



# Travel & Tourism

ECONOMIC IMPACT 2013

**NETHERLANDS**

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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.**

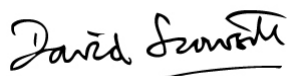
2012 demonstrated again the resilience of the Travel & Tourism industry in the face of continued economic turmoil, as economic growth slowed and was even negative in key global markets. The latest annual research from WTTC and our research partner Oxford Economics, shows that Travel & Tourism's contribution 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

## 2013 ANNUAL RESEARCH: KEY FACTS

2013  
forecast

### GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was EUR11.5bn (1.9% of total GDP) in 2012, and is forecast to rise by 0.9% in 2013, and to rise by 3.1% pa, from 2013-2023, to EUR15.8bn in 2023 (in constant 2012 prices).



### GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was EUR32.4bn (5.4% of GDP) in 2012, and is forecast to rise by 0.6% in 2013, and to rise by 2.9% pa to EUR43.4bn in 2023.



### EMPLOYMENT: DIRECT CONTRIBUTION

In 2012 Travel & Tourism directly supported 464,500 jobs (6.3% of total employment). This is expected to rise by 0.4% in 2013 and rise by 1.4% pa to 535,000 jobs (7.0% of total employment) in 2023.



### EMPLOYMENT: TOTAL CONTRIBUTION

In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 9.6% of total employment (712,000 jobs). This is expected to rise by 0.2% in 2013 to 713,500 jobs and rise by 1.3% pa to 808,000 jobs in 2023 (10.6% of total).



### VISITOR EXPORTS

Visitor exports generated EUR15.5bn (3.0% of total exports) in 2012. This is forecast to grow by 1.1% in 2013, and grow by 2.3% pa, from 2013-2023, to EUR19.6bn in 2023 (2.9% of total).



### INVESTMENT

Travel & Tourism investment in 2012 was EUR2.8bn, or 2.8% of total investment. It should fall by 0.7% in 2013, and rise by 4.1% pa over the next ten years to EUR4.1bn in 2023 (3.4% of total).



## WORLD RANKING (OUT OF 184 COUNTRIES):

Relative importance of Travel & Tourism's total contribution to GDP

**26**

ABSOLUTE

Size in 2012

**147**

RELATIVE SIZE

Contribution to GDP in 2012

**158**

GROWTH

2013 forecast

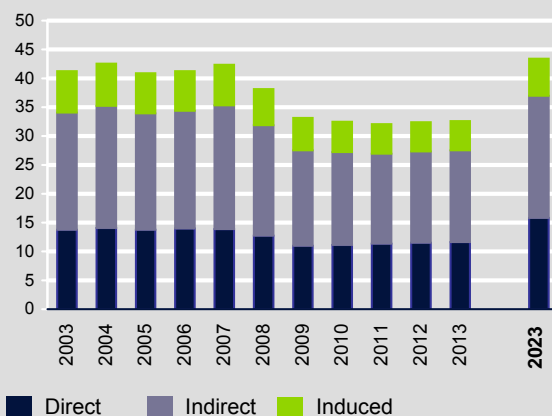
**151**

LONG-TERM GROWTH

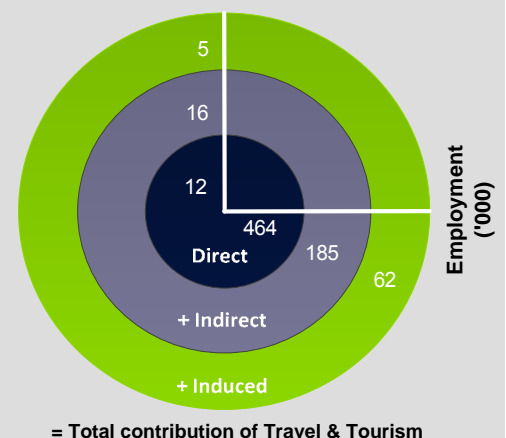
Forecast 2013-2023

Total Contribution of  
Travel & Tourism to GDP

2012 EURbn

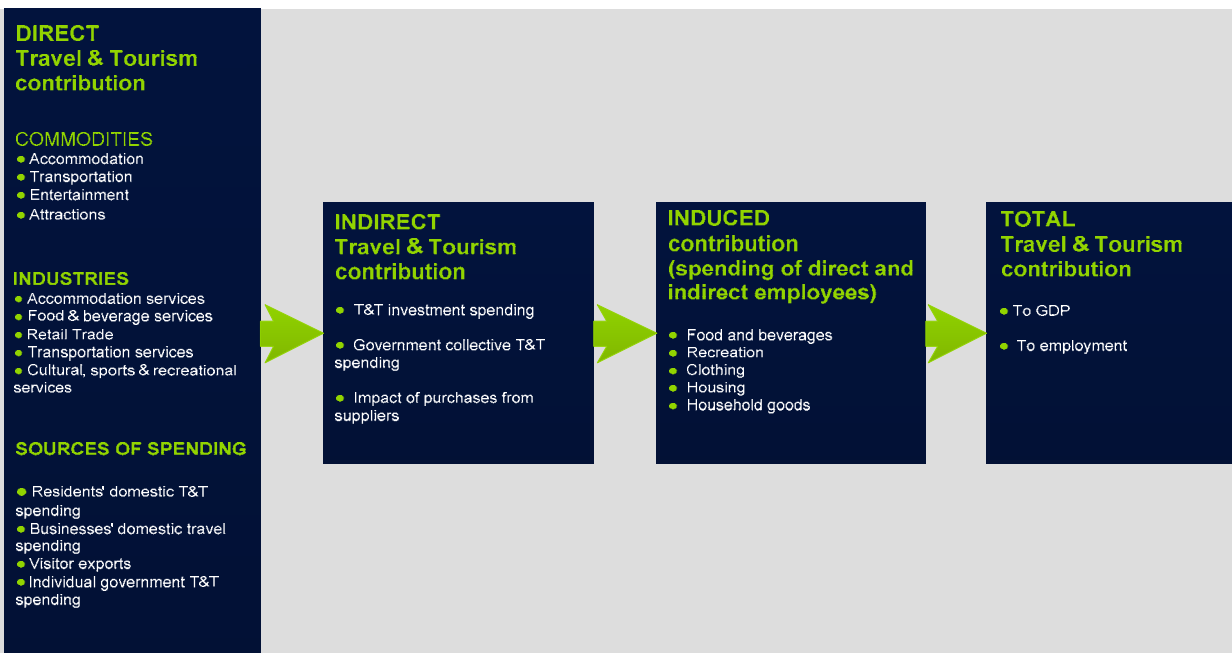


Breakdown of Travel & Tourism's Total  
Contribution to GDP and Employment 2012  
GDP (2012 EURbn)



# Defining the economic contribution of Travel & Tourism

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the industry has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. But WTTC recognises that Travel & Tourism's total contribution is much greater, and aims to capture its indirect and induced impacts through its annual research.



## DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

## TOTAL CONTRIBUTION

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists - including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.

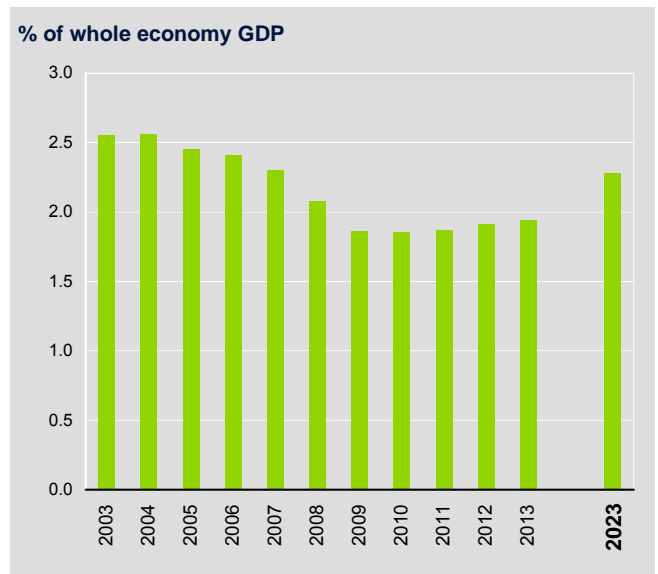
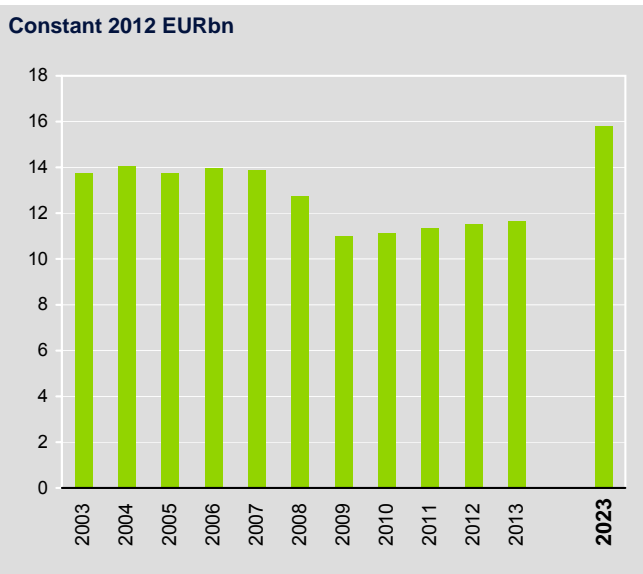
**PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.**

# Travel & Tourism's contribution to GDP<sup>1</sup>

The direct contribution of Travel & Tourism to GDP in 2012 was EUR11.5bn (1.9% of GDP). This is forecast to rise by 0.9% to EUR11.6bn in 2013. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 3.1% pa to EUR15.8bn (2.3% of GDP) by 2023.

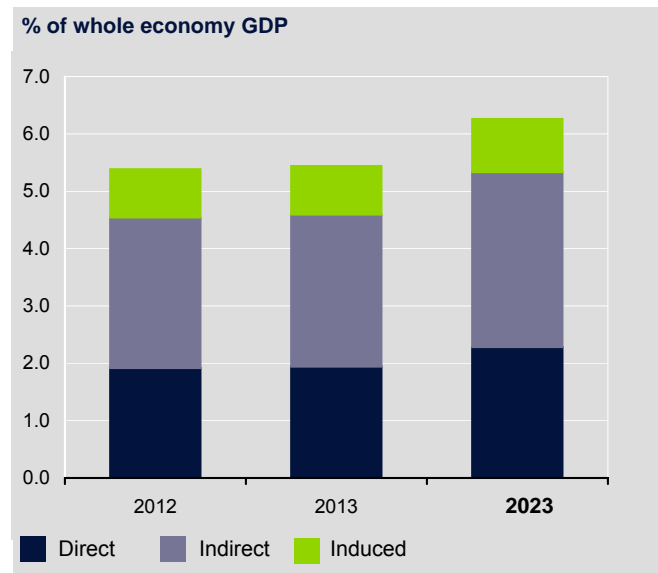
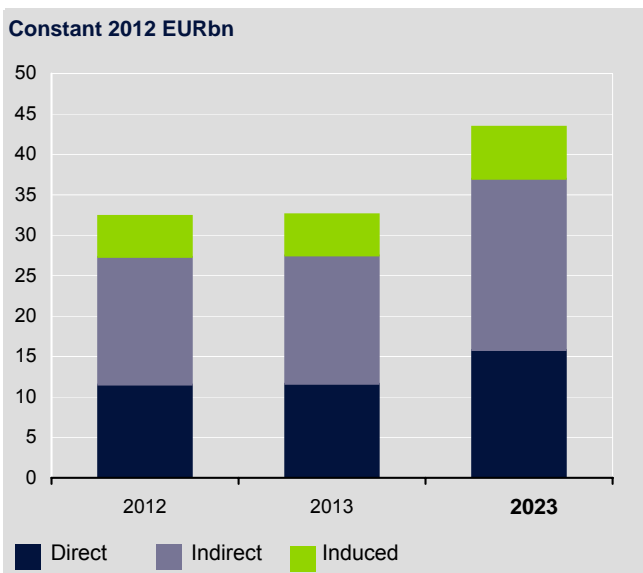
## NETHERLANDS: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was EUR32.4bn in 2012 (5.4% of GDP) and is expected to grow by 0.6% to EUR32.6bn (5.4% of GDP) in 2013.

It is forecast to rise by 2.9% pa to EUR43.4bn by 2023 (6.3% of GDP).

## NETHERLANDS: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



<sup>1</sup> All values are in constant 2012 prices & exchange rates

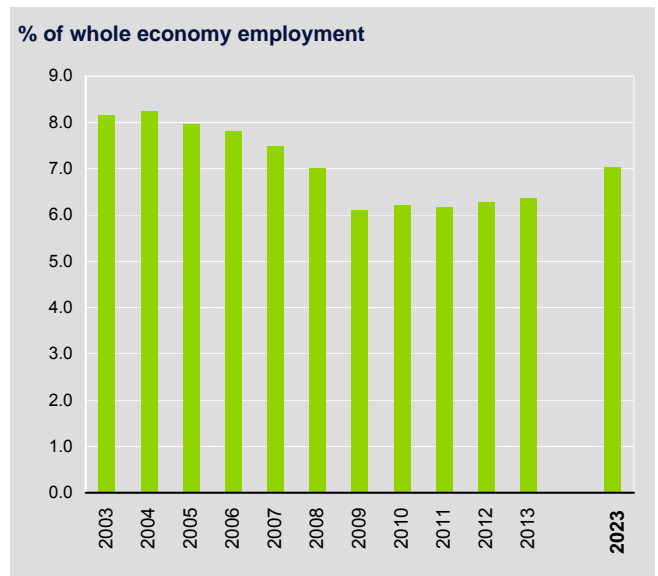
# Travel & Tourism's contribution to employment

Travel & Tourism generated 464,500 jobs directly in 2012 (6.3% of total employment) and this is forecast to grow by 0.4% in 2013 to 466,000 (6.4% of total employment).

This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2023, Travel & Tourism will account for 535,000 jobs directly, an increase of 1.4% pa over the next ten years.

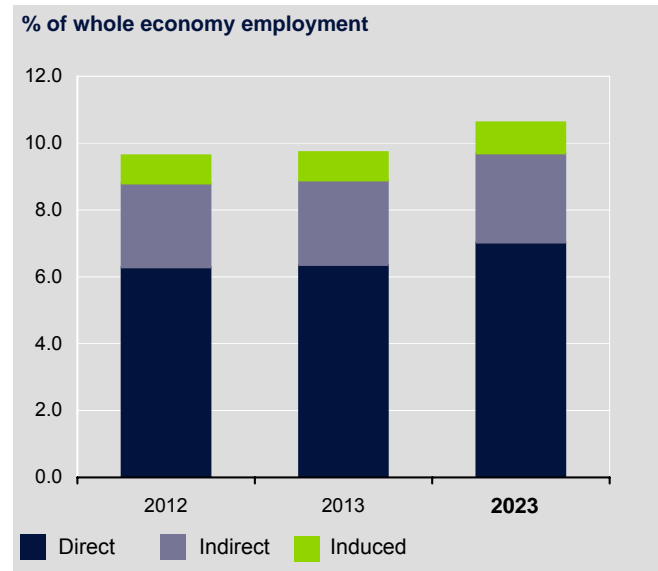
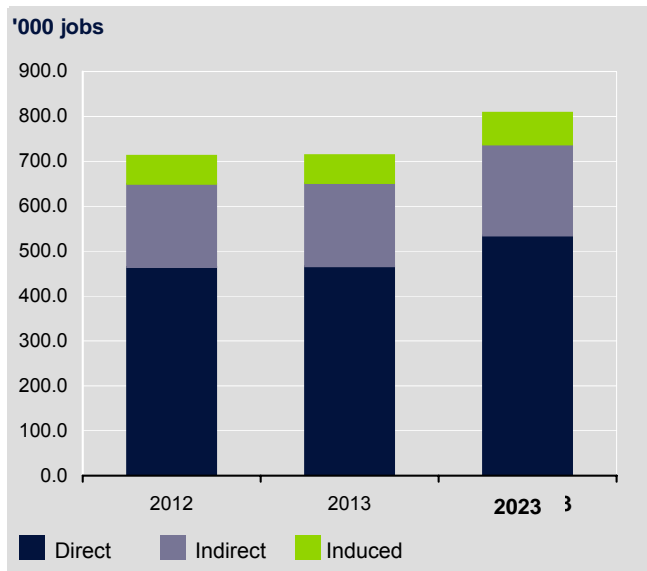
## NETHERLANDS: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 712,000 jobs in 2012 (9.6% of total employment). This is forecast to rise by 0.2% in 2013 to 713,500 jobs (9.7% of total employment).

By 2023, Travel & Tourism is forecast to support 808,000 jobs (10.6% of total employment), an increase of 1.3% pa over the period.

## NETHERLANDS: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT





# Visitor Exports and Investment<sup>1</sup>

## VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2012, Netherlands generated EUR15.5bn in visitor exports. In 2013, this is expected to grow by 1.1%, and the country is expected to attract 12,156,000 international tourist arrivals.

By 2023, international tourist arrivals are forecast to total 14,824,000, generating expenditure of EUR19.6bn, an increase of 2.3% pa.

## NETHERLANDS: VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

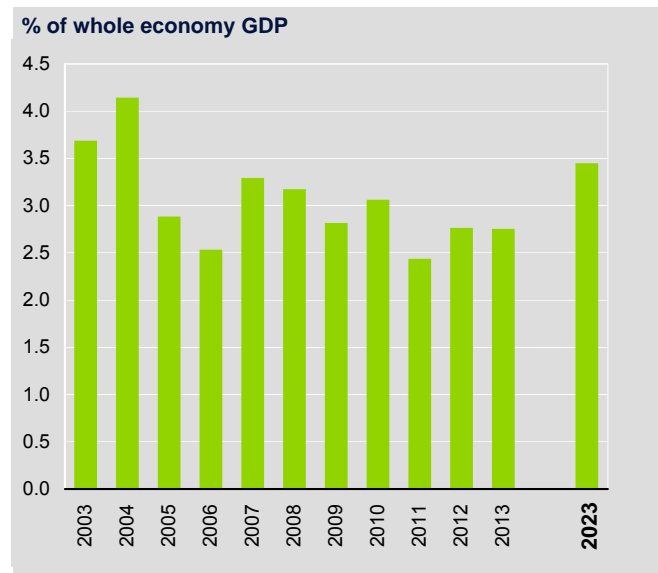
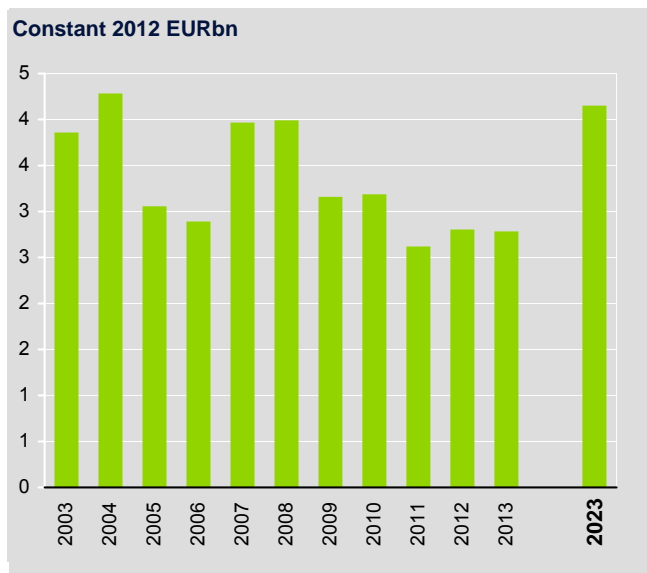


## INVESTMENT

Travel & Tourism is expected to have attracted capital investment of EUR2.8bn in 2012. This is expected to fall by 0.7% in 2013, and rise by 4.1% pa over the next ten years to EUR4.1bn in 2023.

Travel & Tourism's share of total national investment will rise from 2.7% in 2013 to 3.4% in 2023.

## NETHERLANDS: CAPITAL INVESTMENT IN TRAVEL & TOURISM



<sup>1</sup> All values are in constant 2012 prices & exchange rates

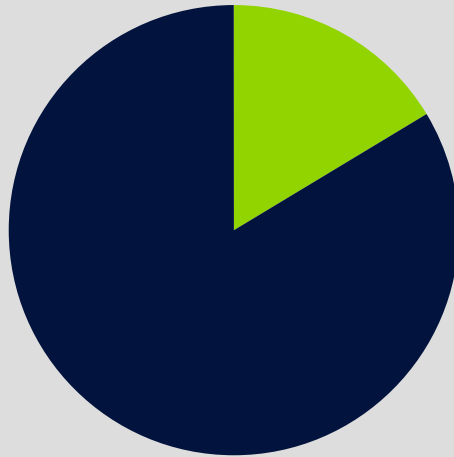
# Different components of Travel & Tourism<sup>1</sup>

## Netherlands

Travel & Tourism's Contribution to GDP:  
Business vs Leisure, 2012

Leisure spending **83.6%**

Business spending **16.4%**



Leisure travel spending (inbound and domestic) generated 83.6% of direct Travel & Tourism GDP in 2012 (EUR25.1bn) compared with 16.4% for business travel spending (EUR4.9bn).

Leisure travel spending is expected to grow by 0.8% in 2013 to EUR25.3bn, and rise by 3.2% pa to EUR34.6bn in 2023.

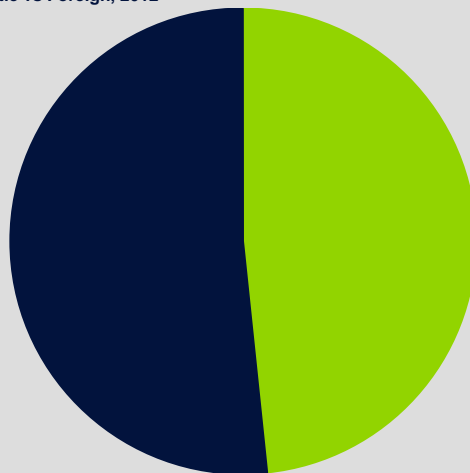
Business travel spending is expected to grow by 0.7% in 2013 to EUR5.0bn, and rise by 2.5% pa to EUR6.3bn in 2023.

## Netherlands

Travel & Tourism's Contribution to GDP:  
Domestic vs Foreign, 2012

Foreign visitor spending **51.6%**

Domestic spending **48.4%**



Domestic travel spending generated 48.4% of direct Travel & Tourism GDP in 2012 compared with 51.6% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 0.4% in 2013 to EUR14.6bn, and rise by 3.8% pa to EUR21.3bn in 2023.

Visitor exports are expected to grow by 1.1% in 2013 to EUR15.7bn, and rise by 2.3% pa to EUR19.6bn in 2023.

## Netherlands

Breakdown of Travel & Tourism's Total Contribution to GDP, 2012

Direct **35.6%**

Induced **15.6%**

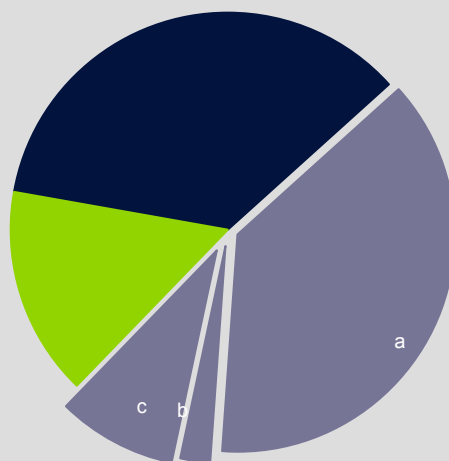
Indirect **48.8%**

*Indirect is the sum of:*

(a) Supply chain **37.8%**

(b) Investment **2.3%**

(c) Government collective **8.7%**



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

**The total contribution of Travel & Tourism to GDP is nearly three times greater than its direct contribution.**

<sup>1</sup> All values are in constant 2012 prices & exchange rates

# Country rankings: Absolute contribution, 2012

Travel & Tourism's Direct Contribution to GDP		2012 (US\$bn)
4	France	99.7
5	Italy	81.9
7	Spain	73.3
9	United Kingdom	58.4
10	Germany	55.4
	<b>World Average</b>	<b>17.2</b>
27	<b>Netherlands</b>	<b>14.8</b>
28	Switzerland	14.4
36	Belgium	10.1
47	Denmark	6.1
97	Luxembourg	1.1

Travel & Tourism's Total Contribution to GDP		2012 (US\$bn)
4	France	253.6
5	Italy	206.9
7	Spain	205.4
8	United Kingdom	168.5
9	Germany	153.8
	<b>World Average</b>	<b>52.3</b>
22	Switzerland	50.4
26	<b>Netherlands</b>	<b>41.6</b>
37	Belgium	25.2
42	Denmark	20.4
93	Luxembourg	3.1

Travel & Tourism's Direct Contribution to Employment		2012 '000 jobs
13	France	1189.2
14	Italy	1099.5
16	United Kingdom	994.0
18	Spain	893.9
	<b>World Average</b>	<b>793.7</b>
24	Germany	734.4
31	<b>Netherlands</b>	<b>464.4</b>
65	Switzerland	143.9
86	Belgium	101.4
97	Denmark	74.4
166	Luxembourg	5.6

Travel & Tourism's Total Contribution to Employment		2012 '000 jobs
13	France	2924.7
17	Spain	2690.9
18	Italy	2680.8
19	United Kingdom	2419.8
21	Germany	1985.5
	<b>World Average</b>	<b>1975.7</b>
40	<b>Netherlands</b>	<b>712.0</b>
59	Switzerland	474.6
87	Belgium	256.8
96	Denmark	198.9
166	Luxembourg	16.4

Travel & Tourism Capital Investment		2012 (US\$bn)
5	France	27.4
7	Germany	23.9
10	Spain	19.1
14	Italy	14.7
15	United Kingdom	14.1
	<b>World Average</b>	<b>4.2</b>
38	<b>Netherlands</b>	<b>3.6</b>
41	Switzerland	3.0
45	Denmark	2.7
51	Belgium	2.0
61	Luxembourg	1.1

Visitor Exports		2012 (US\$bn)
2	Spain	60.7
3	France	57.7
5	Germany	45.1
6	Italy	40.5
7	United Kingdom	40.0
17	<b>Netherlands</b>	<b>19.9</b>
18	Switzerland	19.6
29	Belgium	12.3
	<b>World Average</b>	<b>6.8</b>
43	Denmark	6.4
87	Luxembourg	1.4

The tables on pages 7-10 provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world average. The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

# Country rankings: Relative contribution, 2012

Travel & Tourism's Direct Contribution to GDP		2012 % share
49	Spain	5.4
	<b>World Average</b>	5.2
75	Italy	4.1
78	France	3.8
125	United Kingdom	2.4
128	Switzerland	2.3
144	Belgium	2.1
153	Denmark	1.9
154	<b>Netherlands</b>	1.9
157	Luxembourg	1.9
165	Germany	1.6

Travel & Tourism's Total Contribution to GDP		2012 % share
47	Spain	15.2
	<b>World Average</b>	14.1
78	Italy	10.3
86	France	9.7
109	Switzerland	8.0
122	United Kingdom	6.8
130	Denmark	6.5
146	Luxembourg	5.4
147	<b>Netherlands</b>	5.4
152	Belgium	5.2
164	Germany	4.5

Travel & Tourism's Direct Contribution to Employment		2012 % share
39	<b>Netherlands</b>	6.3
	<b>World Average</b>	5.4
51	Spain	5.2
58	Italy	4.8
67	France	4.4
98	United Kingdom	3.1
100	Switzerland	3.0
106	Denmark	2.8
124	Luxembourg	2.5
135	Belgium	2.2
156	Germany	1.8

Travel & Tourism's Total Contribution to Employment		2012 % share
43	Spain	15.5
	<b>World Average</b>	13.9
65	Italy	11.7
71	France	10.9
80	Switzerland	9.9
83	<b>Netherlands</b>	9.6
111	Denmark	7.6
112	United Kingdom	7.6
118	Luxembourg	7.2
139	Belgium	5.6
157	Germany	4.8

Travel & Tourism Investment Contribution to Total Capital Investment		2012 % share
50	Luxembourg	9.1
	<b>World Average</b>	8.1
70	Spain	7.4
95	France	5.2
104	Denmark	4.9
115	United Kingdom	4.1
118	Italy	4.0
119	Germany	4.0
149	<b>Netherlands</b>	2.8
159	Switzerland	2.4
169	Belgium	2.0

Visitor Exports Contribution to Total Exports		2012 % share
	<b>World Average</b>	16.6
65	Spain	13.8
91	France	8.0
100	Italy	6.7
103	Switzerland	6.3
115	United Kingdom	5.2
134	Denmark	3.7
147	Belgium	3.0
148	<b>Netherlands</b>	3.0
157	Germany	2.5
169	Luxembourg	1.5

# Country rankings: Real growth, 2013

Travel & Tourism's Direct Contribution to GDP		2013 % growth
	<b>World Average</b>	<b>3.0</b>
117	United Kingdom	2.2
122	Luxembourg	2.0
136	Denmark	1.3
147	<b>Netherlands</b>	<b>0.9</b>
152	Belgium	0.7
153	France	0.7
156	Switzerland	0.6
173	Germany	-0.6
175	Italy	-1.1
176	Spain	-1.2

Travel & Tourism's Total Contribution to GDP		2013 % growth
95	Luxembourg	3.4
	<b>World Average</b>	<b>3.0</b>
129	United Kingdom	1.7
144	Denmark	1.3
147	Switzerland	1.3
149	France	1.1
158	<b>Netherlands</b>	<b>0.6</b>
169	Belgium	0.0
176	Germany	-1.4
177	Italy	-1.4
179	Spain	-1.8

Travel & Tourism's Direct Contribution to Employment		2013 % growth
83	United Kingdom	2.9
77	Luxembourg	1.7
	<b>World Average</b>	<b>1.3</b>
60	Switzerland	1.1
133	<b>Netherlands</b>	<b>0.4</b>
145	France	0.1
97	Italy	-0.3
142	Belgium	-0.4
123	Denmark	-0.7
162	Spain	-1.3
170	Germany	-1.3

Travel & Tourism's Total Contribution to Employment		2013 % growth
61	Luxembourg	3.0
	<b>World Average</b>	<b>1.7</b>
98	Switzerland	1.5
110	United Kingdom	1.1
122	France	0.4
126	<b>Netherlands</b>	<b>0.2</b>
147	Denmark	-0.8
158	Italy	-1.1
159	Belgium	-1.2
175	Germany	-2.1
176	Spain	-2.1

Travel & Tourism Investment		2013 % growth
16	Switzerland	9.9
50	Luxembourg	6.6
79	France	4.8
	<b>World Average</b>	<b>3.9</b>
122	Denmark	2.6
144	Germany	0.9
148	United Kingdom	0.6
151	Belgium	0.4
164	<b>Netherlands</b>	<b>-0.7</b>
178	Italy	-3.2
180	Spain	-3.3

Visitor Exports		2013 % growth
	<b>World Average</b>	<b>2.8</b>
99	Luxembourg	2.4
101	Switzerland	2.3
109	United Kingdom	2.0
113	France	1.8
125	<b>Netherlands</b>	<b>1.1</b>
126	Germany	1.1
138	Denmark	0.5
166	Spain	-1.9
167	Italy	-1.9
169	Belgium	-2.4

# Country rankings: Long term growth, 2013 - 2023

Travel & Tourism's Direct Contribution to GDP		2013 - 2023 % growth pa
72	United Kingdom	4.8
	<b>World Average</b>	<b>4.2</b>
135	Luxembourg	3.3
144	<b>Netherlands</b>	<b>3.1</b>
147	Denmark	3.1
164	Switzerland	2.5
168	Belgium	2.3
170	Italy	2.3
175	Germany	1.9
178	France	1.8
184	Spain	1.0

Travel & Tourism's Total Contribution to GDP		2013 - 2023 % growth pa
96	United Kingdom	4.4
	<b>World Average</b>	<b>4.2</b>
131	Luxembourg	3.4
151	<b>Netherlands</b>	<b>2.9</b>
168	Denmark	2.3
171	Italy	2.0
173	Switzerland	1.9
174	Belgium	1.8
179	Germany	1.5
181	France	1.4
183	Spain	1.1

Travel & Tourism's Direct Contribution to Employment		2013 - 2023 % growth pa
60	Switzerland	2.8
77	Luxembourg	2.5
83	United Kingdom	2.4
97	Italy	2.1
	<b>World Average</b>	<b>2.0</b>
123	Denmark	1.6
133	<b>Netherlands</b>	<b>1.4</b>
142	Belgium	1.1
145	France	1.1
162	Spain	0.6
170	Germany	0.1

Travel & Tourism's Total Contribution to Employment		2013 - 2023 % growth pa
57	Luxembourg	2.7
	<b>World Average</b>	<b>2.5</b>
79	United Kingdom	2.3
102	Switzerland	2.0
120	Italy	1.5
130	<b>Netherlands</b>	<b>1.3</b>
148	Denmark	0.8
153	France	0.6
154	Belgium	0.6
160	Spain	0.5
170	Germany	-0.2

Travel & Tourism Investment Contribution to Capital Investment		2013 - 2023 % growth pa
	<b>World Average</b>	<b>5.0</b>
113	<b>Netherlands</b>	<b>4.1</b>
130	Germany	3.4
134	Spain	3.4
135	United Kingdom	3.3
147	Luxembourg	2.9
155	Denmark	2.7
158	France	2.5
159	Italy	2.4
160	Belgium	2.4
181	Switzerland	0.8

Visitor Exports Contribution to Exports		2013 - 2023 % growth pa
49	United Kingdom	5.2
59	Switzerland	5.0
	<b>World Average</b>	<b>4.0</b>
113	Luxembourg	3.6
123	Germany	3.3
159	<b>Netherlands</b>	<b>2.3</b>
168	France	1.8
169	Denmark	1.7
171	Belgium	1.6
174	Spain	1.4
177	Italy	1.1

# Summary tables: Estimates & Forecasts

<b>Netherlands</b>	2012 EURbn <sup>1</sup>	2012 % of total	2013 Growth <sup>2</sup>	EURbn <sup>1</sup>	2023 % of total	Growth <sup>3</sup>
Direct contribution to GDP	11.5	1.9	0.9	15.8	2.3	3.1
Total contribution to GDP	32.4	5.4	0.6	43.4	6.3	2.9
Direct contribution to employment <sup>4</sup>	464	6.3	0.4	535	7.0	1.4
Total contribution to employment <sup>4</sup>	712	9.6	0.2	808	10.6	1.3
Visitor exports	15.5	3.0	1.1	19.6	2.9	2.3
Domestic spending	14.5	2.4	0.4	21.3	3.1	3.8
Leisure spending	25.1	1.6	0.8	34.6	1.9	3.2
Business spending	4.9	0.3	0.7	6.3	0.4	2.5
Capital investment	2.8	2.8	-0.7	4.1	3.4	4.1

<sup>1</sup>2012 constant prices & exchange rates; <sup>2</sup>2013 real growth adjusted for inflation (%); <sup>3</sup>2013-2023 annualised real growth adjusted for inflation (%); <sup>4</sup>'000 jobs

<b>Europe</b>	2012 US\$bn <sup>1</sup>	2012 % of total	2013 Growth <sup>2</sup>	US\$bn <sup>1</sup>	2023 % of total	Growth <sup>3</sup>
Direct contribution to GDP	612.9	2.9	0.8	820.7	3.0	2.9
Total contribution to GDP	1,736.1	8.2	0.6	2,287.4	8.4	2.7
Direct contribution to employment <sup>4</sup>	10,968	2.8	1.2	12,706	3.2	1.4
Total contribution to employment <sup>4</sup>	30,804	8.0	0.7	34,147	8.6	1.0
Visitor exports	513.8	5.3	1.2	717.9	4.9	3.3
Domestic spending	771.4	3.6	1.0	1,024.0	3.8	2.8
Leisure spending	998.8	2.2	0.9	1,363.5	2.3	3.0
Business spending	286.4	0.6	0.9	381.2	0.6	2.8
Capital investment	185.9	4.7	0.8	271.7	4.8	3.8

<sup>1</sup>2012 constant prices & exchange rates; <sup>2</sup>2013 real growth adjusted for inflation (%); <sup>3</sup>2013-2023 annualised real growth adjusted for inflation (%); <sup>4</sup>'000 jobs

<b>Worldwide</b>	2012 US\$bn <sup>1</sup>	2012 % of total	2013 Growth <sup>2</sup>	US\$bn <sup>1</sup>	2023 % of total	Growth <sup>3</sup>
Direct contribution to GDP	2,056.6	2.9	3.1	3,249.2	3.1	4.4
Total contribution to GDP	6,630.4	9.3	3.2	10,507.1	10.0	4.4
Direct contribution to employment <sup>4</sup>	101,118	3.4	1.2	125,288	3.7	2.0
Total contribution to employment <sup>4</sup>	261,394	8.7	1.7	337,819	9.9	2.4
Visitor exports	1,243.0	5.4	3.1	1,934.8	4.8	4.2
Domestic spending	2,996.3	4.2	3.2	4,831.2	4.7	4.6
Leisure spending	3,222.1	2.2	3.2	5,196.0	2.3	4.6
Business spending	1,017.4	0.7	3.1	1,572.8	0.7	4.1
Capital investment	764.7	4.7	4.2	1,341.4	4.9	5.3

<sup>1</sup>2012 constant prices & exchange rates; <sup>2</sup>2013 real growth adjusted for inflation (%); <sup>3</sup>2013-2023 annualised real growth adjusted for inflation (%); <sup>4</sup>'000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and services. Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment

# The economic contribution of Travel & Tourism: Real 2012 prices

<b>Netherlands</b> (EURbn, real 2012 prices)	2007	2008	2009	2010	2011	2012	2013E	2023F
1. Visitor exports	14.8	13.9	12.7	13.8	14.6	15.5	15.7	19.6
2. Domestic expenditure (includes government individual spending)	19.7	18.6	15.2	14.9	14.9	14.5	14.6	21.3
3. Internal tourism consumption (= 1 + 2)	34.5	32.5	27.9	28.7	29.5	30.0	30.3	40.9
4. Purchases by tourism providers, including imported goods (supply chain)	-20.7	-19.8	-16.9	-17.6	-18.2	-18.5	-18.7	-25.1
5. <b>Direct contribution of Travel &amp; Tourism to GDP</b> (= 3 + 4)	13.9	12.7	11.0	11.1	11.3	11.5	11.6	15.8
<b>Other final impacts (indirect &amp; induced)</b>	17.2	15.8	13.6	13.8	14.0	14.3	14.4	19.6
6. Domestic supply chain								
7. Capital investment	4.0	4.0	3.1	3.2	2.6	2.8	2.8	4.1
8. Government collective spending	2.9	3.0	3.2	3.3	3.3	3.3	3.3	3.9
9. Imported goods from indirect spending	-2.6	-3.6	-3.5	-4.2	-4.3	-4.6	-4.6	-6.4
10. Induced	7.0	6.3	5.6	5.3	5.1	5.1	5.1	6.4
11. <b>Total contribution of Travel &amp; Tourism to GDP</b> (= 5 + 6 + 7 + 8 + 9 + 10)	42.3	38.1	33.1	32.5	32.0	32.4	32.6	43.4
<b>Employment impacts ('000)</b>								
12. Direct contribution of Travel & Tourism to employment	546.3	525.4	455.8	459.1	456.3	464.4	466.1	534.5
13. <b>Total contribution of Travel &amp; Tourism to employment</b>	892.5	840.4	732.9	721.8	702.3	712.0	713.6	808.1
<b>Other indicators</b>								
14. Expenditure on outbound travel	14.7	15.3	15.3	14.9	14.8	15.6	15.7	18.3



# The economic contribution of Travel & Tourism: Nominal prices

<b>Netherlands</b> <b>(EURbn, nominal prices)</b>	2007	2008	2009	2010	2011	2012	2013E	2023F
1. Visitor exports	14.0	13.5	12.3	13.5	14.5	15.5	15.9	22.8
2. Domestic expenditure (includes government individual spending)	18.7	18.0	14.8	14.6	14.8	14.5	14.8	24.7
3. Internal tourism consumption (= 1 + 2)	32.8	31.5	27.1	28.1	29.3	30.0	0.5	47.5
4. Purchases by tourism providers, including imported goods (supply chain)	-19.6	-19.1	-16.4	-17.2	-18.1	-18.5	11.3	-29.1
5. <b>Direct contribution of Travel &amp; Tourism to GDP</b> (= 3 + 4)	13.2	12.3	10.7	10.9	11.2	11.5	11.8	18.3
<b>Other final impacts (indirect &amp; induced)</b>	16.3	15.3	13.2	13.5	13.9	14.3	14.6	22.7
6. Domestic supply chain								
7. Capital investment	3.8	3.9	3.1	3.1	2.6	2.8	2.8	4.8
8. Government collective spending	2.8	2.9	3.2	3.2	3.2	3.3	3.3	4.5
9. Imported goods from indirect spending	-2.5	-3.5	-3.4	-4.1	-4.3	-4.6	-4.7	-7.5
10. Induced	6.7	6.1	5.4	5.2	5.1	5.1	5.1	7.5
11. <b>Total contribution of Travel &amp; Tourism to GDP</b> (= 5 + 6 + 7 + 8 + 9 + 10)	40.2	36.9	32.1	31.8	31.8	32.4	33.0	50.4
<b>Employment impacts ('000)</b>								
12. Direct contribution of Travel & Tourism to employment	546.3	525.4	455.8	459.1	456.3	464.4	466.1	534.5
13. <b>Total contribution of Travel &amp; Tourism to employment</b>	892.5	840.4	732.9	721.8	702.3	712.0	713.6	808.1
<b>Other indicators</b>								
14. Expenditure on outbound travel	13.9	14.9	14.9	14.6	14.7	15.6	15.9	21.3

\*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

# The economic contribution of Travel & Tourism: Growth

<b>Netherlands</b>								
<b>Growth<sup>1</sup> (%)</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013E</b>	<b>2023F<sup>2</sup></b>
1. Visitor exports	2.3	-5.8	-8.8	8.3	6.1	6.1	1.1	2.3
2. Domestic expenditure (includes government individual spending)	-2.3	-5.9	-17.9	-1.9	-0.1	-2.5	0.4	3.8
3. Internal tourism consumption (= 1 + 2)	-0.3	-5.8	-13.8	2.7	2.8	1.7	0.8	3.0
4. Purchases by tourism providers, including imported goods (supply chain)	-0.1	-4.4	-14.3	3.7	3.6	1.8	0.7	3.0
5. <b>Direct contribution of Travel &amp; Tourism to GDP</b> (= 3 + 4)	-0.8	-8.2	-13.6	1.3	1.8	1.6	0.9	3.1
<b>Other final impacts (indirect &amp; induced)</b>	-0.8	-8.2	-13.6	1.3	1.8	1.6	0.9	3.1
6. Domestic supply chain								
7. Capital investment	37.4	0.6	-20.9	0.9	-17.9	7.1	-0.7	4.1
8. Government collective spending	6.3	2.6	7.9	0.7	-0.6	1.1	0.4	1.6
9. Imported goods from indirect spending	1.0	16.4	-6.3	12.3	2.5	4.6	0.7	3.2
10. Induced	2.2	-10.9	-10.2	-6.0	-3.2	-0.8	0.2	2.4
11. <b>Total contribution of Travel &amp; Tourism to GDP</b> (= 5 + 6 + 7 + 8 + 9 + 10)	2.7	-10.0	-13.1	-2.0	-1.3	1.0	0.6	2.9
<b>Employment impacts ('000)</b>								
12. Direct contribution of Travel & Tourism to employment	-1.3	-3.8	-13.3	0.7	-0.6	1.8	0.4	1.4
13. <b>Total contribution of Travel &amp; Tourism to employment</b>	0.4	-5.8	-12.8	-1.5	-2.7	1.4	0.2	1.3
<b>Other indicators</b>								
14. Expenditure on outbound travel	0.3	4.3	-0.1	-3.0	-0.6	5.6	0.6	1.6

<sup>1</sup>2007-2012 real annual growth adjusted for inflation (%); <sup>2</sup>2013-2023 annualised real growth adjusted for inflation (%)

# 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	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				Bangladesh	
					Gabon		St Kitts & Nevis					India	Bosnia Herzegovina
					Gambia		St Lucia					Maldives	Croatia
					Ghana		St Vincent & the Grenadines			Nepal		Georgia	
					Guinea		Trinidad & Tobago			Pakistan		Iceland	
					Ivory Coast		UK Virgin Islands			Sri Lanka		Kazakhstan	
					Kenya		US Virgin Islands			SOUTHEAST ASIA		Brunei	
					Lesotho		Argentina					Cambodia	Kyrgyzstan
					Madagascar		Belize					Indonesia	Macedonia
					Malawi		Bolivia					Laos	Moldova
					Mali		Brazil	Malaysia				Montenegro	
					Mauritius		Chile	Myanmar				Norway	
					Mozambique		Colombia	Philippines				Russian Federation	
				Namibia	Costa Rica		Singapore	Serbia					
				Niger	El Salvador		Thailand	Switzerland					
				Nigeria	Ecuador		Vietnam	Turkey					
				Republic of Congo	Guatemala		EUROPEAN UNION	Austria					
				Reunion	Guyana			Bulgaria		Ukraine			
				Rwanda	Honduras			Cyprus		Uzbekistan			
				Sao Tome & Principe	Nicaragua			Czech Republic		MIDDLE EAST	Bahrain		
				Senegal	Panama			Denmark			Iran		
				Seychelles	Paraguay			Estonia			Iraq		
				Sierra Leone	Peru			Finland			Israel		
				South Africa	Suriname			France			Jordan		
				Sudan	Uruguay			Germany			Kuwait		
				Swaziland	Venezuela			Greece			Lebanon		
				Tanzania	Canada		Hungary	Oman					
				Togo	Mexico		Ireland	Qatar					
	Uganda	USA		Italy	Saudi Arabia								
	Zambia			Latvia	Syria								
	Zimbabwe				UAE								
					Yemen								

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.

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**Mark Harms**  
Chairman & CEO

JUMEIRAH GROUP  
**Gerald Lawless**  
President & Group CEO

MANDARIN ORIENTAL  
**Edouard Ettedgui**  
Group Chief Executive

SILVERSEA CRUISES  
**Manfredi Lefebvre d'Ovidio di  
Balsorano de Clunieres**  
Chairman

THE TRAVEL CORPORATION  
**Brett Tollman**  
President & Chief Executive

WYNDHAM WORLDWIDE  
**Stephen P Holmes**  
Chairman & CEO

## EXECUTIVE COMMITTEE

ABERCROMBIE & KENT  
**Geoffrey J W Kent**  
Founder, Chairman & CEO

ACCOR  
**Denis Hennequin**  
Chairman & CEO

AMERICAN EXPRESS COMPANY  
**William Glenn**  
President, Global Merchant Network  
Group

BHARAT HOTELS  
**Jyotsna Suri**  
Chairperson & Managing Director

CARLSON  
**Douglas Anderson**  
President & CEO Carlson Wagonlit Travel

EMIRATES  
**Gary Chapman**  
President Group Services & Dnata,  
Emirates Group

HILTON WORLDWIDE  
**Christopher J Nassetta**  
President & CEO

INTERCONTINENTAL HOTELS GROUP  
**Richard Solomons**  
Chief Executive

MARRIOTT INTERNATIONAL  
**JW Marriott, Jr**  
Chairman  
**Arne M Sorenson**  
President & CEO

OUTRIGGER ENTERPRISES GROUP  
**Dr Richard R Kelley**  
Chairman Emeritus

REVOLUTION PLACES  
**Philippe Bourguignon**  
Vice Chairman

RIOFORTE INVESTMENTS SA  
**Manuel Fernando Espirito Santo**  
Chairman

SABRE HOLDINGS  
**Tom Klein**  
President

SHUN TAK HOLDINGS  
**Pansy Ho**  
Managing Director

JTB CORP  
**Hiroimi Tagawa**  
President & CEO

TRAVEL GUARD WORLDWIDE  
**Jeffrey C Rutledge**  
Chairman & CEO

TRAVELPORT  
**Gordon Wilson**  
President & CEO

TSOGO SUN GROUP  
**Jabu Mabuza**  
Deputy Chairman

VISITBRITAIN  
**Christopher Rodrigues, CBE**  
Chairman

## GLOBAL MEMBERS

ALTOUR  
**Alexandre Chemla**  
President

AMADEUS IT GROUP SA  
**Luis Maroto**  
President & CEO

AVIS BUDGET GROUP  
**Ronald L Nelson**  
Chairman & CEO

BEIJING CAPITAL  
INTERNATIONAL AIRPORT CO  
**DONG Zhiyi**  
Chairman

**ZHANG Guanghui**  
President & CEO

BEIJING TOURISM GROUP  
**LIU Yi**  
President

BEST DAY TRAVEL  
**Fernando García Zalvidea**  
President & Founder

BOSCOLO GROUP  
**Giorgio Boscolo**  
CEO

BRITISH AIRWAYS  
**Keith Williams**  
Chief Executive Officer

CANNERY ROW COMPANY  
**Ted J Balestreri**  
Chairman & CEO

CHINA INTERNATIONAL TRAVEL  
SERVICE, HEAD OFFICE (CITS)  
**YU Ningning**  
President

CHINA SOUTHERN AIRLINES  
**TAN Wangeng**  
President & CEO

COSTA CRUISES  
**Pier Luigi Foschi**  
Chairman of the Board

CTRIP.COM INTERNATIONAL  
**Min Fan**  
CEO

DEPARTMENT OF TOURISM &  
COMMERCE MARKETING,  
GOVERNMENT OF DUBAI  
**Khalid A bin Sulayem**  
Director General

DIAMOND RESORTS  
**Stephen J Cloobek**  
Founder & Chairman

DLA PIPER  
**Sir Nigel Knowles**  
Co-CEO & Managing Partner

DUBAILAND  
**Mohammed Al Habbai**  
CEO

DUBAI AIRPORTS INTERNATIONAL  
**Paul Griffiths**  
CEO

EAST JAPAN RAILWAY COMPANY  
**Satoshi Seino**  
Chairman & Director

EXPEDIA INC  
**Dara Khosrowshahi**  
President & CEO

FAIRMONT HOTELS & RESORTS  
**Jennifer Fox**  
President

GLOBAL BLUE GROUP  
**Per Setterberg**  
President & CEO

HERTZ CORPORATION  
**Mark Frissora**  
Chairman & CEO,

**Michel Taride**  
President, Hertz International

HNA GROUP  
**CHEN Feng**  
Chairman of the Board

HOGG ROBINSON GROUP  
**David Radcliffe**  
Chief Executive

HONG KONG & SHANGHAI HOTELS  
**Clement Kwok**  
CEO & MD

HOTELPLAN GROUP  
**Hans Lerch**  
Vice Chairman & CEO

HUANGSHAN TOURISM GROUP  
**XU Jiwei**  
Chairman

HYATT HOTELS CORPORATION  
**Mark S Hoptlamazian**  
President and CEO

IBM  
**Marty Salfen**  
General Manager, Global Travel &  
Transportation Industry

INDIAN HOTELS COMPANY  
**RK Krishna Kumar**  
Vice Chairman

INTERNATIONAL AIRLINES GROUP  
**Willie Walsh**  
Chief Executive

INTERSTATE HOTELS & RESORTS  
**Jim Abrahamson**  
CEO

JONES LANG LASALLE HOTELS  
**Arthur de Haast**  
Chairman

LEBUA HOTELS & RESORTS  
**Rattawadee Bualert**  
President

**Deepak Ohri**  
CEO

LOEWS HOTELS  
**Jonathan M Tisch**  
Chairman & CEO

LOS ANGELES WORLD AIRPORTS  
**Gina Marie Lindsey**  
Executive Director



# WTTC Members

## LOTTE

**Dong-Bin Shin**  
Chairman

## MELIÁ HOTELS INTERNATIONAL

**Sebastián Escarrer**  
Vice Chairman

## MESSE BERLIN GMBH

**Raimund Hosch**  
President & CEO

## MGM RESORTS INTERNATIONAL

**Jim Murren**  
CEO

## MISSION HILLS GROUP

**Dr Ken Chu**  
Chairman & CEO

## ORBIZ WORLDWIDE

**Barney Harford**  
CEO

## OTI HOLDING

**Ayhan Bektas**  
Chairman

## OZALTIN HOLDING

**Öznur Özdemir**  
Vice Chairman

## PALACE RESORTS

**José Chapur Zahoul**  
President

## PAN PACIFIC HOTEL GROUP

**Patrick Imbardelli**  
President & CEO

## QUNAR

**CC Zhuang**  
Co-Founder & CEO

## RADISSON EDWARDIAN HOTELS

**Jasminder Singh**  
Chairman & CEO

## REED TRAVEL EXHIBITIONS

**Richard Mortimore**  
Managing Director

## RELAIS & CHÂTEAUX

**Jaume Tàpies**  
President

## ROYAL CARIBBEAN CRUISES

**Richard D Fain**  
Chairman & CEO

## R TAUCK & PARTNERS

**Robin Tauck**  
President

## S-GROUP CAPITAL MANAGEMENT

**Vladimir Yakushev**  
Managing Partner

## SHANGRI-LA INTERNATIONAL HOTEL MANAGEMENT

**Greg Dogan**  
President & CEO

## SHANGHAI JIN JIANG INTERNATIONAL HOTELS

**YANG Weimin**  
CEO

## SOUTH AFRICAN AIRWAYS

**Sizakele Mzimela**  
CEO

## SPRING INTERNATIONAL TRAVEL SERVICES

**YU Wan**  
Vice-President

## STARWOOD HOTELS & RESORTS WORLDWIDE

**Frits D van Paasschen**  
President & CEO

## TAJ HOTELS RESORTS & PALACES

**Raymond Bickson**  
Managing Director & CEO

## TAP PORTUGAL

**Fernando Pinto**  
CEO

## TRANSAERO AIRLINES

**Alexander Pleshakov**  
Chairman

## TRAVEL LEADERS

**Michael Batt**  
Chairman & CEO

## UNITED AIRLINES

**Jeff Smisek**  
President & CEO

## Jim Compton

Executive Vice President & Chief Revenue Officer

## VALUE RETAIL

**Desiree Bollier**  
CEO

## VIRTUOSO

**Matthew D Upchurch CTC**  
CEO

## WILDERNESS SAFARIS

**Andy Payne**  
CEO

## ZAGAT SURVEY LLC

**Tim Zagat**  
Co-Founder, Co-Chair & CEO

## INDUSTRY PARTNERS

### BOSTON CONSULTING GROUP

**Dr Achim Fecht**  
Senior Partner & Managing Director

**Dr Daniel Stelter**

Senior Partner & Managing Director

## THE COCA-COLA COMPANY

**Stefanie D Miller**  
Group Vice President, Strategic Partnership Marketing

## DELOITTE

**Adam Weissenberg**  
Vice Chairman & Partner, Deloitte & Touche LLP

## GOOGLE

**Rob Torres**  
Managing Director for Travel

## JCB

**Koremitsu Sannomiya**  
President & Chief Operating Officer

## SPENCER STUART

**Jerry Noonan**  
Global Consumer Leader

## TOSHIBA CORPORATION

**Atsutoshi Nishida**  
Chairman of the Board

## REGIONAL MEMBERS

### APPLE LEISURE GROUP

**Alex Zozaya**  
CEO

### DOURO AZUL

**Mario Ferreira**  
CEO

### EL CID RESORTS

**Carlos Berdegué**  
CEO

### JA RESORTS AND HOTELS

**Kevin Wallace**  
President & CEO

### MAKEMYTRIP.COM

**Deep Kalra**  
Founder & Chief Executive

### NORTHERN CAUCASUS RESORTS

**Alexey Anatolyevich**  
Director General

### ROTANA HOTEL MANAGEMENT CORPORATION

**Selim El Zyr**  
President & CEO

### SHKP HOTELS

**Ricco De Blank**  
CEO

### SWAIN TOURS

**Ian Swain**  
President

### TREND OPERADORA LTDA

**Luis Paulo Luppa**  
CEO

## HONORARY MEMBERS

### ACCOR

**Gérard Pélissou**  
Co-Chairman, Supervisory Board

### AMERICAN EXPRESS COMPANY

**Jonathan S Linen**  
Adviser to Chairman

### ANDRÉ JORDAN GROUP

**André Jordan**  
Chairman

### THE HERTZ CORPORATION

**Frank Olsen**  
Retired Chairman of the Board

### TOSCANA VILLE & CASTELLI

**Tommaso Zanzotto**  
President

### UNIVERSAL MEDIA

**Carl Ruderman**  
Chairman

## CHAIRMAN EMERITUS

### RRE VENTURES

**James D Robinson III**  
General Partner  
WTTC Chairman (1990-1994)

## IMMEDIATE PAST CHAIRMAN

### ABERCROMBIE & KENT

**Geoffrey J W Kent**  
Founder, Chairman & CEO  
WTTC Chairman (2007-2012)

## FORMER CHAIRMEN

### GLOBAL ALLIANCE ADVISORS LLC

**Vincent A Wolfington**  
Chairman

WTTC Chairman (2004-2007)

### INTERCONTINENTAL HOTELS GROUP

**Sir Ian Prosser**  
Retired Chairman  
WTTC Chairman (2001-2003)

### AMERICAN EXPRESS

**Harvey Golub**  
Retired Chairman & CEO  
WTTC Chairman (1996-2001)

### ROBERT H BURNS HOLDINGS

**Robert H Burns**  
Chairman  
WTTC Chairman (1994-1996)

## IMMEDIATE PAST PRESIDENT

### CREWE ASSOCIATES

**Jean-Claude Baumgarten**  
Chairman & MD







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