



## Close to one billion international tourists in the first nine months of 2016

Destinations around the world welcomed 956 million international tourists between January and September 2016, according to the data analysed in this issue of the *UNWTO World Tourism Barometer*. This is 34 million more than in the same period of 2015, a 4% increase.

Demand for international tourism remained robust in the first nine months of 2016, though growing at a somewhat more moderate pace. After a strong start of the year, growth was slower in the second quarter of 2016 to pick up again in the third quarter of the year. While most destinations report encouraging results, others continue to struggle with the impact of negative events, either in their country or in their region.

confidence, as doing so will benefit the entire tourism sector and society as a whole."

### Regional Results

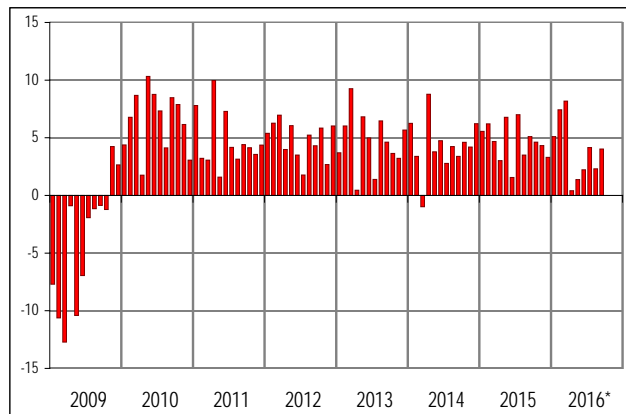
Asia and the Pacific led growth across world regions, with international tourist arrivals (overnight visitors) up 9% through September. All four subregions shared in this growth. Many destinations reported double-digit growth, with the Republic of Korea (+36%), Vietnam (+26%), Japan (+24%) and Sri Lanka (+15%) in the lead.

In Europe, international arrivals grew by 2% between January and September 2016, with solid growth in most destinations. Nonetheless, double-digit increases in major destinations such as Spain, Hungary, Portugal and Ireland were offset by declines in France, Belgium and Turkey. As a consequence,

[to be continued on page 3]

International Tourist Arrivals, monthly evolution

World (% change)



Source: World Tourism Organization (UNWTO) ©

"Tourism is one of the most resilient and fastest-growing economic sectors but it is also very sensitive to risks, both actual and perceived. As such, the sector must continue to work together with governments and stakeholders to minimize risks, respond effectively and build confidence among travelers," said UNWTO Secretary-General, Taleb Rifai.

"No destination is immune to risks. We need to increase cooperation in addressing these global threats, namely those related to safety and security. And we need to make tourism an integral part of emergency planning and response", added Mr Rifai ahead of the Ministerial Meeting on Safe, Secure and Seamless Travel held at the World Travel Market in London on 9 November.

Mr. Rifai also recalled: "Real crises are often magnified or distorted by misperception and affected destinations are facing important challenges, although at the global level demand remains strong. We need to support these countries in restoring

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Statistical Annex

Annex 1 - Annex 31

This issue of the UNWTO World Tourism Barometer and its accompanying Statistical Annex include an analysis of results for international tourism for the first nine months of 2016 based on arrivals and receipts data reported by destinations around the world, as well on international tourism expenditure data for source markets around the world. Furthermore, this issue includes data on the meetings industry from ICCA and an update on the economic environment based on IMF's World Economic Outlook.

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The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO). By monitoring short-term tourism trends on a regular basis, UNWTO aims to provide all those involved, directly or indirectly, in tourism with adequate up-to-date statistics and analysis in a timely fashion.

The *UNWTO World Tourism Barometer* is periodically updated. Issues contain as regular sections: an overview of short-term tourism data from destinations, generating countries and air transport; the results of the latest survey among the UNWTO Panel of Tourism Experts, providing an evaluation of and prospects for short-term tourism performance; and selected economic data relevant for tourism. The objective for future editions of the *UNWTO World Tourism Barometer* will be to broaden its scope and improve coverage gradually over time.

The *UNWTO World Tourism Barometer* is prepared by UNWTO's Tourism Market Trends Programme. The UNWTO Secretariat wishes to express its sincere gratitude to all those who have participated in the elaboration of the *UNWTO World Tourism Barometer*, in particular all institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable contribution.

For more information on the *UNWTO World Tourism Barometer*, including copies of previous issues, please refer to the Facts & Figures section on the UNWTO website at [mkt.unwto.org](http://mkt.unwto.org).

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UNWTO's membership includes 157 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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Data collection for this issue was closed early November 2016.


The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published on the occasion of the Spanish tourism fair Fitur (18-22 January 2017).





The UNWTO World Tourism Barometer is developed as a service for UNWTO Members and published six times a year in English with a Statistical Annex also in French, Spanish and Russian. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.


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[Continuation from page 1]

Northern Europe grew by 6% and Central and Eastern Europe by 5%, while results were weaker in Western Europe (-1%) and Southern Mediterranean Europe (+0%).

International tourist arrivals in the Americas increased by 4% through September. South America (+7%) and Central America (+6%) led results, followed closely by the Caribbean and North America (both +4%).

In Africa (+8%), Sub-Saharan destinations rebounded strongly throughout the year, while North Africa picked up in the third quarter. Available data for the Middle East points to a 6% decrease in arrivals, though results vary from destination to destination. Results started to gradually improve in the second half of the year in both North Africa and the Middle East.

**Strong demand for outbound travel**

The great majority of leading source markets in the world reported increases in international tourism expenditure during the first three to nine months of 2016.

Among the top five source markets, China, the world's top source market, continues to drive demand, reporting double-digit growth in spending (+19%). Likewise, robust results come from the United States (+9%), which benefited many destinations in the Americas and beyond. Germany reported a 5% increase in expenditure, the United Kingdom a 10% increase, and France 3% growth.

In the remainder of the top ten, tourism spending grew notably in Australia and the Republic of Korea (both +9%), and moderately in Italy (+3%). By contrast, expenditure from the Russian Federation declined 37% and from Canada a slight 2%.

Beyond the top 10, eight other markets reported double-digit growth: Egypt (+38%), Argentina (+27%), Spain (+19%), India (+16%), Thailand (+15%), Ukraine (+15%), Ireland (+12%) and Norway (+11%).

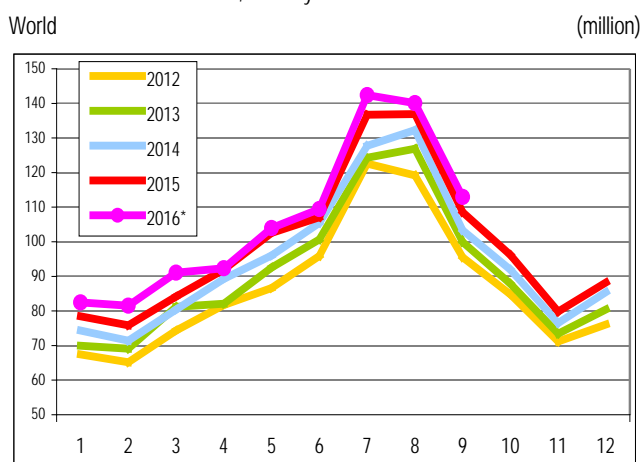
**Prospects remain positive**

Prospects remain positive for the remaining quarter of 2016 according to the UNWTO Confidence Index.

The members of the UNWTO Panel of Tourism Experts are confident about the September-December period, mostly in Africa, the Americas and Asia and the Pacific. Experts in Europe and the Middle East are somewhat more cautious.

Note: Results reflect preliminary data reported to date and are subject to revision.

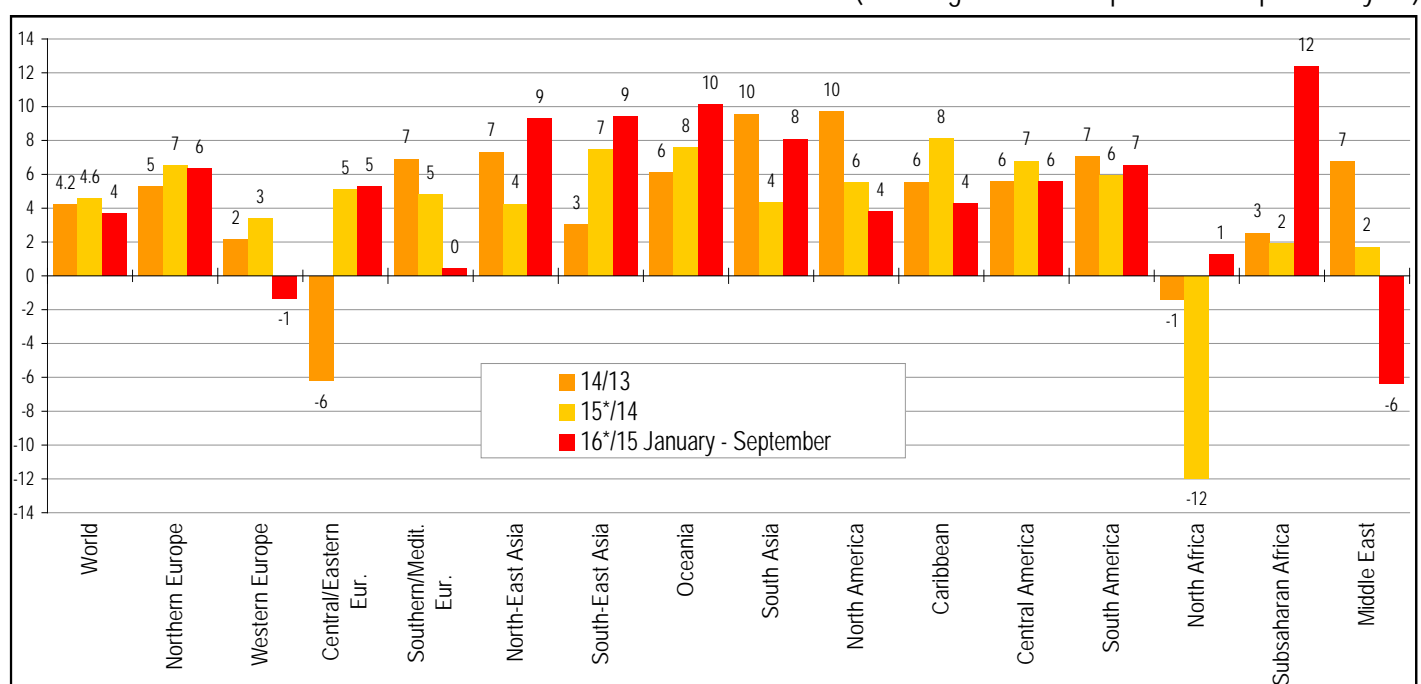
International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

## International Tourist Arrivals by (Sub)region

	Full year								Share 2015*	Change Monthly/quarterly data series (percentage change over same period of the previous year)													
	2000	2005	2010	2011	2012	2013	2014	2015*		14/13	15*/14	2016*			2015*								
	(million)									(%)	(%)	YTD	Q1	Q2	Q3	Jul	Aug	Sep	Q1	Q2	Q3	Q4	
<b>World</b>	674	809	950	994	1,040	1,088	1,134	1,186	100	4.2	4.6	3.7	6.9	1.4	3.5	4.2	2.3	4.0	5.5	3.7	5.2	4.1	
Advanced economies <sup>1</sup>	424	470	516	541	562	588	622	653	55.0	5.7	4.9	4.8	7.9	2.8	4.6	5.6	3.1	5.2	4.4	4.6	4.3	5.0	
Emerging economies <sup>1</sup>	250	339	434	453	478	500	512	533	45.0	2.4	4.1	2.3	6.0	-0.5	1.8	2.0	1.2	2.4	6.5	2.6	6.5	3.2	
<i>By UNWTO regions:</i>																							
<b>Europe</b>	386.6	453.2	489.4	520.6	541.1	567.1	580.2	607.2	51.2	2.3	4.6	1.6	6.5	-0.5	1.0	1.5	-0.1	1.8	6.0	4.7	5.7	3.9	
Northern Europe	44.8	59.9	62.8	64.5	65.6	67.2	70.8	75.4	6.4	5.3	6.5	6.4	10.4	3.6	6.5	6.4	7.2	5.6	4.8	5.7	8.1	10.6	
Western Europe	139.7	141.7	154.4	160.4	166.2	170.8	174.4	180.3	15.2	2.1	3.4	-1.3	4.8	-4.6	-1.9	-1.8	-2.9	-0.6	4.4	4.1	5.3	-0.5	
Central/Eastern Eur.	69.6	95.3	98.9	108.8	118.9	128.1	120.2	126.4	10.7	-6.2	5.1	5.3	6.6	4.1	5.4	6.5	4.7	5.2	8.2	5.2	7.6	4.0	
Southern/Medit. Eur.	132.6	156.4	173.3	186.9	190.4	201.0	214.8	225.2	19.0	6.9	4.8	0.4	6.4	-1.1	-0.5	0.3	-2.2	0.9	6.3	4.5	4.6	5.2	
- of which EU-28	330.5	367.9	384.3	404.8	417.0	433.4	454.1	477.9	40.3	4.8	5.2	4.1	8.3	2.1	3.7	4.3	2.4	4.6	5.7	6.0	5.8	5.1	
<b>Asia and the Pacific</b>	110.4	154.0	205.5	218.3	233.8	249.9	264.4	279.2	23.5	5.8	5.6	9.3	9.4	8.2	10.3	13.9	7.9	9.1	4.1	4.9	5.4	6.1	
North-East Asia	58.3	85.9	111.5	115.8	122.8	127.0	136.3	142.1	12.0	7.3	4.3	9.3	8.9	8.6	10.3	16.7	6.9	7.8	4.5	4.6	1.6	6.4	
South-East Asia	36.3	49.0	70.5	77.8	84.9	94.5	97.3	104.6	8.8	3.0	7.5	9.4	9.9	7.9	10.3	10.9	9.2	10.9	4.0	6.7	9.7	5.1	
Oceania	9.6	10.9	11.4	11.5	11.9	12.5	13.3	14.3	1.2	6.1	7.6	10.1	10.1	9.3	10.8	12.0	9.8	10.7	8.7	5.8	6.7	8.5	
South Asia	6.1	8.2	12.1	13.3	14.2	16.0	17.5	18.3	1.5	9.6	4.3	8.1	9.1	5.3	9.4	12.4	8.0	8.2	-0.7	-3.4	12.8	8.0	
<b>Americas</b>	128.2	133.3	150.2	155.6	162.6	167.6	181.9	192.7	16.3	8.5	6.0	4.4	6.6	1.0	5.5	5.6	5.2	5.7	7.9	4.6	5.2	6.2	
North America	91.5	89.9	99.5	102.2	106.4	110.2	120.9	127.6	10.8	9.7	5.5	3.8	4.9	0.8	5.6	5.6	4.9	6.5	5.1	5.9	5.3	5.6	
Caribbean	17.1	18.8	19.5	19.9	20.6	21.1	22.3	24.1	2.0	5.5	8.1	4.3	6.3	2.1	4.2	5.9	2.9	3.1	7.6	7.2	8.5	7.6	
Central America	4.3	6.3	7.9	8.3	8.9	9.1	9.6	10.2	0.9	5.6	6.8	5.6	8.8	3.1	4.3	7.9	2.8	1.4	6.0	5.5	7.7	8.0	
South America	15.3	18.3	23.2	25.2	26.8	27.2	29.1	30.8	2.6	7.1	5.9	6.6	10.9	0.6	6.1	4.4	9.2	4.9	17.5	-4.3	1.4	6.7	
<b>Africa</b>	26.2	34.8	50.4	50.1	52.4	54.6	55.2	53.4	4.5	1.0	-3.2	8.4	8.2	2.9	13.0	13.2	12.9	12.9	-4.3	-6.4	-4.9	-1.9	
North Africa	10.2	13.9	19.7	18.0	19.6	20.7	20.4	18.0	1.5	-1.4	-12.0	1.3	-6.0	-9.7	13.2	14.2	11.7	13.6	-9.2	-14.4	-12.7	-10.2	
Subsaharan Africa	16.0	20.9	30.7	32.1	32.8	33.9	34.7	35.4	3.0	2.5	1.9	12.4	14.2	9.9	12.9	12.3	13.8	12.6	-2.0	-1.3	1.5	1.8	
<b>Middle East</b>	22.4	33.7	54.7	49.5	50.6	49.1	52.4	53.3	4.5	6.7	1.7	-6.4	-1.4	-9.9	-8.1	-15.2	-6.1	-3.7	9.8	-5.0	7.4	-7.0	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO November 2016)

<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2016, page 146,at [www.imf.org/external/ns/cs.aspx?id=29](http://www.imf.org/external/ns/cs.aspx?id=29).

See box at page 'Annex-1' for explanation of abbreviations and signs used

## Outlook for International Tourist Arrivals

	2008	2009	2010	2011	2012	2013	2014	2015	2016*	average a year 2005-2015	projection 2016* (issued January) between
<b>World</b>	1.9%	-3.9%	6.5%	4.6%	4.7%	4.6%	4.2%	4.6%	3.7%	3.9%	+3.5% and +4.5%
Europe	0.3%	-5.1%	3.1%	6.4%	3.9%	4.8%	2.3%	4.6%	1.6%	3.0%	+3.5% and +4.5%
Asia and the Pacific	1.1%	-1.6%	13.2%	6.2%	7.1%	6.9%	5.8%	5.6%	9.3%	6.1%	+4% and +5%
Americas	2.7%	-4.7%	6.3%	3.6%	4.5%	3.0%	8.5%	6.0%	4.4%	3.8%	+4% and +5%
Africa	2.9%	4.5%	9.3%	-0.7%	4.6%	4.3%	1.0%	-3.2%	8.4%	4.4%	+2% and +5%
Middle East	20.0%	-5.4%	13.1%	-9.6%	2.2%	-2.9%	6.7%	1.7%	-6.4%	4.7%	+2% and +5%

Source: World Tourism Organization (UNWTO) ©

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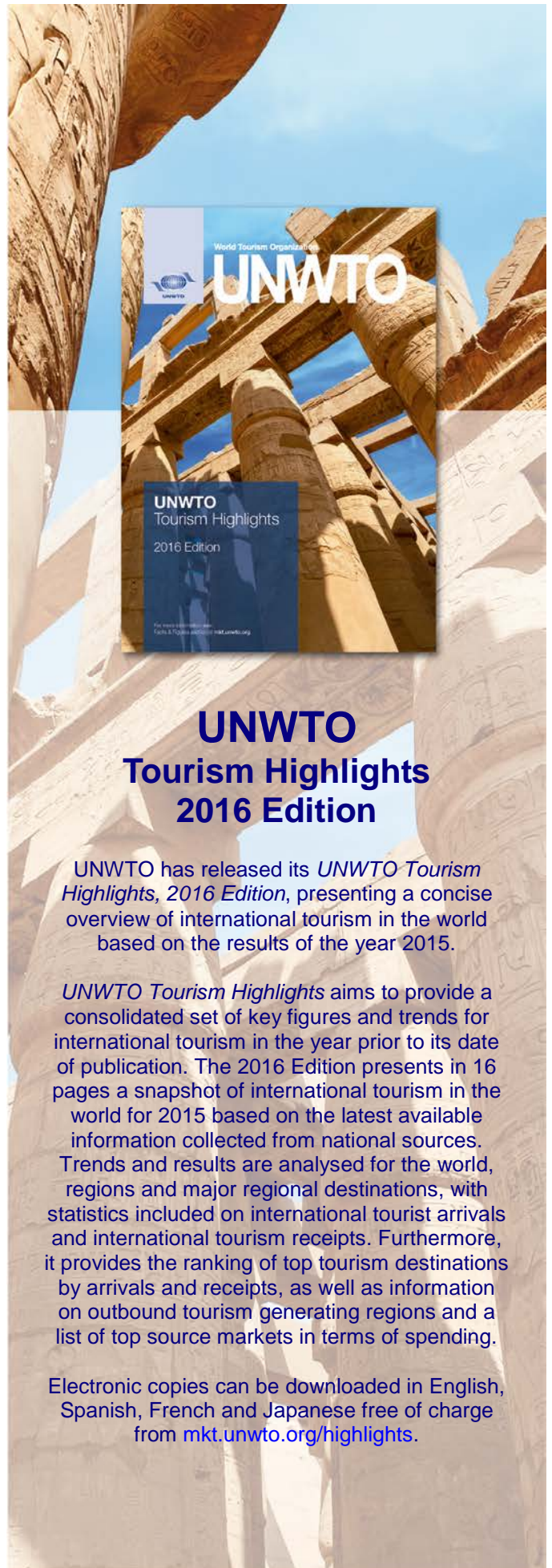
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## UNWTO Tourism Highlights 2016 Edition

UNWTO has released its *UNWTO Tourism Highlights, 2016 Edition*, presenting a concise overview of international tourism in the world based on the results of the year 2015.

*UNWTO Tourism Highlights* aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. The 2016 Edition presents in 16 pages a snapshot of international tourism in the world for 2015 based on the latest available information collected from national sources. Trends and results are analysed for the world, regions and major regional destinations, with statistics included on international tourist arrivals and international tourism receipts. Furthermore, it provides the ranking of top tourism destinations by arrivals and receipts, as well as information on outbound tourism generating regions and a list of top source markets in terms of spending.

Electronic copies can be downloaded in English, Spanish, French and Japanese free of charge from [mkt.unwto.org/highlights](http://mkt.unwto.org/highlights).

## Inbound tourism: short-term trends 2016

### International tourism growing at a somewhat more moderate pace

Based on data reported so far by destinations around the world it is estimated that international tourist arrivals (overnight visitors) worldwide grew 4% in the first nine months of 2016 compared to the same period last year. This preliminary figure is somewhat below that of the full year 2015 (+5%), but in line with UNWTO's projection for 2016 made at the beginning of the year.

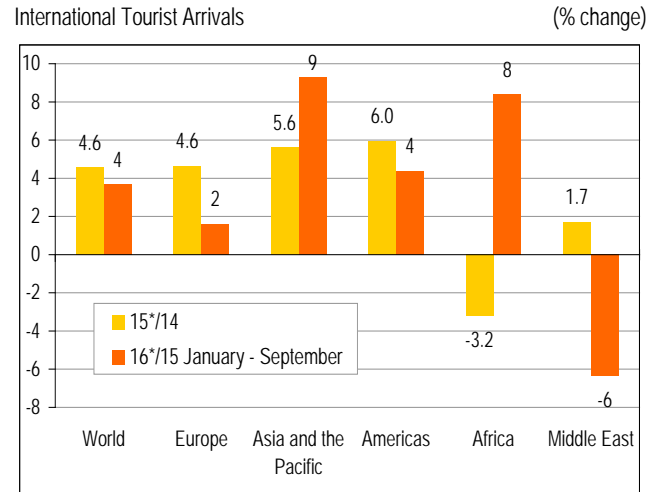
- A total of 144 countries and territories have so far reported data on international arrivals for one or more months of 2016 (out of 220). Of these, 118 countries (82%) have reported an increase in tourist arrivals, with 49 (34%), i.e. just over a third, reporting double-digit growth, while 26 countries (18%) posted a decrease. 136 countries have reported results for at least the first half of 2016, of which over 100 through August and 65 through September.

- Based on this sample of destinations that reported data, it is estimated that destinations worldwide received 956 million international tourist arrivals (overnight visitors) between January and September 2016, some 34 million more than the 922 million recorded in the same period of 2015. This indicates that demand for international tourism continued the positive trend of previous years in the first nine months of 2016, though at a slightly more moderate pace of 3.7%. After a strong start of the year, growth was slow in the second quarter, but picked up again in the third quarter. While many destinations reported encouraging results and share in the overall growth, others continue to struggle with the impact of negative events, either in their country or in their region, as safety and security remain a concern for a number of destinations.

- By UNWTO region, Asia and the Pacific led growth with a 9% increase in international arrivals and strong results in all four subregions. In the Americas, arrivals increased by 4%, driven by results in South and Central America. Results in Europe (+2%) were mixed, with solid growth in most destinations, offset by weaker in others. Africa (+8%) returned to growth after two complicated years with Subsaharan destinations rebounding strongly throughout the year, while North Africa picked up in the third quarter. Available data for the Middle East points to a 6% decline this period, though results vary from destination to destination.

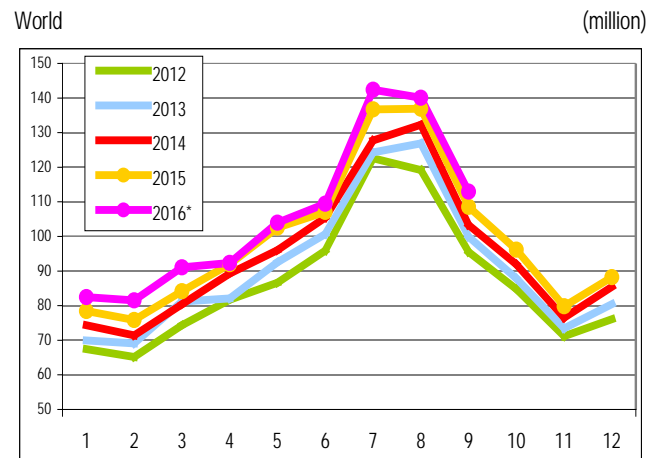
- Over time, growth was quite faster in the first quarter (+7%), than in the second (+1%), while it picked up again in the third (+3%). As a result of the Easter holiday date shift from early April in 2015 to late March in 2016, the fastest growth was recorded in March, when tourist arrivals grew an estimated 8% worldwide, compared to the same month last year. For the same reason April was quite weaker (0%).

- February (+7%) also showed fast growth, but it should be noted that 2016 is a leap year, and therefore February had one more day than usual (29 days). This extra day corresponds to roughly 3.5% more arrivals this month.
- In January international arrivals grew by 5%. May (+1%) and June (+2%) were both rather weak. For destinations in the Middle East and North Africa, June results were weak due to Ramadan taking place for the



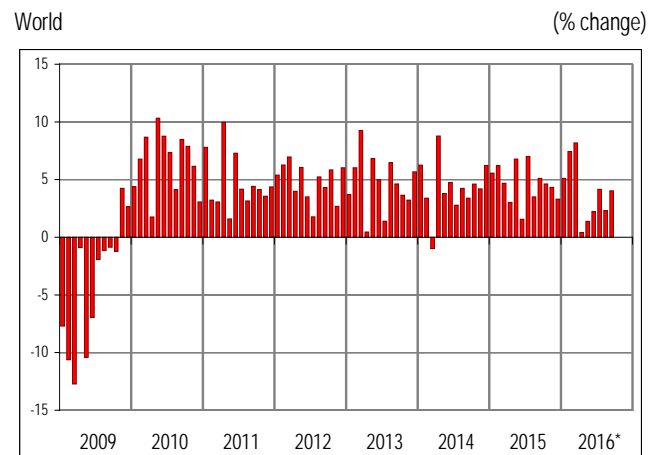
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International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



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most part in this month. This was partly compensated in July (+4%).

- Results for August (+2%) came in rather weak, but many tourists taking holidays in the first week(s) of August actually arrived at their destination in the last weekend of July (and were recorded in this month) because August 1 was a Monday. September (+4%) was slightly above the average for the whole period.
- The Northern Hemisphere high-season months of May, June, July, August and September each exceeded 100 million arrivals a month. These five months counted over 600 million international arrivals overall, around half of the annual total. July and August are the peak months of the year with respectively 143 million and 140 million international arrivals.

### Outlook for the remainder of the year

- The 3.7% increase in international arrivals through September compared to the same nine months of last year, follows 2015 full year growth of 4.6%. 2015 was the sixth consecutive year of above-average growth, with international arrivals increasing by 4% or more every year after the 2009 crisis. So far, growth is somewhat more moderate this year, but could still strengthen in the remaining quarter, making 2016 the seventh consecutive year of consistent growth.

- The first three quarters of the year typically account for around 78% of the total international arrivals count of the year.
- The short-term outlook for international tourism remains largely positive, with growth expected to be sustained in the remainder of 2016. The gradual recovery observed in the last few months in North Africa and the Middle East is expected to continue.
- The participants of the UNWTO Panel of Experts survey evaluated tourism performance in May-August 2016 overall roughly in line with their prospects given at the start of the period four months ago with only few exceptions. The Panel's prospects for the current four months September-December are positive for all regions and activities, with prospects rated at a level similar to the May-August prospects. Confidence is highest among Panel members from Africa, the Americas and Asia and the Pacific, while experts from Europe and the Middle East are somewhat more cautious.
- So far, global results for the first nine months of 2016 are broadly in line with UNWTO's outlook included in the January edition of the *UNWTO World Tourism Barometer* (see table on page Annex-3). According to this projection, international tourist arrivals are expected to increase 3.5% to 4.5% in the full year 2016. The projection is for a continuation of the robust pace of growth recorded in the past six years, in line with the average growth of 3.8% a year for the decade 2010-2020 projected by UNWTO in its long-term forecast report *Tourism Towards 2030*.



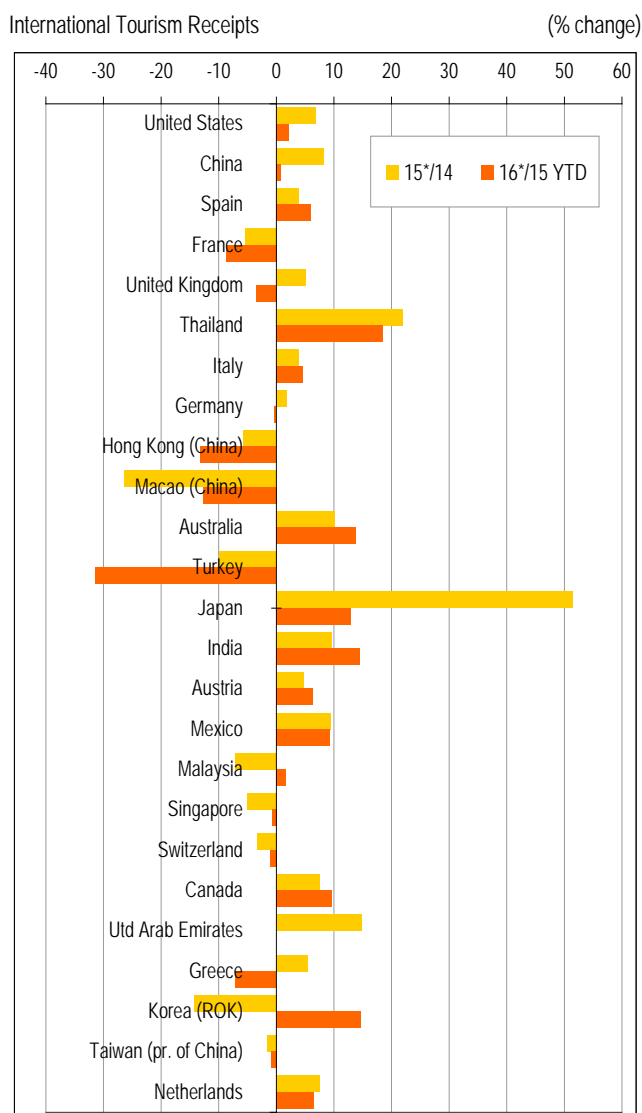
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## International tourism receipts

### Sound results for many destinations

- With few exceptions, year to date figures on international tourism receipts confirm the positive trend recorded in arrivals for this part of 2016. Of the 136 destinations reporting preliminary tourism receipts data for the first three to nine months of 2016, a total of 95 reported growth in earnings compared to the same period of 2015 (70%), of which 35 in double digits (26%), and 41 (30%) posted declines.



Source: World Tourism Organization (UNWTO) ©

- Results reported by the top 10 tourism earners were fairly mixed. The highest growth was recorded by Thailand (6<sup>th</sup> biggest earner) with a 19% increase in receipts through June, following similarly strong growth in the full year 2015 (+22%). Spain (3<sup>rd</sup>) posted 6% growth through August, the second highest in the top 10. The United States, the world's top tourism earner, reported an increase of 2%, while second largest earner China posted an increase of 1%

through June. Italy (7<sup>th</sup>) reported a 5% increase through August.

- Among the remaining five destinations in the top 10, four reported declines in receipts this part of 2016 and one saw flat results. France (4<sup>th</sup>) and the United Kingdom (5<sup>th</sup>) earned 9% and 4% less respectively compared to the same period last year, while the Chinese Special Administrative Regions of Hong Kong (9<sup>th</sup>) and Macao (10<sup>th</sup>) both earned 13% less. Germany (8<sup>th</sup>) reported virtually the same tourism receipts as in the equivalent period last year. Some of this data, however, is still likely to be revised.
- A number of other major destinations further down the ranking enjoyed strong growth in receipts in the first two or three quarters of 2016. Saudi Arabia reported a 26% increase in the first half of 2016 after comparable growth last year. Vietnam recorded 18% growth through September, Sweden 16% through June, and the Republic of Korea and India both 15% through September. Australia and South Africa both reported earnings growth of 14%. Japan posted 13% growth through August, after an exceptional 51% increase in 2015, and four straight years of double-digit figures. New Zealand (+12%) also posted double-digit growth, as did Norway (+11%), Canada and Morocco (both +10%).
- Other top performers this period were Mexico, Ireland, Portugal, the Philippines, the Dominican Republic, Poland, Hungary and Brazil, all reporting growth in tourism earnings between 8% and 9%.

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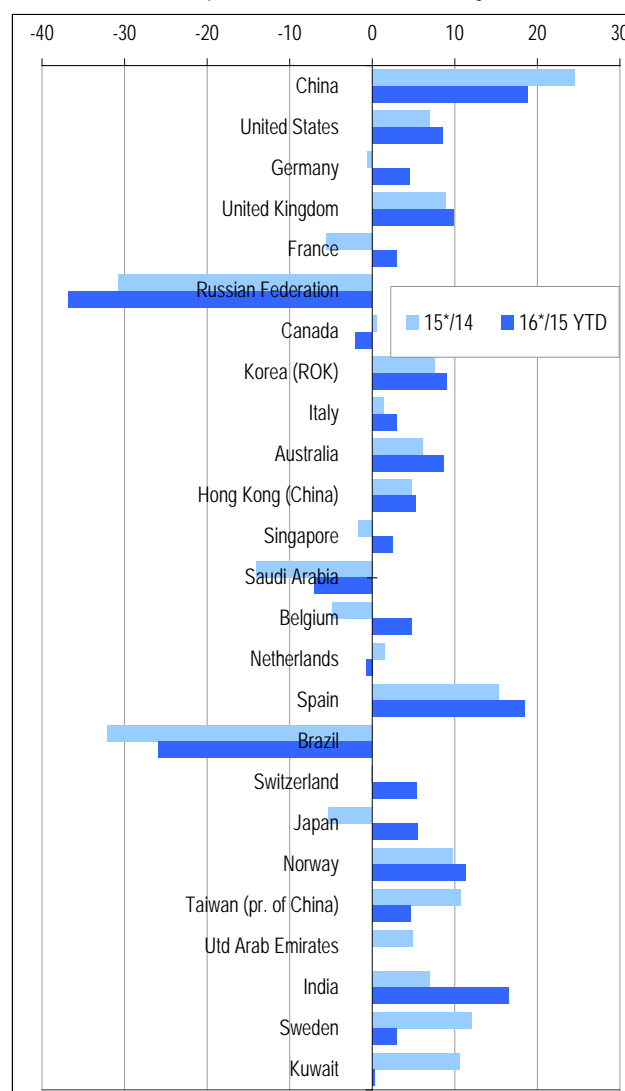


## International tourism expenditure

### Demand for travel abroad varies across source markets

- So far, 47 out of the top 50 outbound markets have reported preliminary data on international tourism expenditure for the first three to nine months of 2016. Of these, 39 (83%) saw an increase in spending, 11 of which in double digits (23%), while 8 (17%) reported declines.
- China, the world's top source market, continues to drive demand for travel abroad in Asia as well as in other regions, reporting double-digit growth in spending (+19% in the first half of 2016).
- With expenditure up 9% through September, similarly robust outbound demand from the United States, the world's second largest market, benefited many destinations in the Americas and beyond.
- Third largest market, Germany, reported a 5% increase in expenditure through August, while fourth largest market, the United Kingdom, reported a 10% increase in the first half of the year.
- In the remainder of the top ten, tourism spending also grew notably in Australia and the Republic of Korea (both +9%). France and Italy reported both an increase in expenditure of 3%.
- By contrast, expenditure from the Russian Federation declined substantially, and from Canada (-2%) slightly.
- Beyond the top 10, there are another nine markets with double-digit growth in spending: Egypt (+38), Argentina (+27), Spain (+19), India (+16), Thailand (+15), Ukraine (+15), Ireland (+12), Norway (+11), Israel (+10%).
- Other markets that showed robust demand for outbound travel in the first part of 2016 were Qatar, Turkey, the Czech Republic (all +8%), New Zealand, Lebanon (both +7%), Portugal (+6%), Japan, Poland, Switzerland, Hong Kong (China), Belgium and Taiwan (pr. of China) (all +5%).
- As with receipts, some of this expenditure data is still likely to be revised.

International Tourism Expenditure (% change, local currencies)



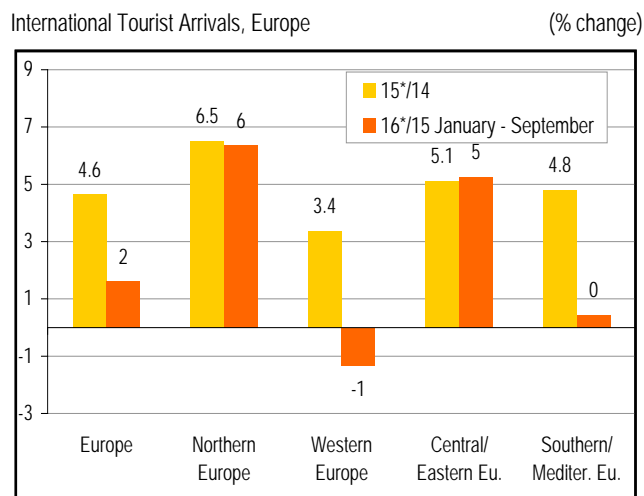
Source: World Tourism Organization (UNWTO) ©



## Regional results

### Europe

International arrivals to destinations in Europe increased by 2% in January-September 2016 compared to the same period last year. Solid performance in most destinations was offset by weaker results in others. A strong first quarter was followed by more modest growth later in the year. Northern Europe (+6%) and Central and Eastern Europe (+5%) led growth this nine-month period, while results were more subdued in Southern Mediterranean Europe (+0%) and Western Europe (-1%).



Source: World Tourism Organization (UNWTO) ©

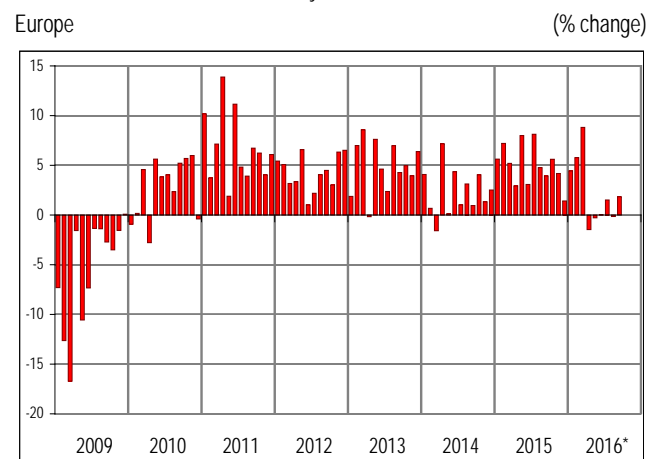
Destinations in Northern Europe (+6%) reported robust results through September 2016, led by Iceland (+31%), which is enjoying its sixth straight year of double-digit growth. Increased air capacity and ongoing promotion are contributing to this strong performance. Norway (+14%) and Ireland (+12%) also boasted double-digit growth this period, thanks to increased air connectivity among other reasons. In Norway, growing interest from Asian source markets and a weaker currency fuelled demand. Sweden posted 7% growth and Finland 4%. In the United Kingdom, the subregion's largest destination, international arrivals grew by 3%.

Central and Eastern Europe recorded 5% growth in January-September, after equal growth in 2015. Virtually all destinations with data available reported robust results, with Moldova (+32% from a low base), Slovakia (+19%), Hungary (+14%), Bulgaria (+13%), Tajikistan (+12%), Lithuania (+11%) and Romania (+10%) all enjoying double-digit growth. Georgia (+9%), the Czech Republic, Estonia and Latvia (all +6%) also turned in good results, while in Armenia (+4%) and Poland (+2%) arrivals grew more modestly. Data is still pending for the subregion's largest destination, the Russian Federation, as well as for Ukraine.

In Southern and Mediterranean Europe, international arrivals' growth was flat (+0%), despite positive results

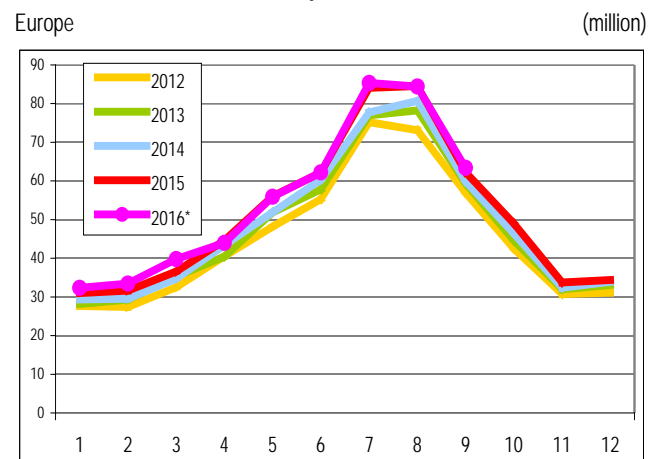
from the majority of destinations. Overall solid growth contrasts with a decline in Turkey due to various incidents in that destination. Portugal (+12%), Spain (+10%) and Croatia (+8%) led the subregion's results, fuelled by strong demand from European source markets, partly due to the perceived security and stability in these countries. Balkan destinations Bosnia & Herzegovina (+14%), Serbia (+11%), Albania and Slovenia (both +10%) all reported double-digit growth, with Montenegro (+6%) and FYR Macedonia (+5%) also performing well. Island destinations Cyprus (+19%) and Malta (+8%) also reported strong results, driven by improved air connectivity and perception of security. Italy, the second largest destination in the subregion reported 4% more arrivals, after similar growth last year. Greece (+1%) experienced modest growth in arrivals, partly the result of the refugee and migrant crisis, though data for July and August point to a recovery. By contrast, arrivals in Turkey (-31%) declined significantly in the aftermath of the Istanbul bombings and the failed July coup d'état. Weaker demand from the Russian Federation, Turkey's second largest source market, also impacted results.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Western Europe recorded a decline of 1% in international arrivals in January-September 2016, with mixed results across destinations. The Netherlands (+5%) enjoyed robust growth this period, partly thanks to various cultural block buster exhibitions in the country and growing arrivals from China and other emerging markets. Austria also reported 5% more arrivals, with particularly strong city tourism favoured by a perception of security in the destination. Germany posted 1% growth through August, with considerable business travel, but weaker leisure travel in the summer due to bad weather. France and Belgium continue to struggle in the aftermath of the November 2015 terrorist attacks, the Brussels bombings in March 2016 and the Nice terrorist attack in July 2016.

Long-haul arrivals from the Americas and Asia were weaker, as these markets are more sensitive to adverse events than European markets. In France arrivals decreased 4% in the period through July. Data is still pending for the months following the Nice attack, though tourism receipts data and anecdotal evidence suggest a further decline in arrivals. The weaker British pound after the UK referendum on EU membership, also suggests weaker demand for France from British tourists. In Belgium arrivals declined 13% through June following the Brussels bombings and the two-week airport shutdown in March. Results were also weak in Switzerland (-2% through August), as the destination continues to deal with the effects of a strong Swiss franc.







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### Asia and the Pacific

Asia and the Pacific enjoyed the highest growth in international arrivals across world regions in January-September 2016, a 9% increase over the same period last year. Growth was strong in all four subregions. Oceania led results with a 10% increase, followed closely by North-East Asia and South-East Asia (both +9%) and South Asia (+8%).

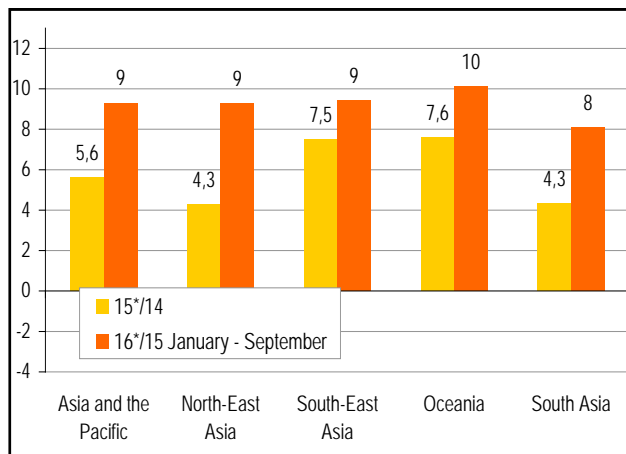
June) with particularly good results in February, due to the Chinese Lunar New Year falling in that month. In Hong Kong (China) arrivals declined slightly, partly due to competition from destinations with relatively weaker currencies, like Japan and Korea.

In South-East Asia (+9%), results were driven by top destination Thailand (+12%), which is enjoying its second straight year of double-digit growth. Demand was strong in particular from China, the Russian Federation and the United States. Vietnam (+26%) boasted the highest percentage increase in the subregion, rebounding from modest results last year. The Philippines (+13%) and Singapore (+10%) also reported double-digit growth, while arrivals increased 9% in Indonesia and 4% in Malaysia, Cambodia and Myanmar.

In Oceania (+10%), major destinations Australia, New Zealand (both +12%) and Guam (+10%) all grew in double digits. Fiji posted an increase of 4% this period, while results were mixed across smaller Pacific island destinations.

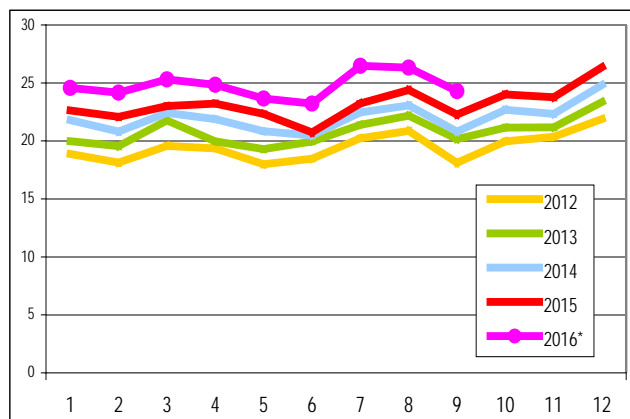
South Asia recorded 8% more international tourist arrivals in January-September 2016. Results were led by Sri Lanka (+15%), which is boasting its seventh consecutive year of double digit growth. South Asia's top destination India (+11%) led growth in absolute terms, thanks to improved visa facilitation measures, among other reasons, while Maldives reported an increase of 3%.

International Tourist Arrivals, Asia and the Pacific (% change)



Source: World Tourism Organization (UNWTO) ©

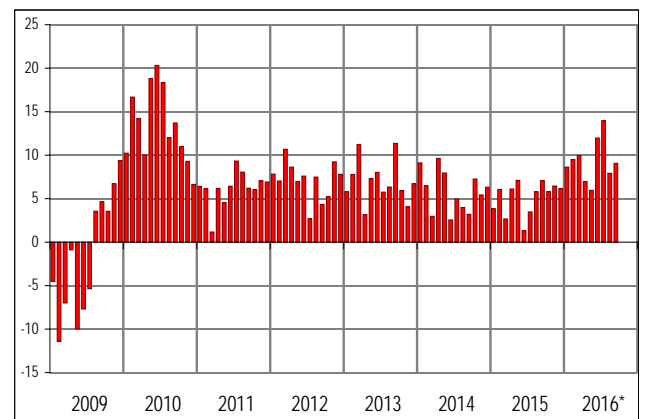
International Tourist Arrivals, monthly evolution Asia and the Pacific (million)



Source: World Tourism Organization (UNWTO) ©

The largest subregion, North-East Asia recorded 9% growth in international arrivals this nine-month period, driven by remarkable results in the Republic of Korea (+36%) and Japan (+24%). Korea rebounded strongly from weaker results last year, following the MERS outbreak in mid-2015. In Japan arrivals are growing at double-digit rates for the fifth year in a row, fuelled by strong demand from South-East Asian markets and China, and supported by simpler visa procedures and the weaker yen. Macao (China) recorded 9% growth, due to increased air connectivity and product diversification, while arrivals in Taiwan (pr. of China) grew by 5%. China, the subregion's largest destination, reported an increase of 4% (through

International Tourist Arrivals, monthly evolution Asia and the Pacific (% change)



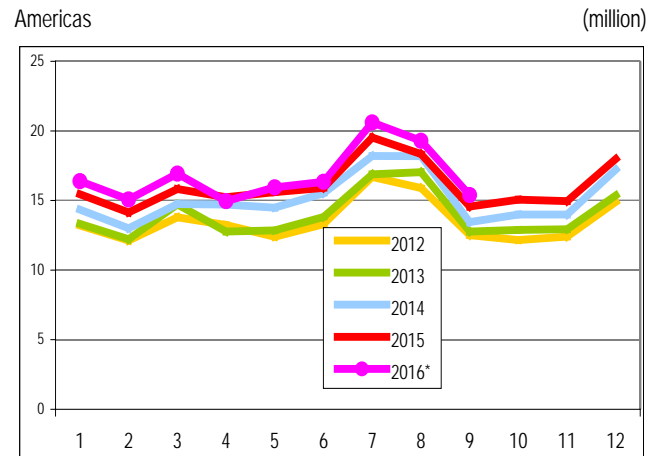
Source: World Tourism Organization (UNWTO) ©

The Americas

International tourist arrivals in the Americas increased 4% in the first nine months of 2016, in line with the world average. Demand remained solid despite concerns over the Zika virus in some destinations. Strong US outbound flows continued to fuel growth across the region, thanks to a robust US dollar and economy. South America (+7%) and Central America (+6%) led results, with the Caribbean and North America both growing by 4%.

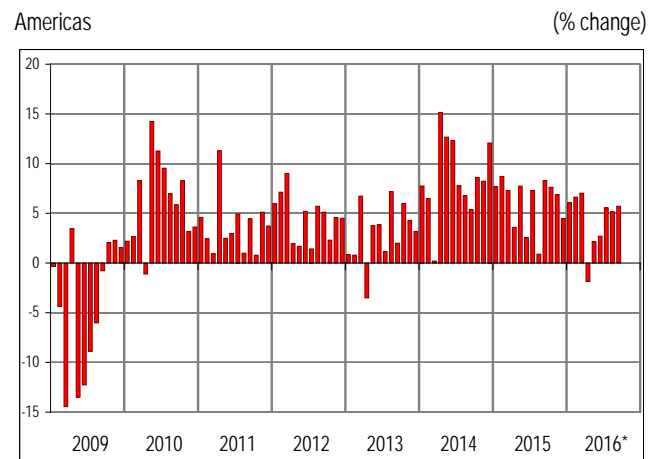
bly since late 2014, meaning these countries are comparatively less affordable than other destinations in the region.

International Tourist Arrivals, monthly evolution



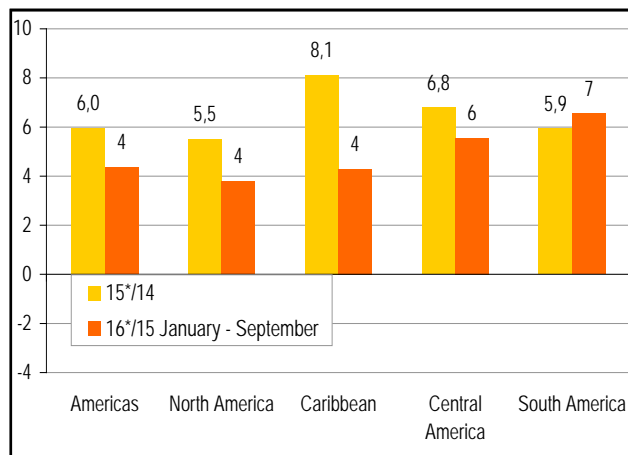
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, Americas (% change)



Source: World Tourism Organization (UNWTO) ©

In South America (+7%) results were led by Chile (+29%), which is enjoying a second straight year of strong growth, partly due to the weaker Chilean peso and the easing of foreign exchange controls in neighbouring Argentina. Results in Colombia (+13%) were also supported by a more affordable currency and by improved security prospects following the local peace agreements. Uruguay (+7%) reported increased demand from Argentina, also due to the latter's foreign exchange liberalisation. Peru (+6%) benefited from promotional activities in bordering source markets, as well as simpler visa procedures for Chinese visitors. Argentina meanwhile, reported a decline in arrivals due to weak demand from its main source market, Brazil, currently in recession. Results for Brazil itself, the subregion's largest destination, are still unavailable, though data on international tourism receipts and the depreciation of the Brazilian real point to a notable increase in arrivals. The Rio 2016 Olympic Games held in August also add to this interpretation.

International arrivals in the Caribbean were up 4% in January-September 2016 compared to the same period last year, driven by results in Cuba (+12% through August) which is benefiting from improved relations with the United States, including the lift on travel bans for outbound tourism from the US. The subregion's top destination, the Dominican Republic (+7%) also turned in strong results, building on solid demand from the United States, Europe and Latin American markets. Jamaica (+2% through August) saw weaker demand from Canada this period, while Bahamas (+2% through June) is facing stiff competition from more affordable destinations, partly due to the peg of its currency to the US dollar. In Puerto Rico arrivals grew by a modest 1% (through July) also the result of the strong US dollar. Smaller destinations with robust growth this period were Turks & Caicos (+20% through June), Bermuda (+10%) and Antigua & Barbuda (+9%).

Central America recorded a 6% increase in international arrivals this nine-month period, led by Costa Rica (+12%) which is benefitting from increased air connectivity and a weaker currency. Honduras (+6%), Nicaragua (+5%) and Guatemala (+4% through August) all reported solid results and above last year's growth rates. Smaller destination Belize enjoyed 16% more arrivals, while Panama (+1%) and El Salvador (+0% through June) reported weaker results, mostly due to unfavourable exchange rates. The currencies of both destinations are pegged to the US dollar, which has appreciated considera-

In North America, international tourist arrivals grew by an estimated 4% in the first nine months of the year, in line with the regional average. Canada enjoyed 10% growth (through August), with rising tourist numbers from the United States, Europe and Asia. International arrivals in

Mexico grew by 8%, also through August, driven by solid demand from the United States. The favourable exchange rate of the Mexican peso contributed to growth from both North American and European markets. The United States, the region's largest destination, saw a small decline of 2% in arrivals through April. Recent data on tourism receipts points to slow growth overall through September. The more expensive US dollar and sluggish demand from important source markets such as Canada and Brazil, contributed to these weaker results.

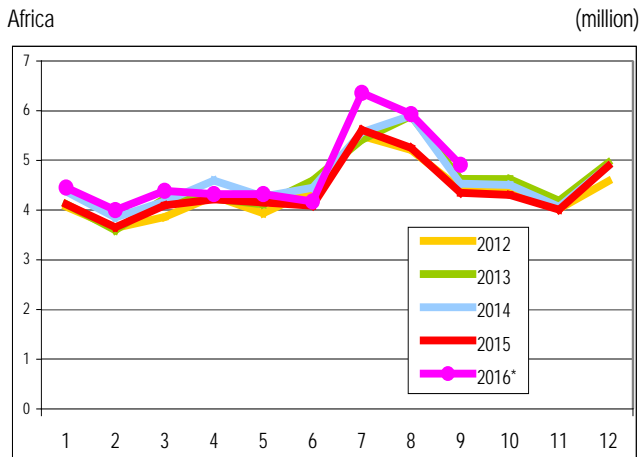
**Africa and the Middle East**

In Africa, international arrivals increased an estimated 8% in the first nine months of 2016 according to comparatively limited available data. Various destinations in Sub-Saharan Africa (+12%) rebounded strongly after a decline in the last year and a half, while North Africa (+1%) started to recover in the third quarter.

The region's top destination, South Africa, enjoyed 15% growth in international arrivals through August, driving results in Sub-Saharan Africa. The simplification of some previously stricter visa procedures contributed to this rebound. Kenya (+18%) also boasted double-digit growth this period in a robust recovery that follows strong marketing efforts and heightened security. Island destinations Cabo Verde (+11%), Mauritius (+10%), Seychelles and Reunion (both +8%) also posted solid results, supported by improved air and sea connectivity. Sierra Leone has rebounded strongly after the Ebola virus outbreak in 2015, with arrivals quadrupling in January-June compared to the same period last year. Pent-up demand from 2014 and 2015 lies behind this remarkable surge, though from very depressed levels.

In North Africa, arrivals were up 1% thanks to a change in trend in Tunisia (+2%) and Morocco (+1%), where arrivals rebounded in the third quarter. The gradual recovery of the Russian market and the redirection of tourism flows from other destinations, contributed to these results.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

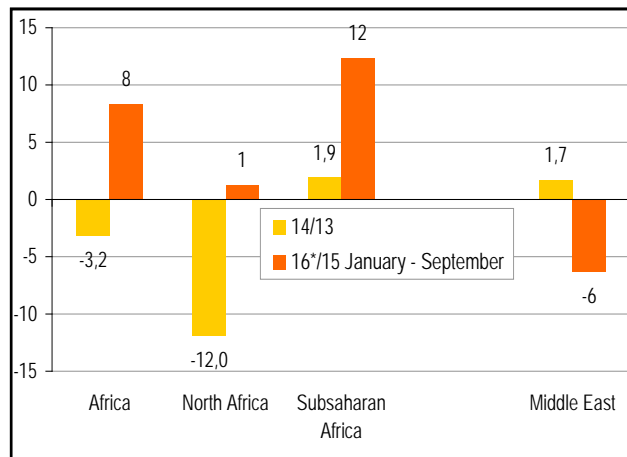
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International Tourist Arrivals, Africa & Middle East (% change)



Source: World Tourism Organization (UNWTO) ©

International arrivals in the Middle East are estimated to have decreased by 6% in the January-September period, with mixed results across destinations. Oman (+12%) and Lebanon (+10%) recorded double-digit growth this period, following strong results in 2015, while the United Arab Emirate of Dubai reported 2% growth and top destination Saudi Arabia 1%.

The subregion's average was weighed down by the sharp decline in Egypt (-48% through September) which is struggling after last year's security incidents and negative travel advisories. Renewed efforts to overcome the adverse image and recover international tourist volumes are being put forward in this important destination. The ongoing political and security concerns in the region are affecting other destinations as well, such as Palestine and Jordan.

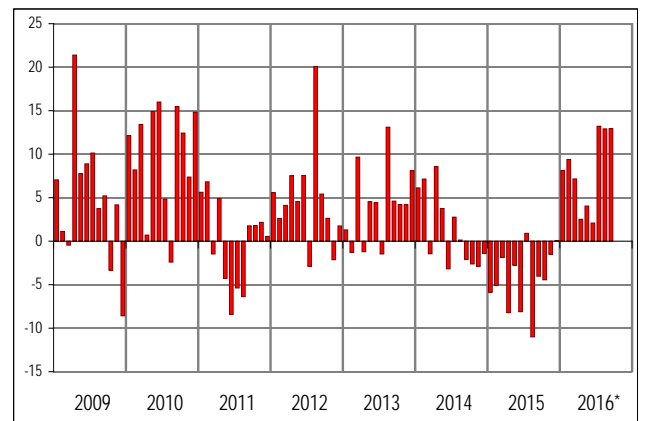
Inbound figures in the Middle East were particularly weak in June because the Muslim month of Ramadan fell almost entirely in that month, slowing travel in that period. However, growth picked up again in July in most destinations.

Results for both Africa and the Middle East should be read with caution, as they are based on currently limited data available for these regions.

Note: All results presented in this issue are based on preliminary data as reported by the various destinations around the world and UNWTO estimates of still missing data. Updated information will be included in the next issue of the UNWTO World Tourism Barometer scheduled for January.

International Tourist Arrivals, monthly evolution

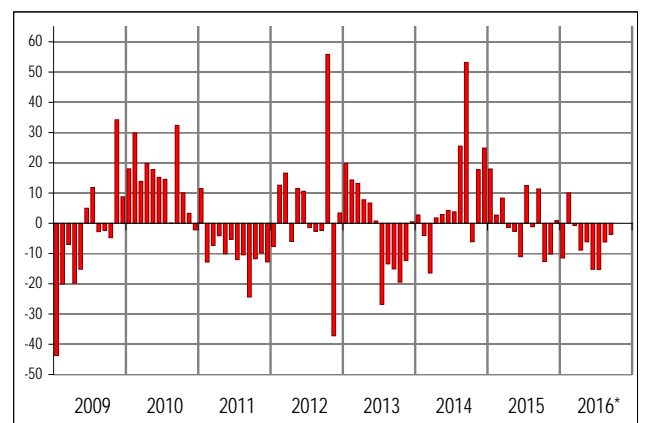
Africa (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

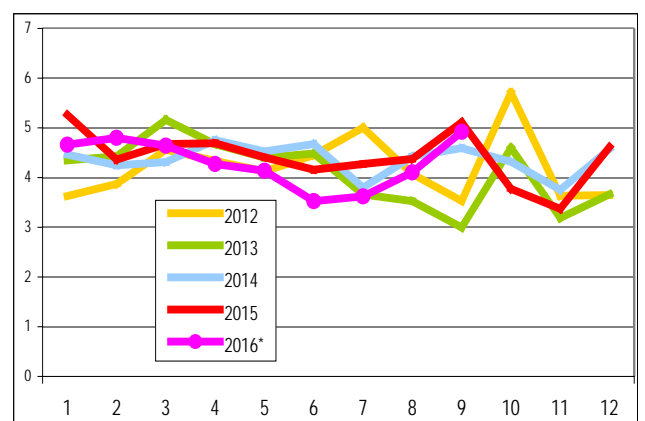
Middle East (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

Middle East (million)



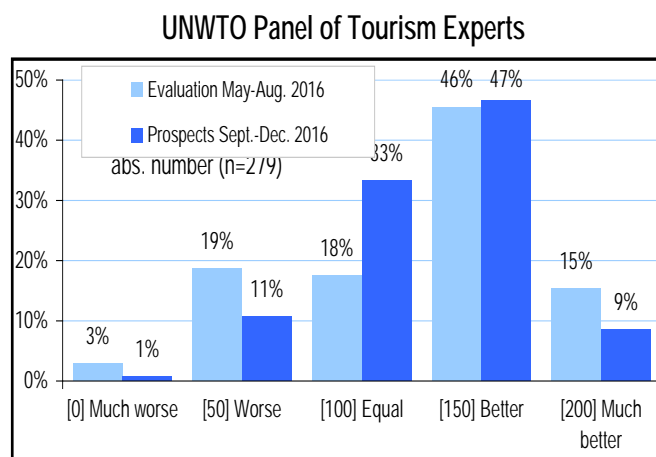
Source: World Tourism Organization (UNWTO) ©

## Evaluation by UNWTO's Panel of Tourism Experts

### *Favourable prospects for September-December 2016*

The latest UNWTO Panel of Tourism Experts survey shows that overall business confidence with regard to global tourism remains positive, but with significant differences across regions and activities. Respondents to the latest survey evaluated tourism performance favourably in the May to August period of 2016, in line with their prospects expressed at the start of the period. Prospects for September to December 2016 remain also optimistic across most regions and activities, and similar to past evaluations.

period at 125, in line with their evaluation of May-August (126). However, responses are rather more concentrated around 'better' and less spread out over the five categories.



Source: World Tourism Organization (UNWTO) ©

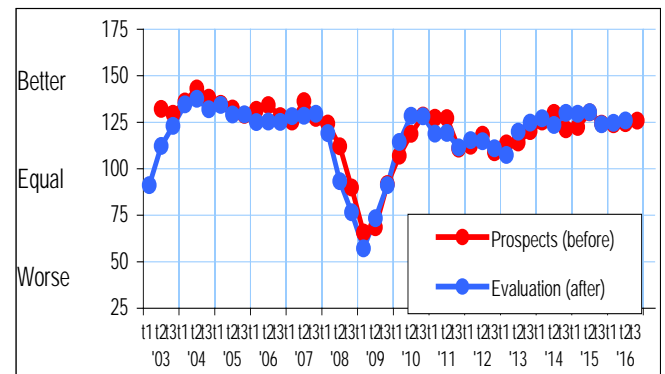
UNWTO has conducted its Panel of Expert survey to track global tourism performance and business sentiment (regarding the short-term outlook) every four months since April 2003. In each survey Panel members are asked to rate both their evaluation of the previous period and outlook for the coming period on the following scale: much worse [0]; worse [50], equal [100]; better [150], much better [200]. The number of regular respondents to the Barometer surveys stands currently at close to 300.

In their evaluation of the four months from May to August of 2016, over half of the over 279 members of UNWTO's Panel of Experts who responded to this edition's survey, judged tourism performance to have been 'better' or 'much better' (61%) than what they would reasonably expect for this time of the year, against 18% who indicated 'equal' performance and 22% 'worse' or 'much worse'.

Averaging these responses on a scale of 0 to 200, the Panel evaluated tourism performance in the period May-August 2016 with a score of 126, slightly above their prospects for this period expressed in May (124). An average value above 100 means that the number of participants who evaluate the situation as 'better' or 'much better' outnumber those who perceive it as 'worse' or 'much worse'.

Experts also remain confident about the outlook for the current four months September-December, rating this

### UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

### *Evaluation of the four-month period May-August 2016*

UNWTO's Panel of Experts gave tourism performance in May-August 2016 an overall rating of 126 – in line with the expected performance at the beginning of the period (124) and similar to the evaluation of the first four months of the year (125).

Emerging economy experts (119) rated the period below those from advanced economies (131). The score for emerging economies was overall positive, but weighed down by responses from the Middle East in particular.

By region, the highest scores for May-August came from experts in Africa (141), 23 points above their expectations at the beginning of the period, reflecting the rebound in Sub-Saharan Africa. Experts from Asia and the Pacific also evaluated the period very favourably (135), with a score 15 points above their cautious expectations in May (120), in line with the solid growth in arrivals in the region. Experts from Europe rated the performance of this period at 132, 4 points above their prospects at the beginning of the period (128). In the Americas, experts evaluated the performance at 117, 8 points below the 125 points given at the start. In the Middle East (85) by contrast, the period was evaluated more negatively than initially expected (109), due to the ongoing geopolitical risks and unrest in some destinations. The evaluation by Global operators was at 114, 4 points lower than their score for prospects four months ago.

Both the public and the private sector evaluated the May-August 2016 period in a positive way, with a score of 127 and 125 points respectively.

The highest scores by activity came from Consultancy, Research and Media, which gave the period



May-August a score of 132. Destinations (129) and the Accommodation & Catering sector (125) also turned in favourable evaluations for this four-month period, ahead of Tour Operators & Travel Agencies (113) and Transport (110) which were more cautious in their evaluations. General Industry Bodies & Other (108) were the least upbeat about tourism performance in the past four months.

### *Outlook for the four-month period September-December 2016*

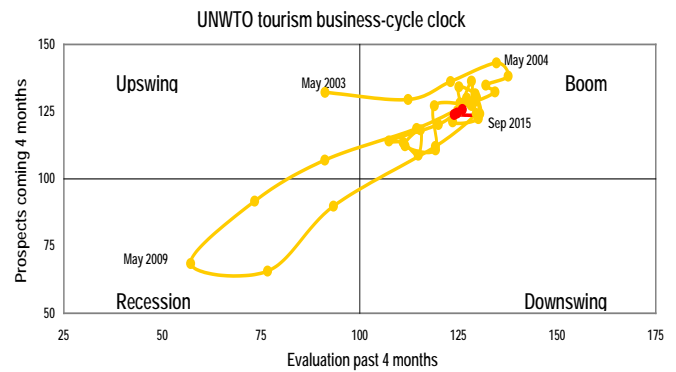
Experts remain optimistic about the current September-December period, with responses resulting in an overall score of 126, the same as the May-August evaluation and very similar to scores for the past three periods. The sentiment is positive among all regions and activities, though it varies across categories of respondents.

Expectations in advanced economies (123) are positive but below those in emerging economies (130). By region, experts from Africa (136) are the most optimistic about September-December, with a score 18 points higher than their prospects for the May-August period (118). This reflects the ongoing recovery in Africa, most of all in Sub-Saharan Africa. Experts from the Americas are also more optimistic about September-December (133), than they were about the previous four months (125). In Asia and the Pacific experts are also confident (131), following good but lower expectations in the May to September period (120). In Europe (122), the market sentiment is positive too, but the outlook is more restrained than for the past four months (128), as security concerns continue to have an impact on tourism in the region. Prospects in the Middle East (115) are cautiously positive and slightly more optimistic than for May-August (109).

The public sector remains optimistic, with a score of 131, just below the May-August prospects (135). The private sector's outlook is also favourable (122) and slightly above the prospects for the past four months (116).

By activity, ratings are rather mixed, ranging from a high of 134 for Destinations, to a low of 100 for Transport companies. With the exception of General Industry Bodies (117) and Global Operators (109), which are slightly more cautious, all sectors are quite optimistic about the remaining four months of 2016, posting scores between 122 and 126.

*See corresponding graphs by region and activity in the Statistical Annex.*



### The UNWTO Tourism Confidence Index

The UNWTO *Tourism Confidence Index* is based on the results of an email survey conducted by the UNWTO Secretariat among selected representatives of public and private sector organisations participating in the UNWTO *Panel of Tourism Experts*. The survey has been repeated every four months since May 2003 in order to keep track of actual performance, as well as perceived short-term prospects, of the tourism sector. This allows performance and prospects to be compared over time, as well as providing a comparison of the actual performance of the past four months with prospects forecast for the same period four months earlier. Results are also broken down by region and by sector of activity. These breakdowns should, however, be interpreted with caution as they may in some cases be based only on a relatively small number of responses.

*The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey, in particular from countries still not included in the listing below, are kindly invited to send an email to [barom@unwto.org](mailto:barom@unwto.org).*

### How to read this data

For the UNWTO *Tourism Confidence Index* members of the UNWTO Panel of Tourism Experts are asked once every four months by email to answer the following two simple questions:

- *What is your assessment of tourism performance in your destination or business for the four months just ended (or about to end) as against what you would reasonably expect for this time of year?*
- *What are the tourism prospects of your destination or business in the coming four months compared with what you would reasonably expect for this time of year?*

Participants should select one of the following five options: much worse [0]; worse [50], equal [100]; better [150], much better [200]. Results are averaged and broken down by region and by activity. A value above 100 means that the number of participants who evaluate the situation as "better" or "much better", outnumber the participants who reply "worse" or "much worse".

In addition, participants are also invited to include a qualitative assessment in their own words. The analysis contained in the *UNWTO World Tourism Barometer* is in large part based on their comments.

## Meetings industry

The International Association Meetings Market – International Congress and Convention Association (ICCA)



Most popular cities and countries for international association meetings by participant numbers

**ICCA -the International Congress and Convention Association-** is the global community and knowledge hub for the international association meetings industry. ICCA represents the main specialists in organising, transporting, and accommodating international meetings and events, and comprises over 1,000 member companies and organisations in over 90 countries worldwide. ICCA specialises in the international association meetings sector, offering data, communication channels, and business development opportunities.

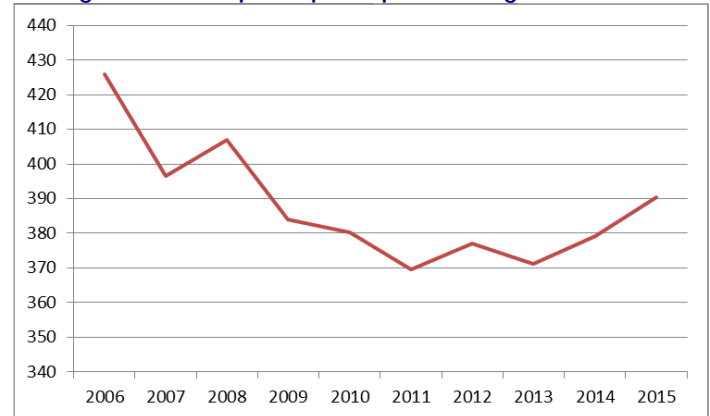
ICCA was founded in 1963 by a group of travel agents with the first and foremost aim to evaluate practical ways to get the travel industry involved in the rapidly expanding market of international meetings and to exchange actual information related to their operations in this market.

ICCA's research department collects the data on international association meetings on which all of its statistical reports are based. The ICCA Association Database covers meetings organised by international associations that take place on a regular basis, rotate between a minimum of three countries and have at least 50 participants. In the recently-released Statistics Report 2015, ICCA analyses international association meetings that took place during 2015 based on data available at the time of editing. ICCA's Association Database is designed as a sales and marketing resource to enable its members to target future international association meetings, which is why it does not include one-off events or events which do not move between locations.

### *Regions – The majority of meetings take place in Europe*

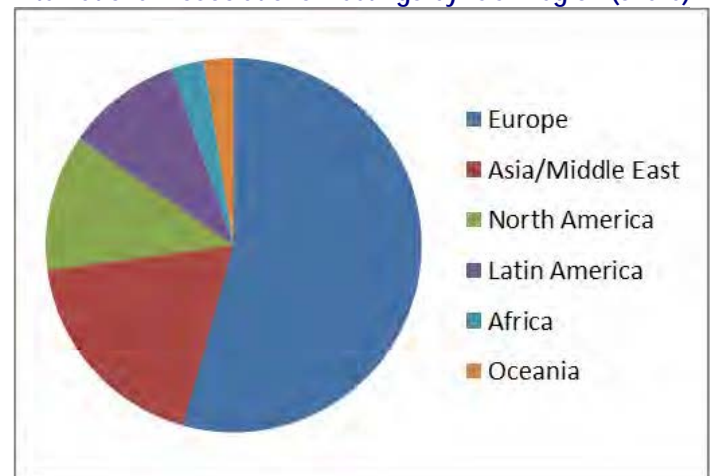
The 12,076 international association meetings held in 2015 that have been identified to date attracted a total of 4.7 million participants, or an average of almost 400 per meeting. After the decline suffered in the years after the financial crisis of 2008, the average number of participants has been on the increase again since 2013 as numbers of meetings decreased slightly, but participant numbers remained stable. Some 60% of meetings gathered less than 250 participants, 32% attracted from 250 till 1000 participants and 7% a 1000 or over.

### Average number of participants per meeting



Source: ICCA

### International Associations Meetings by ICCA region (share)



Source: ICCA

The majority of international association meetings took place in Europe with 6,556 meetings in 2015, corresponding to a market share of 54%. Asia / Middle East follows in second place with 2,236 meetings (19%). North America with 1,420 meetings represents 12% of all meetings and Latin America with 1,207 represents 10%. Africa and Oceania follow with 338 and 306 meetings respectively, representing 3% each. The shares of each region have remained virtually the same in the past decade.

### *Countries – United States, Germany and Spain on top*

The top six countries by number of estimated participants are the same as those in the ranking by number of qualifying meetings, with some variation in the respective rankings. The United States comes first in both rankings with 925 qualifying meetings and 413,000 participants in 2015, followed by Germany with 667 meetings and 244,000 participants. In the ranking of number of participants, Spain, the United Kingdom, Italy, France, Canada, the Republic of Korea, Brazil and Austria occupy respectively 3<sup>rd</sup> to 10<sup>th</sup> place.

Among the first 25 countries by estimated number of participants, the United Kingdom, Canada, the Republic of Korea, Brazil, Austria, Portugal, Denmark, Thailand,

Czech Republic, Singapore, Belgium and Peru all reported double-digit increases in participants in 2015.

#### ICCA country ranking

measured by estimated number of participants in 2015

Rank 2015	Country	# participants	# meetings	# participants per meeting
1	United States	413,000	925	450
2	Germany	244,000	667	370
3	Spain	242,000	572	420
4	United Kingdom	232,000	582	400
5	Italy	203,000	504	400
6	France	196,000	522	380
7	Canada	175,000	308	570
8	Republic of Korea	159,000	267	600
9	Brazil	147,000	292	500
10	Austria	143,000	258	550
11	Netherlands	133,000	333	400
12	Japan	125,000	355	350
13	China	109,000	333	330
14	Australia	98,000	247	400
15	Portugal	97,000	278	350
16	Denmark	86,000	204	420
17	Turkey	85,000	211	400
18	Thailand	81,000	151	540
19	Czech Republic	80,000	154	520
20	Singapore	77,000	156	490
21	Sweden	72,000	216	330
22	Mexico	69,000	184	380
23	Argentina	62,000	181	340
24	Belgium	60,000	216	280
25	Peru	60,000	105	570

Source: International Congress and Convention Association (ICCA)

#### Cities – second-tier cities are growing faster

The number of participants increased in many cities in 2015. Vienna counted the largest number of participants with an estimated 125,000, followed by London which attracted 117,000 participants, Barcelona with 109,000 and Berlin with 104,000.

In particular the top cities attracted more participants, while at the same time the number of qualifying meetings hosted decreased slightly, with all cities in the top 5 reporting fewer meetings. This implies that they hosted overall larger meetings.

Since the total number of qualifying association meetings in 2015 has increased, this also means that meetings are somewhat more equally spread out amongst destinations. Therefore, relatively smaller, second tier destinations are becoming increasingly successful at attracting meetings.

#### ICCA city ranking

measured by estimated number of participants in 2015

Rank 2015	City	# participants	# meetings	# participants per meeting
1	Vienna	125,000	178	700
2	London	117,000	171	690
3	Barcelona	109,000	180	610
4	Berlin	104,000	195	530
5	Singapore	77,000	156	490
6	Paris	75,000	186	410
7	Copenhagen	75,000	138	550
8	Prague	74,000	123	600
9	Vancouver, BC	73,000	78	940
10	Amsterdam	73,000	120	600
11	Bangkok	68,000	103	660
12	Milan	64,000	93	690
13	Madrid	62,000	171	370
14	Istanbul	62,000	148	420
15	Lisbon	62,000	145	430
16	Lima	53,000	82	640
17	Seoul	52,000	117	440
18	Rome	50,000	99	500
19	Sao Paulo	49,000	78	630
20	Daegu	43,000	17	2,530
21	Hong Kong	42,000	112	380
22	Taipei	40,000	90	440
23	Stockholm	40,000	89	450
24	Budapest	38,000	95	400
25	Montreal, QC	37,000	76	490

Source: International Congress and Convention Association (ICCA)

#### Characteristics of meetings

The ICCA Statistics Report also analyses other indicators such as frequency, subject, favourite months and the average length of meetings.

Most of the qualifying international association meetings are held on an annual basis (60%). Biennial meetings accounted for 21%.

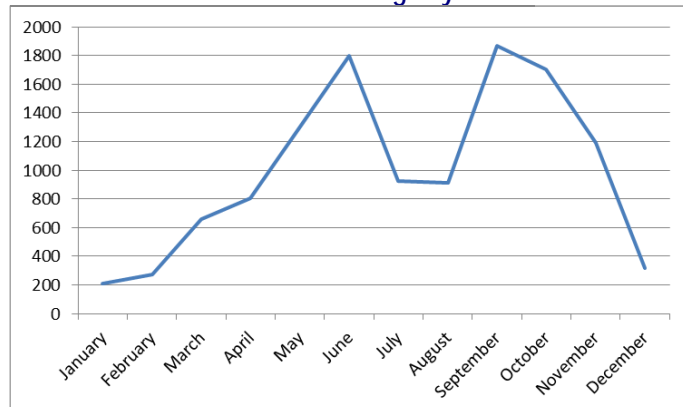
The average length of meetings in 2015 remained at 3.7 days.

Regarding the subjects of international association meetings, the shares of the top 10 subjects have remained virtually unchanged over the past decade. Medical science has been the leading subject for the past ten years, followed by technology and science.

In terms of meeting facilities, hotels are the most frequently used type of venue accounting for 43% of all total congress venues used. Universities, which have increased their share in recent years, are in second place with 27%. Conference / Exhibition Centre venues (20%) follow in third position.

September remains the favourite month for associations to hold international meetings with 16% of the total, followed by June (15%) and October (14%).

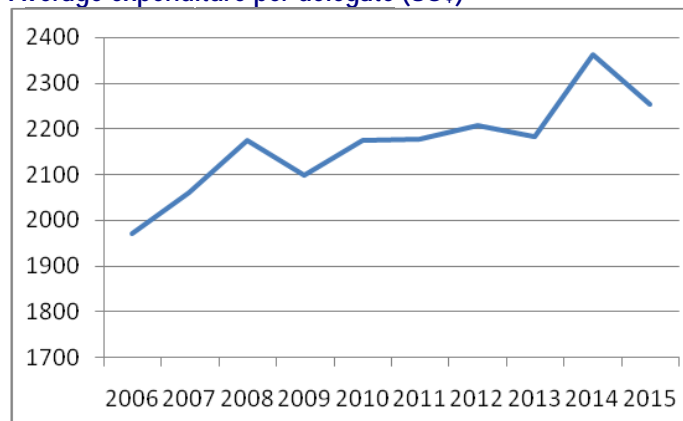
### International Associations Meetings by month



Source: ICCA

Over the past ten years, the average income from registration fees and the average overall expenditure per delegate on qualifying association meetings has been growing at a steady pace. However, both indicators have slightly decreased in 2015 in current US dollars terms, but this is mostly a reflection of the substantial appreciation of the US dollar to many currencies in 2015, rendering earnings in local currencies lower in US dollar terms. The average fee per delegate per meeting was US\$ 496 in 2015, down US\$ 24, while the average expenditure per delegate per meeting was US\$ 2,255, down US\$ 107.

### Average expenditure per delegate (US\$)



Source: ICCA

### Statistics Report is a 'snapshot'

Numbers are still likely to vary as the Statistics Report is a 'snapshot' of qualifying meetings in the ICCA Association Database as sampled in May 2016. Future statistics may be amended as ICCA adds additional qualifying meetings to its database.

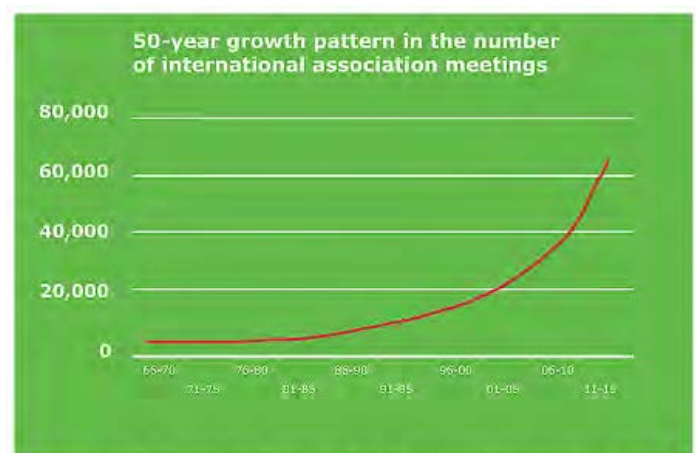
As one of the very few reports which compares destinations' meetings-related performance on a global scale, the annual ICCA rankings are one of the most eagerly anticipated industry publications. Due to lack of

global figures on other meeting segments, they are often mistakenly perceived as the destination rankings for the meetings industry as a whole, even though they only cover a narrow segment of the total meetings market. To be included, meetings must be organised by associations, must be held on a regular basis, have at least 50 delegates, and rotate between at least three countries.

Whilst these ICCA rankings provide some evidence of a city or country's relative performance, it is only when all data on all the meetings taking place in a destination are considered - corporate, intergovernmental, non-rotating, etc - that a true, complete picture can be seen. ICCA always advises its members to collect their own statistics on all meetings they organise, and provide a full picture on their performance.

ICCA CEO Martin Sirk commented: "In an uncertain world with ever increasing business disruption, the stability and continuing long-term growth of international association meetings are encouraging more and more suppliers and destinations to include this market segment in their mix of business. What also remains true is that these are the most complex and long-lead-time meetings to win, requiring excellent research and targeting, top class bidding and presentation skills, and patience. It's always risky to draw conclusions from a single year's data, but it appears that competition is getting tougher for the traditional market leaders, with faster growth outside the top ten positions. This might also reflect a trend we are hearing anecdotally, as many of the top destinations are starting to create their own international meetings, rather than simply bidding for traditional association meetings whenever rotation patterns allow, and these new meetings don't appear in our data, since they don't usually rotate between countries."

More extensive rankings by participant numbers, as well as the worldwide and regional rankings by number of meetings, are included in ICCA's 2015 Statistics Report, at [www.iccaworld.org/knowledge/benefit.cfm?benefitid=4036](http://www.iccaworld.org/knowledge/benefit.cfm?benefitid=4036).



Download "A modern history of international association meetings: 1963-2012" from [www.icca50.com](http://www.icca50.com)

As included in the ICCA Association Database, which only includes association meetings taking place regularly, rotating between at least 3 different countries, and attracting 50 or more participants.

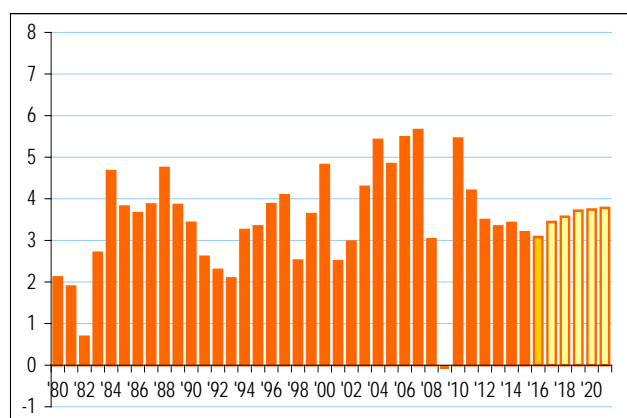
## The economic environment

### Subdued global growth in 2016 and a gradual recovery in 2017

In its October 2016 *World Economic Outlook (WEO)*, the International Monetary Fund (IMF) projects global economy to expand by 3.1% in 2016, slightly below the 3.2% recorded in 2015. The forecast reflects a more subdued outlook for advanced economies (1.6% in 2016) following a slowdown in the United States and the Britain's June vote in favour of leaving the European Union (Brexit). In emerging market and developing economies, growth will accelerate for the first time in six years, to 4.2%, though with sharp differences across regions and countries.

In 2017, global growth is projected to increase to 3.4% on the back of recoveries in major emerging market nations, including the Russian Federation and Brazil.

World  
Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

### Global recovery to pick up in 2017

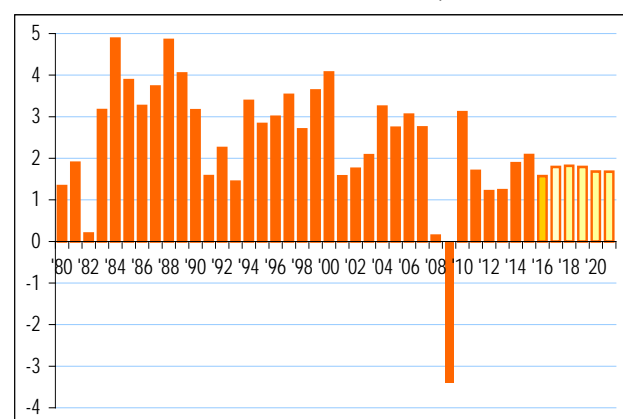
- Economic growth is projected at 3.1% worldwide in 2016, after 3.2% in 2015, reflecting a somewhat more subdued outlook for advanced economies. The recovery is still considered to be precarious, eight years after the global financial crisis.
- In 2017, the recovery is expected to strengthen, as the outlook improves for emerging market and developing economies and as the United States regains some momentum. Global growth is projected to increase slightly to 3.4% next year, supported by a rebound in major emerging market economies, including the Russian Federation (+1.1%) and Brazil (+0.5%).
- This improved outlook for 2017 is based on a number of assumptions such as: a gradual normalization of

conditions in economies currently under stress, including a general pickup in commodity exporters, a gradual slowdown and rebalancing of China's economy with medium-term growth rates that remain higher than the average for emerging market economies, and resilient growth in other emerging market and developing economies.

- Given the still weak and precarious nature of the global recovery, the IMF underscored the urgent need for a comprehensive, consistent, and coordinated policy approach to reinvigorate growth, ensure it is distributed more evenly, and make it durable. By using monetary, fiscal, and structural policies in concert -within countries, consistent over time and across countries- the whole can be greater than the sum of its parts.

### Advanced economies

Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

### Slower growth in advanced economies

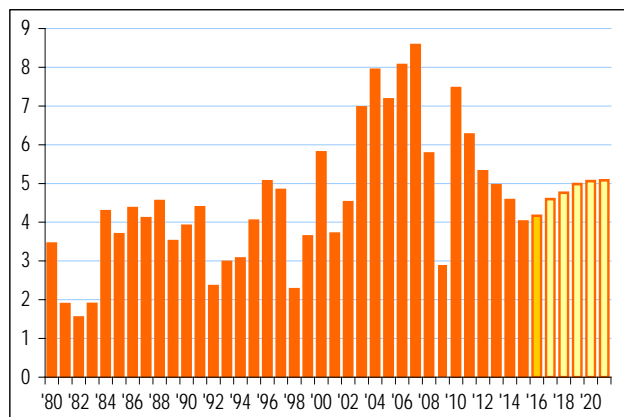
- In advanced economies growth is forecast at 1.6% in 2016, after 2.1% in 2015, following slower US activity in the first half of 2016 and the June UK vote in favour of leaving the European Union (Brexit) which has generated some uncertainty. The IMF marked down its forecast for the United States this year to 1.6%, from 2.2% in July, following weaker-than-expected results caused by weak business investment and lower inventories. These developments have put further downward pressure on global interest rates, as monetary policy is now expected to remain accommodative for longer.
- In 2017, growth is forecast to increase to 1.8% in advanced economies, though an ongoing risk of stagnation exists. As global growth remains sluggish, the prospect of an extended shortfall in private demand leading to permanently lower growth and low inflation is more tangible. This could also further fuel anti-trade sentiment in some countries, stifling growth.
- The euro area is projected to expand 1.7% in 2016, compared with 2.0% in 2015. Domestic demand, notably investment, decelerated in some of the larger

euro area economies after successive quarters of stronger growth. In 2017, the euro area is projected to grow by 1.5%.

- Growth in the United Kingdom is predicted to slow to 1.8% in 2016 and to 1.1% in 2017, down from 2.2% in 2015. Although financial reaction to the UK Brexit referendum has been contained, the increase in economic, political, and institutional uncertainty and the likely reduction in trade and financial flows between the United Kingdom and the rest of the European Union are expected to have some macro-economic impact.
- In Japan, the world's third largest economy, growth is expected to remain subdued at 0.5% this year and 0.6% in 2017. In the near term, government spending and easy monetary policy will support growth. In the medium term, Japan's economy will be hampered by a shrinking population.

#### Emerging market and developing countries

Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

#### Improved prospects for emerging economies

- Growth will accelerate slightly for the first time in six years in emerging market and developing economies, to 4.2% in 2016. Important ongoing realignments include economic rebalancing in China and the adjustment of commodity exporters to lower prices and thus a long-term decline in their terms of trade. Prospects differ across regions and countries, with emerging Asia in general and India in particular showing robust growth and Subsaharan Africa experiencing a slowdown.
- Emerging economies are expected to grow 4.6% in 2017, though prospects differ considerably across countries and regions. Several emerging market and developing economies still face important policy challenges in adjusting to weaker commodity prices.
- In emerging Asia, growth continues to be resilient, projected at 6.5% for 2016 and 6.3% for 2017.
- China's economy, the world's second largest, is forecast to expand 6.6% this year and 6.2% in 2017, down from 6.9% growth last year. Policymakers will continue to

rebalance the economy toward consumption and services, away from investment and industry. This is expected to slow growth in the short term while building the foundations for a more sustainable long-term expansion.

- India's gross domestic product is projected to expand 7.6% this year and next, the fastest pace among the world's major economies.
- Economic activity in Latin America and the Caribbean slowed to -0.6% in 2016, as several countries are still in recession, with recovery expected to take hold in 2017 (+1.6%). Brazil will see a contraction of 3.3% this year, but is expected to grow at 0.5% in 2017 on the assumption of declining political uncertainty and the waning effects of past economic shocks.
- Subsaharan Africa's largest economies continue to struggle with lower commodity revenues, weighing on growth in the region, projected at +1.5% in 2016. Nigeria's economy is forecast to shrink 1.7% and South Africa's will barely expand in 2016. By contrast, several of the region's non-commodity exporters including Côte d'Ivoire, Ethiopia, Kenya, and Senegal, are expected to continue to grow at a robust pace of more than 5% this year. In 2017, growth is expected to pick-up to 2.9%.
- Countries in the Middle East are still confronting challenging conditions from lower oil prices, as well as civil conflict and terrorism. The region's growth is projected at 3.0% in 2016 and 2.8% in 2017.

#### Price Crude Oil Brent

(US\$ per barrel)



Source: US Department of Energy, Energy Information Administration

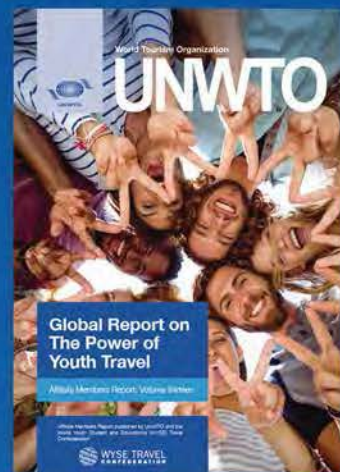
Global economic information available from the *World Economic Outlook* (WEO), a survey by the International Monetary Fund (IMF) staff published twice a year in spring and autumn, with occasional interim updates. It presents IMF staff economists' analyses of global economic developments and addresses topics of pressing current interest.

The full October 2016 World Economic Outlook report is available at: [www.imf.org/external/ns/cs.aspx?id=29](http://www.imf.org/external/ns/cs.aspx?id=29).

See full tables with GDP growth and unemployment projections on pages 28-31 of the Statistical Annex.

#### GDP growth measurement, methodological note

IMF estimates growth rates on the basis of GDP in purchasing power parity (PPP). This is done because the purchasing power of a US dollar varies from one economy to another. As a US dollar usually buys rather more goods and services in emerging economies, their GDP is more strongly weighted in the aggregate, in general resulting in a higher overall growth rate as emerging economies tend to grow faster. For instance, at market value the weight of the United States is 25% and of China 15% in 2015, while at PPP their weights are respectively 16% and 18%.



### Affiliate Members Global Report: Volume thirteen - The Power of Youth Travel

Youth travel has become one of the fastest growing segments of international tourism, representing tremendous socioeconomic opportunities for local communities. This latest edition of The Power of Youth Travel leverages the extensive knowledge and expertise of UNWTO's longstanding Affiliate Member, the World Youth Student and Educational (WYSE) Travel Confederation, and illustrates the value generated from the collaboration between private enterprises and public bodies in addressing the ever-changing demands of youth tourism.

See further:

<http://affiliatemembers.unwto.org/publications>



# World Tourism Organization UNWTO Publications

## UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* and accompanying Statistical Annex aim to provide tourism stakeholders with up-to-date statistics and analysis in a timely fashion. The information is updated six times a year and covers short-term tourism trends, including a retrospective and prospective assessment of current tourism performance by the UNWTO Panel of Tourism Experts.

Available in English, with the Statistical Annex also available in French, Spanish and Russian.



## Marketing Handbooks:

- E-Marketing for Tourism Destinations
- Tourism Product Development
- Tourism Destination Branding

This series of Marketing Handbooks developed by UNWTO and the European Travel Commission (ETC) addresses key components of the marketing and promotion of tourism destinations. The handbooks provide a comprehensive overview of current strategies and best practices with regard to, among others, product development, destination branding and e-marketing, complemented with case studies and best practice recommendations.



## Tourism in the Mediterranean, 2015 edition

The new *UNWTO Tourism Trends Snapshot* series provides a closer look at selected tourism topics. The first issue *Tourism in the Mediterranean, 2015 edition* provides insight into the general trends in terms of arrivals and receipts in the Mediterranean region, the performance of the individual destinations, the long-term trends up to 2030 as well as the opportunities and challenges.

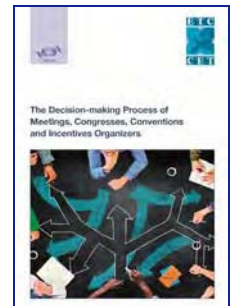
Available in English.



## The Decision-making Process of Meetings, Congresses, Conventions and Incentives Organizers

This ETC/UNWTO study aims at providing a better understanding of the Meetings Industry and the way in which meeting and events organizers make decisions. The study offers a wide-ranging overview of the MCCI segments, as well as a comprehensive analysis of planners' needs and expectations with respect to destination and venue choice, complemented with best-practice examples.

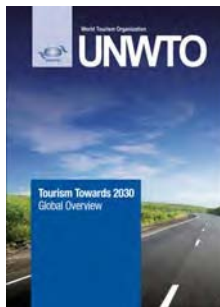
Available in English



## Tourism Towards 2030

*UNWTO Tourism Towards 2030* is UNWTO's long-term outlook and assessment of future tourism trends. Key outputs of the study are quantitative projections for international tourism flows up to 2030, based on data series of international tourist arrivals by subregion of destination, region of origin and mode of transport.

Available in English.

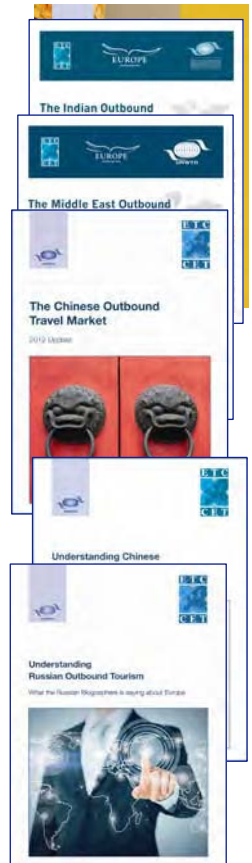


## Outbound Travel Market studies:

- Key Outbound Tourism Markets in South-East Asia
- The Indian Outbound Travel Market
- The Russian Outbound Travel Market
- The Middle East Outbound Travel Market
- The Chinese Outbound Travel Market

The *Outbound Travel Market* series offers a unique insight into fast-growing source markets around the world. UNWTO and ETC have analysed the key outbound markets of China, Brazil, the Russian Federation, India and the Middle East. Jointly with Tourism Australia, UNWTO has covered the key South-East Asian markets of Indonesia, Malaysia, Singapore, Thailand and Vietnam.

Available in English.



## UNWTO/GTERC Asia Tourism Trends

The annual *Asia Tourism Trends* series includes an analysis of recent tourism trends in Asia, with emphasis on international tourist arrivals and receipts as well as outbound tourism and expenditure. Furthermore, this report also highlights other relevant topics relating to tourism development in Asia and the Pacific.

Available in English.



## Compendium of Tourism Statistics, 2016 Edition. Data 2010–2014

The *Compendium* provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on tourism industries, employment and relevant macroeconomic indicators. The 2016 edition presents data for 200 countries, with methodological notes in English, French and Spanish.

## Yearbook of Tourism Statistics, 2016 Edition. Data 2010–2014

The *Yearbook of Tourism Statistics* focuses on data relating to inbound tourism (arrivals and nights), broken down by country of origin. The 2016 edition presents data for 196 countries, with methodological notes in English, French and Spanish.



- Understanding Russian Outbound Tourism
- Understanding Brazilian Outbound Tourism
- Understanding Chinese Outbound Tourism

The innovative UNWTO/ETC *Understanding Outbound Tourism Netnographic* series explores the behaviour and mind-set of outbound travellers based on internet and social media activity.

Available in English.

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