

World Tourism Organization



UNWTO

Tourism in the Americas

2013 Edition

Editorial committee

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Foreword

Tourism has been consolidating in recent decades as a key sector for economic and social development, job creation and the welfare of numerous communities in the Americas. It has furthermore grown as a driver of integration and development in the region.

As a result of its ever-increasing share of the gross domestic product of countries in the region, relevance as a source of foreign exchange and employment, the sector occupies today a growing position on national agendas.

2012 was a landmark for tourism worldwide with over one billion international tourists travelling the world in one single year for the first time. For the Americas as well it was a record year – it received over 163 million international tourists up from 156 million the year before and accounting for 16% of world's tourist arrivals and 20% of international tourism receipts.

This positive outcome is the result of a growing middle-class in the region, increased political support to the tourism sector, visa facilitation, private investment and infrastructure upgrading.

This publication aims to identify the main trends shaping tourism in the Americas over the last years while bringing to light important national case studies in key areas such as air transport development, visa facilitation or regional tourism. We trust it can contribute towards a deeper understanding on the present and future of tourism in the Americas and its role as a contributor to sustainable development and social inclusion in the region.

Taleb Rifai

Secretary-General, UNWTO

In recent years, the tourism sector in the Americas region has been showing a notable dynamism that is reflected in the growth of domestic tourism and an increase in international tourist arrivals as well as in greater diversification and development of products, a trend that was consolidated in 2012.

This publication, produced jointly by the Regional Programme for the Americas and the Affiliate Members of the World Tourism Organization (UNWTO), with support from MAPFRE, aims to present the main results of tourism activity in the region and to analyse one of the central issues for its development: visa facilitation. It also puts forward

the opinions of our Affiliate Members regarding the central issues for the development of tourism in the region.

We hope that this effort will encourage reflection and analysis regarding various topics that will lead to a greater understanding and better promotion of tourism development in our region.

Carlos Vogeler

*Regional Director
for the Americas, UNWTO*

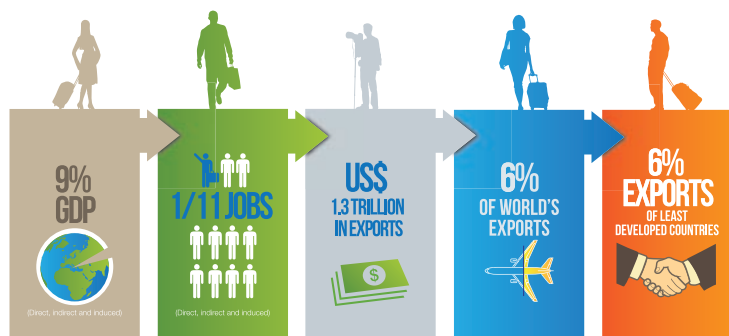
Yolanda Perdomo

*Director, UNWTO
Affiliate Members*

Tourism in the World

2012, an Exceptional Year

During 2012, in a global context characterized by an unstable economy and regional conflicts, tourism showed its strength as a sector. For the first time in history, **the number of international tourists** (overnight tourists) **exceeded one billion**. Indeed, with growth of +4%, which represented 40 million additional international tourists compared to 2011, the figure reached was **1,035 million**.



WHY TOURISM MATTERS

For this reason, the World Tourism Organization (UNWTO) launched the **One Billion Tourists: One Billion Opportunities** campaign (1billiontourists.unwto.org) whose purpose is to highlight tourism social and economic importance and impact.

During the year, emerging economies had growth of 4.2%, outpacing the advanced economies, which grew by 3.9%.

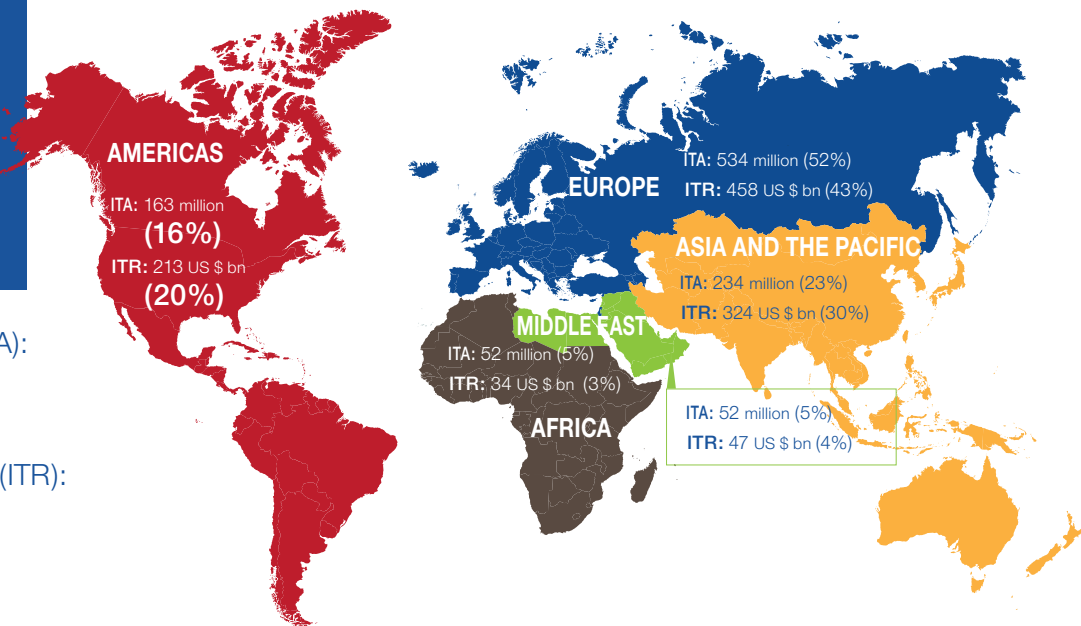
The Asia-Pacific region recorded the highest growth rate among all regions with a 7% increase in international tourist arrivals, representing an additional 16 million tourists. Africa posted growth of 6%, equivalent to 3 million more tourists, and received, for the first time ever, more than 50 million tourists. Europe, which receives slightly more than half of international arrivals, grew by 3.5% (18 million additional arrivals). Only the Middle East was unable to get on the growth track due to regional problems and it posted a decline of 5%.

For its part, the Americas region grew nearly 5%, representing more than 7 million new international visitors.

It is expected that this growth, globally and according to the forecasts, stay for 2013 at rates that fluctuate between 3% and 4%. It is estimated that the Asia-Pacific region will grow between +5% and +6%, Africa between +4% and +6%, the Americas between +3% and +4%, Europe between +2% and +3, and the Middle East between 0% and 5%.

In 2012 the one-billion mark was surpassed in the number of international tourists

International Tourism 2012



International Tourist Arrivals (ITA):

1,035 million

International Tourism Receipts (ITR):

US \$ 1,075 billion

International Tourism Receipts

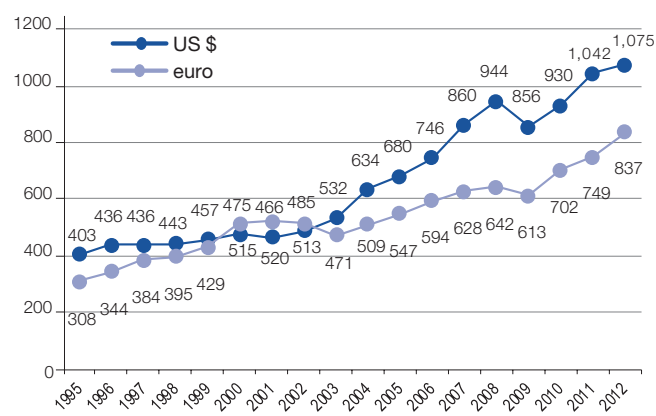
One of the most important indicators of tourism is international tourism receipts (ITR), which is the estimated expenditure made by international tourists in the host country and represents an important part of the economic impact of the sector in the economy of a country.

During the year, international tourism receipts amounted to US \$ 1,075 billion, representing growth in real terms of 4.2% compared to 2011. This figure confirms the close correlation between international tourist arrivals (which grew by 4%) and international tourism receipts.

By region, Asia-Pacific, the Americas and Africa showed strong growth of 7.6%, 5.8% and 6.2% respectively. Europe grew by 1.8% and the Middle East decreased by 2%.

Europe, which has a 52% market share of international arrivals, absorbs the largest part of international receipts with 43%, with Asia-Pacific receiving 30%, the Americas 20%, the Middle East 4% and Africa 3%.

International tourism receipts, 2012 (billion)



Source: World Tourism Organization (UNWTO).

Expenditures are concentrated in hotels and accommodation, meals and beverages, local transportation, entertainment and shopping, and this spending makes it possible to preserve and maintain a very large number of jobs, and opens up opportunities for local economies due to its impact on a diverse range of economic activities.

... other figures

Domestic Tourism comprises the activities of a resident visitor within the country of reference

5 to 6 billion

domestic tourists in the world

+ 4.0%

growth in real terms of tourism receipts



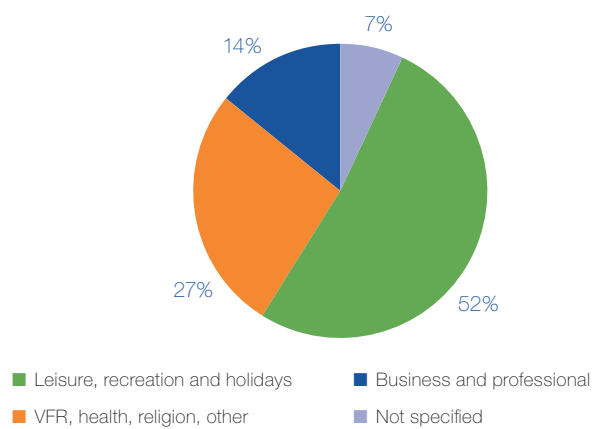
Purposes of travel have been classified into various categories: leisure, recreation and holidays; business or professional reasons; visit friends and relatives (VFR), religion, pilgrimages, health and treatments and others

Purpose of Travel and Means of Transport

At the global level, 52% of trips by international tourists, just over 536 million, are motivated by leisure, recreation and holidays.

In second place, with 27%, are trips for visiting friends and family, health and treatments, religion and pilgrimages. Some 14% are for business or professional matters and 7% for unspecified activities.

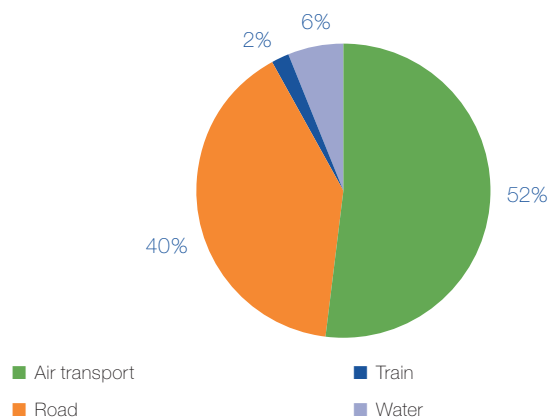
Inbound tourism by purpose of visit, 2012 (%)



Source: World Tourism Organization (UNWTO).

With respect to means of transport, 52% of trips are made by air followed by land arrivals, mainly related to intraregional tourism, accounting for 42% (40% by road and 2% by rail). Arrivals by maritime transport represent 6%.

Inbound tourism by means of transport, 2012 (%)



Source: World Tourism Organization (UNWTO).

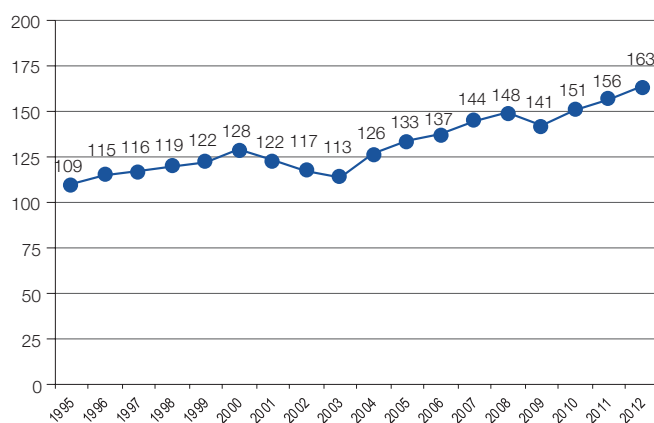
Tourism in the Americas

The Americas region, thanks to the variety and strength of its culture and its history, its natural and architectural attractions, and the hospitality of its people, has great potential for tourism development.

It is a relatively young sector that has been consolidating itself to the extent that it has become a priority in the national agendas of the countries of the region.

Indeed, recent years have been characterized by institutional strengthening that has made it possible to design and implement public policies and allowed the development of the public, private and social sectors related to tourism.

International tourist arrivals in the Americas, 2012
(million)



Source: World Tourism Organization (UNWTO).

Tourism in the Americas (2012)



Growth by subregion (2012/2011)



In a context of political stability and economic growth in the region, there has been development in infrastructure and tourism products, improved connectivity conditions by land, air and sea, as well as a boost to human resources training and the formation of a culture around tourism. These are all factors that have enabled the growth of domestic and international markets with the resulting social benefits for host communities.

As a result of this, tourism has been showing a dynamism that led to an average annual growth for the period 2003-2012 of 4.1%.

For 2012, international tourist arrivals and international tourism receipts enjoyed positive growth allowing the region to retain its global market share of 16% and 20% respectively.

International Tourist Arrivals

Central America, with 7.3%, posted the highest growth rate in the region

International arrivals to the region depend on several factors related to the capacity, the development and the maturity of destinations.

During 2012, relative to 2011, the region received over 7 million additional tourists, which in relative terms represents growth of 4.6%, higher than the global average of 4.0%.

The total number of international tourist arrivals to the region was 163 million.

The greatest number of international arrivals was recorded in North America. This subregion absorbs 65% of arrivals with 107 million international tourists. It is followed by South America which received 27 million, representing a 16% market share. The Caribbean received 21 million, equivalent to 13%, and Central America accounted for 6%, or 9 million.

As can be observed, all the subregions showed positive growth. Central America was the subregion that experienced the greatest growth in relative terms with 8%, the highest in the region, followed by South America with 5%, North America with 4%, and finally the Caribbean with 4%.

Building Sustainable Tourism (Brazil)*

For 20 years now, the Roteiros de Charme hotels have been concerned about the sustainability of their activities and their regions. Besides the charm inherent in their hotel accommodation offerings, one of the principles of the Associação de Hotéis Roteiros de Charme is the relentless pursuit of sustainability in the day-to-day activity of accommodation. Best practices related to the rational use of energy, water conservation, recycling of solid waste, the involvement of the hotels in initiatives and projects to conserve the environmental heritage, historical heritage, and culture of their regions are well known to most regular guests of the Association.

Voluntary environmental codes of conduct figure prominently among the set of measures recommended by international organizations for the pursuit of sustainability in various sectors of socio-economic importance, including tourism. Placing tourism on the path of sustainability is a challenge that requires commitment and partnerships between business, government and civil society.

The sustainability of a tourist destination lies mainly achieving a strategic planning process and the shared management of development in the destination and its region, that is capable of orchestrating the actions of economic actors, social partners and the government, in a participatory manner. Current public policies aimed at the tourism industry seek to establish the foundations for this procedure to be implemented at all locations. It is this concept that is reflected in the Environmental Code of Conduct of the Association in accordance with the guidance of international organizations working in the areas of the environment and tourism.

The Environmental Programme of Roteiros de Charme, structured through its Environmental Code of Conduct, www.roteirosdecharme.com.br, and carried out and implemented by all Members since 1999, offers educational activities, promotes environmental awareness of employees, customers and the local community and supports the initiatives of local actors, such as government and civil society. All these efforts are aligned in the pursuit of sustainable tourism and development in the communities in which member establishments operate.

* Contribution by Associação de Hotéis Roteiros de Charme (Brazil).

Meetings Tourism in Argentina (2003-2011)*

The outstanding performance of Meetings Tourism in Argentina is evident after considering the international events that the country has developed at 41 destinations for hosting events. This segment, which includes the organization of conferences, exhibitions, conventions, sporting events and incentive travel, has shown exponential growth in recent years.

Starting in 2008, at the proposal by AOCA (Argentina Association of Exhibition Organizers and Suppliers of Conferences and Events) to the then Secretariat of Tourism – today the national Ministry of Tourism – a joint effort between the public and private sectors was initiated with AOCA-SECTUR-INPROTUR (National Institute Tourism Promotion), with the appointment of a renowned expert to develop 2008-2011 Strategic Marketing Plan for Meetings Tourism, which was recently updated.

The work generated by the Country Team starting in 2008, after commitments were assumed by its component sectors, resulted in a significant enhancement of Argentina's international positioning, moving up 14 places in the first year, which was consolidated in 2009, 2010 and 2011, with a steady growth in the number of international conferences held in the country.

In the 5 years prior to the implementation of the Marketing Plan in 2008, Argentina stood between positions 40 and 36 in the world rankings that is issued every year by ICCA (International Congress and Convention Association). The ranking takes into consideration the databases of all countries of the world that year after year serve as venues for international events.

The growth of this segment has also been reflected in the cities in the interior of the country, and for the first time there are eight Argentine destinations included in the international ranking of ICCA (International Congress and Convention Association) with over 5 international conferences. In addition to the City of Buenos Aires, which is ranked no. 16 in the world ranking, Mendoza is ranked 132 in the world, with 16 events, followed by Mar del Plata, Cordoba, Rosario and La Plata in positions 150, 186, 212 and 234, respectively.

The latest statistics of 2011 announced by ICCA in the month of May, show further growth of our country, placing Argentina in the 18th spot in the world ranking, with 186 of the 10,070 total international congresses held.

In a context of international crisis where most economic activities have been seriously affected worldwide, Argentina has, since 2009, ranked among the top 20 countries of the world in hosting international events. Also, this positioning is reflected with respect to the rest of the countries in the Latin American region where Argentina has attained 2nd place in the international ranking, surpassing Mexico once again.

Moreover, it is noteworthy that despite the international crisis in recent years, the only three countries in the region that have not declined in the ICCA rankings from 2007 to the present are Argentina, Colombia and Paraguay.

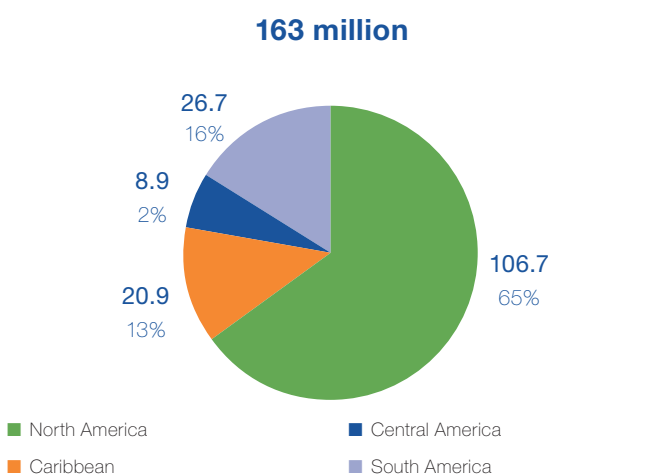
Among the achievements made since the implementation of the Strategic Marketing Plan for Meetings are the implementation of the First Economic Observatory of Meetings Tourism since 2010, the first statistical database on the segment, which includes all the destinations in the country that host events, which is coordinated between INPROTUR, AOCA and the University of Buenos Aires (UBA). For the first time, the public, private and academic sectors joined forces with the aim of gathering information on the main indicators of Meetings Tourism in the country, in order to have a useful input for governments, on the one hand, to define public policy aimed at encouraging the development of the activity and evaluate its effectiveness, and for the private sector, on the other hand, to improve investment and management decisions for businesses.

The Observatory consists of a national network of 27 Provincial Technical Focal Points belonging to provincial and municipal tourism bodies and to Conference, Convention & Visitors' Bureaus, the latest members to join this team and, who are based starting 2012 in AOCA, the association that represents them.

As a result of the work of the Observatory in 2011 3,066 meetings were identified, of which 2,546 were classified under Congresses and Conventions, 431 under Fairs and Exhibitions, and 89 under International Sporting Events.

* Contribution by Jordi Busquets (Argentina), Advisor of Federación Empresaria Hotelera Gastronómica de la República Argentina (FEHGRA).

International tourist arrivals in the Americas region, 2012
(US \$ million)



Source: World Tourism Organization (UNWTO).

Tourism growth is getting stronger in the region. In fact, 80% of countries reporting data show positive growth rates.

The Central American subregion shows very significant growth in certain countries. Nicaragua grew by 11.3%, Belize by 10.7%, Panama 9.1%, Costa Rica 6.9% and Guatemala by 6.5%.

Some South American countries had double-digit growth. Venezuela with 19.3%, Chile with 13.3%, Ecuador with 11.5%, Paraguay 10.6% and Peru with 9.5%

In the subregion of North America, which receives the most international tourists in the region, the United States grew a very significant 6.8% as a result in increased flexibility of its admission policies. Canada, coming off a year of negative

growth, showed a recovery with growth of 2%. Mexico posted no growth in relative terms.

In the Caribbean subregion, various countries showed solid growth. St. Maarten, coming from negative growth in 2011 (-4.2%), had a positive growth of 7.6%, the same growth posted by Curaçao. The Dominican Republic, which has experienced steady growth in recent years, grew by 5.9%

Countries with the highest growth arrivals in 2012/2011

Country	Growth (%)
Venezuela	19.3
Bolivia	17.8
Chile	13.3
Ecuador	11.5
Nicaragua	11.3
Belize	10.7
Paraguay	10.6
Peru	9.5
Panama	9.1
Curaçao	7.6
St. Maarten	7.6
Costa Rica	6.9
United States of America	6.8
Guatemala	6.5
Colombia	6.4

Source: World Tourism Organization (UNWTO).

See more information on page 24.

80% of countries from the Americas reporting data show positive growth rates in international tourist arrivals



Commercial Air Transport in the Americas*

There is no doubt that commercial aviation is an important tool for the economic development of a country. However, the sector also feels the consequences of such development, growing and declining in direct relation with the economic level attained in the region where its actors, the airlines, operate. Thus, the variation in their rates of growth or contraction depends on the variation the gross domestic product of the country of origin of the airline. On average, the proportion of the sector's performance in relation to the performance of GDP is 1.1; but this can reach much higher levels in emerging or developing countries.

Within this context, the airline industry reflects changes in the local economy. Notable developments in the world economy in recent years have decisively influenced the performance of air transport.

For example, in the 1980s and 1990s, the Gulf War caused an increase in oil prices, which had a major impact on airlines. In the United States of America in the 1980s, the crisis in the sector and increased costs caused a dramatic economic concentration that reduced the number of major airlines from 21 to 7. As a result, low-cost airlines emerged in an attempt to win back lower-income users who had turned to rail transport in lieu of flying. This practice, which provides reasonable profits, inspired European companies, which have obtained positive results with their regional companies.

At the beginning of the 2000s, the destruction of the twin towers in New York again caused a major downturn in U.S. air transport, which spread to Europe and Asia. In the following years, the industry had stable performance but, starting in 2009, the liquidity crisis in the U.S. housing market and the recent economic crisis in the European common market, once again struck the global air transport industry, bringing a bleak and uncertain outlook for the future. In the United States of America, for example, airlines went from a profit of US \$ 367 million to a loss of US \$ 181 million in the fourth quarter of 2012.

Latin America has certainly been affected by the changes in the global economy, but paradoxically, to a lesser extent, probably due to the globalization process over the past last decades. In the years 2011 and 2012, passenger traffic in Latin America grew between 5.9% and 7%, respectively, with earnings of US \$ 100 million. In Brazil, the scenario is one of growing domestic and international traffic, but the main airlines—Tam and Gol—have posted brutal losses. In the past two years, these airlines have accumulated losses of approximately US \$ 1.5 billion. Brazilian airlines operate with the same difficulties as international ones in terms of the high cost of fuel; but with the additional handicap of an unfavourable exchange rate against the dollar and the euro, exacerbated by higher tax rates levied by the government compared to other countries. National airlines have sought solutions, with “code-sharing” agreements and mergers with international organizations, but so far with no positive results.

* Collaboration by Percy Rodrigues (Brazil), Member of the Tourism Council of the b. Conferedacao Nacional do Comercio do Bens, Servicos e Turismo (CNC).

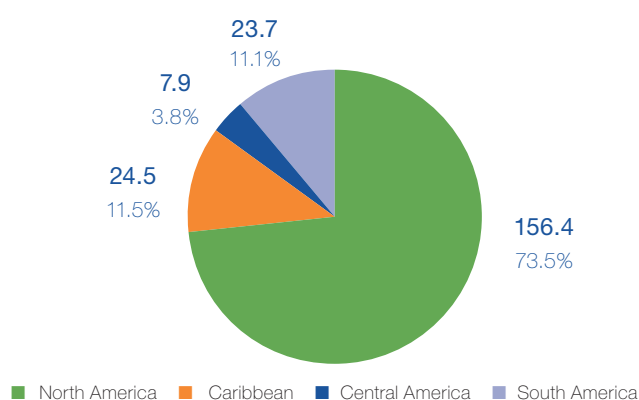


International Tourism Receipts

For the region of the Americas, international tourism receipts totalled US \$ 213 billion, representing growth in real terms, of 6% compared to 2011. With this performance, the region maintained its 20% share of worldwide receipts.

All subregions showed growth in absolute terms. North America has the highest receipts with US \$ 156.4 billion, representing a regional share of 74%, followed by the Caribbean, with US \$ 24.5 billion representing 11.5% of receipts, South America with US \$ 23.7 billion, representing 11.1%, and Central America with US \$ 7.9 billion, with a share of 3.8% of total international tourism receipts.

Share of tourism receipts by subregion (US \$ billion)



Source: UNWTO, *Tourism Highlights 2013 Edition*.

In relative terms, two subregions saw growth in their shares from the previous year. North America went from 72.9% to 73.5% and Central America from 3.6% to 3.8%, while the subregions of the Caribbean and South America went from 12% to 11.5% and from 11.5% to 11.1% respectively.

It is worth highlighting that out of the total receipts of the region, the United States absorbs 59.4% representing US \$ 126.214 billion, followed by Canada with US \$ 17.401 billion representing 8.2%, and Mexico with 6% representing US \$ 12.739 billion.

Moreover, in regard to the market shares in each subregion, the data show the following:

- For **North America**, the receipts of the United States represent 81%, Canada 11% and Mexico 8%.
- For **the Caribbean**, the Dominican Republic absorbs 18.5%, followed by Puerto Rico with 13%, the Bahamas with 9.6%, and Jamaica with 8.3%.
- Of the total revenues in **Central America**, Costa Rica accounts for 30.2% of revenues, Panama 28.1% and Guatemala 17.6%.
- Finally, for **South America**, Brazil has a share of 28%, Argentina 20.6%, followed by Peru with 11.2%, Colombia with 9.9% and Chile with 9.2%.

Purpose of Travel

This refers to the stimulus or interest that moves a person or a group of individuals to take a trip and thus satisfy a need.

The main purpose of travel, in 2012, in the region of the Americas was leisure, recreation and entertainment with nearly 45%, followed by visiting friends and family, health and religion, with 21%, and business or professional matters with 10%. The rest (24%) was not specified.

The behaviours in each of the regions have their own particularities.

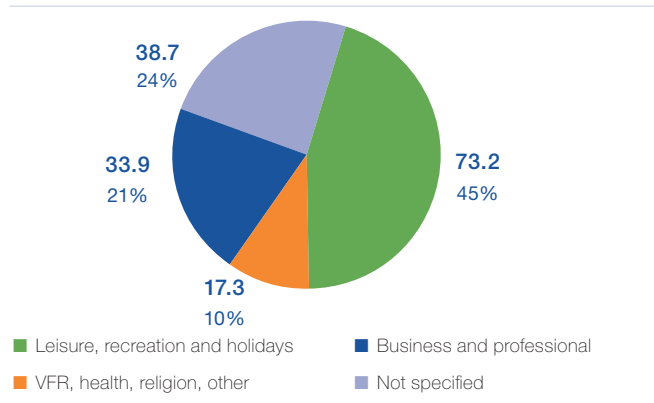
For the Caribbean subregion the percentage of international tourists who travel for leisure, recreation and holidays is 76%, while for South America it is 62%, in Central America 58% and in North America 34%.

The percentage of trips for visiting friends and family, health, religion or pilgrimage accounted for 23% of arrivals in the subregion of North America, followed by South America with 20%, Central America with 19%, and the Caribbean with 14%.

The main purpose of a tourist trip is defined as one without which the trip would not have taken place and entails travel by a person outside his usual residence from the time of departure until his return

As for trips for business or professional purposes, these showed an increased presence in Central America with 19%, followed by South America with 19%, Central America with 10% and North America with 9%.

Purpose of travel in the Americas (million of tourists)



Source: World Tourism Organization (UNWTO).

Intraregional Tourism

For destinations in the countries of the Americas, 74% of arrivals in 2012 originate in the same region with an important participation of the United States of America and Canada. The arrival of more international tourists to the region is mainly from Europe followed by Asia and the Pacific.

Hospitality

According to STR Global and STR (North America) 2012 was a positive year for the hotel industry as most of the regions showed growth in virtually all indicators (average occupancy, average daily rate and revenue per available room).

The Americas region reported increases of 1.5 percentage points in hotel occupancy rising from 60.1% in 2011 to 61.5% in 2012, a 4% increase in average daily rate and 6% in revenue per available room.

Hotel Performance by Region

Region	Occupancy (%)			Average daily rate			RevPAR*		
	2012	2011	Percent change	2012	2011	Percent change	2012	2011	Percent change
		(%)	(%p)	US \$		(%)	US \$		(%)
America	61.5	60.1	1.5	109	105	3.8	67	63	6.3
North America	61.4	59.9	1.5	107	103	3.9	66	62	6.5
Caribbean	66.5	62.0	4.5	176	170	3.9	117	105	11.4
Central America	57.4	60.4	-3.0	114	114	0.0	66	69	-4.9
South America	65.0	66.7	-1.6	143	141	1.0	93	94	-1.5

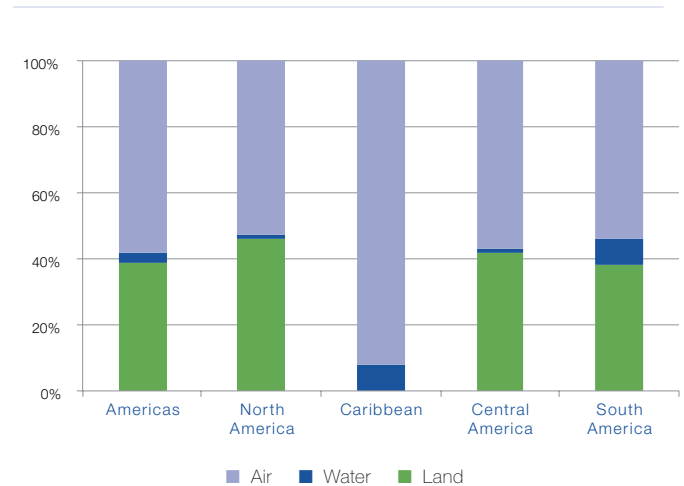
Source: STR (North America) and STR Global. © 2013 STR and STR Global. All rights reserved. (% p: percentage points).

* Revenue Per Available Room.

Mode of Transport

In 2012, 58% of international tourists arrived in the countries of the Americas by air, 39% by land and 3% by water. Air transport, which is the most important mode of transport in all sub regions, reached 56% in Central America and 92% in the Caribbean. Arrivals by land in North America reached 46%. Water occupies a share of more than 7% in the Caribbean and South America.

Inbound tourism by mode of transport, 2012



Source: World Tourism Organization (UNWTO).

According to STR, the Caribbean subregion achieved the highest occupancy growth at 4.5 percentage points going from 62% to 66.5% and average RevPAR of US \$ 117.

In the North American region there was positive growth of 1.5 percentage points from 59.9% to 61.4%.

Central America and South America with occupancy rates and income showed decreases of 3 and 1.6 percentage points respectively.

Punta del Este Plans for the Next 30 Years*

The “jewel” of the South Atlantic, the most sophisticated tourist destination in Latin America, in its moment of greatest success and tourism development in the past 50 years, has decided not to wait for the natural maturity and the concomitant plateau that it will inexorably reach sooner or later, and has rather launched an urban development plan for the coming 30 years, thus initiating a revamp at its peak and not during a process of stagnation and decline, as has been common in other destinations.

The new Uruguayan land use planning law has given its regional authorities (Provinces) powers to regulate their own territories. In exercise of these powers, the Department of Maldonado, the political jurisdiction where Punta del Este is located, issued its own land use plan and, in keeping with this, Departmental Council (Local Parliament) approved the most far-reaching land use plan in the history of Uruguay.

In a 1600-hectare part of its territory, an area where there currently no activity and which serves only as a transit point of little value, a development ordinance has been approved allowing the private construction of residential and commercial properties within a rational urban planning scheme under the “Urban Forest” concept and called Eje Aparicio Saravia.

This urban planning allows the private sector to plan its investments and construction, with clear rules that are the same for everybody, thus protecting the territory from short-sighted speculation.

As a matter of course, the public sector through the Local Government will provide the necessary infrastructure and emblematic projects that will enhance the value of this “new territory” that is naturally integrated with the existing successful development.

A double perimeter road, whose first section is already finished, will directly connect the Eje Aparicio Saravia with the Ruta Interbalnearia, Montevideo and the International Airports of Montevideo and Punta del Este. The development includes a new domestic and international bus terminal, and Educational City Park of 15 hectares, which will house the facilities to establish universities and business schools, a convention centre and a fairground which will shortly be open to tender, and whose construction will begin before year-end, an Urban Park of 400 hectares that will serve as a recreational area for tourists and the resident population, and the recovery of 630 hectares of wetlands, which will be the main attraction for lovers of nature tourism.

A seasonal sun-and-sand tourism destination is thus reinventing itself in anticipation of the future.

* Ramón de Isequilla Real de Azúa,
Tourism Consultant - Delegate of Destino Punta del Este in the Affiliate Members.



Enhance the development of tourism so that it becomes an instrument of social inclusion

Outbound Tourism in the Americas

The United States of America and Canada are among the leading outbound markets in the world and in the Americas. In 2012, in terms of international tourism expenditure, the United States ranks third worldwide with a expenditure of US \$ 83 billion while Canada with US \$ 35 billion ranks seventh. Brazil has experienced rapid growth in recent years, doubling its spending between 2009 and 2012, with a tourism expenditure of US \$ 22 billion in 2012. Other countries that are among the top 50 source markets in terms of expenditure in 2012 were Mexico (US \$ 8 billion), Argentina (US \$ 6 billion) and Colombia (US \$ 3 billion). Markets such as Venezuela, Peru and Chile that, albeit with more modest numbers, are seeing rapid growth in recent years.

Tourism in the Americas in 2013

According to the *UNWTO World Tourism Barometer*, during the first eight months of the year tourism in the region grew by 3.2%, which represented an additional 4 million international tourist arrivals. North America posted notable growth of 4%. These results back the projection that the number of tourists to the region, for 2013, will grow between 3% and 4%, a growth rate that is close to the global average.

Tourism Towards 2030: Forecasts for the Americas

The UNWTO study *Tourism Towards 2030* shows that there is great potential for the growth of international tourism. Globally, the number of international tourist arrivals will grow by an average of 3.3% per year over the period 2010-2030. International tourist arrivals to destinations in emerging economies in Asia, Latin America, Central and Eastern Europe, Mediterranean Europe and the Middle East, and Africa will grow at twice the pace (+ 4.4%) of that of destinations in advanced economies (+2.2%). As a result, arrivals in emerging economies will exceed those of the advanced economies in 2015. In 2030, 57% of international arrivals be concentrated in the emerging destinations (versus 30% in 1980) and 43% in the destinations of advanced economies (against 70% in 1980).

Challenges and Opportunities

The Americas region has great potential to further enhance the development of tourism so that it becomes an instrument of social inclusion that generates decent jobs and improves the quality of life of the population within a framework of sustainability.

To this end it is important to consider, within the strategies of each country and at the regional level:

- **the development and improvement of the infrastructure** of tourist destinations;
- the creation of the **conditions for improving air connectivity** both within countries as well as at the intraregional level and abroad;
- **promoting public-private partnership** that makes it possible to stimulate the development and consolidation of tourism destinations, the integration of production chains related to the sector and to attract investment;
- **planning and developing new products** to meet the demands entailed by the profile of today's tourists and by emerging markets;
- working towards **travel facilitation** in terms of both visa issuance and the waiving of visa requirement, as well as the reception and visitor services at points of entry to the country;
- **continuous improvements in the quality and competitiveness** of tourist destinations and the price level;
- **intensifying marketing strategies** and making them more permanent, including branding and aspects related to actual and perceived safety and security.

All this comes within a governance framework that allows proper coordination of different levels of government at the national, regional and local levels as well as with key stakeholders that have an impact on the sector.



Visa Facilitation

Over the past six decades, tourism has experienced continued expansion and diversification. Many new destinations have emerged alongside the traditional ones of Europe and North America, which has led to a very substantial increase in destinations and tourists worldwide.

In order to fully reap the benefits international tourism can bring to an economy it is necessary to put in place conditions so that the country can be easily visited and make it attractive to develop and invest in the sector.

For this reason, the World Tourism Organization (UNWTO) has been conducting various activities to bring into the international agenda, and to the agendas of individual countries, the issue of facilitation for obtaining a visa or entry into a tourist destination.

Joint research by the UNWTO and the World Travel and Tourism Council (WTTC) presented to the 4th T20 Ministers Meeting in May 2012, which took place in Mérida, Mexico, demonstrates that improving and facilitating visa processes could generate increased receipts and create more jobs.

The analysis also identified **five important areas of opportunity**:

- a. Improve delivery of information about the tourism destination.
- b. Facilitate current processes to obtain visas.
- c. Differentiated treatment to facilitate tourist travel.
- d. Institute eVisa programmes.
- e. Establish international and regional agreements.

As a result of this work, the G20 Leaders recognized, at its June 2012 Summit held in Los Cabos, Mexico, “the role of tourism as a vehicle for job creation, economic growth and development”.

Facilitating visa processes could generate increased receipts and create more jobs

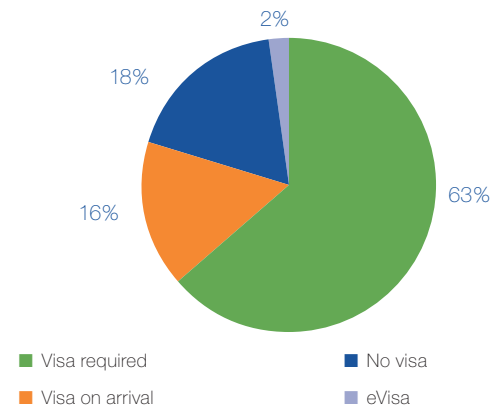
The UNWTO study on Visa Facilitation states that “visa requirements still affect global tourism significantly. In 2012, destinations around the world requested on average from 63% of the world’s population that they obtain a visa before initiating their international journey. Only 18% of the world’s population would not require a Visa at all when travelling for tourism purposes”.

It recognizes that when it comes to obtaining visas, emerging economies are overall more open than advanced ones. When travelling to an emerging economy destination on average 61% of the world population needs a traditional Visa and 2% an eVisa. While for advanced economy destinations 73% need a traditional Visa and 2% an eVisa. However, full exemption from a visa is more common in advanced economies (24% vs. 17%), whereas in emerging economies Visa on arrival is much more common (21% vs. 0.4%).

The study states that when travelling to the Americas region, 60% of the world’s population is required to obtain a traditional Visa prior to travelling to a destination of the region. However, this figure varies widely across the sub-regions of the Americas. While North America is one of the

most restricted sub-regions, where only 11% of the world’s population can enter without a Visa, the Caribbean is the third most open sub-region in the world with 39% Visa exemptions and 8% Visa on arrival. Two other sub-regions, Central and South America have practically abolished Visas and make the Americas the leading region in having abolished this travel formality.

World population affected by visa policies, 2012



Source: World Tourism Organization (UNWTO).

JAMAICA WAIVES VISA REQUIREMENTS

On 6 March 2013, Jamaica took a very important step towards travel facilitation, by deciding to waive the visa requirement for tourists from the **Russian Federation, the Czech Republic, Hungary, Poland, Slovakia and Ukraine** for a maximum of thirty days, along with the indefinite prolongation of the visa exemption applicable to nationals of **Colombia, Panama and Venezuela**.

SMART VISA

On April 23, in the city of Lima, Peru, the national tourism authorities of **Colombia, Ecuador and Peru** signed an agreement establishing the basis for implementing a **Smart Visa** system, which will make it possible to eliminate barriers that hamper the free movement of tourists and discourage travel.

PACIFIC ALLIANCE VISA

At the presidential summit of the Pacific Alliance (Cali, Colombia, 24 May 2013) the **Presidents of Mexico, Colombia, Peru and Chile** decided to create the **Pacific Alliance Visa**, which allows their citizens to visit any of the countries.

MEXICO AND BRAZIL ELIMINATE VISAS

The governments of **Mexico and Brazil** agreed on this measure with the aim of increasing the flow of tourists between the two countries. The measure came into force last 16 May.



The Americas: Visa Facilitation Overview

Openness

The openness index shows the percentage of the world population affected by visa policies of a country or region.

In 2013, the Americas region has an openness index of 36, compared to the world openness index of 30.¹

Openness in the Americas has increased from 2008, when it was 28. In 2008 the openness index of the world was 20.

Openness across subregions varies widely, ranging from 4 to 100.²

World population affected by visa policies, 2013

	Openness	No visa	Visa on arrival	eVisa	Visa
World	30	18%	15%	3%	64%
America	36	32%	5%	1%	62%
North America	14	11%	0%	6%	83%
Caribbean	41	39%	2%	1%	58%
Central America	36	31%	8%	0%	62%
South America	36	29%	9%	0%	62%

Source: World Tourism Organization (UNWTO).

¹ World Tourism Organization (2013), *Tourism Visa Openness Report: Visa Facilitation as Means to Stimulate Tourism Growth*, UNWTO, Madrid.

² Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of visa on arrival weighted by 0.7 and eVisa by 0.5. For the (sub) regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by natural logarithm of the population size (i.e. in 1,000 population)) in order to take into account differences in destination size).

Lima Letter of Intent on Smart Tourism

The Ministers and High Authorities of Tourism meeting in the city of Lima, based on what has been expressed in various meetings on tourism matters, wish to express their intention to work towards an electronic Smart Visa system that benefits the citizens of third countries visiting the territories of the undersigned, in order to increase the facilitation of tourist travel and their safety.

Considering that tourism constitutes a significant contribution to the integration and to the full and integral development of their peoples, such electronic system will contribute to the growth of the tourism sector, and this in turn to the development of trade and investment in the territories of the signatory States.

The Ministers and High Authorities of Tourism recognize the importance of tourism activity, and express their desire to give new impetus to the tourism sector in a way that promotes the mobility of tourists by maximizing the use of technology and reducing inefficiencies caused by the processing of traditional visas.

In this regard, the Ministers and High Authorities of Tourism subscribing States, in coordination with corresponding government agencies in each signatory State, agree to work jointly for the implementation of this system, in order to gradually eliminate the current barriers that hamper the free movement of tourists and discourage leisure travel, by acting more strategically in the processing of visas in order to promote social integration.

This Letter of Intent reflects the tourism sector's desire and does not aim to create legal rights or obligations under national or international law.

Signed in the city of Lima, Republic of Peru, in six copies in Spanish, on 23 April 2013.

Tatyana Orozco
Vice Minister of Tourism of the Republic of Colombia

Freddy Ehlers Zurita
Minister of Tourism of the Republic of Ecuador

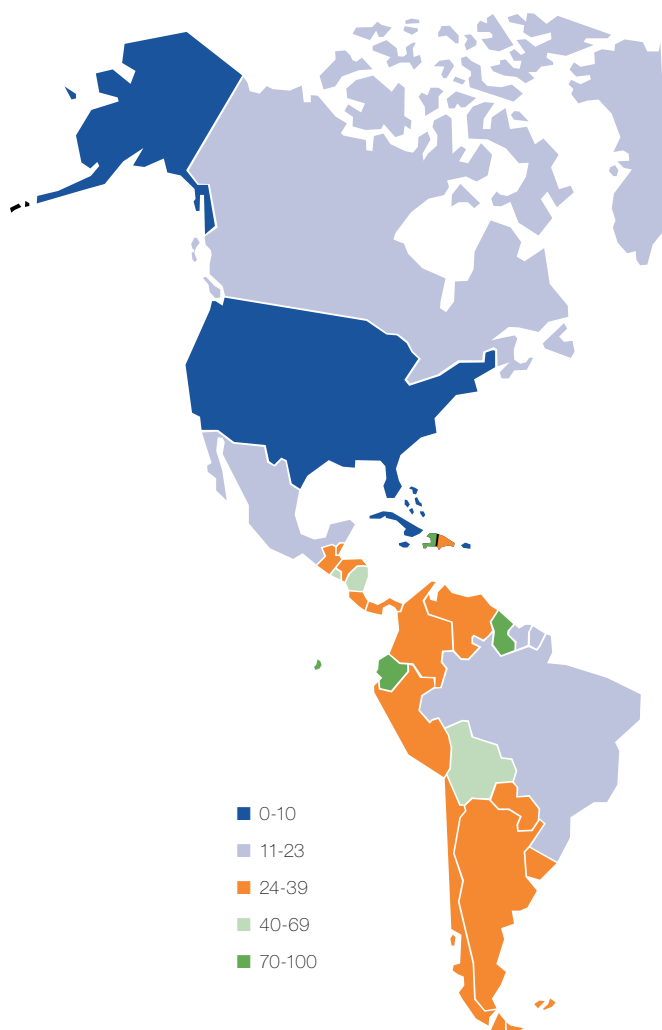
José Luis Silva Martinot
Minister of Trade and Tourism of the Republic of Peru

Ten most open countries in the Americas

Dominica	100
Haiti	99
Turks and Caicos Islands	80
Montserrat	76
Guyana	76
Saint Vincent and the Grenadines	76
Ecuador	72
Nicaragua	65
Bolivia	53
Saint Kitts and Nevis	53

Source: World Tourism Organization (UNWTO).

Tourism visa openness index for the Americas, 2013



Mobility

All around the world, countries' citizens have experienced an increasing mobility (facing less visa restrictions when travelling) between 2008 and 2013.

Citizens with the greatest mobility (of the Americas) are of the United States (155.4), of Canada (152.7) and of Argentina (140.7).

Between 2008 and 2013, citizens (of the Americas) with the greatest improvements in mobility are of St. Kitts and Nevis, of Antigua and Barbuda, and of the Bahamas.

Increase in mobility for citizens of the Americas, 2008 and 2013*

Country	2008	2013	Difference between 2008 and 2013
St Kitts and Nevis	66.0	127.8	61.8
Antigua and Barbuda	64.5	124.3	59.8
Bahamas	70.5	129.6	59.1
Barbados	76.5	134.3	57.8
Brazil	99.5	140.6	41.1
Argentina	104.0	140.7	36.7
Venezuela	89.0	124.5	35.5
Panama	83.0	116.5	33.5
Chile	108.0	137.1	29.1
Mexico	98.5	127.4	28.9

* from a total possible score of 195.

Source: World Tourism Organization (UNWTO).

Reciprocity

From 2008 to 2013, open visa policy pair reciprocity (where two countries do not require any visas from each other's citizens) increased among countries of the Americas from 43% to 52%.

Between Americas and non-Americas countries open reciprocity increased from 15% of all policies in 2008 to 18% in 2013.

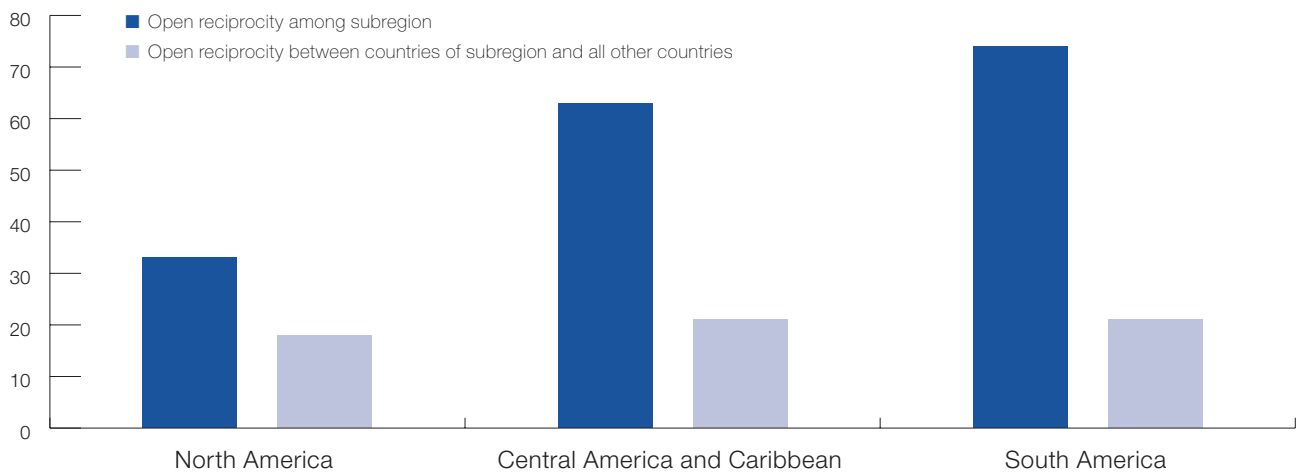
The two advanced economies in the Americas region (Canada and the United States) do not require a visa of each other's citizens. Among emerging economies 58% of policy pairs are reciprocally, which has increased from

47% in 2008. This can be compared to the world average, where 10% of policies are reciprocally open among emerging economies.

Comparing subregions, open reciprocity is highest among South American countries (74%), second highest among Caribbean and Central America countries (63%) and 33% among North American Countries.³

³ The Caribbean and Central American subregions are aggregated. However, Caribbean countries with insignificant outbound travel are not included in reciprocity because policies for their citizens are not collected.

Open reciprocity among subregions and between subregions and all other countries



Source: World Tourism Organization (UNWTO).

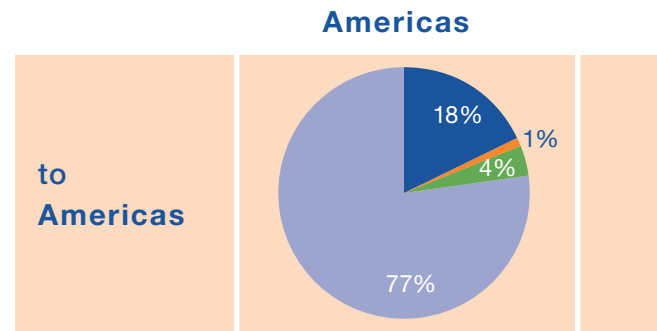


Population affected by Visa Policies by Region*

Travellers from...

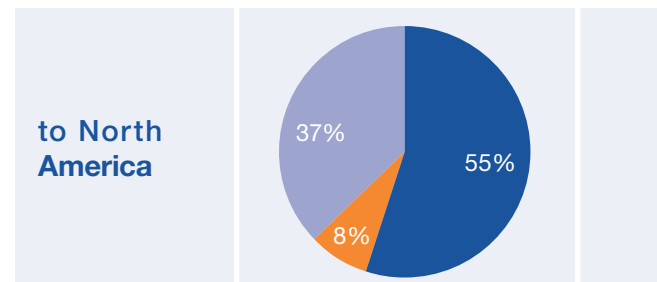
When travelling to the Americas (%)

	Visa required	eVisa	Visa on arrival	No visa
Africa	78	0	7	15
Americas	18	1	4	77
Asia and the Pacific	77	1	5	17
Europe	23	3	3	71
Middle East	83	1	6	11



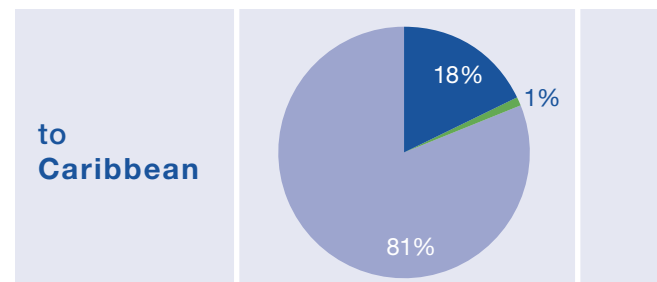
When travelling to North America (%)

	Visa required	eVisa	Visa on arrival	No visa
Africa	100	0	0	0
Americas	55	8	0	37
Asia and the Pacific	94	2	0	4
Europe	39	25	0	36
Middle East	100	0	0	0



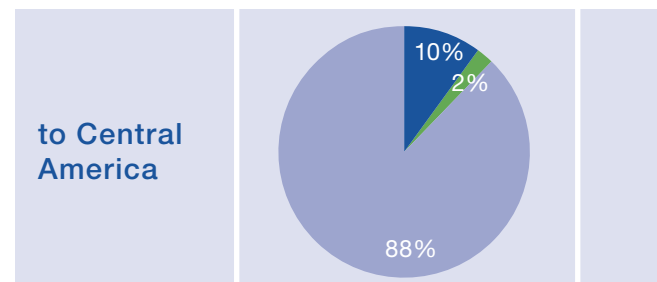
When travelling to Caribbean (%)

	Visa required	eVisa	Visa on arrival	No visa
Africa	72	1	2	26
Americas	18	0	0	81
Asia and the Pacific	70	1	2	27
Europe	26	2	1	70
Middle East	84	1	0	15



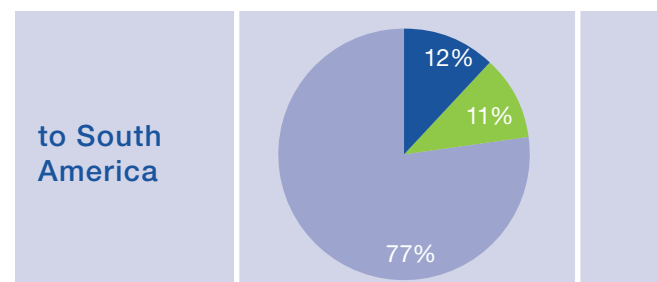
When travelling to Central America (%)

	Visa required	eVisa	Visa on arrival	No visa
Africa	76	0	14	10
Americas	10	0	2	88
Asia and the Pacific	80	0	8	12
Europe	17	0	2	81
Middle East	74	0	14	12



When travelling to South America (%)

	Visa required	eVisa	Visa on arrival	No visa
Africa	79	0	11	11
Americas	12	0	11	77
Asia and the Pacific	78	0	9	13
Europe	16	0	8	76
Middle East	81	0	10	8



Source: World Tourism Organization (UNWTO).

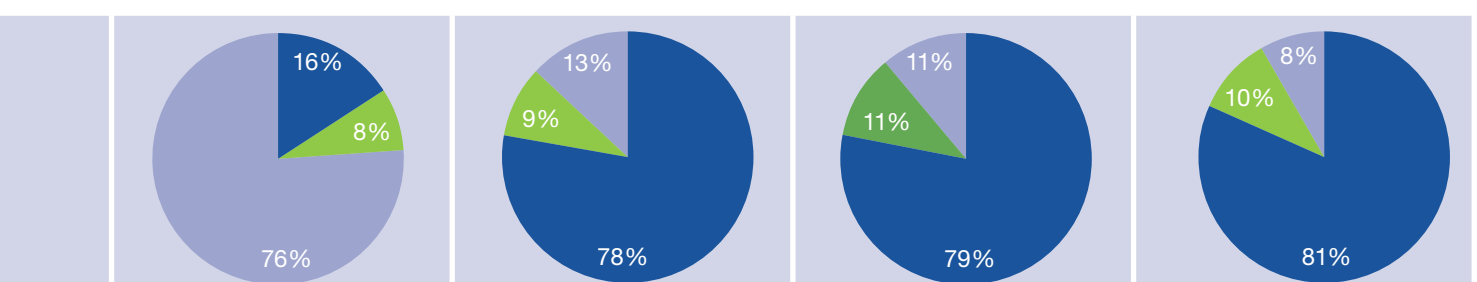
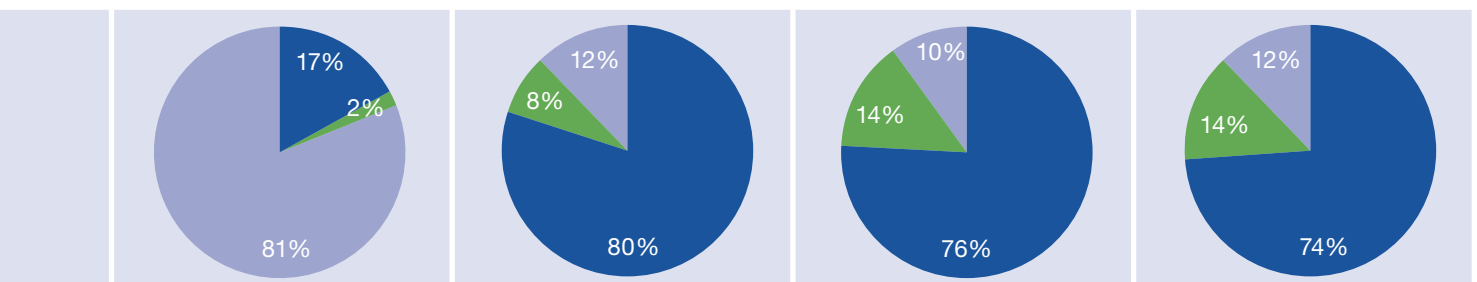
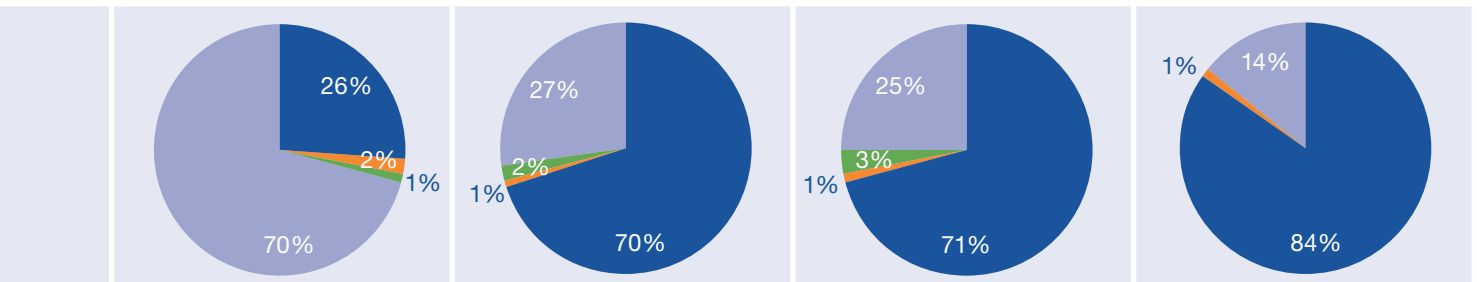
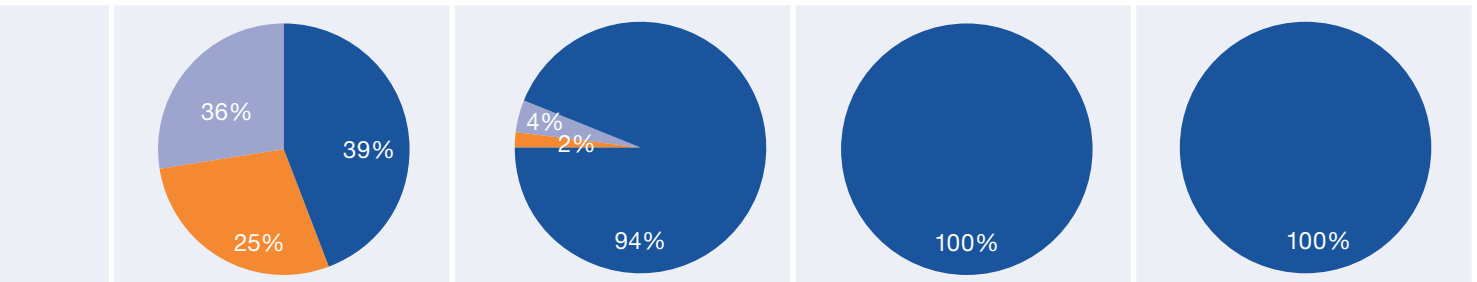
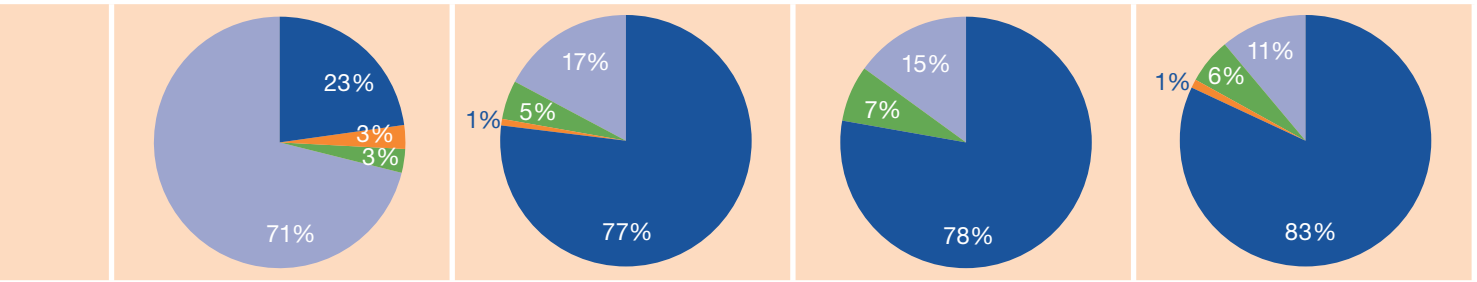
* Regions defined by the UNWTO. For reasons of rounding, data from some regions do not add to 100.

Europe

Asia and the Pacific

Africa

Middle East



■ Visa required
 ■ eVisa
 ■ Visa on arrival
 ■ No visa

Visas and Travel Facilitation: The Case of Mexico*

Various historical and geopolitical circumstances make Mexico a country with migratory flows that are peculiar, intense and complex. Located between the powerful North American dynamo and the rest of the Latin America, its territory is a common route for the flow of people. It is impossible to have an in-depth understanding of the characteristics of Mexican immigration policy without taking into account these circumstances, which have complex ramifications in economic and social life of Mexico.

Visa policies, which in general are designed to achieve functions such as security, population monitoring or simply reciprocity, tend to become a barrier to travel and tourism, a sector that is an engine of growth for economies. Visas, and costs associated with their processing - in monetary terms and time spent to obtain them - are often a strong deterrent for travellers. When faced with a prospect of long lines and red tape, many divert their interest to destinations with fewer complications.

Among the members of the G20, Mexico shares with Turkey and Australia the distinction of having the most open visa policies. Only 3% of the tourists from 145 countries who visited the country in 2011 needed a visa. And since 2009, every tourist, irrespective of nationality, can enter the country if they have a U.S. visa.

Despite this policy of openness, the impact that visa facilitation for other tourists can have is not negligible, this can have far-reaching effects. A study carried out for the members of the G20 group and presented at the Meeting of the T20 Ministers estimated that, if a visa facilitation policy is implemented, the flow of visitors to the country would show an increase of between 18.4% and 21.5% in 2015 compared with the figures for 2012.

This is an undoubtedly important finding, which if borne out, could give a strong boost to the Mexican tourism industry.

The opposite effect - increasing tourism flows - was evident when it was visa requirements with the countries of the Pacific Alliance were eliminated. The increase in the number of visitors from those countries who visited Mexico was almost immediate.

Mexico actively participates in the Pacific Alliance project, an initiative of the then president of Peru, Alan Garcia, with the aim of strengthening links within a solid economic bloc in trade relations with the Asia-Pacific region. According to the

Lima Declaration that announced it, the purpose of creating this alliance is to "encourage regional integration and greater growth, development and competitiveness". The ultimate commitment is "advance progressively toward the goal of achieving the free movement of goods, services, capital and people".

The elimination of visa requirement comes in this context and for Mexico it represents a strategic element in order to maintain a prominent place in business and tourism within the complex political situation of the continent, without losing the ability to monitor people entering its national territory, as has happened recently with the Pacific Alliance countries.

The key point in this issue is that this element of facilitation benefits only two segments of the total flow of persons between the two countries, tourists and businesspersons, with both flows subject to stays not exceeding one hundred eighty days as established by immigration regulations in force.

This is, despite providing a visa exemption for tourists and business persons whose intended stay in Mexican territory does not exceed one hundred eighty days, a situation that was already attenuated with the Electronic Authorization System (SAE). Those persons who intend to stay in the country for other reasons must, in accordance with current regulations, enter with prior authorization granted by the relevant consular office or by an administrative office of the National Immigration Institute in Mexican territory linked to an employment proposal.

For security purposes, the Mexican government has to increase its levels of priority attention based on the concept of virtual borders, emphasizing the analysis of information obtained under the Advanced Passenger Information System (APIS) and the immediate implementation of the Passenger Name Record (PNR) system, in order to analyse in a timely manner the profiles of people who, on the one hand attempt to board any flight from the South American country and, on the other hand, those who board and travel to Mexico with profiles identified as high risk.

Today, the facilitation of migrant flows occupies a central place in the tourism competitiveness agenda that has been established by the Mexican government for the next six years. The Ministry of Tourism, which is responsible for the sector, is working with the various agencies involved in order to make progress in this matter.

* Contribution by Elvira Janett Lucio Duana (Mexico). Assistant Director for International Affairs of the Ministry of Tourism of Mexico.



The Importance of Facilitating Immigration for Tourism: Tourism without Borders*

The desire to build a region without borders, in which nationals and tourists can move without hindrance and without major requirements, is unquestionably an important factor for the development and optimization of a real integration process and to foster the growth of solid tourism activity that reinforces economic and social benefits for communities, countries and the region as a whole.

Consistent with the above, in the framework of the Central American integration process, presidential mandates were issued relating to facilitating the transit of tourists in terms of immigration and customs policies as well as air, sea and land transport policies. In the San Jose Declaration, issued at the XXII Summit of Heads of State and Government, in late 2002, it was agreed to implement a system of free border crossings, to create special one-stop administrative processing windows for tourists, eliminate visas, improve infrastructure, services and technology and encourage planning and policies for air and ground transportation. In 2005, the agreement was signed creating the single Central American visa by the CA-4 countries (Guatemala, El Salvador, Honduras and Nicaragua), allowing the unification of list of countries that require and do not require visas and those to which consulted visas apply. In 2006 an agreement was signed facilitating air operations in the CA-4, which grants privileges to international air operators as if they were domestic, and also an air transport facilitation agreement was signed in the Mundo Maya region, composed of Mexico, Belize, Guatemala, El Salvador and Honduras.

The immigration facilitation mandates have been in place for some time in the CA-4, producing benefits by increasing flows of domestic, regional and international tourists thanks to rapid passage, lower costs for tourists due to the elimination of fees and the reduction in time delays by minimizing bureaucratic formalities, and by giving tourists better service, comfort and treatment when they travel from one country to another. Moreover, this has enhanced a sense of belonging to the region and constitutes real progress for Central American integration. This eliminated the use of arrival and departure cards that were used to measure tourism indicators, and a new standardized regional methodology for data collection was designed, modelled of Spain's Frontur survey, which provides greater information on the profile of tourists. Also it contributed to better coordination and liaison among the immigration and customs authorities of neighbouring countries through the sharing of information on arrivals and departures of tourists as well as between foreign ministries, ministries of tourism and other institutions on the subject of tourism flows.

In order to promote Central American multidestination products it is essential to implement the mandates and processes to facilitate border-crossing by tourists in addition to applying the suitable security measures for each country. Some measures such as providing guides and information services at border crossings, training official staff at borders, services by tourism police, improving technology to expedite the process and tourist infrastructure are key elements that countries should manage and support to ensure tourist satisfaction, which affects the positive image of a country or region and the probability that the tourist will return and recommend the destination.

It is very important to promote air facilitation agreements that can make it possible to unify and standardize measures, mechanisms, fees and infrastructure, which will result in the expansion of the supply of air services in terms of airlines, flights and seats, thus contributing to greater facilities for the movement of tourists with different rates and options to visit countries in the region. It is an opportunity cost to achieve higher growth and social and economic benefits for the population, the business sector and governments.

* Contribution by Mercedes Melendez de Mena (El Salvador). She was Director of the Salvadoran Institute of Tourism, Executive Director of the Mundo Maya Organization, Tourism Integration Secretariat (SITGA) and Director of Tourism of the Secretary General of the Central American Integration System.

International Tourist Arrivals and Tourism Receipts by Country of Destination

		International Tourist Arrivals							International Tourism Receipts				
		Series ¹	(1000)			Share (%)			(US\$ million)				Share (%)
			2010	2011	2012*	10/09	11/10	12*/11	2012*	2010	2011	2012	2012*
Americas		150,364	155,964	163,115	6.4	3.7	4.6	100	180,848	197,944	212,623	100	
North America		99,305	102,130	106,683	6.7	2.8	4.5	65.4	131,297	144,221	156,355	73.5	
Canada	TF	16,219	16,016	16,344	3.1	-1.3	2.0	10.0	15,842	16,800	17,401	8.2	
Mexico	TF	23,290	23,403	23,403	4.2	0.5	0.0	14.3	11,992	11,869	12,739	6.0	
United States	TF	60,008	62,711	66,969	9.2	4.5	6.8	41.1	103,463	115,552	126,214	59.4	
Caribbean		19,537	20,122	20,887	1.6	3.0	3.8	12.8	22,735	23,530	24,536	11.5	
Anguilla	TF	62	66	65	7.1	6.1	-1.6	0.0	99	112	113	0.1	
Antigua, Barb	TF	230	241	247	-1.9	5.0	2.3	0.2	298	312	319	0.2	
Aruba	TF	825	869	904	1.5	5.4	4.0	0.6	1,253	1,353	1,404	0.7	
Bahamas	TF	1,370	1,346	1,422	3.3	-1.7	5.6	0.9	2,163	2,279	2,393	1.1	
Barbados	TF	532	568	536	2.6	6.7	-5.5	0.3	1,034	963	916	0.4	
Bermuda	TF	232	236	232	-1.5	1.6	-1.7	0.1	442	466	454	0.2	
Br. Virgin Is	TF	330	338	351	7.0	2.2	4.0	0.2	389	388	397	0.2	
Cayman Islands	TF	288	309	322	6.0	7.2	4.1	0.2	485	491	..	..
Cuba	TF	2,507	2,688	2,815	4.2	7.2	4.7	1.7	2,187	2,283	2,326	1.1	
Curaçao	TF	342	390	420	-6.9	14.2	7.6	0.3	385	453	543	0.3	
Dominica	TF	77	76	78	2.1	-1.3	3.4	0.0	95	113	110	0.1	
Dominican Rp	TF	4,125	4,306	4,563	3.3	4.4	5.9	2.8	4,209	4,436	4,736	2.2	
Grenada	TF	110	118	112	0.9	7.1	-5.1	0.1	112	117	110	0.1	
Guadeloupe	TCE	392	418	..	13.2	6.5	..	..	510	583	..	..
Haiti	TF	255	349	..	-34.2	36.9	..	..	169	162	170	0.1
Jamaica	TF	1,922	1,952	1,986	4.9	1.6	1.8	1.2	2,001	2,008	2,070	1.0	
Martinique	TF	476	495	487	7.9	3.9	-1.6	0.3	472	516	462	0.2	
Montserrat	TF	6	5	5	-5.2	-9.8	-0.7	0.0	6	5	5	0.0	
Puerto Rico	TF	3,186	3,048	3,069	0.1	-4.3	0.7	1.9	3,211	3,143	3,193	1.5	
Saint Lucia	TF	306	312	307	9.9	2.1	-1.8	0.2	309	321	335	0.2	
St. Kitts-Nev	TF	98	102	104	5.6	3.4	2.5	0.1	90	94	94	0.0	
St. Maarten	TF	443	424	457	0.7	-4.2	7.6	0.3	674	719	842	0.4	
St. Vincent, Grenadines	TF	72	74	74	-3.9	1.9	0.7	0.0	86	92	93	0.0	
Trinidad Tbg	TF	388	402	..	-7.5	3.7	..	..	450	472	..	..
Turks, Caicos	TF	281	354	299	-20.0	26.0	-15.6	0.2	..	..	..	..
US Virgin Is	TF	590	532	580	4.8	-9.8	9.1	0.4	1,013	..	..	..
Central America		7,908	8,256	8,872	4.0	4.4	7.5	5.4	6,627	7,110	8,028	3.8	
Belize	TF	242	250	277	4.2	3.5	10.7	0.2	249	248	299	0.1	
Costa Rica	TF	2,100	2,192	2,343	9.2	4.4	6.9	1.4	1,999	2,152	2,299	1.1	
El Salvador	TF	1,150	1,184	1,255	5.4	3.0	5.9	0.8	390	415	544	0.3	
Guatemala	TF	1,219	1,225	1,305	-12.4	0.5	6.5	0.8	1,378	1,350	1,419	0.7	
Honduras	TF	863	871	895	3.2	1.0	2.7	0.5	627	639	661	0.3	
Nicaragua	TF	1,011	1,060	1,180	8.5	4.8	11.3	0.7	309	378	422	0.2	
Panama	TF	1,324	1,473	1,606	10.3	11.2	9.1	1.0	1,676	1,926	2,262	1.1	
South America		23,614	25,456	26,673	10.2	7.8	4.8	16.4	20,189	23,084	23,705	11.1	
Argentina	TF	5,325	5,705	5,585	23.6	7.1	-2.1	3.4	4,942	5,354	4,882	2.3	
Bolivia	TF	807	946	1,114	20.2	17.2	17.8	0.7	379	481	532	0.3	
Brazil	TF	5,161	5,433	5,677	7.5	5.3	4.5	3.5	5,702	6,555	6,645	3.1	
Chile	TF	2,801	3,137	3,554	1.5	12.0	13.3	2.2	1,645	1,889	2,201	1.0	
Colombia	TF	2,385	2,045	2,175	3.6	-14.3	6.4	1.3	2,083	2,201	2,354	1.1	
Ecuador	VF	1,047	1,141	1,272	8.1	9.0	11.5	0.8	781	843	1,033	0.5	
French Guiana	TF	..	..	..	..	..	..	..	..	..	..	..
Guyana	TF	152	157	177	7.7	3.3	12.6	0.1	80	95	64	0.0	
Paraguay	TF	465	524	579	5.9	12.6	10.6	0.4	217	261	265	0.1	
Peru	TF	2,299	2,598	2,846	7.4	13.0	9.5	1.7	2,008	2,360	2,657	1.2	
Suriname	TF	204	220	240	35.9	7.9	8.9	0.1	61	61	71	0.0	
Uruguay	TF	2,349	2,857	2,695	14.3	21.6	-5.7	1.7	1,509	2,203	2,076	1.0	
Venezuela	TF	526	595	710	-6.3	13.0	19.3	0.4	740	739	844	0.4	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO October 2013)

* Provisional figure or data.

.. figure or data not (yet) available.

¹ Series of International Tourist Arrivals – TF: International tourist arrivals at frontiers (excluding same-day visitors);

VF: International visitor arrivals at frontiers (tourists and same-day visitors); TCE: International tourist arrivals at collective tourism establishments.

UNWTO PUBLICATIONS



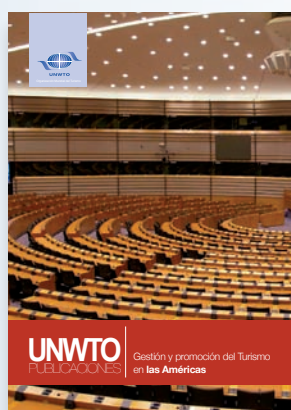
Tourism as an Inducer of Development, Social Inclusion and Regional Integration

Tourism is a major driver of economic and social development thanks to its capacity to activate other economic sectors, its intensive use of labour, and its involvement of a significant number of micro, small and medium-sized enterprises companies that offer opportunities for social inclusion.

2nd UNWTO International Congress on Ethics and Tourism

Quito, Ecuador, 11 and 12 September 2012

Tourism is playing an increasingly important role in the life of societies. Its impact in social and economic terms is undeniable, but furthermore it also helps reinforce the dialogue among civilizations. Its rise has brought with it challenges that entail addressing issues such as sustainability and the preservation of natural resources as well as respect for the way of life of societies and their deepest cultural values, and most of all the fight against the exploitation of human beings.



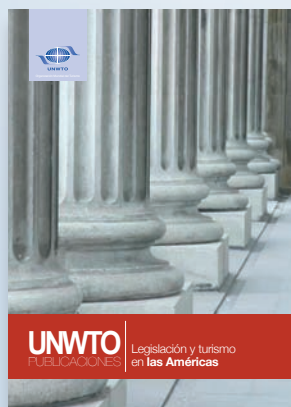
Gestión y promoción del turismo en las Américas

(Tourism management and promotion in the Americas)

Tourism in the Americas region is a factor of development and regional integration. State participation through National Tourism Administrations (NTAs) has been central to its evolution, management and consolidation as a sector. The study shows how NTAs are organized, their objectives and priorities, and the promotion mechanisms they use. (Available in Spanish).

Tourism and New Technologies

The travel and tourism sector has been consolidating itself as one of the fastest growing productive industries in the world economy. This dynamism is explained by the change in the profile of tourists and by the use of new information and communications media, such as the Internet, social networks and television. This publication brings together the views of expressed by different experts on the subject at the seminar held in San Jose, Costa Rica, in 2013.



Tourism legislation in the Americas

(Legislación del turismo en las América)

Tourism laws define the legal framework within which the sector develops. This volume is the first compilation of the tourism laws of different countries of the Americas region. It begins with an introductory study, and goes on to provide an overview of the concepts, visions, actors, promotional criteria as well as the rights and obligations of tourists and the different public and private organizations in the sector. (Available in Spanish).



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