8
Finland	TF	1,779	2,714	3,140	3,670	4,192	4,226	..	0.3	0.4	..	0.8	..	5.2	4.3
Ireland	TF	4,818	6,646	7,333	7,134	7,630	7,550	..	0.9	0.9	..	-1.0	..	2.7	0.4
Sweden	TCE/TF	2,309	3,828	4,883	4,951	9,959	10,914	..	0.4	0.6	..	9.6	..	9.6	12.2
United Kingdom	TF	21,719	23,212	28,039	28,296	29,306	29,282	31,169	4.1	3.5	2.9	-0.1	6.4	2.0	1.3
In Western Europe		*104,956*	*131,476*	*134,106*	*145,402*	*152,581*	*158,272*	*165,234*	*19.9*	*16.6*	*15.2*	*3.7*	*4.4*	*2.6*	*2.6*
Austria	TCE	17,173	17,982	19,952	22,004	23,012	24,151	24,813	3.3	2.5	2.3	4.9	2.7	2.1	2.8
Belgium	TCE	5,560	6,457	6,742	7,186	7,494	7,591	7,642	1.1	0.8	0.7	1.3	0.7	1.8	1.6
France	TF	60,033	77,190	74,988	77,648	81,550	83,013	..	11.4	9.3	..	1.8	..	1.9	1.5
Germany	TCE	14,848	18,992	21,499	26,875	28,352	30,407	31,545	2.8	2.7	2.9	7.3	3.7	4.3	4.9
Luxembourg	TCE	768	852	913	805	873	905	..	0.1	0.1	..	3.7	..	1.0	-0.1
Netherlands	TCE	6,574	10,003	10,012	10,883	11,300	12,205	12,782	1.2	1.2	1.2	n/a	4.7	3.8	3.1
In Central/Eastern Europe		*43,571*	*40,897*	*47,398*	*44,578*	*47,855*	*50,454*	*52,278*	*8.2*	*5.9*	*4.8*	*5.4*	*3.6*	*1.0*	*1.2*
Bulgaria	TF	3,466	2,785	4,837	6,047	6,328	6,541	6,897	0.7	0.6	0.6	3.4	5.5	3.9	4.5
Czech Rep	TCE/TF	3,381	4,773	9,404	8,629	9,019	9,461	9,004	0.6	1.2	0.8	4.9	-4.8	n/a	-0.5
Estonia	TF	530	1,220	1,917	2,372	2,665	2,744	2,868	0.1	0.2	0.3	3.0	4.5	9.8	5.2
Hungary	TF	2,878	2,992	9,979	9,510	10,250	10,353	10,675	0.5	1.2	1.0	1.0	3.1	n/a	0.8
Latvia	TF	539	509	1,116	1,373	1,493	1,435	1,536	0.1	0.1	0.1	-3.9	7.0	6.0	4.1
Lithuania	TF	650	1,083	2,000	1,507	1,775	1,900	..	0.1	0.2	..	7.0	..	6.5	-0.7
Poland	TF	19,215	17,400	15,200	12,470	13,350	14,840	15,845	3.6	1.9	1.5	11.2	6.8	-1.1	0.5
Romania	TCE	766	867	1,430	1,343	1,515	1,653	1,715	0.1	0.2	0.2	9.1	3.7	4.6	2.3
Slovakia	TCE	903	1,053	1,515	1,327	1,460	1,528	1,653	0.2	0.2	0.2	4.6	8.2	3.4	1.1
In Southern Europe		*86,074*	*116,734*	*126,085*	*132,634*	*141,906*	*143,460*	*151,809*	*16.3*	*15.6*	*14.0*	*1.1*	*5.8*	*3.2*	*2.3*
Croatia	TCE	1,485	5,338	7,743	9,111	9,927	10,369	10,955	0.3	1.0	1.0	4.5	5.7	11.7	4.4
Cyprus	TF	2,100	2,686	2,470	2,173	2,392	2,465	2,405	0.4	0.3	0.2	3.0	-2.4	0.8	-0.3
Greece	TF	10,130	13,096	14,765	15,007	16,427	15,518	17,920	1.9	1.8	1.6	-5.5	15.5	3.2	2.4
Italy	TF	31,052	41,181	36,513	43,626	46,119	46,360	47,704	5.9	4.5	4.4	0.5	2.9	2.4	3.4
Malta	TF	1,116	1,216	1,171	1,339	1,415	1,443	1,582	0.2	0.1	0.1	2.0	9.6	2.0	3.8
Portugal	TCE	4,539	5,725	5,956	6,832	7,412	7,685	8,324	0.9	0.7	0.8	3.7	8.3	3.4	4.3
Slovenia	TCE	732	1,090	1,555	1,869	2,037	2,156	2,259	0.1	0.2	0.2	5.8	4.8	6.5	4.8
Spain	TF	34,920	46,403	55,914	52,677	56,177	57,464	60,661	6.6	6.9	5.6	2.3	5.6	3.1	1.0
Total extra EU		37 mn	56 mn	85 mn	105 mn	115 mn	122 mn	131 mn	7	11	12	6.5	7.1	7.3	5.5
In Northern and Western Europe		*10,308*	*11,589*	*11,762*	*14,227*	*14,425*	*13,968*	*14,568*	*2.0*	*1.5*	*1.3*	*-3.2*	*4.3*	*1.9*	*2.7*
Iceland	TF	190	303	374	489	566	673	807	0.0	0.0	0.1	19.0	20.0	8.4	10.1
Norway	TF/TCE	2,880	3,104	3,824	4,767	4,963	4,375	4,734	0.5	0.5	0.4	-11.9	8.2	2.8	2.7
Liechtenstein	TCE	59	62	50	64	67	62	60	0.0	0.0	0.0	-6.9	-4.4	0.0	2.3
Monaco	THS	233	300	286	279	295	292	..	0.0	0.0	..	-1.0	..	1.3	0.3
Switzerland	THS	6,946	7,821	7,229	8,628	8,534	8,566	8,967	1.3	0.9	0.8	0.4	4.7	1.4	2.7
In Central/Eastern Europe		*14,515*	*28,449*	*43,021*	*49,919*	*55,278*	*61,200*	*66,665*	*2.7*	*5.3*	*6.1*	*10.7*	*8.9*	*8.8*	*5.6*
Armenia	TF	12	45	319	687	758	843	957	0.0	0.0	0.1	11.3	13.5	27.5	14.7
Azerbaijan	TF	..	..	693	1,280	1,562	1,986	2,130	..	0.1	0.2	27.1	7.2	..	15.1
Belarus	TF	161	60	91	120	116	119	137	0.0	0.0	0.0	2.3	15.2	-0.9	5.3
Georgia	TF	..	..	..	1,067	1,319	1,790	2,065	..	..	0.2	35.7	15.4	..	..
Kazakhstan	TF	..	1,471	3,143	3,393	4,093	4,438	4,926	..	0.4	0.5	8.4	11.0	..	5.8
Kyrgyzstan	TF/VF	36	59	319	855	2,278	2,406	..	0.0	0.0	..	5.6	..	28.0	33.4
Rep Moldova	TCE	32	18	67	64	75	89	96	0.0	0.0	0.0	18.6	7.5	6.3	4.5
Russian Federation	TF	..	19,198	19,940	20,262	22,674	25,727	28,356	..	2.5	2.6	13.5	10.2	..	4.5
Tajikistan	TF	..	4	..	..	..	..	..	..	..	..	..	..	..	..
Turkmenistan	TF	218	3	12	..	..	..	..	0.0	0.0	..	..	..	..	..
Ukraine	TF	3,716	6,431	17,631	21,203	21,415	23,013	24,671	0.7	2.2	2.3	7.5	7.2	11.1	4.3
Uzbekistan	TF	92	302	242	975	..	..	..	0.0	0.0	..	..	..	..	..
In Southern Europe		*11,878*	*15,859*	*30,331*	*40,684*	*45,024*	*46,981*	*49,547*	*2.2*	*3.8*	*4.6*	*4.3*	*5.5*	*8.3*	*6.3*
Albania	TF	..	..	628	2,191	2,468	3,156	..	..	0.1	..	27.9	..	..	26.0
Andorra	TF	..	2,946	2,418	1,808	2,242	2,238	2,329	..	0.3	0.2	-0.2	4.1	..	-0.5
Bosnia & Herzg	TCE	..	171	217	365	392	439	529	..	0.0	0.0	11.9	20.5	..	11.8
F.Yug.Rp.Macedonia	TCE	147	224	197	262	327	351	400	0.0	0.0	0.0	7.3	13.8	5.7	9.2
Israel	TF	2,215	2,417	1,903	2,803	2,820	2,886	2,962	0.4	0.2	0.3	2.3	2.6	1.6	5.7
Montenegro	TCE				1,088	1,201	1,264	1,324	..	..	0.1	5.3	4.8	..	..
San Marino	THS	28	43	50	120	156	139	..	0.0	0.0	..	-10.9	..	9.9	15.7
Serbia	TCE				683	764	810	922	..	..	0.1	6.0	13.8	..	..
Serbia & Montenegro	TCE	228	239	725					0.0	0.1					
Turkey	TF	7,083	9,586	24,193	31,364	34,654	35,698	37,795	1.3	3.0	3.5	3.0	5.9	9.7	5.7

(Data as collected by UNWTO April 2014)

European Union (28)

Inbound tourism by country of destination

								Market share			Growth rate		Average annual growth	
	1995	2000	2005	2010	2011	2012	2013	1995	2005	2013	2012/11	2013/12	1995-13	2005-13
	International Tourism Receipts (euro million)											%		%
World	308 bn	515 bn	548 bn	702 bn	749 bn	839 bn	873 bn	100	100	100	12.0	4.0	6.0	6.0
Europe	*160 mn*	*251 mn*	*282 mn*	*310 mn*	*334 mn*	*353 mn*	*368 mn*	*52*	*51*	*42*	*5.8*	*4.2*	*4.7*	*3.4*
Total European Union (28)	142 mn	221 mn	243 mn	259 mn	277 mn	291 mn	303 mn	46	44	35	5.0	4.2	4.3	2.8
In Northern Europe	*24,136*	*36,447*	*39,976*	*40,798*	*43,360*	*47,732*	*50,820*	*7.8*	*7.3*	*5.8*	*10.1*	*6.5*	*4.2*	*3.0*
Denmark	2,808	4,002	4,243	4,415	4,873	5,111	5,246	0.9	0.8	0.6	4.9	2.6	3.5	2.7
Finland	1,254	1,528	1,757	2,301	2,745	3,021	3,024	0.4	0.3	0.3	10.1	0.1	5.0	7.0
Ireland	1,748	2,851	3,863	3,106	3,010	3,022	3,335	0.6	0.7	0.4	0.4	10.4	3.7	-1.8
Sweden	2,654	4,400	5,457	6,535	7,539	8,381	8,648	0.9	1.0	1.0	11.2	3.2	6.8	5.9
United Kingdom	15,672	23,665	24,656	24,440	25,193	28,197	30,567	5.1	4.5	3.5	11.9	8.4	3.8	2.7
In Western Europe	*54,412*	*83,446*	*90,993*	*97,636*	*104,730*	*110,488*	*113,933*	*17.7*	*16.6*	*13.1*	*5.5*	*3.1*	*4.2*	*2.9*
Austria	9,883	10,593	12,904	14,027	14,267	14,706	15,139	3.2	2.4	1.7	3.1	2.9	2.4	2.0
Belgium	3,477	7,137	7,932	9,162	9,421	10,129	10,165	1.1	1.4	1.2	7.5	0.4	6.1	3.1
France	20,945	35,706	35,384	35,463	39,334	41,680	42,239	6.8	6.5	4.8	6.0	1.3	4.0	2.2
Germany	13,762	20,240	23,449	26,159	27,930	29,683	31,030	4.5	4.3	3.6	6.3	4.5	4.6	3.6
Luxembourg	1,316	1,956	2,904	3,107	3,471	3,593	3,628	0.4	0.5	0.4	3.5	1.0	5.8	2.8
Netherlands	5,029	7,814	8,420	9,718	10,307	10,697	11,731	1.6	1.5	1.3	3.8	9.7	4.8	4.2
In Central/Eastern Europe	*11,417*	*16,568*	*17,771*	*23,918*	*25,178*	*26,167*	*26,257*	*3.7*	*3.2*	*3.0*	*3.9*	*0.3*	*4.7*	*5.0*
Bulgaria	637	1,163	1,939	2,743	2,850	2,917	3,057	0.2	0.4	0.4	2.4	4.8	9.1	5.9
Czech Rep	2,202	3,219	3,869	5,372	5,480	5,475	5,308	0.7	0.7	0.6	-0.1	-3.0	n/a	4.0
Estonia	260	553	784	809	897	954	1,049	0.1	0.1	0.1	6.3	9.9	8.0	3.7
Hungary	2,260	4,064	3,297	4,059	4,008	3,771	3,846	0.7	0.6	0.4	-5.9	2.0	n/a	1.9
Latvia	15	142	274	483	554	580	650	0.0	0.1	0.1	4.7	12.2	23.2	11.4
Lithuania	59	424	740	722	950	1,025	1,104	0.0	0.1	0.1	7.9	7.7	17.7	5.1
Poland	5,057	6,147	5,043	7,186	7,675	8,513	8,236	1.6	0.9	0.9	10.9	-3.3	2.7	6.3
Romania	451	389	853	860	1,019	1,142	1,083	0.1	0.2	0.1	12.1	-5.2	5.0	3.0
Slovakia	476	469	973	1,685	1,745	1,789	1,925	0.2	0.2	0.2	2.5	7.6	8.1	8.9
In Southern Europe	*51,951*	*84,640*	*93,784*	*96,649*	*104,016*	*106,855*	*112,362*	*16.9*	*17.1*	*12.9*	*2.7*	*5.2*	*4.4*	*2.3*
Croatia	1,031	2,986	5,924	6,230	6,617	6,859	7,194	0.3	1.1	0.8	3.7	4.9	11.4	2.5
Cyprus	1,375	2,102	1,863	1,590	1,846	2,023	2,197	0.4	0.3	0.3	9.5	8.6	2.6	2.1
Greece	3,161	9,982	10,730	9,611	10,505	10,443	12,000	1.0	2.0	1.4	-0.6	14.9	7.7	1.4
Italy	21,965	29,767	28,453	29,257	30,891	32,056	33,064	7.1	5.2	3.8	3.8	3.1	2.3	1.9
Malta	502	636	607	814	911	989	1,056	0.2	0.1	0.1	8.5	6.8	4.2	7.2
Portugal	3,693	5,677	6,199	7,601	8,146	8,606	9,250	1.2	1.1	1.1	5.6	7.5	5.2	5.1
Slovenia	829	1,045	1,451	1,925	1,975	2,090	2,101	0.3	0.3	0.2	5.8	0.6	5.3	4.7
Spain	19,394	32,446	38,558	39,621	43,126	43,791	45,505	6.3	7.0	5.2	1.5	3.9	4.9	2.1
Total extra EU	18 mn	30 mn	39 mn	51 mn	57 mn	62 mn	65 mn	6	7	7	9.7	4.6	7.3	6.5
In Northern and Western Europe	*8,286*	*9,785*	*11,196*	*15,080*	*16,636*	*17,345*	*17,516*	*2.7*	*2.0*	*2.0*	*4.3*	*1.0*	*4.2*	*5.8*
Iceland	142	247	332	423	539	672	794	0.0	0.1	0.1	24.7	18.2	10.0	11.5
Norway	1,813	2,342	2,809	3,550	3,813	4,236	4,263	0.6	0.5	0.5	11.1	0.6	4.9	5.4
Liechtenstein	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Monaco	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Switzerland	6,332	7,195	8,054	11,106	12,284	12,437	12,459	2.1	1.5	1.4	1.2	0.2	3.8	5.6
In Central/Eastern Europe	*3,853*	*5,509*	*8,599*	*12,351*	*15,069*	*17,651*	*18,862*	*1.3*	*1.6*	*2.2*	*17.1*	*6.9*	*9.2*	*10.3*
Armenia	1	41	179	310	322	353	345	0.0	0.0	0.0	9.8	-2.4	40.4	8.5
Azerbaijan	54	68	63	496	925	1,894	1,781	0.0	0.0	0.2	104.8	-6.0	21.5	51.9
Belarus	18	101	203	332	350	533	544	0.0	0.0	0.1	52.4	2.0	21.0	13.1
Georgia	4	153	194	497	686	1,098	1,295	0.0	0.0	0.1	60.1	17.9	37.2	26.8
Kazakhstan	93	386	563	758	868	1,048	1,099	0.0	0.1	0.1	20.7	4.8	14.7	8.7
Kyrgyzstan	4	16	59	214	460	338	..	0.0	0.0	..	-26.5	..	30.2	28.4
Rep Moldova	44	43	83	130	140	165	170	0.0	0.0	0.0	18.1	3.0	7.9	9.4
Russian Federation	3,296	3,713	4,718	6,661	8,138	8,374	9,027	1.1	0.9	1.0	2.9	7.8	5.8	8.4
Tajikistan	..	..	1	3	2	3	..	..	0.0	..	20.5	..	..	11.3
Turkmenistan	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Ukraine	146	427	2,512	2,857	3,085	3,769	3,827	0.0	0.5	0.4	22.2	1.6	19.9	5.4
Uzbekistan	..	29	23	91	..	..	..	..	0.0	..	..	..	..	..
In Southern Europe	*6,230*	*14,460*	*19,381*	*23,866*	*24,937*	*27,162*	*28,632*	*2.0*	*3.5*	*3.3*	*8.9*	*5.4*	*8.8*	*5.0*
Albania	50	421	692	1,227	1,169	1,145	1,107	0.0	0.1	0.1	-2.1	-3.4	18.8	6.1
Andorra	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Bosnia & Herzg	..	252	418	448	453	484	519	..	0.1	0.1	6.8	7.3	..	2.7
F.Yug.Rp.Macedonia	15	41	72	149	173	182	201	0.0	0.0	0.0	5.3	10.4	15.7	13.7
Israel	2,288	4,454	2,304	3,852	3,811	4,276	4,267	0.7	0.4	0.5	12.2	-0.2	3.5	8.0
Montenegro			222	552	619	643	666	..	0.0	0.1	3.8	3.5	..	14.7
San Marino	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Serbia			248	602	712	705	793	..	0.0	0.1	-1.0	12.4	..	15.7
Serbia & Montenegro	32	32						0.0						
Turkey	3,790	8,268	15,426	17,036	17,999	19,727	21,080	1.2	2.8	2.4	9.6	6.9	10.0	4.0

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO April 2014)

European Union (28)

Inbound tourism by country of destination

								Market share			Growth rate		Average annual growth	
	1995	2000	2005	2010	2011	2012	2013	1995	2005	2013	2012/11	2013/12	1995-13	2005-13
	International Tourism Receipts (US$ million)											%		%
World	403 bn	476 bn	681 bn	931 bn	1,043 bn	1,078 bn	1,159 bn	100	100	100	3.4	7.5	6.0	6.9
Europe	*210 mn*	*232 mn*	*350 mn*	*411 mn*	*465 mn*	*454 mn*	*489 mn*	*52*	*51*	*42*	*-2.3*	*7.8*	*4.8*	*4.3*
Total European Union (28)	186 mn	204 mn	302 mn	343 mn	386 mn	374 mn	403 mn	46	44	35	-3.1	7.7	4.4	3.7
In Northern Europe	*31,570*	*33,662*	*49,734*	*54,085*	*60,357*	*61,326*	*67,494*	*7.8*	*7.3*	*5.8*	*1.6*	*10.1*	*4.3*	*3.9*
Denmark	3,673	3,696	5,278	5,853	6,783	6,566	6,967	0.9	0.8	0.6	-3.2	6.1	3.6	3.5
Finland	1,640	1,412	2,186	3,051	3,820	3,881	4,017	0.4	0.3	0.3	1.6	3.5	5.1	7.9
Ireland	2,286	2,633	4,806	4,118	4,190	3,883	4,429	0.6	0.7	0.4	-7.3	14.1	3.7	-1.0
Sweden	3,471	4,064	6,790	8,663	10,495	10,768	11,485	0.9	1.0	1.0	2.6	6.7	6.9	6.8
United Kingdom	20,500	21,857	30,675	32,401	35,069	36,228	40,597	5.1	4.5	3.5	3.3	12.1	3.9	3.6
In Western Europe	*71,171*	*77,070*	*113,204*	*129,435*	*145,785*	*141,955*	*151,314*	*17.7*	*16.6*	*13.1*	*-2.6*	*6.6*	*4.3*	*3.7*
Austria	12,927	9,784	16,054	18,596	19,860	18,894	20,106	3.2	2.4	1.7	-4.9	6.4	2.5	2.9
Belgium	4,548	6,592	9,868	12,146	13,114	13,014	13,500	1.1	1.4	1.2	-0.8	3.7	6.2	4.0
France	27,396	32,978	44,021	47,013	54,753	53,550	56,098	6.8	6.5	4.8	-2.2	4.8	4.1	3.1
Germany	18,001	18,693	29,173	34,679	38,879	38,136	41,211	4.5	4.3	3.6	-1.9	8.1	4.7	4.4
Luxembourg	1,721	1,806	3,613	4,119	4,831	4,617	4,819	0.4	0.5	0.4	-4.4	4.4	5.9	3.7
Netherlands	6,578	7,217	10,475	12,883	14,348	13,743	15,580	1.6	1.5	1.3	-4.2	13.4	4.9	5.1
In Central/Eastern Europe	*14,933*	*15,302*	*22,109*	*31,709*	*35,048*	*33,619*	*34,872*	*3.7*	*3.2*	*3.0*	*-4.1*	*3.7*	*4.8*	*5.9*
Bulgaria	833	1,074	2,412	3,637	3,967	3,748	4,059	0.2	0.4	0.4	-5.5	8.3	9.2	6.7
Czech Rep	2,880	2,973	4,813	7,121	7,628	7,035	7,050	0.7	0.7	0.6	-7.8	0.2	n/a	4.9
Estonia	340	510	975	1,073	1,249	1,226	1,393	0.1	0.1	0.1	-1.9	13.6	8.1	4.6
Hungary	2,956	3,753	4,101	5,381	5,580	4,845	5,107	0.7	0.6	0.4	-13.2	5.4	n/a	2.8
Latvia	20	131	341	640	771	745	864	0.0	0.1	0.1	-3.4	16.0	23.3	12.3
Lithuania	77	391	921	958	1,323	1,317	1,467	0.0	0.1	0.1	-0.4	11.3	17.8	6.0
Poland	6,614	5,677	6,274	9,526	10,683	10,938	10,938	1.6	0.9	0.9	2.4	0.0	2.8	7.2
Romania	590	359	1,061	1,140	1,418	1,468	1,438	0.1	0.2	0.1	3.5	-2.0	5.1	3.9
Slovakia	623	433	1,210	2,233	2,429	2,299	2,556	0.2	0.2	0.2	-5.4	11.2	8.2	9.8
In Southern Europe	*67,952*	*78,173*	*116,676*	*128,128*	*144,790*	*137,287*	*149,228*	*16.9*	*17.1*	*12.9*	*-5.2*	*8.7*	*4.5*	*3.1*
Croatia	1,349	2,758	7,370	8,259	9,211	8,812	9,555	0.3	1.1	0.8	-4.3	8.4	11.5	3.3
Cyprus	1,798	1,941	2,318	2,108	2,570	2,599	2,917	0.4	0.3	0.3	1.1	12.3	2.7	2.9
Greece	4,135	9,219	13,349	12,742	14,623	13,417	15,938	1.0	2.0	1.4	-8.2	18.8	7.8	2.2
Italy	28,731	27,493	35,398	38,786	43,000	41,185	43,912	7.1	5.2	3.8	-4.2	6.6	2.4	2.7
Malta	656	587	755	1,079	1,268	1,270	1,403	0.2	0.1	0.1	0.2	10.4	4.3	8.1
Portugal	4,831	5,243	7,712	10,077	11,339	11,056	12,284	1.2	1.1	1.1	-2.5	11.1	5.3	6.0
Slovenia	1,084	965	1,805	2,552	2,749	2,685	2,791	0.3	0.3	0.2	-2.3	3.9	5.4	5.6
Spain	25,368	29,967	47,970	52,525	60,031	56,263	60,435	6.3	7.0	5.2	-6.3	7.4	4.9	2.9
Total extra EU	24 mn	27 mn	49 mn	68 mn	79 mn	80 mn	86 mn	6	7	7	1.3	8.1	7.4	7.4
In Northern and Western Europe	*10,839*	*9,037*	*13,929*	*19,991*	*23,157*	*22,284*	*23,263*	*2.7*	*2.0*	*2.0*	*-3.8*	*4.4*	*4.3*	*6.6*
Iceland	186	229	413	561	750	863	1,055	0.0	0.1	0.1	15.1	22.2	10.1	12.4
Norway	2,371	2,163	3,495	4,707	5,308	5,442	5,661	0.6	0.5	0.5	2.5	4.0	5.0	6.2
Liechtenstein	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Monaco	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Switzerland	8,282	6,645	10,020	14,724	17,100	15,979	16,547	2.1	1.5	1.4	-6.6	3.6	3.9	6.5
In Central/Eastern Europe	*5,040*	*5,088*	*10,698*	*16,374*	*20,976*	*22,678*	*25,051*	*1.3*	*1.6*	*2.2*	*8.1*	*10.5*	*9.3*	*11.2*
Armenia	1	38	223	411	448	454	458	0.0	0.0	0.0	1.3	0.9	40.6	9.4
Azerbaijan	70	63	78	657	1,287	2,433	2,365	0.0	0.0	0.2	89.0	-2.8	21.6	53.2
Belarus	23	93	253	440	487	685	722	0.0	0.0	0.1	40.7	5.5	21.1	14.0
Georgia	6	141	241	659	955	1,411	1,720	0.0	0.0	0.1	47.8	21.9	37.3	27.8
Kazakhstan	122	356	701	1,005	1,209	1,347	1,460	0.0	0.1	0.1	11.4	8.4	14.8	9.6
Kyrgyzstan	5	15	73	284	640	435	..	0.0	0.0	..	-32.2	..	30.0	29.0
Rep Moldova	57	39	103	173	195	213	226	0.0	0.0	0.0	9.0	6.4	8.0	10.3
Russian Federation	4,312	3,429	5,870	8,831	11,328	10,759	11,988	1.1	0.9	1.0	-5.0	11.4	5.8	9.3
Tajikistan	..	..	2	4	3	3	..	..	0.0	..	11.2	..	..	11.8
Turkmenistan	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Ukraine	191	394	3,125	3,788	4,294	4,842	5,083	0.0	0.5	0.4	12.8	5.0	20.0	6.3
Uzbekistan	..	27	28	121	..	..	..	..	0.0	..	..	..	..	..
In Southern Europe	*8,149*	*13,356*	*24,112*	*31,639*	*34,712*	*34,898*	*38,027*	*2.0*	*3.5*	*3.3*	*0.5*	*9.0*	*8.9*	*5.9*
Albania	65	389	860	1,626	1,628	1,471	1,470	0.0	0.1	0.1	-9.6	-0.1	18.9	6.9
Andorra	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Bosnia & Herzg	..	233	521	594	631	622	689	..	0.1	0.1	-1.5	10.9	..	3.6
F.Yug.Rp.Macedonia	19	38	89	197	240	234	267	0.0	0.0	0.0	-2.8	14.1	15.8	14.6
Israel	2,993	4,114	2,866	5,106	5,305	5,494	5,667	0.7	0.4	0.5	3.6	3.1	3.6	8.9
Montenegro			276	732	862	826	884	..	0.0	0.1	-4.2	7.0	..	15.6
San Marino	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Serbia			308	798	992	906	1,053	..	0.0	0.1	-8.6	16.2	..	16.6
Serbia & Montenegro	42	30						0.0	..	..	..	..	..	..
Turkey	4,957	7,636	19,191	22,585	25,054	25,345	27,997	1.2	2.8	2.4	1.2	10.5	10.1	4.8

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO April 2014)

EU-28, arrivals and nights in accommodation establishments, 2011

	All collective accommodation							Hotels and similar accommodation						
	Arrivals			Nights			Nights	Arrivals			Nights			Nights
	million	share (%)		million	share (%)		per arrival	million	share (%)		million	share (%)		per arrival
Total	814	100		2,477	100		3.0	641	100		1,639	100		2.6
from:														
Domestic	517	63.5		1,395	56.3		2.7	397	62.0		852	52.0		2.1
International	297	36.5	100	1,082	43.7	100	3.6	244	38.0	100	786	48.0	100	3.2
Europe	233	28.6	78.3	892	36.0	82.5	3.8	189	29.5	77.5	646	39.4	82.2	3.4
Intra-EU-27	203	25.0	68.4	793	32.0	73.3	3.0	160	25.0	65.8	553	33.7	70.3	2.5
Belgium	11	1.4	3.8	39	1.6	3.6	3.1	9	1.3	3.5	25	1.5	3.2	2.5
Bulgaria	1	0.1	0.3	2	0.1	0.2	2.6	1	0.1	0.3	2	0.1	0.3	2.4
Czech Republic	4	0.4	1.2	14	0.6	1.3	3.4	3	0.4	1.1	10	0.6	1.2	2.9
Denmark	5	0.6	1.7	19	0.8	1.8	4.2	4	0.6	1.6	12	0.8	1.6	3.1
Germany	48	5.9	16.2	228	9.2	21.1	3.1	37	5.7	15.1	157	9.6	19.9	2.7
Estonia	1	0.1	0.2	1	0.1	0.1	2.1	0	0.1	0.2	1	0.1	0.2	2.0
Ireland	3	0.4	1.2	13	0.5	1.2	3.1	3	0.5	1.2	9	0.6	1.2	2.6
Greece	1	0.2	0.5	4	0.2	0.4	2.6	1	0.2	0.6	4	0.2	0.5	2.5
Spain	11	1.3	3.6	29	1.2	2.7	2.7	9	1.5	3.9	24	1.5	3.1	2.5
France	18	2.3	6.2	57	2.3	5.3	2.7	16	2.4	6.4	44	2.7	5.6	1.9
Croatia	..	..	..	..	..	..		..	..	..	..	..	..	
Italy	15	1.8	5.0	45	1.8	4.2	3.6	13	2.0	5.3	37	2.2	4.7	3.0
Cyprus	..	..	..	..	..	..	..	0	0.1	0.1	1	0.1	0.1	2.5
Latvia	..	..	..	..	..	..	..	0	0.1	0.2	1	0.1	0.1	2.0
Lithuania	1	0.1	0.3	2	0.1	0.2	2.4	1	0.1	0.3	2	0.1	0.2	2.2
Luxembourg	1	0.1	0.3	3	0.1	0.3	3.2	1	0.1	0.3	2	0.1	0.3	3.1
Hungary	2	0.3	0.7	7	0.3	0.7	2.8	2	0.3	0.7	5	0.3	0.6	2.6
Malta	..	..	..	..	..	..	..	0	0.0	0.1	1	0.0	0.1	3.0
Netherlands	20	2.5	6.7	84	3.4	7.8	3.6	12	1.8	4.8	36	2.2	4.6	2.4
Austria	7	0.8	2.2	24	1.0	2.2	3.2	6	0.9	2.3	18	1.1	2.2	2.8
Poland	5	0.6	1.8	20	0.8	1.9	3.0	4	0.7	1.8	15	0.9	1.9	2.3
Portugal	3	0.3	0.9	7	0.3	0.7	2.6	2	0.4	0.9	6	0.4	0.8	2.2
Romania	2	0.3	0.8	9	0.3	0.8	3.0	2	0.4	0.9	7	0.4	0.9	2.9
Slovenia	2	0.2	0.5	7	0.3	0.6	3.9	1	0.1	0.4	3	0.2	0.4	3.3
Slovakia	1	0.2	0.4	5	0.2	0.4	3.3	1	0.2	0.4	4	0.2	0.5	2.9
Finland	3	0.4	1.1	11	0.4	1.0	2.2	3	0.5	1.2	9	0.5	1.1	2.1
Sweden	6	0.7	2.0	22	0.9	2.0	2.4	5	0.8	2.1	17	1.0	2.2	2.1
United Kingdom	31	3.9	10.6	137	5.5	12.7	3.2	26	4.1	10.7	103	6.3	13.1	2.8
Extra-EU	29	3.6	9.9	99	4.0	9.1	3.4	28	4.4	11.6	93	5.7	11.9	3.3
European Free Trade Association	15	1.9	5.1	52	2.1	4.8	3.4	12	1.9	5.0	38	2.3	4.9	3.1
Iceland	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Switzerland and Liechtenstein	10	1.2	3.2	31	1.2	2.8	3.2	8	1.3	3.4	24	1.5	3.1	2.9
Norway	5	0.6	1.7	20	0.8	1.8	3.9	4	0.6	1.6	13	0.8	1.7	3.5
Turkey	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Russia	..	..	..	..	..	..	..	8	1.3	3.3	34	2.1	4.3	4.1
Ukraine	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Other european countries	..	..	..	..	..	..	..	5	0.8	2.2	15	0.9	1.9	2.7
Interregional	59	7.3	19.9	171	6.9	15.8	2.9	52	8.1	21.3	133	8.1	16.9	2.6
Africa	2	0.3	0.8	9	0.4	0.8	3.6	2	0.3	0.9	7	0.4	0.9	3.2
South Africa	..	..	..	..	..	..	..	0	0.1	0.2	1	0.1	0.2	3.0
Other African countries	..	..	..	..	..	..	..	2	0.3	0.7	6	0.4	0.7	3.2
America	29	3.6	9.9	82	3.3	7.5	2.8	27	4.3	11.2	72	4.4	9.1	2.6
Northern America	23	2.8	7.6	63	2.6	5.9	2.8	21	3.3	8.7	56	3.4	7.1	2.6
Canada	..	..	..	..	..	..	..	3	0.5	1.3	9	0.5	1.1	2.8
United States	..	..	..	..	..	..	..	18	2.7	7.2	46	2.8	5.9	2.6
Other Northern American countries	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Central and South America	..	..	..	..	..	..	..	6	1.0	2.5	16	1.0	2.0	2.5
Brazil	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Other Central or South Am. c.	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Asia & Pacific (incl. Middle East)	24	2.9	8.1	63	2.5	5.8	2.6	22	3.5	9.2	55	3.3	6.9	2.4
China (including Hong Kong)	..	..	..	..	..	..	..	4	0.6	1.7	8	0.5	1.0	1.8
Japan	..	..	..	..	..	..	..	5	0.8	2.1	10	0.6	1.3	2.0
South Korea	..	..	..	..	..	..	..	..	..	..	..	..	..	..
Other Asian countries	..	..	..	..	..	..	..	8	1.3	3.4	24	1.5	3.0	2.9
Oceania	4	0.5	1.4	12	0.5	1.1	2.9	4	0.6	1.5	10	0.6	1.3	2.9
Australia	..	..	..	..	..	..	..	3	0.5	1.3	9	0.6	1.2	2.8
Other Oceanian countries	..	..	..	..	..	..	..	0	0.1	0.2	1	0.1	0.1	3.0
World - not allocated	5	0.7	1.8	19	0.8	1.7	3.5	3	0.5	1.2	7	0.4	0.9	2.4

Source: compiled by World Tourism Organization (UNWTO) based on Eurostat

EU-28, Arrivals of visitors in all collective establishments (hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks), 2011

	Total	Domestic	International	Europe	Intra-EU-27	Extra-EU	Interregional	America	Asia/Pacific	Africa	World not allocated	share of international arrivals Intra-EU-27	Extra-EU	Interregional
	1000											%		
EU-28	813,941	516,696	297,245	232,646	203,292	29,354	59,227	29,342	23,971	2,426	5,372	68	10	20
to:														
Belgium	13,618	6,124	7,494	6,487	6,188	298	979	489	423	68	28	83	4	13
Bulgaria	4,937	2,528	2,409	2,073	1,579	494	194	43	150	1	142	66	21	8
Czech Republic	12,899	6,184	6,715	5,448	4,362	1,086	1,267	481	756	30	0	65	16	19
Denmark	6,171	4,019	2,153	1,844	1,323	520	306	156	137	13	3	61	24	14
Germany	141,741	113,476	28,264	21,569	17,489	4,081	6,093	2,906	2,995	191	602	62	14	22
Estonia	2,726	918	1,808	1,731	1,424	307	64	32	29	2	13	79	17	4
Ireland	..	3,988	..	2,995	..	..	..	787	..	..	..	..	..	..
Greece	21,083	8,534	12,549	8,623	7,038	1,585	1,637	850	730	56	2,289	56	13	13
Spain	103,083	55,431	47,653	39,954	36,477	3,477	6,904	4,513	1,942	449	795	77	7	14
France	148,790	107,185	41,605	32,874	29,154	3,719	8,725	4,166	4,015	544	6	70	9	21
Croatia	8,521	..	..	..	..	..	589	216	362	11	..	..	..	..
Italy	103,724	56,263	47,461	34,328	29,051	5,276	12,544	6,785	5,393	366	589	61	11	26
Cyprus	2,495	547	1,947	1,822	1,378	445	77	26	42	9	48	71	23	4
Latvia	1,585	522	1,063	1,007	693	314	48	25	22	1	8	65	30	5
Lithuania	1,577	634	943	872	597	275	71	31	37	3	0	63	29	8
Luxembourg	934	61	873	770	724	46	103	38	55	10	0	83	5	12
Hungary	7,587	3,915	3,671	3,085	2,571	514	578	234	333	11	8	70	14	16
Malta	1,344	144	1,199	1,099	1,037	63	100	21	34	45	0	86	5	8
Netherlands	30,667	19,367	11,300	9,001	8,296	706	2,284	1,320	850	114	..	73	6	20
Austria	30,906	10,726	20,180	17,943	15,956	1,987	2,003	731	1,221	50	234	79	10	10
Poland	21,477	17,067	4,410	3,808	3,066	742	575	225	339	11	26	70	17	13
Portugal	14,850	7,586	7,264	6,002	5,657	345	1,220	874	261	84	42	78	5	17
Romania	7,032	5,515	1,517	1,224	1,068	156	271	108	153	10	..	70	10	18
Slovenia	3,045	1,124	1,921	1,725	1,370	355	196	63	129	4	0	71	18	10
Slovakia	3,537	2,089	1,448	1,314	1,180	133	131	43	85	4	3	82	9	9
Finland	10,727	8,104	2,623	2,142	1,346	796	352	120	224	8	129	51	30	13
Sweden	23,824	18,818	5,006	4,048	2,558	1,490	550	273	257	20	408	51	30	11
United Kingdom	77,164	55,827	21,337	14,453	12,931	1,522	6,884	3,785	2,816	283	..	61	7	32

Source: compiled by World Tourism Organization (UNWTO) based on Eurostat

EU-28, Arrivals of visitors in hotels and similar accommodation, 2011

	Total											share of international arrivals		
		Domestic	International											
				Europe			Interregional				World			
					Intra-EU-27	Extra-EU		America	Asia/Pacific	Africa	not allocated	Intra-EU-27	Extra-EU	Interregional
	1000											%	%	%
EU-28	640,564	397,001	243,564	188,717	160,381	28,335	51,924	27,378	22,426	2,236	2,923	66	12	21
to:														
Belgium	9,960	3,883	6,077	5,158	4,875	283	893	443	387	63	26	80	5	15
Bulgaria	4,629	2,242	2,387	2,054	1,569	485	194	43	150	1	140	66	20	8
Czech Republic	10,479	4,102	6,377	5,145	4,093	1,052	1,232	465	738	28	0	64	16	19
Denmark	3,838	2,322	1,516	1,230	882	348	286	147	127	13	0	58	23	19
Germany	115,583	90,794	24,789	18,463	14,737	3,727	5,764	2,750	2,833	181	561	59	15	23
Estonia	2,371	668	1,703	1,632	1,340	292	58	30	26	2	12	79	17	3
Ireland	..	3,162	..	2,692	..	..	..	712	..	..	..	..	..	..
Greece	16,355	6,313	10,042	8,410	6,838	1,571	1,625	847	723	56	7	68	16	16
Spain	85,367	45,825	39,542	32,182	29,222	2,960	6,603	4,345	1,836	421	757	74	7	17
France	110,146	79,763	30,383	22,392	19,541	2,851	8,028	3,874	3,685	469	6	64	9	26
Croatia	5,250	942	4,308	3,787	2,306	1,481	521	184	328	9	..	54	34	12
Italy	83,056	45,072	37,984	26,154	21,620	4,534	11,300	6,003	4,971	326	530	57	12	30
Cyprus	2,465	543	1,921	1,799	1,358	441	75	26	41	9	47	71	23	4
Latvia	1,412	427	985	934	630	304	44	23	20	1	7	64	31	4
Lithuania	1,428	519	909	839	573	266	70	31	36	3	0	63	29	8
Luxembourg	715	34	682	585	544	41	96	35	51	10	0	80	6	14
Hungary	6,559	3,144	3,414	2,837	2,336	501	570	231	328	11	8	68	15	17
Malta	1,333	144	1,189	1,090	1,028	62	99	21	34	45	0	86	5	8
Netherlands	19,876	10,849	9,027	6,765	6,079	686	2,263	1,311	839	112	..	67	8	25
Austria	25,938	8,966	16,972	14,936	13,098	1,838	1,828	665	1,116	47	207	77	11	11
Poland	15,485	11,578	3,907	3,340	2,682	658	541	209	323	9	26	69	17	14
Portugal	13,114	6,322	6,792	5,554	5,220	334	1,197	860	254	83	42	77	5	18
Romania	6,852	5,356	1,496	1,204	1,049	155	271	108	153	10	21	70	10	18
Slovenia	2,184	656	1,528	1,351	1,035	316	177	56	118	4	0	68	21	12
Slovakia	2,713	1,479	1,235	1,109	989	120	123	39	81	3	2	80	10	10
Finland	9,267	6,945	2,322	1,859	1,159	700	335	115	213	8	127	50	30	14
Sweden	16,785	13,414	3,370	2,460	1,713	747	516	259	238	19	395	51	22	15
United Kingdom	60,731	41,538	19,193	12,756	11,334	1,422	6,437	3,548	2,620	270	..	59	7	34

Source: compiled by World Tourism Organization (UNWTO) based on Eurostat

EU-28, Nights of visitors in all collective establishments (hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks), 2011

	Total											share of international nights		
		Domestic	International											
				Europe			Interregional				World			
					Intra-EU-27	Extra-EU		America	Asia/Pacific	Africa	not allocated	Intra-EU-27	Extra-EU	Interregional
	1000											%		
EU-28	2,476,702	1,394,819	1,081,883	892,102	793,284	98,817	170,929	81,560	63,113	8,719	18,851	73	9	16
to:														
Belgium	31,380	14,656	16,724	14,650	14,045	604	2,020	1,031	824	164	54	84	4	12
Bulgaria	18,656	6,229	12,427	11,197	8,031	3,166	593	111	479	3	637	65	25	5
Czech Republic	38,235	18,810	19,425	16,355	12,016	4,339	3,070	1,269	1,713	88	0	62	22	16
Denmark	28,218	18,720	9,498	8,504	6,243	2,261	987	537	412	39	6	66	24	10
Germany	339,021	275,940	63,081	48,252	39,471	8,780	13,653	6,379	6,790	484	1,177	63	14	22
Estonia	5,399	1,651	3,749	3,589	2,881	709	134	72	57	4	26	77	19	4
Ireland	..	10,385	..	13,090	..	..	..	4,933	..	..	..	..	..	..
Greece	87,551	22,037	65,514	50,553	40,906	9,647	3,940	1,902	1,867	171	11,021	62	15	6
Spain	389,877	150,489	239,387	221,224	203,039	18,185	15,829	10,704	4,002	1,123	2,334	85	8	7
France	400,994	277,779	123,215	101,039	90,316	10,723	22,149	11,040	9,605	1,503	27	73	9	18
Croatia	39,251	..	..	..	..	..	1,142	499	612	31	..	..	..	..
Italy	386,895	210,421	176,474	144,293	125,132	19,161	30,585	17,501	11,400	1,683	1,597	71	11	17
Cyprus	14,285	1,172	13,113	12,638	9,387	3,250	282	106	141	34	193	72	25	2
Latvia	3,294	1,037	2,257	2,133	1,324	809	107	61	43	3	17	59	36	5
Lithuania	3,267	1,384	1,883	1,737	1,169	568	146	62	77	7	0	62	30	8
Luxembourg	2,236	180	2,056	1,856	1,768	88	199	79	97	23	0	86	4	10
Hungary	19,435	9,515	9,920	8,546	7,221	1,325	1,353	594	727	32	22	73	13	14
Malta	7,652	320	7,332	6,834	6,355	479	498	116	193	190	0	87	7	7
Netherlands	85,368	57,629	27,739	23,531	22,138	1,393	4,146	2,320	1,602	224	..	80	5	15
Austria	105,340	31,692	73,648	68,669	62,107	6,562	4,396	1,725	2,506	165	582	84	9	6
Poland	57,148	46,528	10,620	9,323	7,951	1,373	1,249	511	706	33	47	75	13	12
Portugal	46,858	18,998	27,860	24,754	23,492	1,262	3,001	2,107	597	297	105	84	5	11
Romania	17,979	14,913	3,067	2,475	2,141	334	558	213	321	24	..	70	11	18
Slovenia	8,860	3,754	5,106	4,692	3,662	1,030	414	142	258	14	0	72	20	8
Slovakia	10,416	6,425	3,990	3,603	3,238	364	383	101	270	12	5	81	9	10
Finland	19,988	14,480	5,507	4,520	2,874	1,646	789	276	490	23	198	52	30	14
Sweden	48,423	37,078	11,344	9,440	5,808	3,633	1,101	542	518	40	803	51	32	10
United Kingdom	231,258	142,597	88,661	54,208	47,295	6,913	34,453	16,628	15,677	2,148	..	53	8	39

Source: compiled by World Tourism Organization (UNWTO) based on Eurostat

EU-28, Nights of visitors in hotels and similar accommodation, 2011

	Total	Domestic	International	Europe	Intra-EU-27	Extra-EU	Interregional	America	Asia/Pacific	Africa	World not allocated	share of international nights Intra-EU-27	Extra-EU	Interregional
	1000											%	%	%
EU-28	1,638,743	852,360	786,382	646,272	552,803	93,469	132,980	71,744	54,520	7,120	7,131	70	12	17
to:														
Belgium	17,966	6,529	11,436	9,520	8,952	568	1,867	955	761	151	49	78	5	16
Bulgaria	17,454	5,167	12,287	11,072	7,981	3,091	592	111	479	3	623	65	25	5
Czech Republic	27,880	9,853	18,027	15,110	11,013	4,096	2,917	1,217	1,623	78	0	61	23	16
Denmark	11,879	6,502	5,377	4,453	3,092	1,361	924	505	381	38	0	58	25	17
Germany	240,782	189,392	51,390	37,660	29,948	7,713	12,664	5,908	6,314	443	1,066	58	15	25
Estonia	4,595	1,117	3,478	3,336	2,673	663	117	65	49	4	25	77	19	3
Ireland	..	6,678	..	11,292	..	..	..	4,564	..	..	..	..	..	..
Greece	69,138	15,370	53,768	49,830	40,250	9,580	3,913	1,895	1,848	171	25	75	18	7
Spain	286,761	111,524	175,237	158,865	144,982	13,883	14,262	9,760	3,571	931	2,110	83	8	8
France	201,970	134,958	67,013	48,059	41,290	6,769	19,079	9,771	8,156	1,152	27	62	10	28
Croatia	20,467	942	19,525	18,534	13,516	5,018	991	424	543	24	..	69	26	5
Italy	259,911	139,897	120,014	92,722	77,959	14,763	25,973	14,775	9,924	1,274	1,319	65	12	22
Cyprus	14,088	1,155	12,933	12,470	9,247	3,222	274	104	137	33	189	72	25	2
Latvia	2,826	757	2,069	1,955	1,192	763	98	56	39	3	16	58	37	5
Lithuania	2,837	1,019	1,818	1,674	1,126	548	144	61	76	7	0	62	30	8
Luxembourg	1,375	95	1,280	1,091	1,013	78	189	75	92	22	0	79	6	15
Hungary	16,189	7,415	8,774	7,423	6,142	1,281	1,331	584	716	31	21	70	15	15
Malta	7,500	319	7,181	6,692	6,226	466	489	111	189	189	0	87	6	7
Netherlands	34,576	17,891	16,685	12,641	11,341	1,300	4,044	2,283	1,550	212	..	68	8	24
Austria	82,327	23,180	59,147	54,682	48,770	5,912	3,950	1,568	2,232	150	515	82	10	7
Poland	29,182	20,785	8,397	7,206	6,056	1,150	1,144	464	655	26	47	72	14	14
Portugal	39,440	13,437	26,004	22,988	21,772	1,216	2,913	2,064	557	292	102	84	5	11
Romania	17,367	14,385	2,982	2,391	2,062	329	557	212	321	24	34	69	11	19
Slovenia	6,185	2,179	4,006	3,633	2,720	913	372	126	233	13	0	68	23	9
Slovakia	7,020	3,744	3,276	2,914	2,610	304	358	89	259	10	4	80	9	11
Finland	16,367	11,655	4,711	3,789	2,399	1,391	727	264	442	22	194	51	30	15
Sweden	27,990	21,458	6,532	4,768	3,319	1,448	1,000	503	461	36	765	51	22	15
United Kingdom	151,286	84,959	66,326	39,501	34,570	4,931	26,826	13,232	11,947	1,646	..	52	7	40

Source: compiled by World Tourism Organization (UNWTO) based on Eurostat

Projections to 2020-2025-2030 *UNWTO Tourism Towards 2030*

Population by (sub)region

	Population (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	4,453	5,306	5,726	6,123	6,507	6,896	7,657	8,003	8,321	1.5	1.7	1.2	0.9	1.1	1.0	0.8	100	100	100	100	100	100
Advanced economies	840	896	927	956	988	1,020	1,068	1,088	1,104	0.6	0.7	0.6	0.4	0.5	0.4	0.3	19	16	15	14	14	13
Emerging economies	3,613	4,410	4,799	5,167	5,519	5,876	6,588	6,915	7,218	1.6	1.9	1.4	1.0	1.2	1.1	0.9	81	84	85	86	86	87
By UNWTO regions:																						
Europe	*797.1*	*846.6*	*862.0*	*868.7*	*880.1*	*896.9*	*920.4*	*927.4*	*930.8*	*0.4*	*0.5*	*0.3*	*0.2*	*0.3*	*0.2*	*0.1*	*17.9*	*15.1*	*13.0*	*12.0*	*11.6*	*11.2*
Northern Europe	82.6	84.3	85.7	87.2	89.3	92.4	97.9	100.5	102.9	0.4	0.3	0.5	0.5	0.6	0.6	0.5	1.9	1.5	1.3	1.3	1.3	1.2
Western Europe	170.4	175.4	180.7	183.1	186.4	189.1	192.0	193.1	193.9	0.3	0.4	0.3	0.1	0.2	0.1	0.1	3.8	3.2	2.7	2.5	2.4	2.3
Central/Eastern Europe	358.0	385.1	386.9	382.7	378.3	379.0	381.4	380.5	377.7	0.2	0.5	-0.1	0.0	0.1	0.0	-0.1	8.0	6.8	5.5	5.0	4.8	4.5
Southern/Mediter. Eu.	186.2	201.8	208.6	215.7	226.0	236.4	249.1	253.3	256.3	0.8	0.8	0.8	0.4	0.5	0.5	0.3	4.2	3.6	3.4	3.3	3.2	3.1
EU-28	*462.6*	*475.8*	*482.8*	*486.3*	*495.5*	*505.2*	*516*	*519*	*520*	*0.3*	*0.3*	*0.3*	*0.1*	*0.2*	*0.2*	*0.1*	*10.4*	*8.4*	*7.3*	*6.7*	*6.5*	*6.3*
in Northern Europe	78.2	79.8	81.1	82.4	84.4	87.2	92	95	97	0.4	0.2	0.5	0.5	0.6	0.6	0.5	1.8	1.4	1.3	1.2	1.2	1.2
in Western Europe	164.0	168.7	173.6	175.9	178.9	181.3	184	185	186	0.3	0.4	0.3	0.1	0.1	0.1	0.1	3.7	3.0	2.6	2.4	2.3	2.2
in Central/Eastern Europe	100.0	104.0	103.0	101.6	100.5	100.1	99	98	97	0.0	0.2	-0.2	-0.2	-0.1	-0.1	-0.2	2.2	1.8	1.5	1.3	1.2	1.2
in Southern/Mediter. Eu.	120.4	123.4	125.1	126.4	131.7	136.6	140	141	141	0.4	0.3	0.6	0.1	0.3	0.2	0.0	2.7	2.2	2.0	1.8	1.8	1.7
non-EU	*334.5*	*370.8*	*379.2*	*382.4*	*384.6*	*391.7*	*405*	*409*	*410*	*0.5*	*0.8*	*0.2*	*0.2*	*0.3*	*0.3*	*0.1*	*7.5*	*6.6*	*5.7*	*5.3*	*5.1*	*4.9*
in Northern / Western Eu.	10.7	11.2	11.7	12.0	12.4	12.9	14	14	14	0.6	0.6	0.7	0.4	0.5	0.5	0.4	0.2	0.2	0.2	0.2	0.2	0.2
in Central/Eastern Europe	258.0	281.1	283.9	281.1	277.9	278.9	282	282	281	0.3	0.6	-0.1	0.0	0.1	0.1	-0.1	5.8	5.0	4.0	3.7	3.5	3.4
in Southern/Mediter. Eu.	65.8	78.4	83.6	89.3	94.3	99.8	109	113	116	1.4	1.6	1.2	0.7	0.9	0.8	0.6	1.5	1.5	1.4	1.4	1.4	1.4
Africa	*435*	*574*	*654*	*738*	*831*	*935*	*1,176*	*1,309*	*1,448*	*2.6*	*2.8*	*2.4*	*2.2*	*2.3*	*2.3*	*2.1*	*9.8*	*11.4*	*13.6*	*15.4*	*16.4*	*17.4*
Americas	*617*	*724*	*778*	*835*	*886*	*935*	*1,027*	*1,067*	*1,103*	*1.4*	*1.6*	*1.2*	*0.8*	*0.9*	*0.9*	*0.7*	*13.8*	*13.6*	*13.6*	*13.4*	*13.3*	*13.3*
Asia and the Pacific	*2,505*	*3,027*	*3,279*	*3,510*	*3,715*	*3,908*	*4,262*	*4,404*	*4,520*	*1.5*	*1.8*	*1.2*	*0.7*	*0.9*	*0.8*	*0.6*	*56.3*	*57.3*	*56.7*	*55.7*	*55.0*	*54.3*
Middle East	*99*	*134*	*153*	*171*	*194*	*222*	*271*	*296*	*319*	*2.7*	*2.9*	*2.5*	*1.8*	*2.0*	*1.9*	*1.6*	*2.2*	*2.7*	*3.2*	*3.5*	*3.7*	*3.8*

Source: compiled by World Tourism Organization (UNWTO) based on World Population Prospects, the 2010 Revision, United Nations, Department of Economic and Social Affairs, Population Division (2011), http://esa.un.org/unpd/wpp/Excel-Data/population.htm

Gross Domestic Product (GDP) by (sub)region (constant prices 2010 euro, purchasing power parity (PPP) weighted)

	Gross Domestic Product (GDP) euro 2010 constant prices (trillion)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	20.7	28.8	32.8	39.4	47.1	56.1	86.3	104.6	123.7	3.4	3.1	3.7	4.0	4.4	4.2	3.7	100	100	100	100	100	100
Advanced economies	13.7	18.9	21.2	25.0	27.8	29.2				2.6	2.9	2.2					66	65	52			
Emerging economies	7.0	9.8	11.6	14.4	19.3	26.9				4.6	3.4	5.8					34	35	48			
By UNWTO regions:																						
Europe	*8.1*	*10.7*	*10.7*	*12.3*	*14.1*	*15.4*	*19.9*	*22.6*	*25.5*	*2.2*	*1.9*	*2.4*	*2.6*	*2.6*	*2.6*	*2.5*	*39.0*	*32.7*	*27.4*	*23.0*	*21.6*	*20.6*
Northern Europe	1.2	1.6	1.8	2.2	2.5	2.5				2.4	2.5	2.3					6.0	5.5	4.5			
Western Europe	2.9	3.6	4.1	4.6	4.9	5.2				1.9	2.2	1.6					14.1	12.4	9.2			
Central/Eastern Europe	2.0	3.0	2.1	2.3	3.1	3.7				..	..	4.0					..	6.3	6.6			
Southern/Mediter. Eu.	1.9	2.5	2.8	3.3	3.7	3.9				2.5	2.7	2.3					9.1	8.5	7.0			
EU-28	*6.3*	*8.1*	*8.7*	*9.9*	*10.9*	*11.5*				*2.0*	*2.1*	*1.9*					*30.6*	*26.5*	*20.5*			
in Northern Europe	1.2	1.5	1.7	2.0	2.3	2.3				2.4	2.5	2.3					5.6	5.1	4.2			
in Western Europe	2.8	3.4	3.9	4.4	4.6	4.9				1.9	2.3	1.6					13.3	11.8	8.8			
in Central/Eastern Europe	0.8	1.0	0.9	0.9	1.1	1.3				..	..	2.7					..	2.7	2.4			
in Southern/Mediter. Eu.	1.7	2.1	2.3	2.6	2.8	2.9				1.9	2.1	1.7					8.0	6.9	5.2			
non-EU	*1.7*	*2.6*	*2.0*	*2.5*	*3.3*	*3.8*				*2.7*	*1.0*	*4.4*					*8.4*	*6.2*	*6.9*			
in Northern / Western Eu.	0.2	0.3	0.3	0.4	0.4	0.4				2.0	1.9	2.1					1.2	1.0	0.8			
in Central/Eastern Europe	1.3	2.0	1.2	1.4	2.0	2.4				..	..	4.8					..	3.6	4.2			
in Southern/Mediter. Eu.	0.2	0.4	0.5	0.7	0.9	1.0				..	..	4.5					..	1.6	1.8			
Africa	*0.6*	*0.8*	*0.9*	*1.1*	*1.4*	*1.8*	*3.0*	*3.7*	*4.7*	*3.5*	*2.2*	*4.9*	*4.8*	*4.9*	*4.8*	*4.7*	*3.1*	*2.7*	*3.3*	*3.4*	*3.5*	*3.8*
Americas	*7.4*	*9.7*	*11.2*	*13.6*	*15.4*	*16.8*	*22.2*	*25.0*	*28.1*	*2.8*	*2.8*	*2.7*	*2.6*	*2.8*	*2.7*	*2.4*	*35.8*	*34.2*	*29.9*	*25.7*	*23.9*	*22.7*
Asia and the Pacific	*4.0*	*6.9*	*9.1*	*11.3*	*14.8*	*20.4*	*38.7*	*50.1*	*61.5*	*5.6*	*5.7*	*5.6*	*5.7*	*6.6*	*6.2*	*4.7*	*19.1*	*27.7*	*36.4*	*44.8*	*47.9*	*49.7*
Middle East	*0.6*	*0.7*	*0.9*	*1.0*	*1.3*	*1.7*	*2.7*	*3.2*	*3.9*	*3.3*	*2.2*	*4.5*	*4.3*	*4.6*	*4.4*	*3.9*	*3.1*	*2.7*	*3.0*	*3.1*	*3.1*	*3.1*

Source: compiled by World Tourism Organization (UNWTO) and Trajectory based on the World Economic Outlook database of September 2011 of the International Monetary Fund (IMF) (www.imf.org/external/pubs/ft/weo) and GDP growth rates as forecast by Oxford Economics. Values in U$ exchanged at 2010 average exchange rate of euro 0.7543 per US$ (one euro to US$ 1.3257). Countries weighted by purchasing power parity (ppp), i.e. taking into account cost of living.

Gross Domestic Product (GDP) per capita (constant prices 2010 euro, purchasing power parity (PPP) weighted)

	Gross Domestic Product (GDP) per capita, euro 2010 constant prices									Average annual growth (%)						
	actual data						projections			actual data			projections			
										1980-2010, of which			2010-'30, of which			
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30
World	4,700	5,400	5,700	6,400	7,200	8,100	11,300	13,100	14,900	1.8	1.3	2.4	3.1	3.4	3.3	2.8
Advanced economies	16,300	21,100	22,800	26,100	28,100	28,700				1.9	2.3	1.5				
Emerging economies	1,900	2,200	2,400	2,800	3,500	4,600				3.0	1.6	4.4				
By UNWTO regions:																
Europe	*10,100*	*12,600*	*12,400*	*14,200*	*16,100*	*17,100*	*21,600*	*24,300*	*27,400*	*1.8*	*1.4*	*2.2*	*2.4*	*2.4*	*2.4*	*2.4*
Northern Europe	15,100	19,100	21,000	24,900	27,600	27,500				2.0	2.2	1.8				
Western Europe	17,100	20,700	22,400	25,100	26,100	27,400				1.6	1.8	1.4				
Central/Eastern Europe	..	..	5,300	6,000	8,100	9,800				..	..	4.2				
Southern/Mediter. Eu.	10,100	12,300	13,400	15,200	16,500	16,700				1.7	1.9	1.5				
EU-28	13,700	16,900	18,000	20,300	21,900	22,800				1.7	1.8	1.6				
in Northern Europe	14,700	18,700	20,500	24,300	27,000	26,900				2.0	2.2	1.8				
in Western Europe	16,800	20,400	22,300	24,900	25,900	27,200				1.6	1.9	1.3				
in Central/Eastern Europe	..	..	8,600	8,700	11,100	13,300				..	..	2.9				
in Southern/Mediter. Eu.	13,800	17,100	18,200	20,500	21,500	21,500				1.5	1.9	1.1				
non-EU	5,200	7,100	5,300	6,500	8,500	9,800				2.1	0.1	4.2				
in Northern / Western Eu.	23,300	26,500	28,000	31,600	33,700	34,600				1.3	1.2	1.4				
in Central/Eastern Europe	..	..	4,100	5,100	7,000	8,500				..	..	5.0				
in Southern/Mediter. Eu.	..	..	6,300	7,700	9,500	10,200				..	..	3.3				
Africa	*1,500*	*1,400*	*1,400*	*1,400*	*1,700*	*2,000*	*2,500*	*2,800*	*3,200*	*1.0*	*-0.5*	*2.4*	*2.4*	*2.3*	*2.3*	*2.5*
Americas	*12,000*	*13,400*	*14,400*	*16,300*	*17,400*	*18,000*	*21,600*	*23,400*	*25,500*	*1.4*	*1.2*	*1.5*	*1.8*	*1.8*	*1.8*	*1.7*
Asia and the Pacific	*1,600*	*2,300*	*2,800*	*3,200*	*4,000*	*5,200*	*9,100*	*11,400*	*13,600*	*4.0*	*3.8*	*4.2*	*4.9*	*5.8*	*5.4*	*4.1*
Middle East	*6,400*	*5,300*	*5,700*	*6,100*	*6,800*	*7,600*	*9,800*	*10,900*	*12,200*	*0.6*	*-0.8*	*1.9*	*2.4*	*2.6*	*2.4*	*2.2*

Source: compiled by World Tourism Organization (UNWTO) based on population and GDP tables

Values in U$ exchanged at 2010 average exchange rate of euro 0.7543 per US$ (one euro to US$ 1.3257) and weighted by purchasing power parity (ppp), i.e. taking into account cost of living.

International tourism by (sub)region of destination

	International Tourist Arrivals received (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	277	435	528	676	807	948	1,369	1,594	1,817	4.2	4.4	4.0	3.3	3.7	3.5	2.9	100	100	100	100	100	100
to Advanced economies	194	296	335	419	459	506	653	721	783	3.2	3.7	2.8	2.2	2.6	2.4	1.8	70	63	53	48	45	43
to Emerging economies	83	139	193	256	348	442	716	873	1,034	5.8	5.8	5.7	4.3	4.9	4.6	3.7	30	37	47	52	55	57
By UNWTO regions:																						
Europe	*177.3*	*261.5*	*304.7*	*387.1*	*448.9*	*484.8*	*632*	*697*	*757*	*3.4*	*3.7*	*3.1*	*2.3*	*2.7*	*2.4*	*1.8*	*64.1*	*57.7*	*51.1*	*46.1*	*43.7*	*41.7*
Northern Europe	20.4	28.7	36.4	45.5	60.4	62.7	77	83	88	3.8	3.9	3.7	1.7	2.1	1.9	1.3	7.4	6.9	6.6	5.6	5.2	4.9
Western Europe	68.3	108.6	112.2	139.7	141.7	154.4	193	208	222	2.8	3.4	2.2	1.8	2.3	2.0	1.4	24.7	21.2	16.3	14.1	13.1	12.2
Central/Eastern Europe	26.6	33.9	58.1	69.3	90.4	94.5	136	156	175	4.3	5.3	3.3	3.1	3.7	3.4	2.5	9.6	11.0	10.0	9.9	9.8	9.6
Southern/Mediter. Eu.	61.9	90.3	98.0	132.6	156.4	173.3	226	249	272	3.5	3.1	3.9	2.3	2.7	2.5	1.9	22.4	18.5	18.3	16.5	15.6	15.0
EU-28	*154.6*	*230.1*	*268.0*	*331.2*	*363.8*	*380.0*	*479*	*520*	*557*	*3.0*	*3.7*	*2.4*	*1.9*	*2.3*	*2.1*	*1.5*	*55.9*	*50.7*	*40.1*	*35.0*	*32.6*	*30.6*
in Northern Europe	19.1	26.6	33.4	42.1	56.2	57.4	71	77	81	3.7	3.8	3.7	1.8	2.2	1.9	1.4	6.9	6.3	6.1	5.2	4.8	4.5
in Western Europe	61.3	100.3	105.0	131.5	134.1	145.4	182	196	209	2.9	3.6	2.2	1.8	2.3	2.0	1.4	22.2	19.9	15.3	13.3	12.3	11.5
in Central/Eastern Europe	21.0	26.7	43.6	40.9	47.4	44.6	64	73	82	2.5	5.0	0.2	3.1	3.7	3.4	2.5	7.6	8.2	4.7	4.7	4.6	4.5
in Southern/Mediter. Eu.	53.1	76.5	86.1	116.7	126.1	132.6	162	173	184	3.1	3.3	2.9	1.7	2.0	1.8	1.3	19.2	16.3	14.0	11.8	10.9	10.1
non-EU	*22.7*	*31.4*	*36.7*	*55.9*	*85.1*	*104.8*	*153*	*177*	*200*	*5.2*	*3.3*	*7.2*	*3.3*	*3.9*	*3.6*	*2.7*	*8.2*	*6.9*	*11.1*	*11.2*	*11.1*	*11.0*
in Northern / Western Eu.	8.3	10.4	10.3	11.6	11.8	14.2	17	19	20	1.8	1.5	2.2	1.7	2.1	1.8	1.3	3.0	2.0	1.5	1.3	1.2	1.1
in Central/Eastern Europe	5.6	7.2	14.5	28.4	43.0	49.9	72	82	92	7.6	6.6	8.6	3.1	3.7	3.4	2.5	2.0	2.7	5.3	5.3	5.2	5.1
in Southern/Mediter. Eu.	8.8	13.8	11.9	15.9	30.3	40.7	64	76	88	5.2	2.0	8.6	3.9	4.6	4.3	3.3	3.2	2.2	4.3	4.7	4.8	4.9
Asia and the Pacific	*22.8*	*55.8*	*82.0*	*110.1*	*153.5*	*204.9*	*356*	*448*	*537*	*7.6*	*8.9*	*6.3*	*4.9*	*5.7*	*5.4*	*4.2*	*8.2*	*15.5*	*21.6*	*26.0*	*28.1*	*29.5*
Americas	*62.3*	*92.8*	*109.1*	*128.2*	*133.3*	*150.6*	*200*	*224*	*249*	*3.0*	*3.8*	*2.2*	*2.5*	*2.9*	*2.7*	*2.2*	*22.5*	*20.7*	*15.9*	*14.6*	*14.1*	*13.7*
Middle East	*7.1*	*9.6*	*13.7*	*24.1*	*36.3*	*58.2*	*96*	*118*	*142*	*7.3*	*4.5*	*10.1*	*4.6*	*5.2*	*4.8*	*3.9*	*2.6*	*2.6*	*6.1*	*7.0*	*7.4*	*7.8*
Africa	*7.2*	*14.7*	*18.7*	*26.2*	*34.8*	*49.9*	*85*	*107*	*133*	*6.7*	*6.6*	*6.8*	*5.0*	*5.4*	*5.2*	*4.6*	*2.6*	*3.5*	*5.3*	*6.2*	*6.7*	*7.3*

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

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			
										1980-2010, of which			2010-'30, of which			
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30
World	6	8	9	11	12	14	18	20	22	2.7	2.7	2.7	2.3	2.7	2.5	2.0
to Advanced economies	23	33	36	44	46	50	61	66	71	2.6	3.0	2.1	1.8	2.1	1.9	1.5
to Emerging economies	2	3	4	5	6	8	11	13	14	4.1	3.8	4.3	3.3	3.7	3.5	2.8
By UNWTO regions:																
Europe	*22*	*31*	*35*	*45*	*51*	*54*	*69*	*75*	*81*	*3.0*	*3.1*	*2.9*	*2.1*	*2.4*	*2.2*	*1.7*
Northern Europe	25	34	42	52	68	68	79	83	86	3.4	3.7	3.2	1.2	1.5	1.3	0.8
Western Europe	40	62	62	76	76	82	100	108	115	2.4	3.0	1.8	1.7	2.1	1.9	1.3
Central/Eastern Europe	7	9	15	18	24	25	36	41	46	4.1	4.8	3.4	3.1	3.6	3.4	2.6
Southern/Mediter. Eu.	33	45	47	61	69	73	91	98	106	2.7	2.3	3.0	1.9	2.1	2.0	1.6
EU-28	33	48	55	68	73	75	93	100	107	2.7	3.4	2.0	1.8	2.1	1.9	1.4
in Northern Europe	24	33	41	51	67	66	77	81	84	3.4	3.5	3.2	1.2	1.6	1.4	0.9
in Western Europe	37	59	60	75	75	80	99	106	113	2.6	3.3	1.9	1.7	2.1	1.9	1.3
in Central/Eastern Europe	21	26	42	40	47	45	65	75	85	2.5	4.8	0.3	3.3	3.8	3.5	2.7
in Southern/Mediter. Eu.	44	62	69	92	96	97	115	123	131	2.7	3.0	2.3	1.5	1.7	1.6	1.2
non-EU	7	8	10	15	22	27	38	43	49	4.7	2.4	7.0	3.1	3.5	3.3	2.6
in Northern / Western Eu.	78	92	88	97	95	110	128	135	140	1.2	0.8	1.5	1.2	1.6	1.4	0.9
in Central/Eastern Europe	2	3	5	10	15	18	25	29	33	7.3	5.9	8.7	3.1	3.6	3.3	2.6
in Southern/Mediter. Eu.	13	18	14	18	32	41	59	68	76	3.8	0.4	7.3	3.2	3.7	3.4	2.7
Asia and the Pacific	*1*	*2*	*3*	*3*	*4*	*5*	*8*	*10*	*12*	*6.0*	*7.0*	*5.1*	*4.2*	*4.8*	*4.5*	*3.6*
Americas	*10*	*13*	*14*	*15*	*15*	*16*	*19*	*21*	*23*	*1.6*	*2.2*	*0.9*	*1.7*	*1.9*	*1.8*	*1.5*
Middle East	*7*	*7*	*9*	*14*	*19*	*26*	*36*	*40*	*44*	*4.4*	*1.5*	*7.4*	*2.7*	*3.1*	*2.8*	*2.3*
Africa	*2*	*3*	*3*	*4*	*4*	*5*	*7*	*8*	*9*	*4.0*	*3.8*	*4.2*	*2.7*	*3.0*	*2.9*	*2.4*

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

International tourism by economic development stage and region of destination

	International Tourist Arrivals received (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	277	435	528	676	807	948	1,369	1,594	1,817	4.2	4.4	4.0	3.3	3.7	3.5	2.9	100	100	100	100	100	100
to Advanced economies	*194.1*	*296.1*	*334.8*	*419.4*	*458.9*	*506.2*	*653*	*721*	*783*	*3.2*	*3.7*	*2.8*	*2.2*	*2.6*	*2.4*	*1.8*	*70.1*	*63.4*	*53.4*	*47.7*	*45.2*	*43.1*
to Emerging economies	*82.6*	*138.5*	*193.3*	*256.3*	*348.0*	*442.2*	*716*	*873*	*1,034*	*5.8*	*5.8*	*5.7*	*4.3*	*4.9*	*4.6*	*3.7*	*29.9*	*36.6*	*46.6*	*52.3*	*54.8*	*56.9*
Europe	*177.3*	*261.5*	*304.7*	*387.1*	*448.9*	*484.8*	*632*	*697*	*757*	*3.4*	*3.7*	*3.1*	*2.3*	*2.7*	*2.4*	*1.8*	*64.1*	*57.7*	*51.1*	*46.1*	*43.7*	*41.7*
to Advanced economies	148.4	217.8	242.2	309.0	337.7	357.6	441	473	503	3.0	3.3	2.6	1.7	2.1	1.9	1.3	53.6	45.8	37.7	32.2	29.7	27.7
to Emerging economies	28.9	43.7	62.5	78.1	111.3	127.2	191	223	255	5.1	5.3	4.9	3.5	4.2	3.8	2.9	10.4	11.8	13.4	14.0	14.0	14.0
EU-28	*154.6*	*230.1*	*268.0*	*331.2*	*363.8*	*380.0*	*479*	*520*	*557*	*3.0*	*3.7*	*2.4*	*1.9*	*2.3*	*2.1*	*1.5*	*55.9*	*50.7*	*40.1*	*35.0*	*32.6*	*30.6*
to Advanced economies	138.6	206.3	227.7	292.0	321.5	338.7	417	449	477	3.0	3.4	2.7	1.7	2.1	1.9	1.3	50.1	43.1	35.7	30.5	28.1	26.2
to Emerging economies	16.0	23.8	40.2	39.2	42.3	41.4	61	71	80	3.2	6.3	0.2	3.4	4.0	3.7	2.8	5.8	7.6	4.4	4.5	4.5	4.4
non-EU	*22.7*	*31.4*	*36.7*	*55.9*	*85.1*	*104.8*	*153*	*177*	*200*	*5.2*	*3.3*	*7.2*	*3.3*	*3.9*	*3.6*	*2.7*	*8.2*	*6.9*	*11.1*	*11.2*	*11.1*	*11.0*
to Advanced economies	9.8	11.5	14.5	17.0	16.1	19.0	23	25	26	2.2	2.6	1.8	1.6	2.0	1.8	1.2	3.5	2.7	2.0	1.7	1.5	1.4
to Emerging economies	12.9	19.9	22.2	38.9	69.0	85.9	130	152	174	6.5	3.7	9.4	3.6	4.2	3.9	3.0	4.7	4.2	9.1	9.5	9.6	9.6

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

International tourism by region of destination and mode of transport

	International Tourist Arrivals received (million)									Average annual growth (%)							Market share					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	277	435	528	676	807	948	1,369	1,594	1,817	4.2	4.4	4.0	3.3	3.7	3.5	2.9	100	100	100	100	100	100
by air	105	187	236	314	398	484	704	821	938	5.2	5.5	4.9	3.4	3.8	3.6	2.9	38	45	51	51	52	52
over surface	171	248	292	362	409	465	666	772	879	3.4	3.6	3.1	3.2	3.7	3.4	2.8	62	55	49	49	48	48
to:																						
Europe	177.3	261.5	304.7	387.1	448.9	484.8	632	697	757	3.4	3.7	3.1	2.3	2.7	2.4	1.8	100	100	100	100	100	100
by air	*54.7*	*94.3*	*111.6*	*148.7*	*198.7*	*221.5*	*291*	*323*	*353*	*4.8*	*4.9*	*4.7*	*2.4*	*2.8*	*2.5*	*2.0*	*31*	*37*	*46*	*46*	*46*	*47*
over surface	*122.7*	*167.2*	*193.0*	*238.4*	*250.3*	*263.4*	*341*	*374*	*404*	*2.6*	*3.1*	*2.1*	*2.2*	*2.6*	*2.4*	*1.7*	*69*	*63*	*54*	*54*	*54*	*53*
EU-28	154.6	230.1	268.0	331.2	363.8	380.0	479	520	557	3.0	3.7	2.4	1.9	2.3	2.1	1.5	100	100	100	100	100	100
by air	*48.6*	*84.5*	*99.1*	*131.8*	*167.8*	*178.0*	*226*	*246*	*265*	*4.4*	*4.9*	*4.0*	*2.0*	*2.4*	*2.2*	*1.6*	*31*	*37*	*47*	*47*	*47*	*48*
over surface	*106.0*	*145.6*	*168.8*	*199.4*	*196.0*	*202.0*	*253*	*273*	*292*	*2.2*	*3.2*	*1.2*	*1.9*	*2.3*	*2.0*	*1.4*	*69*	*63*	*53*	*53*	*53*	*52*
non-EU	22.7	31.4	36.7	55.9	85.1	104.8	153	177	200	5.2	3.3	7.2	3.3	3.9	3.6	2.7	100	100	100	100	100	100
by air	*6.0*	*9.8*	*12.5*	*16.9*	*30.9*	*43.5*	*65*	*77*	*88*	*6.8*	*5.0*	*8.6*	*3.6*	*4.2*	*3.9*	*3.0*	*26*	*34*	*41*	*43*	*43*	*44*
over surface	*16.7*	*21.6*	*24.2*	*39.0*	*54.2*	*61.4*	*88*	*100*	*113*	*4.4*	*2.5*	*6.4*	*3.1*	*3.7*	*3.3*	*2.5*	*74*	*66*	*59*	*57*	*57*	*56*
Northern Europe	20.4	28.7	36.4	45.5	60.4	62.7	77	83	88	3.8	3.9	3.7	1.7	2.1	1.9	1.3	100	100	100	100	100	100
by air	10.9	17.9	22.5	29.3	39.3	39.0	48	51	54	4.3	5.0	3.7	1.7	2.1	1.9	1.3	53	62	62	62	62	62
over surface	9.6	10.7	13.9	16.2	21.1	23.7	30	32	34	3.1	2.5	3.6	1.8	2.2	2.0	1.4	47	38	38	38	38	38
EU-28	19.1	26.6	33.4	42.1	56.2	57.4	71	77	81	3.7	3.8	3.7	1.8	2.2	1.9	1.4	100	100	100	100	100	100
by air	10.2	16.6	20.6	27.1	36.6	35.7	44	47	50	4.3	4.8	3.7	1.7	2.1	1.9	1.4	53	62	62	62	62	62
over surface	8.9	9.9	12.8	15.0	19.6	21.7	27	29	31	3.0	2.4	3.6	1.8	2.2	2.0	1.4	47	38	38	38	38	38
non-EU	1.3	2.1	3.1	3.4	4.2	5.3	6	7	7	4.7	5.8	3.6	1.4	1.8	1.5	1.0	100	100	100	100	100	100
by air	0.7	1.3	1.9	2.2	2.7	3.3	4	4	4	5.3	6.8	3.7	1.1	1.5	1.3	0.7	53	62	62	60	60	59
over surface	0.6	0.8	1.2	1.2	1.5	2.0	2	3	3	4.0	4.4	3.6	1.8	2.2	2.0	1.4	47	38	38	40	40	41
Western Europe	68.3	108.6	112.2	139.7	141.7	154.4	193	208	222	2.8	3.4	2.2	1.8	2.3	2.0	1.4	100	100	100	100	100	100
by air	14.0	26.8	26.2	33.8	45.1	51.4	65	72	77	4.4	4.3	4.6	2.1	2.4	2.2	1.7	21	23	33	34	34	35
over surface	54.3	81.8	85.9	105.8	96.6	103.0	128	137	145	2.2	3.1	1.2	1.7	2.2	1.9	1.3	79	77	67	66	66	65
EU-28	61.3	100.3	105.0	131.5	134.1	145.4	182	196	209	2.9	3.6	2.2	1.8	2.3	2.0	1.4	100	100	100	100	100	100
by air	12.6	24.8	24.6	31.8	42.7	48.4	62	67	73	4.6	4.5	4.6	2.1	2.4	2.2	1.7	21	23	33	34	34	35
over surface	48.7	75.5	80.4	99.6	91.4	97.0	120	129	137	2.3	3.4	1.3	1.7	2.2	1.9	1.3	79	77	67	66	66	65
non-EU	7.0	8.3	7.2	8.2	7.6	9.0	11	12	13	0.8	0.3	1.4	1.8	2.3	2.0	1.4	100	100	100	100	100	100
by air	1.4	2.0	1.7	2.0	2.4	3.0	4	4	4	2.5	1.1	3.9	2.1	2.4	2.2	1.7	21	23	33	34	34	35
over surface	5.5	6.2	5.5	6.2	5.2	6.0	7	8	8	0.3	0.0	0.5	1.7	2.2	1.9	1.3	79	77	67	66	66	65

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Continuation from previous page

International tourism by region of destination and mode of transport

	International Tourist Arrivals received (million)									Average annual growth (%)							Market share					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
Central/Eastern Europe	26.6	33.9	58.1	69.3	90.4	94.5	136	156	175	4.3	5.3	3.3	3.1	3.7	3.4	2.5	100	100	100	100	100	100
by air	8.2	9.5	7.1	10.5	17.3	23.8	36	43	49	3.6	-0.9	8.4	3.7	4.3	4.0	3.1	31	12	25	27	28	28
over surface	18.5	24.4	51.0	58.8	73.1	70.6	100	113	125	4.6	7.0	2.2	2.9	3.5	3.2	2.3	69	88	75	73	72	72
EU-28	21.0	26.7	43.6	40.9	47.4	44.6	64	73	82	2.5	5.0	0.2	3.1	3.7	3.4	2.5	100	100	100	100	100	100
by air	6.1	7.4	5.5	6.4	9.4	11.1	17	20	23	2.0	-0.7	4.8	3.7	4.3	4.0	3.1	29	13	25	26	27	28
over surface	14.9	19.2	38.1	34.5	38.0	33.5	47	53	59	2.7	6.5	-0.9	2.9	3.5	3.2	2.3	71	87	75	74	73	72
non-EU	5.6	7.2	14.5	28.4	43.0	49.9	72	82	92	7.6	6.6	8.6	3.1	3.7	3.4	2.5	100	100	100	100	100	100
by air	2.0	2.1	1.6	4.1	7.9	12.8	20	23	26	6.3	-1.4	14.6	3.7	4.4	4.0	3.1	36	11	26	27	28	29
over surface	3.6	5.1	12.9	24.4	35.1	37.2	52	59	66	8.1	8.9	7.3	2.9	3.5	3.2	2.3	64	89	74	73	72	71
Southern/Mediter. Eu.	61.9	90.3	98.0	132.6	156.4	173.3	226	249	272	3.5	3.1	3.9	2.3	2.7	2.5	1.9	100	100	100	100	100	137
by air	21.6	40.1	55.8	75.0	96.9	107.3	141	157	172	5.5	6.5	4.5	2.4	2.8	2.6	2.0	35	57	62	63	63	32
over surface	40.4	50.3	42.2	57.6	59.5	66.0	84	92	100	1.7	0.3	3.0	2.1	2.5	2.3	1.7	65	43	38	37	37	37
EU-28	53.1	76.5	86.1	116.7	126.1	132.6	162	173	184	3.1	3.3	2.9	1.7	2.0	1.8	1.3	100	100	100	100	100	100
by air	19.7	35.6	48.5	66.4	79.1	82.8	103	111	119	4.9	6.2	3.6	1.8	2.2	2.0	1.5	37	56	62	64	64	65
over surface	33.4	40.9	37.6	50.3	47.0	49.8	59	62	65	1.3	0.8	1.9	1.3	1.7	1.5	1.0	63	44	38	36	36	35
non-EU	8.8	13.8	11.9	15.9	30.3	40.7	64	76	88	5.2	2.0	8.6	3.9	4.6	4.3	3.3	100	100	100	100	100	100
by air	1.9	4.4	7.3	8.6	17.8	24.4	38	46	53	9.0	9.6	8.4	3.9	4.6	4.2	3.3	21	62	60	60	60	60
over surface	7.0	9.4	4.6	7.3	12.5	16.2	26	30	35	2.9	-2.8	8.8	4.0	4.7	4.3	3.3	79	38	40	40	40	40
Africa	7.2	14.7	18.7	26.2	34.8	49.9	85	107	133	6.7	6.6	6.8	5.0	5.4	5.2	4.6	100	100	100	100	100	100
by air	*4.5*	*7.2*	*9.4*	*13.8*	*17.7*	*24.8*	*42*	*51*	*62*	*5.9*	*5.1*	*6.7*	*4.6*	*5.3*	*4.9*	*4.0*	*62*	*50*	*50*	*49*	*48*	*46*
over surface	*2.7*	*7.6*	*9.3*	*12.4*	*17.0*	*25.1*	*43*	*56*	*71*	*7.7*	*8.6*	*6.8*	*5.4*	*5.6*	*5.5*	*5.1*	*38*	*50*	*50*	*51*	*52*	*54*
Americas	62.3	92.8	109.1	128.2	133.3	150.6	200	224	249	3.0	3.8	2.2	2.5	2.9	2.7	2.2	100	100	100	100	100	100
by air	*26.4*	*44.1*	*56.5*	*73.9*	*77.6*	*86.9*	*115*	*129*	*142*	*4.1*	*5.2*	*2.9*	*2.5*	*2.9*	*2.7*	*2.1*	*42*	*52*	*58*	*58*	*57*	*57*
over surface	*35.9*	*48.7*	*52.6*	*54.3*	*55.7*	*63.6*	*85*	*96*	*107*	*1.9*	*2.6*	*1.3*	*2.6*	*2.9*	*2.8*	*2.3*	*58*	*48*	*42*	*42*	*43*	*43*
Asia and the Pacific	22.8	55.8	82.0	110.1	153.5	204.9	356	448	537	7.6	8.9	6.3	4.9	5.7	5.4	4.2	100	100	100	100	100	100
by air	*15.6*	*35.8*	*51.5*	*64.9*	*84.0*	*115.9*	*196*	*244*	*290*	*6.9*	*8.3*	*5.5*	*4.7*	*5.4*	*5.1*	*4.0*	*69*	*63*	*57*	*55*	*54*	*54*
over surface	*7.2*	*20.0*	*30.5*	*45.2*	*69.6*	*89.0*	*160*	*204*	*246*	*8.8*	*10.1*	*7.4*	*5.2*	*6.1*	*5.7*	*4.4*	*31*	*37*	*43*	*45*	*46*	*46*
Middle East	7.1	9.6	13.7	24.1	36.3	58.2	96	118	142	7.3	4.5	10.1	4.6	5.2	4.8	3.9	100	100	100	100	100	100
by air	*4.3*	*5.1*	*6.9*	*12.4*	*19.7*	*34.5*	*60*	*75*	*91*	*7.2*	*3.2*	*11.3*	*5.0*	*5.7*	*5.3*	*4.3*	*61*	*51*	*59*	*62*	*64*	*64*
over surface	*2.8*	*4.5*	*6.8*	*11.7*	*16.7*	*23.7*	*36*	*43*	*50*	*7.4*	*6.1*	*8.7*	*3.9*	*4.3*	*4.1*	*3.4*	*39*	*49*	*41*	*38*	*36*	*36*

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

International tourism by region of destination and purpose of visit

	International Tourist Arrivals received (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	277	435	528	676	807	948	1,369	1,594	1,817	4.2	4.4	4.0	3.3	3.7	3.5	2.9	100	100	100	100	100	100
Leisure, recreation and holidays	160	252	296	364	436	524	757	882	1,006	4.0	4.2	3.9	3.3	3.8	3.5	2.9	58	56	55	55	55	55
Business and professional	42	69	92	122	130	147	205	236	266	4.3	5.3	3.2	3.0	3.4	3.2	2.6	15	17	15	15	15	15
VFR, health, religion, other	75	113	141	190	241	278	407	476	545	4.5	4.3	4.6	3.4	3.9	3.6	3.0	27	27	29	30	30	30
to:																						
Europe	*177.3*	*261.5*	*304.7*	*387.1*	*448.9*	*484.8*	*632*	*697*	*757*	*3.4*	*3.7*	*3.1*	*2.3*	*2.7*	*2.4*	*1.8*	*100*	*100*	*100*	*100*	*100*	*100*
Leisure, recreation and holidays	110.3	161.0	176.2	209.2	246.2	272.1	352	387	420	3.1	3.2	2.9	2.2	2.6	2.4	1.8	62	58	56	56	56	55
Business and professional	26.2	40.4	50.8	69.8	69.2	72.2	90	98	104	3.4	4.5	2.4	1.9	2.2	2.0	1.5	15	17	15	14	14	14
VFR, health, religion, other	40.7	60.1	77.7	108.1	133.6	140.6	189	212	233	4.2	4.4	4.0	2.6	3.0	2.8	2.1	23	26	29	30	30	31
EU-28	*154.6*	*230.1*	*268.0*	*331.2*	*363.8*	*380.0*	*478*	*519*	*556*	*3.0*	*3.7*	*2.4*	*1.9*	*2.3*	*2.1*	*1.5*	*100*	*100*	*100*	*100*	*100*	*100*
Leisure, recreation and holidays	95.2	140.6	155.9	185.4	207.8	225.0	283	307	328	2.9	3.3	2.5	1.9	2.3	2.1	1.5	62	58	59	59	59	59
Business and professional	23.3	36.2	44.9	60.4	57.9	59.7	73	78	83	3.2	4.5	1.9	1.7	2.1	1.8	1.3	15	17	16	15	15	15
VFR, health, religion, other	36.1	53.2	67.2	85.3	98.1	95.4	123	134	145	3.3	4.2	2.4	2.1	2.5	2.3	1.7	23	25	25	26	26	26
Non-EU	*22.7*	*31.4*	*36.7*	*55.9*	*85.1*	*104.8*	*153*	*177*	*201*	*5.2*	*3.3*	*7.2*	*3.3*	*3.9*	*3.6*	*2.7*	*100*	*100*	*100*	*100*	*100*	*100*
Leisure, recreation and holidays	15.1	20.4	20.3	23.8	38.4	47.1	69	81	91	3.9	2.0	5.8	3.4	4.0	3.6	2.8	67	55	45	45	45	46
Business and professional	3.0	4.1	5.9	9.3	11.3	12.5	17	19	21	4.9	4.7	5.2	2.6	3.1	2.9	2.1	13	16	12	11	11	10
VFR, health, religion, other	4.6	6.9	10.5	22.8	35.5	45.2	67	78	88	7.9	5.6	10.2	3.4	4.0	3.7	2.8	20	29	43	44	44	44

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

Arrivals for which the purpose of visit was not specified have been proportionally divided over the categories of this classification.

International tourism by region of origin: world

	International Tourist Arrivals generated (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
World	277	435	528	676	807	948	1,369	1,594	1,817	4.2	4.4	4.0	3.3	3.7	3.5	2.9	100	100	100	100	100	100
from:																						
Europe	169.2	255.2	308.1	396.5	467.0	512.8	684	760	833	3.8	4.1	3.5	2.5	2.9	2.7	2.0	61.2	58.3	54.1	49.9	47.7	45.8
Asia and the Pacific	24.7	59.7	87.7	115.9	155.2	208.7	364	459	549	7.4	8.8	5.9	5.0	5.7	5.4	4.2	8.9	16.6	22.0	26.6	28.8	30.2
Americas	71.1	100.6	110.2	132.8	140.4	160.3	213	239	265	2.7	3.0	2.5	2.6	2.9	2.7	2.2	25.7	20.9	16.9	15.5	15.0	14.6
Africa	5.7	10.6	12.2	15.5	20.3	29.8	52	69	90	5.7	5.2	6.1	5.7	5.8	5.7	5.5	2.1	2.3	3.1	3.8	4.3	5.0
Middle East	5.9	8.6	9.9	15.0	24.0	36.8	57	68	80	6.3	3.5	9.1	4.0	4.4	4.1	3.5	2.1	1.9	3.9	4.1	4.2	4.4

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

International tourism by region of origin per 100 population

	International Tourist Arrivals generated per 100 population									Average annual growth (%)						
	actual data						projections			actual data			projections			
										1980-2010, of which			2010-'30, of which			
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30
World	6	8	9	11	12	14	18	20	22	2.7	2.7	2.7	2.3	2.7	2.5	2.0
from:																
Europe	*21*	*30*	*36*	*46*	*53*	*57*	*74*	*82*	*89*	*3.4*	*3.5*	*3.2*	*2.3*	*2.7*	*2.4*	*1.9*
Asia and the Pacific	*1*	*2*	*3*	*3*	*4*	*5*	*9*	*10*	*12*	*5.8*	*6.9*	*4.7*	*4.2*	*4.8*	*4.6*	*3.6*
Americas	*12*	*14*	*14*	*16*	*16*	*17*	*21*	*22*	*24*	*1.3*	*1.4*	*1.3*	*1.7*	*1.9*	*1.8*	*1.5*
Africa	*1*	*2*	*2*	*2*	*2*	*3*	*4*	*5*	*6*	*3.0*	*2.4*	*3.6*	*3.4*	*3.4*	*3.4*	*3.4*
Middle East	*6*	*6*	*6*	*9*	*12*	*17*	*21*	*23*	*25*	*3.5*	*0.6*	*6.5*	*2.1*	*2.3*	*2.2*	*1.9*

Source: World Tourism Organization (UNWTO) © (compiled April 2014)

International tourism by region of origin: Europe, EU-28

	International Tourist Arrivals generated (million)									Average annual growth (%)							Share (%)					
	actual data						projections			actual data			projections				actual data			projections		
										1980-2010, of which			2010-'30, of which									
	1980	1990	1995	2000	2005	2010	2020	2025	2030		1980-'95	'95-2010		2010-'20	2010-'25	2020-'30	1980	1995	2010	2020	2025	2030
to Europe	*177.3*	*261.5*	*304.7*	*387.1*	*448.9*	*484.8*	*632*	*697*	*757*	*3.4*	*3.7*	*3.1*	*2.3*	*2.7*	*2.4*	*1.8*	*64*	*58*	*51*	*46*	*44*	*42*
from:																						
within same region	153.0	226.8	268.2	339.3	396.7	421.4	546	600	649	3.4	3.8	3.1	2.2	2.6	2.4	1.7	55	51	44	40	38	36
EU-28	137.2	200.2	228.7	285.2	324.9	329.8	415	447	476	3.0	3.5	2.5	1.9	2.3	2.1	1.4	49.6	43.3	34.8	30.3	28.1	26.2
non-EU	15.8	26.6	39.4	54.1	71.8	91.6	131	152	174	6.0	6.3	5.8	3.2	3.7	3.4	2.8	5.7	7.5	9.7	9.6	9.6	9.5
from other regions	24.3	34.7	36.5	47.8	52.2	63.5	85	97	108	3.3	2.8	3.8	2.7	3.0	2.9	2.4	8.8	6.9	6.7	6.2	6.1	5.9
Asia and the Pacific	4.8	9.0	12.2	15.2	18.4	24.1	36	42	48	5.5	6.4	4.6	3.5	4.0	3.8	2.9	1.7	2.3	2.5	2.6	2.6	2.6
Americas	15.0	21.0	20.2	28.1	28.0	30.3	37	39	42	2.4	2.0	2.7	1.6	1.9	1.7	1.4	5.4	3.8	3.2	2.7	2.5	2.3
Africa	2.6	3.0	2.3	2.7	3.2	4.2	6	8	10	1.6	-0.6	3.9	4.4	4.4	4.4	4.4	0.9	0.4	0.4	0.5	0.5	0.5
Middle East	1.9	1.7	1.8	1.8	2.6	5.0	7	8	9	3.2	-0.6	7.2	2.9	3.2	3.0	2.5	0.7	0.3	0.5	0.5	0.5	0.5
to EU-28	*154.6*	*230.1*	*268.0*	*331.2*	*363.8*	*380.0*	*479*	*520*	*557*	*3.0*	*3.7*	*2.4*	*1.9*	*2.3*	*2.1*	*1.5*	*56*	*51*	*40*	*35*	*33*	*31*
from:																						
Europe	132.7	199.0	235.2	288.3	318.9	328.2	411	444	473	3.1	3.9	2.2	1.8	2.3	2.0	1.4	48.0	44.5	34.6	30.0	27.8	26.0
EU-28	122.1	180.5	209.9	259.2	283.3	286.2	352	376	397	2.9	3.7	2.1	1.6	2.1	1.8	1.2	44.1	39.7	30.2	25.7	23.6	21.8
non-EU	10.6	18.5	25.3	29.1	35.6	42.0	59	68	76	4.7	6.0	3.4	3.0	3.5	3.3	2.6	3.8	4.8	4.4	4.3	4.3	4.2
from other regions	21.9	31.2	32.8	42.9	44.9	51.8	68	76	84	2.9	2.7	3.1	2.4	2.7	2.6	2.1	7.9	6.2	5.5	5.0	4.8	4.6
Asia and the Pacific	4.4	7.9	10.7	13.2	14.9	18.2	26	30	34	4.9	6.1	3.6	3.1	3.6	3.4	2.6	1.6	2.0	1.9	1.9	1.9	1.8
Americas	13.5	19.3	18.6	25.8	25.3	26.9	32	34	37	2.3	2.1	2.5	1.5	1.8	1.6	1.3	4.9	3.5	2.8	2.3	2.2	2.0
Africa	2.3	2.8	2.1	2.4	2.9	3.6	6	7	9	1.5	-0.8	3.8	4.3	4.4	4.3	4.3	0.8	0.4	0.4	0.4	0.4	0.5
Middle East	1.6	1.2	1.4	1.5	1.9	3.0	4	4	5	2.1	-1.0	5.2	2.6	2.9	2.7	2.3	0.6	0.3	0.3	0.3	0.3	0.3
PM non-EU and other reg.	32.5	49.6	58.1	72.0	80.5	93.8	127	144	160	3.6	3.9	3.2	2.7	3.1	2.9	2.3	11.8	11.0	9.9	9.3	9.0	8.8
to non-EU	*22.7*	*31.4*	*36.7*	*55.9*	*85.1*	*104.8*	*153*	*177*	*200*	*5.2*	*3.3*	*7.2*	*3.3*	*3.9*	*3.6*	*2.7*	*8*	*7*	*11*	*11*	*11*	*11*
from:																						
Europe	20.4	27.8	33.0	51.0	77.8	93.2	136	156	176	5.2	3.3	7.2	3.2	3.8	3.5	2.6	7.4	6.2	9.8	9.9	9.8	9.7
EU-28	15.1	19.8	18.9	26.0	41.6	43.5	64	72	79	3.6	1.5	5.7	3.0	3.9	3.4	2.2	5.5	3.6	4.6	4.6	4.5	4.3
non-EU	5.2	8.1	14.1	25.0	36.2	49.6	72	84	97	7.8	6.9	8.8	3.4	3.8	3.6	3.1	1.9	2.7	5.2	5.3	5.3	5.3
from other regions	2.3	3.6	3.7	4.9	7.3	11.7	18	21	24	5.5	3.2	7.9	3.7	4.3	4.0	3.2	0.8	0.7	1.2	1.3	1.3	1.3
Asia and the Pacific	0.4	1.1	1.5	2.0	3.5	5.8	10	12	14	9.1	8.6	9.5	4.5	5.2	4.9	3.8	0.2	0.3	0.6	0.7	0.7	0.8
Americas	1.4	1.8	1.7	2.3	2.8	3.4	4	5	5	2.9	1.0	4.8	2.3	2.6	2.5	2.0	0.5	0.3	0.4	0.3	0.3	0.3
Africa	0.2	0.3	0.3	0.3	0.3	0.5	1	1	1	3.0	1.1	4.9	4.8	4.9	4.8	4.7	0.1	0.0	0.1	0.1	0.1	0.1
Middle East	0.3	0.5	0.3	0.3	0.7	2.0	3	3	4	6.8	1.4	12.6	3.3	3.7	3.4	2.9	0.1	0.1	0.2	0.2	0.2	0.2

Source: World Tourism Organization (UNWTO) © (compiled April 2014)