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# Foreword

**The World Travel & Tourism Council (WTTC) has been investing in economic impact research for over 20 years. This research assesses the Travel & Tourism industry's contribution to GDP and jobs for 184 countries and 24 regions and economic groups in the world. Our ten-year forecasts are unique in the information they provide to assist governments and private companies plan policy and investment decisions for the future.**

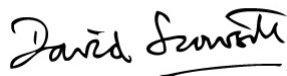
2012 demonstrated again the resilience of the Travel & Tourism industry in the face of continued economic turmoil, as economic growth slowed and was even negative in key global markets. The latest annual research from WTTC and our research partner Oxford Economics, shows that Travel & Tourism's contribution to GDP grew for the third consecutive year in 2012, and created more than 4 million new jobs. The strongest growth in 2012 was evident in international demand as appetite for travel beyond national borders, from leisure and business visitors, remains strong.

Travel & Tourism's importance to the wider economy continued to grow in 2012. Its total contribution comprised 9% of global GDP (US \$6.6 trillion) and generated over 260 million jobs – 1 in 11 of the world's total jobs. The industry outperformed the entire wider economy in 2012, growing faster than other notable industries such as manufacturing, financial services and retail.

With such resilience in demand and an ability to generate high employment, the importance of Travel & Tourism as a tool for economic development and job creation is clear. In total, the industry contributed to over 10% of all new jobs created in 2012. Less restrictive visa regimes and a reduction in punitive taxation levels would help the industry to contribute even more to broader economic development and better fulfil the clear demand for international travel.

While 2013 will present further challenges for the global economy and the Travel & Tourism industry, we remain optimistic that Travel & Tourism will continue to grow, outpace growth of the wider economy and remain a leading generator of jobs.

In the longer-term, demand from and within emerging markets will continue to rise in significance. Destinations need to be willing to invest in infrastructure suitable for new sources of demand to achieve the clear growth potential that exists. For example, we forecast that China will overtake the US by 2023 as the world's largest Travel & Tourism economy, measured in total GDP terms (2012 prices), and the size of the outbound market.



**David Scowsill**  
President & CEO  
World Travel & Tourism Council

# Glossary

## KEY DEFINITIONS

**Travel & Tourism** – relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

**Direct contribution to GDP** – GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

**Direct contribution to employment** – the number of direct jobs within the Travel & Tourism industry. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

**Total contribution to GDP** – GDP generated directly by the Travel & Tourism industry plus its indirect and induced impacts (see below).

**Total contribution to employment** – the number of jobs generated directly in the Travel & Tourism industry plus the indirect and induced contributions (see below).

## DIRECT SPENDING IMPACTS

**Visitor exports** – spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

**Domestic Travel & Tourism spending** – spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

**Government individual spending** – spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

**Internal tourism consumption** – total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

**Business Travel & Tourism spending** – spending on business travel within a country by residents and international visitors.

**Leisure Travel & Tourism spending** – spending on leisure travel within a country by residents and international visitors.

## INDIRECT AND INDUCED IMPACTS

**Indirect contribution** – the contribution to GDP and jobs of the following three factors:

- **Capital investment** – includes capital investment spending by all sectors directly involved in the Travel & Tourism industry. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.
- **Government collective spending** – general government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.
- **Supply-chain effects** – purchases of domestic goods and services directly by different sectors of the Travel & Tourism industry as inputs to their final tourism output.

**Induced contribution** – the broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

## OTHER INDICATORS

**Outbound expenditure** – spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

**Foreign visitor arrivals** – the number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.

# Methodological note

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008) and has made small revisions to the research both this year and in 2012, following a full refinement in 2011. This has involved further benchmarking of country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New country TSAs incorporated this year were Jordan, Italy and Sweden. As part of the alignment process in 2012, international travel expenditure inflows and outflows related to education were excluded from the data. Three new countries have been added in 2013 (Georgia, Iraq and Uzbekistan), bringing the total countries covered to 184 country reports. Additionally, we also produce a world report and reports on 17 world regions and sub-regions. This year there are 7 reports for special economic and geographic groups, including, for the first time, the Organization of American States (OAS) and the Commonwealth.

## Economic and Geographic Groups

### APEC (ASIA-PACIFIC ECONOMIC COOPERATION)

Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan, Thailand, USA, Vietnam.

### G20

Argentina, Australia, Brazil, Canada, China, European Union, France\*, Germany\*, India, Indonesia, Italy\*, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, South Korea, Turkey, UK\*, USA.

### MEDITERRANEAN

Albania, Algeria, Bosnia Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Montenegro, Morocco, Serbia, Slovenia, Spain, Syria, Tunisia, Turkey, Jordan, Macedonia, Portugal.

### OAS (ORGANIZATION OF AMERICAN STATES)

Argentina, Antigua and Barbuda, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, St Kitts and Nevis, Nicaragua, Panama, Paraguay, Peru, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay.

### OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)

Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

### OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

### SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)

Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

### THE COMMONWEALTH

Anguilla, Antigua and Barbuda, Australia, Bahamas, Bangladesh, Barbados, Belize, Bermuda, Botswana, Brunei, Cameroon, Canada, Cayman Islands, Cyprus, Dominica, Gambia, Ghana, Grenada, Guyana, India, Jamaica, Kenya, Kiribati, Lesotho, Malawi, Malaysia, Maldives, Malta, Mauritius, Mozambique, Namibia, Nigeria, New Zealand, Pakistan, Papua New Guinea, Rwanda, South Africa, Seychelles, Sierra Leone, Singapore, Solomon Islands, Sri Lanka, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Swaziland, Tanzania, Tonga, Trinidad and Tobago, Uganda, UK, British Virgin Islands, Vanuatu, Zambia.

\*included in European Union

# Economic impact reports: Regions, sub-regions and countries

WORLD													
REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY		
AFRICA	NORTH AFRICA	Algeria	AMERICAS	CARIBBEAN	Anguilla	ASIA-PACIFIC	NORTHEAST ASIA	Japan	EUROPE	EUROPEAN UNION	Lithuania		
		Egypt			Antigua & Barbuda			China			Luxembourg		
		Libya			Aruba			Hong Kong			Malta		
		Morocco			Bahamas			South Korea			Netherlands		
		Tunisia			Barbados			Macau			Poland		
	SUB-SAHARAN				Angola			Bermuda			Taiwan	Portugal	
					Benin			Cayman Islands			Mongolia	Romania	
					Botswana			Cuba			Australia	Slovakia	
					Burkina Faso			Former Netherlands Antilles			New Zealand	Slovenia	
					Burundi			Dominica			Fiji	Spain	
					Cameroon		Dominican Republic	Kiribati		Sweden			
					Cape Verde		Grenada	Other Oceania		UK			
					Central African Republic		Guadeloupe	Papua New Guinea		OTHER EUROPE	Albania		
					Chad		Haiti	Solomon Islands			Armenia		
					Comoros		Jamaica	Tonga			Azerbaijan		
					Democratic Republic of Congo		Martinique	Vanuatu			Belarus		
					Ethiopia		Puerto Rico	SOUTH ASIA			Bosnia Herzegovina		
					Gabon		St Kitts & Nevis				Bangladesh	Croatia	
					Gambia		St Lucia				India	Georgia	
					Ghana		St Vincent & the Grenadines				Maldives	Iceland	
					Guinea		Trinidad & Tobago				Nepal	Kazakhstan	
					Ivory Coast		UK Virgin Islands				Pakistan	Kyrgyzstan	
					Kenya		US Virgin Islands			Sri Lanka	Macedonia		
					Lesotho		LATIN AMERICA			SOUTHEAST ASIA	Moldova		
					Madagascar						Argentina	Brunei	Montenegro
					Malawi						Belize	Cambodia	Norway
					Mali			Bolivia			Indonesia	Russian Federation	
					Mauritius			Brazil			Laos	Serbia	
					Mozambique			Chile			Malaysia	Switzerland	
				Namibia	Colombia			Myanmar			Turkey		
				Niger	Costa Rica			Philippines			Ukraine		
				Nigeria	Chile			Singapore			Uzbekistan		
				Republic of Congo	Colombia			Thailand			MIDDLE EAST	Bahrain	
				Reunion	Costa Rica		Vietnam	Iran					
				Rwanda	El Salvador		Austria	Iraq					
				Sao Tome & Principe	Ecuador		Belgium	Israel					
				Senegal	Guatemala		Bulgaria	Jordan					
				Seychelles	Guyana		Cyprus	Kuwait					
				Sierra Leone	Honduras		Czech Republic	Lebanon					
				South Africa	Nicaragua		Denmark	Oman					
				Sudan	Panama		Estonia	Qatar					
				Swaziland	Paraguay		Finland	Saudi Arabia					
				Tanzania	Peru		France	Syria					
				Togo	Suriname		Germany	UAE					
				Uganda	Uruguay		Greece	Yemen					
				Zambia	Venezuela		Hungary						
				Zimbabwe	Canada		Ireland						
					Mexico		Italy						
					USA		Latvia						



Every trip that is taken helps to boost our global economy by trillions of dollars and supports 260 million jobs worldwide. That's almost 1 in 11 of all the jobs on our planet. So, thanks for playing your part in Travel & Tourism – one of the world's greatest industries.

For more information on the  
World Travel & Tourism Council visit [wttc.org](http://wttc.org)



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With the Chairs and Chief Executives of the 100 foremost Travel & Tourism companies as its members, WTTC has a unique mandate and overview on all matters related to Travel & Tourism.

WTTC works to raise awareness of Travel & Tourism as one of the world's largest industries, supporting over 260 million jobs and generating 9% of global GDP in 2012.

Together with its research partner, Oxford Economics, WTTC produces comprehensive reports on an annual basis - to quantify, compare and forecast the economic impact of Travel & Tourism on 184 economies around the world. It also publishes a World report highlighting global trends, as well as reports on regions, sub-regions and economic and geographic groups.

To download one-page summaries, the full reports or spreadsheets, visit [www.wttc.org](http://www.wttc.org)



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