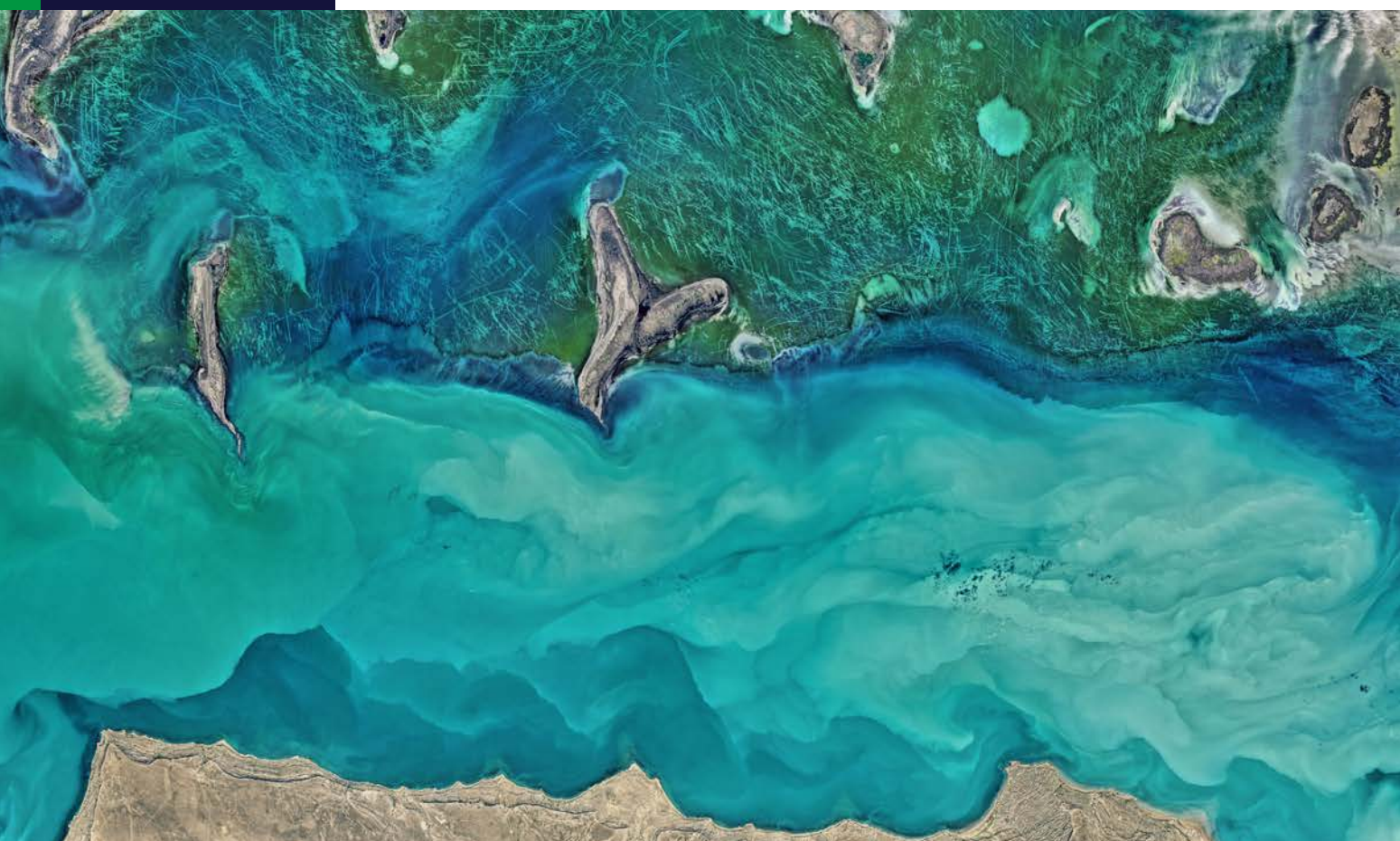



WORLD
TRAVEL &
TOURISM
COUNCIL

TRAVEL & TOURISM
ECONOMIC IMPACT 2017
INDONESIA



A satellite image of the North Caspian Sea, showing a vast expanse of dark blue water. The right side of the image features a large, irregular landmass with a textured, brownish-gold appearance, likely representing the coast of Russia or Azerbaijan. The water surface is marked by numerous swirling patterns and lighter blue patches, indicating ice scours and sediment transport. The overall scene is captured from a high-altitude perspective, showing the intricate details of the sea's surface and the surrounding land.

For more information, please contact:

ROCHELLE TURNER | Research Director
rochelle.turner@wttc.org

EVELYNE FREIERMUTH | Policy & Research Manager
evelyne.freiermuth@wttc.org

COVER: Ice Scours The North Caspian Sea - NASA
INSIDE COVER: Prince Regent National Park, Australia - NASA



FOREWORD

The United Nations has designated 2017 the *International Year of Sustainable Tourism for Development*. As one of the world's largest economic sectors, Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. The International Year provides an enormous opportunity to further showcase the tremendous economic, social, cultural, environmental, and heritage value that the sector can bring.

The right policy and investment decisions are only made with empirical evidence. For over 25 years, the World Travel & Tourism Council (WTTC) has been providing this evidence, quantifying the economic and employment impact of Travel & Tourism. This year, the 2017 Annual Economic Reports cover 185 countries and 26 regions of the world, providing the necessary data on 2016 performance as well as unique 10-year forecasts on the sector's potential.

Despite the ever-increasing and unpredictable shocks from terrorist attacks and political instability, to health pandemics and natural disasters, Travel & Tourism continued to show its resilience in 2016, contributing direct GDP growth of 3.1% and supporting 6 million net additional jobs in the sector. In total, Travel & Tourism generated US\$7.6 trillion (10.2% of global GDP) and 292 million jobs in 2016, equivalent to 1 in 10 jobs in the global economy. The sector accounted for 6.6% of total global exports and almost 30% of total global service exports.

For the sixth successive year, growth in Travel & Tourism outpaced that of the global economy (2.5%). Additionally in 2016, direct Travel & Tourism GDP growth not only outperformed the economy-wide growth recorded in 116 of the 185 countries covered by the annual economic impact research (including in major Travel & Tourism economies such as Australia, Canada, China, India, Mexico and South Africa), but it also was stronger than the growth recorded in the financial and business services, manufacturing, public services, retail and distribution, and transport sectors.

The outlook for the Travel & Tourism sector in 2017 remains robust and will continue to be at the forefront of wealth and employment creation in the global economy, despite the emergence of a number of challenging headwinds. Direct Travel & Tourism GDP growth is expected to accelerate to 3.8%, up from 3.1% in 2016. As nations seem to be looking increasingly inward, putting in place barriers to trade and movement of people, the role of Travel & Tourism becomes even more significant, as an engine of economic development and as a vehicle for sharing cultures, creating peace, and building mutual understanding.

Over the longer term, growth of the Travel & Tourism sector will continue to be strong so long as the investment and development takes place in an open and sustainable manner. Enacting pro-growth travel policies that share benefits more equitably can foster a talent and business environment necessary to enable Travel & Tourism to realise its potential. In doing so, not only can we expect the sector to support over 380 million jobs by 2027, but it will continue to grow its economic contribution, providing the rationale for the further protection of nature, habitats, and biodiversity.

WTTC is proud to continue to provide the evidence base required in order to help both public and private bodies make the right decisions for the future growth of a sustainable Travel & Tourism sector.



David Scowsill
President & CEO



CONTENTS

THE ECONOMIC IMPACT OF TRAVEL & TOURISM MARCH 2017

FOREWORD

2017 ANNUAL RESEARCH: KEY FACTS	1
DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM	2
TRAVEL & TOURISM'S CONTRIBUTION TO GDP	3
TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT	4
VISITOR EXPORTS AND INVESTMENT	5
DIFFERENT COMPONENTS OF TRAVEL & TOURISM	6
COUNTRY RANKINGS: ABSOLUTE CONTRIBUTION, 2016	7
COUNTRY RANKINGS: RELATIVE CONTRIBUTION, 2016	8
COUNTRY RANKINGS: REAL GROWTH, 2016	9
COUNTRY RANKINGS: LONG TERM GROWTH, 2017 - 2027	10
SUMMARY TABLES: ESTIMATES & FORECASTS	11
THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: REAL 2016 PRICES ____	12
THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES ____	13
THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: GROWTH	14
GLOSSARY	15
METHODOLOGICAL NOTE	16
REGIONS, SUB-REGIONS & COUNTRIES	17

2017 FORECAST

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was IDR226,411.0bn (USD17.0bn), 1.8% of total GDP in 2016 and is forecast to rise by 4.3% in 2017, and to rise by 5.6% pa, from 2017-2027, to IDR405,975.0bn (USD30.5bn), 1.9% of total GDP in 2027.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was IDR770,310.0bn (USD57.9bn), 6.2% of GDP in 2016, and is forecast to rise by 4.3% in 2017, and to rise by 6.2% pa to IDR1,464,700.0bn (USD110.1bn), 6.8% of GDP in 2027.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2016 Travel & Tourism directly supported 1,944,000 jobs (1.6% of total employment). This is expected to rise by 1.7% in 2017 and rise by 2.4% pa to 2,517,000 jobs (1.7% of total employment) in 2027.

EMPLOYMENT: TOTAL CONTRIBUTION

In 2016, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 5.6% of total employment (6,708,500 jobs). This is expected to rise by 1.7% in 2017 to 6,820,000 jobs and rise by 2.9% pa to 9,080,000 jobs in 2027 (6.2% of total).

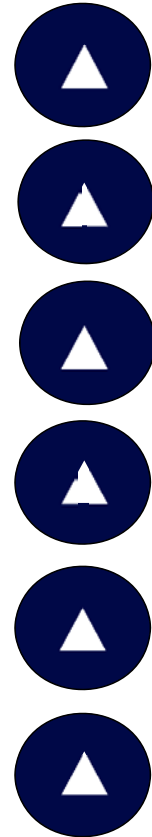
VISITOR EXPORTS

Visitor exports generated IDR173,433.0bn (USD13.0bn), 7.6% of total exports in 2016. This is forecast to grow by 3.1% in 2017, and grow by 6.5% pa, from 2017-2027, to IDR335,736.0bn (USD25.2bn) in 2027, 10.4% of total.

INVESTMENT

Travel & Tourism investment in 2016 was IDR180,886.0bn, 4.4% of total investment (USD13.6bn). It should rise by 2.9% in 2017, and rise by 6.6% pa over the next ten years to IDR352,864.0bn (USD26.5bn) in 2027, 4.8% of total.

¹All values are in constant 2016 prices & exchange rates

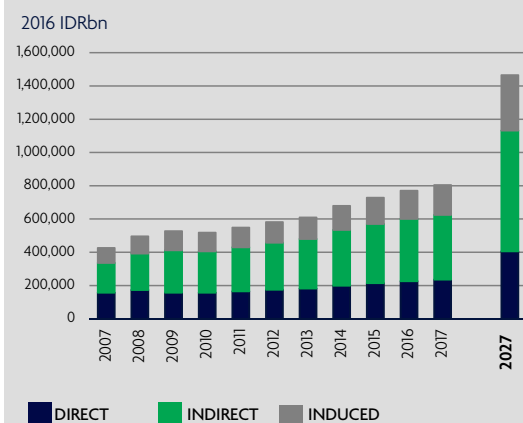


WORLD RANKING (OUT OF 185 COUNTRIES):

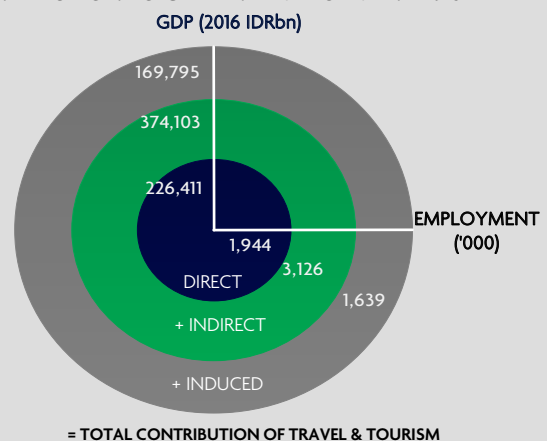
Relative importance of Travel & Tourism's total contribution to GDP

22 ABSOLUTE Size in 2016	144 RELATIVE SIZE Contribution to GDP in 2016	99 GROWTH 2017 forecast	20 LONG-TERM GROWTH Forecast 2017-2027
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TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP

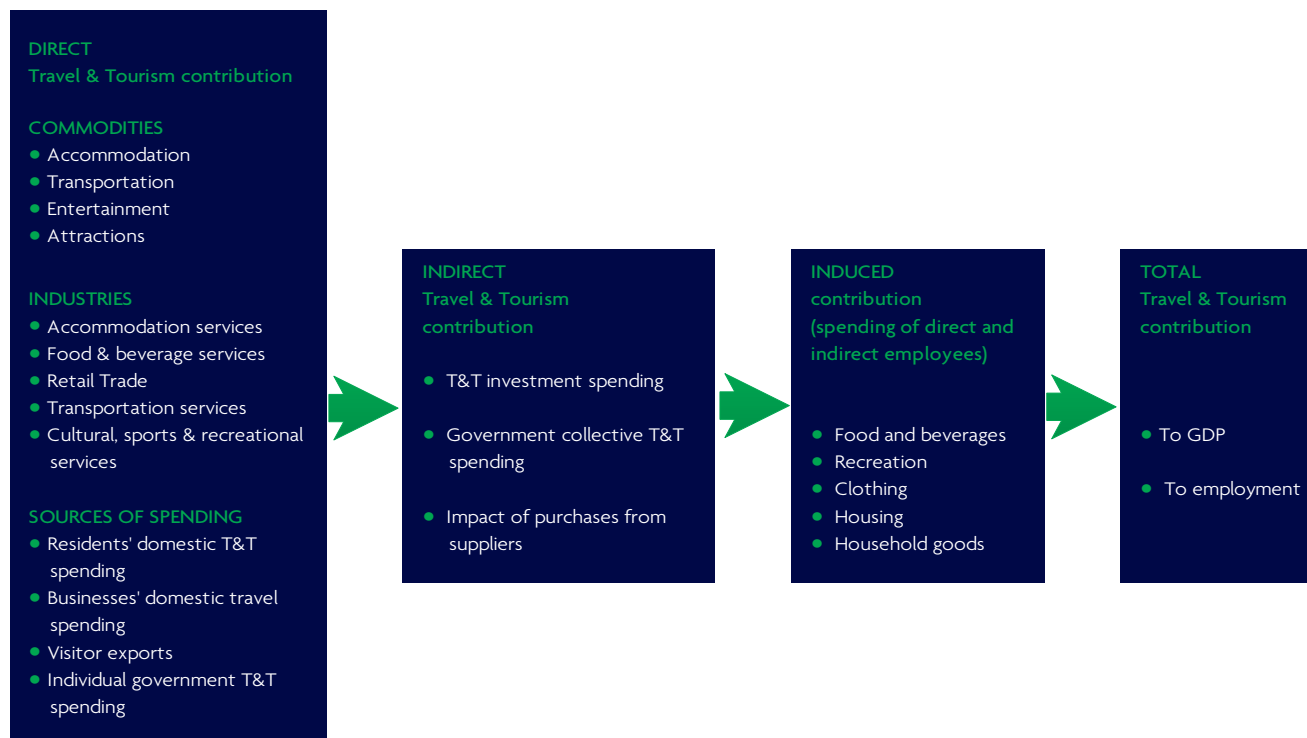


BREAKDOWN OF TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP AND EMPLOYMENT 2016



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).

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.

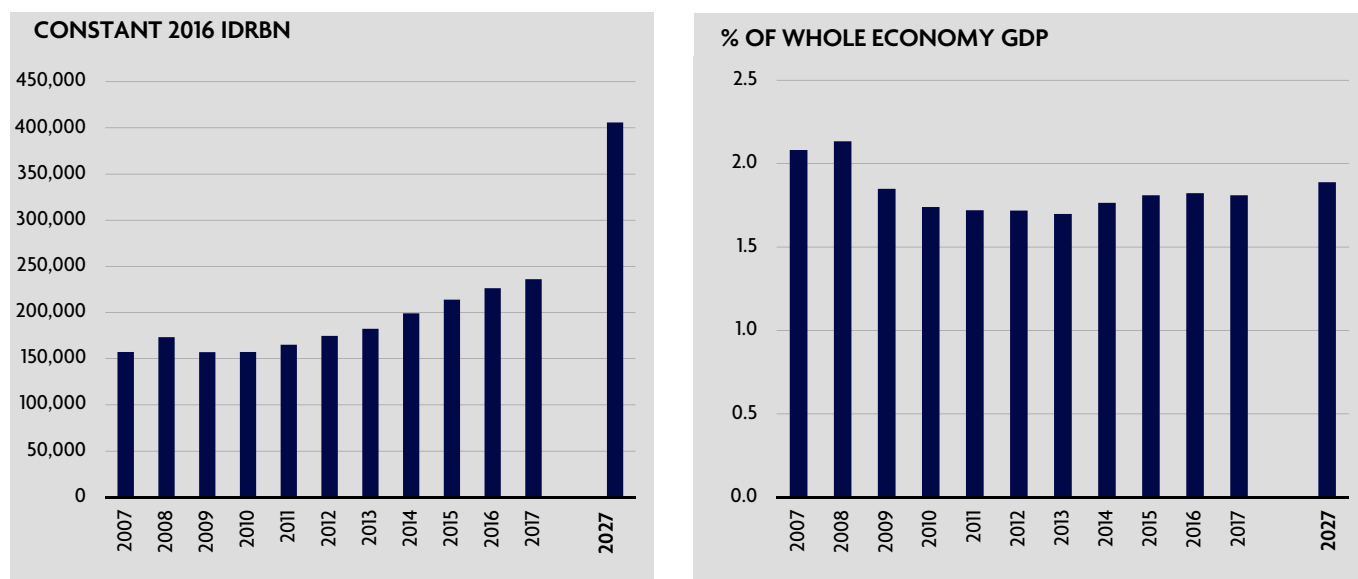
PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.

TRAVEL & TOURISM'S CONTRIBUTION TO GDP¹

The direct contribution of Travel & Tourism to GDP in 2016 was IDR226,411.0bn (1.8% of GDP). This is forecast to rise by 4.3% to IDR236,204.0bn in 2017. 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 5.6% pa to IDR405,975.0bn (1.9% of GDP) by 2027.

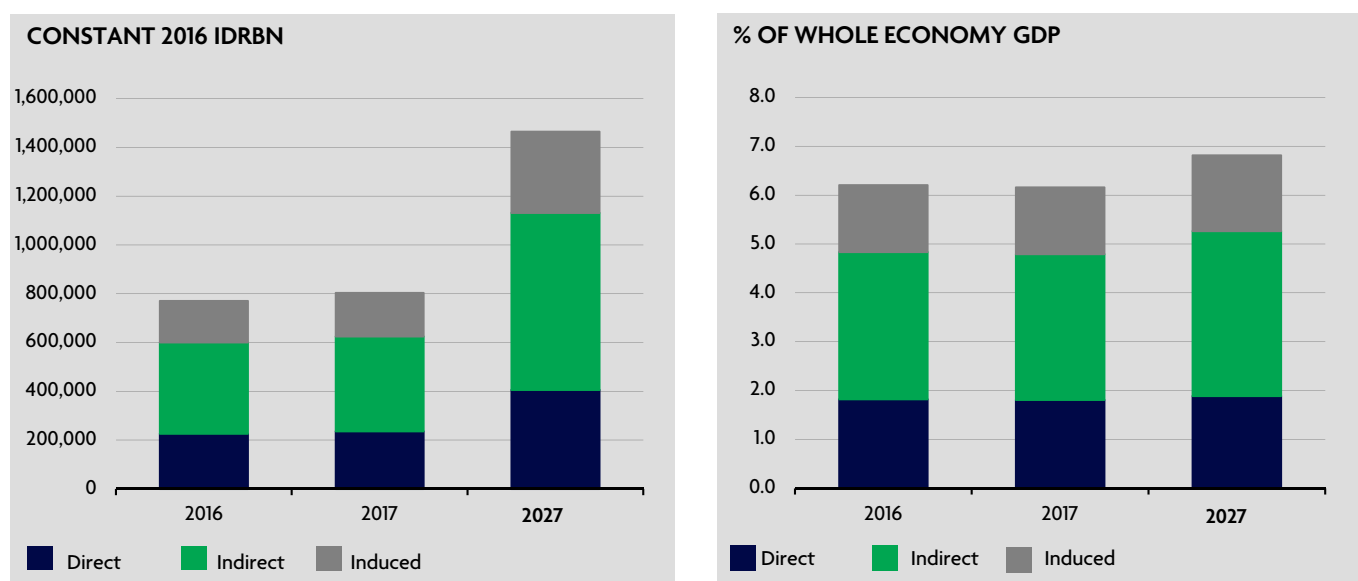
INDONESIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was IDR770,310.0bn in 2016 (6.2% of GDP) and is expected to grow by 4.3% to IDR803,499.0bn (6.2% of GDP) in 2017.

It is forecast to rise by 6.2% pa to IDR1,464,700.0bn by 2027 (6.8% of GDP).

INDONESIA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



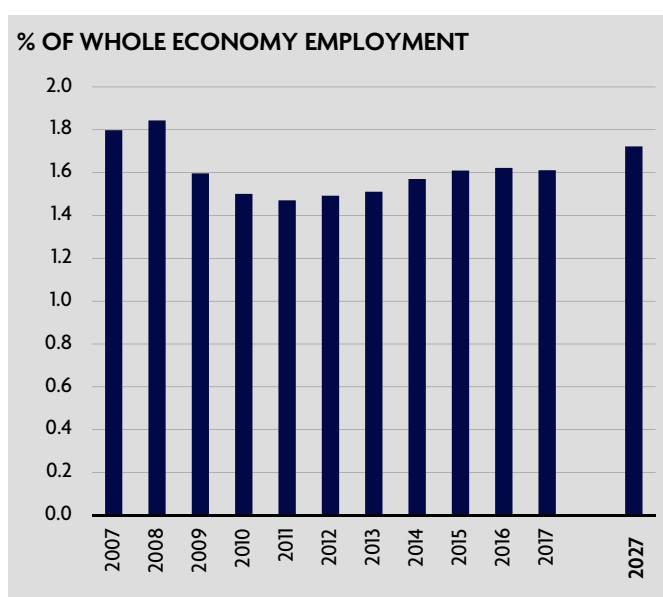
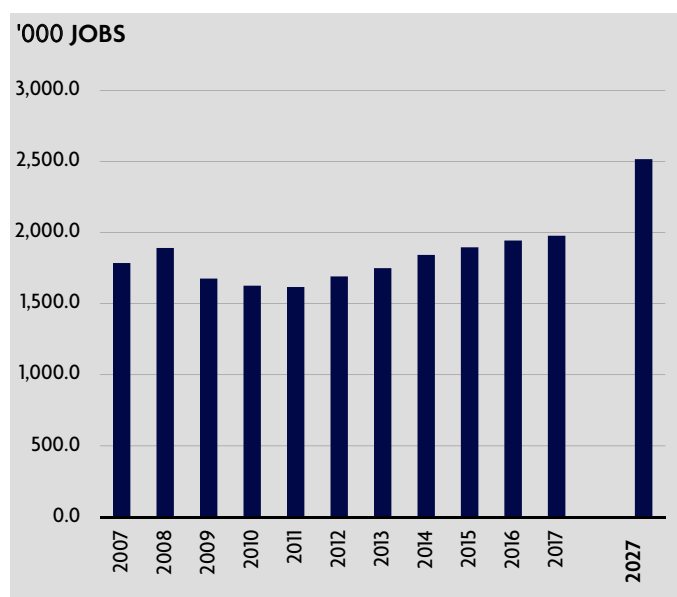
¹ All values are in constant 2016 prices & exchange rates

TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT

Travel & Tourism generated 1,944,000 jobs directly in 2016 (1.6% of total employment) and this is forecast to grow by 1.7% in 2017 to 1,977,500 (1.6% 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 2027, Travel & Tourism will account for 2,517,000 jobs directly, an increase of 2.4% pa over the next ten years.

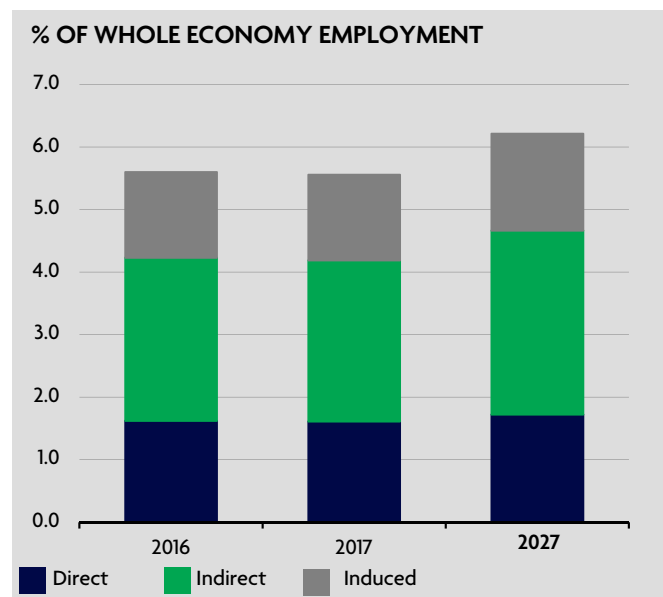
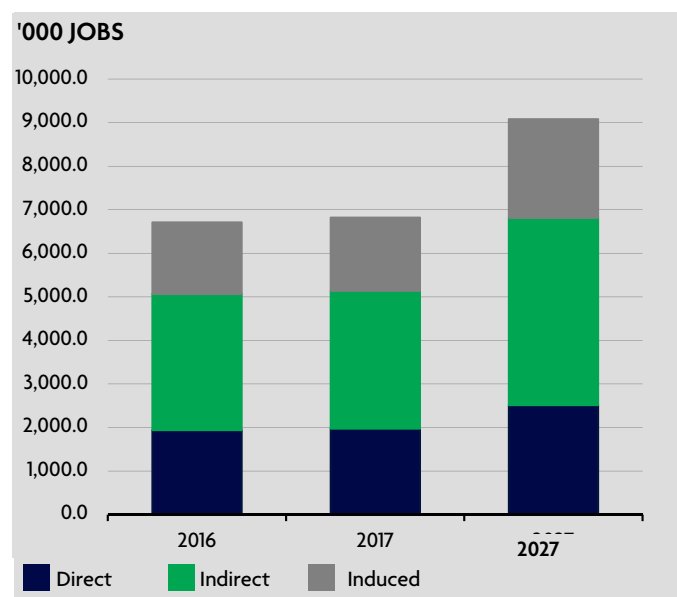
INDONESIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 6,708,500 jobs in 2016 (5.6% of total employment). This is forecast to rise by 1.7% in 2017 to 6,820,000 jobs (5.6% of total employment).

By 2027, Travel & Tourism is forecast to support 9,080,000 jobs (6.2% of total employment), an increase of 2.9% pa over the period.

INDONESIA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



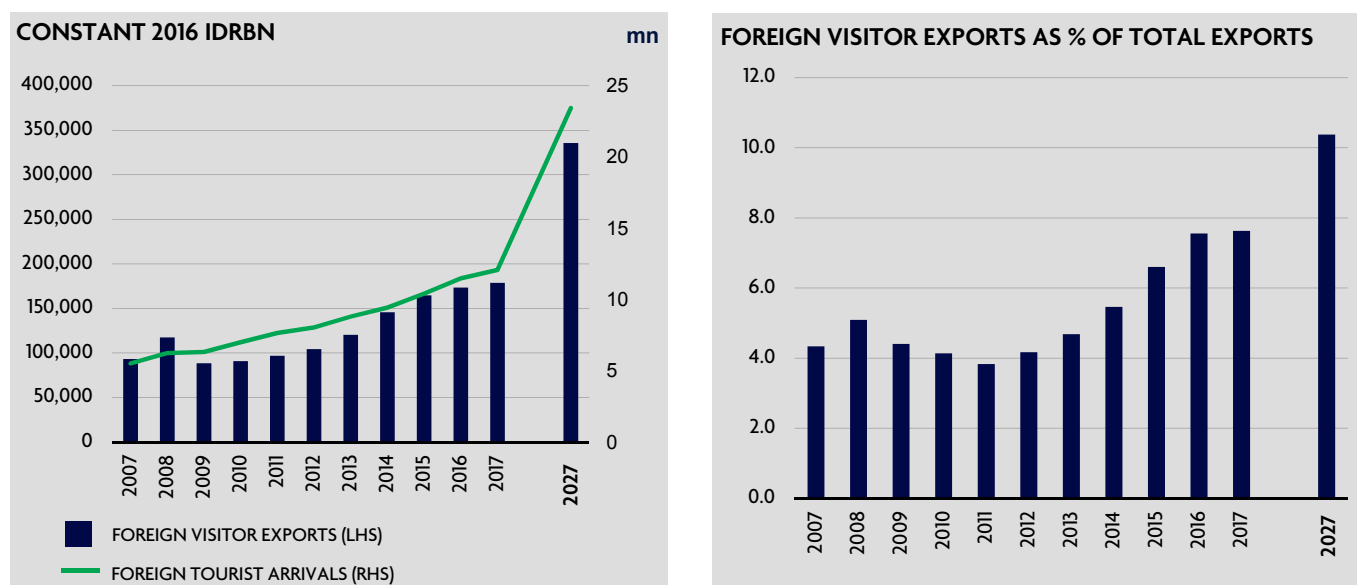
VISITOR EXPORTS AND INVESTMENT¹

VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2016, Indonesia generated IDR173,433.0bn in visitor exports. In 2017, this is expected to grow by 3.1%, and the country is expected to attract 12,078,000 international tourist arrivals.

By 2027, international tourist arrivals are forecast to total 23,436,000, generating expenditure of IDR335,736.0bn, an increase of 6.5% pa.

INDONESIA:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

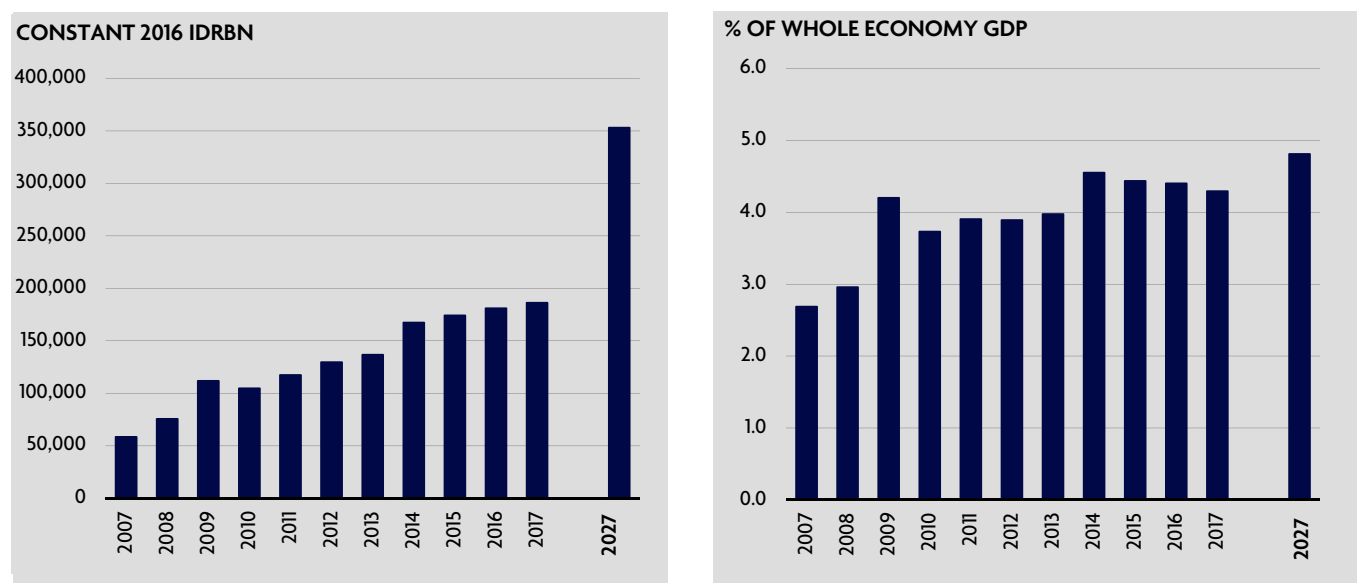


INVESTMENT

Travel & Tourism is expected to have attracted capital investment of IDR180,886.0bn in 2016. This is expected to rise by 2.9% in 2017, and rise by 6.6% pa over the next ten years to IDR352,864.0bn in 2027.

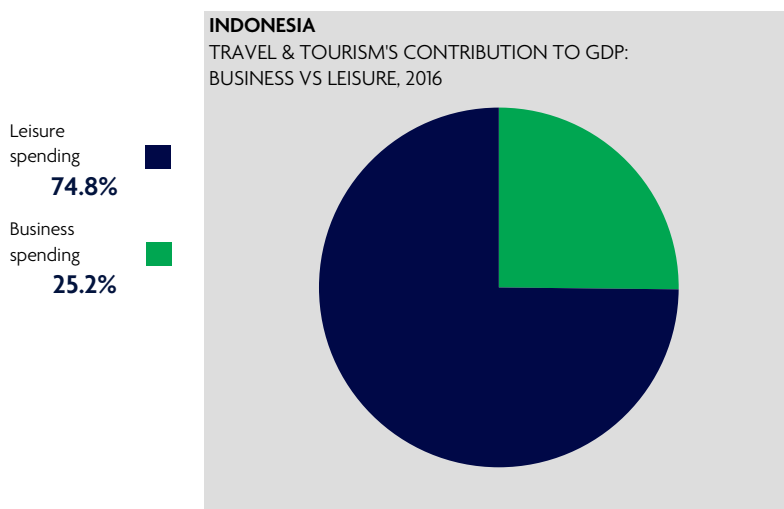
Travel & Tourism's share of total national investment will rise from 4.3% in 2017 to 4.8% in 2027.

INDONESIA:CAPITAL INVESTMENT IN TRAVEL & TOURISM



¹ All values are in constant 2016 prices & exchange rates

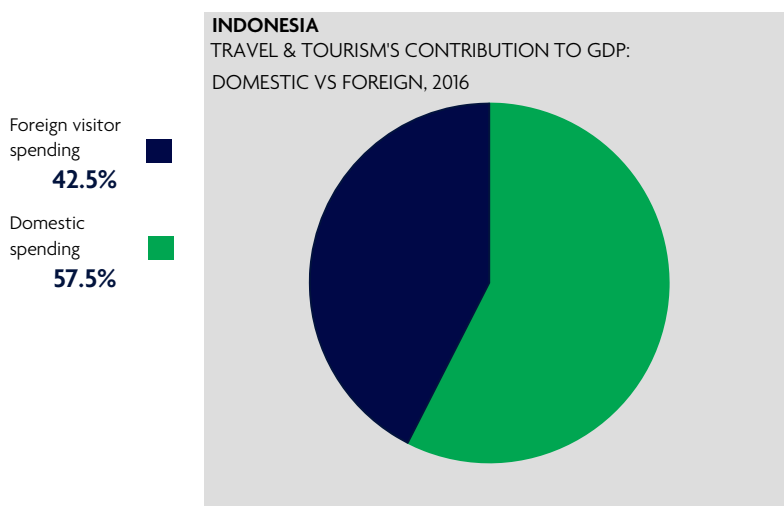
DIFFERENT COMPONENTS OF TRAVEL & TOURISM¹



Leisure travel spending (inbound and domestic) generated 74.8% of direct Travel & Tourism GDP in 2016 (IDR305,396.0bn) compared with 25.2% for business travel spending (IDR102,716.0bn).

Leisure travel spending is expected to grow by 4.1% in 2017 to IDR317,780.0bn, and rise by 5.5% pa to IDR544,747.0bn in 2027.

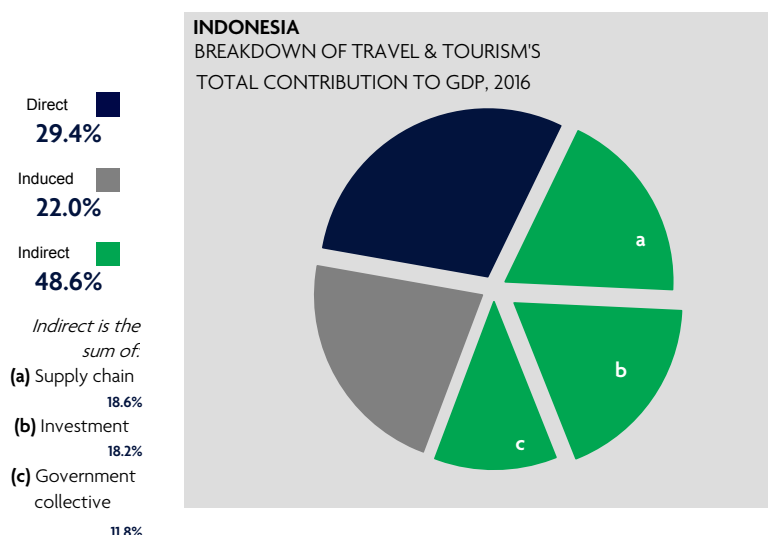
Business travel spending is expected to grow by 5.7% in 2017 to IDR108,545.0bn, and rise by 5.1% pa to IDR178,039.0bn in 2027.



Domestic travel spending generated 57.5% of direct Travel & Tourism GDP in 2016 compared with 42.5% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 5.5% in 2017 to IDR247,565.0bn, and rise by 4.6% pa to IDR387,049.0bn in 2027.

Visitor exports are expected to grow by 3.1% in 2017 to IDR178,760.0bn, and rise by 6.5% pa to IDR335,736.0bn in 2027.



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 three times greater than its direct contribution.

¹ All values are in constant 2016 prices & exchange rates

COUNTRY RANKINGS: ABSOLUTE CONTRIBUTION, 2016

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2016 (US\$bn)
2	China	275.2
9	India	71.7
12	Australia	36.9
13	Thailand	36.7
16	Philippines	25.0
	World Average	19.1
22	Indonesia	17.0
29	Malaysia	14.0
	Southeast Asia Average	12.0
38	Vietnam	9.3
61	Sri Lanka	4.4
72	Cambodia	2.4

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2016 '000 jobs
1	India	25394.7
2	China	23680.6
7	Thailand	2313.7
8	Philippines	2219.0
9	Vietnam	1959.6
10	Indonesia	1944.2
	Southeast Asia Average	1115.6
17	Cambodia	988.2
	World Average	843.9
25	Malaysia	639.7
31	Australia	545.0
39	Sri Lanka	405.9

TRAVEL & TOURISM INVESTMENT		2016 (US\$bn)
2	China	137.6
5	India	34.0
12	Australia	16.1
14	Indonesia	13.6
20	Thailand	7.0
26	Vietnam	5.5
27	Malaysia	5.0
	Southeast Asia Average	4.9
	World Average	4.4
52	Philippines	1.9
68	Sri Lanka	0.9
84	Cambodia	0.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2016 (US\$bn)
2	China	1000.7
7	India	208.9
12	Australia	136.2
15	Thailand	82.5
20	Philippines	60.1
22	Indonesia	57.9
	World Average	57.3
27	Malaysia	40.4
	Southeast Asia Average	30.1
50	Vietnam	18.4
62	Sri Lanka	9.7
78	Cambodia	5.5

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2016 '000 jobs
1	China	69527.7
2	India	40343.0
5	Philippines	7357.2
7	Indonesia	6708.6
9	Thailand	5739.0
12	Vietnam	4002.8
	Southeast Asia Average	3015.5
18	Cambodia	2252.3
	World Average	2152.9
24	Malaysia	1700.7
30	Australia	1495.2
42	Sri Lanka	894.5

VISITOR EXPORTS		2016 (US\$bn)
2	China	119.7
4	Thailand	53.7
14	India	22.8
18	Australia	20.3
22	Malaysia	17.5
28	Indonesia	13.0
	Southeast Asia Average	12.4
38	Vietnam	8.3
	World Average	7.6
48	Philippines	6.7
54	Sri Lanka	4.5
62	Cambodia	3.4

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 and regional average. Averages in above tables are simple cross-country averages. 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, 2016

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2016 % share
20	Cambodia	12.2
25	Thailand	9.2
31	Philippines	8.2
55	Sri Lanka	5.1
60	Malaysia	4.7
	Southeast Asia	4.7
64	Vietnam	4.6
105	India	3.3
	World	3.1
117	Australia	2.9
137	China	2.5
161	Indonesia	1.8

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2016 % share
21	Cambodia	11.4
46	Thailand	6.1
51	India	5.8
55	Philippines	5.5
64	Sri Lanka	4.8
70	Australia	4.6
71	Malaysia	4.5
	World	3.6
92	Vietnam	3.6
	Southeast Asia	3.6
110	China	3.1
168	Indonesia	1.6

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2016 % share
28	Cambodia	15.5
51	Vietnam	9.9
74	Thailand	7.1
	Southeast Asia	6.8
79	Malaysia	6.5
85	India	5.7
92	Australia	5.1
106	Indonesia	4.4
	World	4.4
114	Sri Lanka	4.0
146	China	2.9
158	Philippines	2.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2016 % share
23	Cambodia	28.3
35	Thailand	20.6
37	Philippines	19.7
59	Malaysia	13.7
	Southeast Asia	11.8
71	Sri Lanka	11.4
77	Australia	10.9
	World	10.2
97	India	9.6
104	Vietnam	9.1
106	China	9.0
144	Indonesia	6.2

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2016 % share
24	Cambodia	25.9
42	Philippines	18.1
50	Thailand	15.1
65	Australia	12.5
68	Malaysia	12.0
78	Sri Lanka	10.7
	Southeast Asia	9.7
	World	9.6
94	India	9.3
100	China	9.0
119	Vietnam	7.3
150	Indonesia	5.6

VISITOR EXPORTS CONTRIBUTION TO EXPORTS		2016 % share
43	Cambodia	26.5
45	Sri Lanka	26.1
57	Thailand	19.2
96	Malaysia	8.8
	Southeast Asia	8.6
97	Australia	8.5
101	Philippines	7.8
104	Indonesia	7.6
	World	6.6
125	India	5.4
128	China	5.3
142	Vietnam	4.5

COUNTRY RANKINGS: REAL GROWTH, 2017

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 % growth
2	Cambodia	10.7
6	Thailand	9.3
23	Philippines	7.6
24	Vietnam	7.5
25	China	7.5
	Southeast Asia	7.3
42	India	6.9
83	Sri Lanka	5.1
100	Indonesia	4.3
104	Malaysia	4.2
113	Australia	4.0
	World	3.8

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 % growth
6	Cambodia	9.1
22	Thailand	6.3
44	Philippines	5.3
	Southeast Asia	4.1
78	Sri Lanka	3.6
113	Vietnam	2.5
123	India	2.1
	World	2.1
132	Malaysia	1.9
138	Indonesia	1.7
151	China	1.0
181	Australia	-3.84

TRAVEL & TOURISM INVESTMENT		2017 % growth
4	Thailand	10.3
8	Philippines	9.5
16	Malaysia	8.2
27	China	7.4
29	Sri Lanka	7.3
38	Vietnam	6.9
77	Cambodia	5.1
88	India	4.5
	World	4.1
	Southeast Asia	4.0
112	Indonesia	2.9
148	Australia	1.4

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 % growth
2	Cambodia	9.9
5	Thailand	9.4
11	Philippines	7.8
17	Vietnam	7.4
23	China	7.1
	Southeast Asia	6.9
30	India	6.7
54	Sri Lanka	5.5
99	Indonesia	4.3
103	Malaysia	4.2
	World	3.6
129	Australia	3.3

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 % growth
6	Thailand	6.9
11	Cambodia	6.7
48	Philippines	4.4
	Southeast Asia	3.7
98	Sri Lanka	2.8
114	Vietnam	2.3
	World	1.9
122	India	1.8
124	Malaysia	1.8
129	China	1.7
131	Indonesia	1.7
178	Australia	-2.64

VISITOR EXPORTS		2017 % growth
6	Cambodia	11.8
15	Philippines	11.1
21	Thailand	10.3
	Southeast Asia	8.5
73	Vietnam	7.0
89	Australia	6.1
101	India	5.4
109	Sri Lanka	5.2
111	Malaysia	5.2
	World	4.5
151	Indonesia	3.1
154	China	3.0

COUNTRY RANKINGS: LONG TERM GROWTH, 2017 - 2027

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 - 2027 % growth pa
3	China	7.5
8	India	6.8
10	Thailand	6.7
12	Sri Lanka	6.6
14	Cambodia	6.5
30	Vietnam	6.0
Southeast Asia		5.7
41	Indonesia	5.6
58	Malaysia	5.2
60	Philippines	5.2
World		4.0
158	Australia	2.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 - 2027 % growth pa
3	China	7.2
8	India	6.7
9	Cambodia	6.6
10	Thailand	6.5
20	Indonesia	6.2
22	Sri Lanka	6.1
38	Vietnam	5.8
Southeast Asia		5.7
53	Malaysia	5.4
60	Philippines	5.3
World		3.9
159	Australia	2.5

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 - 2027 % growth pa
7	Thailand	5.0
11	Cambodia	4.8
23	Malaysia	3.9
27	Sri Lanka	3.7
Southeast Asia		3.3
92	Indonesia	2.4
93	Philippines	2.4
World		2.2
105	India	2.1
125	China	1.7
148	Vietnam	1.3
169	Australia	0.9

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 - 2027 % growth pa
6	Thailand	4.6
13	Malaysia	4.0
29	Cambodia	3.5
34	China	3.5
Southeast Asia		3.0
67	Indonesia	2.9
74	Sri Lanka	2.7
World		2.5
93	Philippines	2.3
109	India	2.0
143	Australia	1.3
154	Vietnam	1.0

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2017 - 2027 % growth pa
10	China	6.9
11	Vietnam	6.9
16	Indonesia	6.6
20	Cambodia	6.4
41	India	5.7
Southeast Asia		5.6
47	Thailand	5.5
48	Malaysia	5.5
World		4.5
85	Philippines	4.4
149	Sri Lanka	2.6
156	Australia	2.3

VISITOR EXPORTS CONTRIBUTION TO TOTAL EXPORTS		2017 - 2027 % growth pa
14	Thailand	7.3
15	Sri Lanka	7.3
27	Philippines	6.8
32	Indonesia	6.5
35	Vietnam	6.4
40	Cambodia	6.2
Southeast Asia		6.2
44	India	6.1
61	Malaysia	5.4
World		4.3
138	Australia	3.5
184	China	0.2

SUMMARY TABLES: ESTIMATES & FORECASTS

INDONESIA	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	17.0	1.8	4.3	30.5	1.9	5.6
Total contribution to GDP	57.9	6.2	4.3	110.1	6.8	6.2
Direct contribution to employment ⁴	1,944	1.6	1.7	2,517	1.7	2.4
Total contribution to employment ⁴	6,709	5.6	1.7	9,080	6.2	2.9
Visitor exports	13.0	8.0	3.1	25.2	11.3	6.5
Domestic spending	17.6	1.9	5.5	29.1	1.8	4.6
Leisure spending	23.0	1.3	4.1	41.0	1.4	5.5
Business spending	7.7	0.5	5.7	13.4	0.5	5.1
Capital investment	13.6	4.4	2.9	26.5	4.8	6.6

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 jobs

SOUTHEAST ASIA	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	119.7	4.7	7.3	222.8	5.3	5.7
Total contribution to GDP	301.1	11.8	6.9	563.0	13.5	5.7
Direct contribution to employment ⁴	11,156	3.6	4.1	16,087	4.4	3.3
Total contribution to employment ⁴	30,155	9.7	3.7	42,043	11.4	3.0
Visitor exports	123.7	8.6	8.5	245.5	10.8	6.2
Domestic spending	108.7	4.3	5.3	177.3	4.4	4.5
Leisure spending	167.3	3.4	6.1	314.7	3.9	5.9
Business spending	65.1	1.3	9.2	108.1	1.3	4.3
Capital investment	48.6	6.8	4.0	87.5	7.0	5.6

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 jobs

WORLDWIDE	2016 USDbn ¹	2016 % of total	2017 Growth ²	USDbn ¹	2027 % of total	Growth ³
Direct contribution to GDP	2,306.0	3.1	3.8	3,537.1	3.5	4.0
Total contribution to GDP	7,613.3	10.2	3.6	11,512.9	11.4	3.9
Direct contribution to employment ⁴	108,741	3.6	2.1	138,086	4.0	2.2
Total contribution to employment ⁴	292,220	9.6	1.9	381,700	11.1	2.5
Visitor exports	1,401.5	6.6	4.5	2,221.0	7.2	4.3
Domestic spending	3,574.6	4.8	3.7	5,414.1	5.4	3.9
Leisure spending	3,822.5	2.3	3.9	5,917.7	2.7	4.1
Business spending	1,153.6	0.7	4.0	1,719.9	0.8	3.7
Capital investment	806.5	4.4	4.1	1,307.1	5.0	4.5

¹2016 constant prices & exchange rates; ²2017 real growth adjusted for inflation (%); ³2017-2027 annualised real growth adjusted for inflation (%); ⁴000 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 2016 PRICES

INDONESIA (IDRbn, real 2016 prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	96,844	104,333	120,344	145,670	164,617	173,433	178,760	335,736
2. Domestic expenditure (includes government individual spending)	195,167	206,152	206,845	212,587	221,198	234,679	247,565	387,049
3. Internal tourism consumption (= 1 + 2)	292,011	310,485	327,189	358,257	385,815	408,112	426,325	722,785
4. Purchases by tourism providers, including imported goods (supply chain)	-126,759	-135,559	-144,633	-159,064	-171,766	-181,701	-190,121	-316,810
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	165,252	174,926	182,556	199,193	214,049	226,411	236,204	405,975
Other final impacts (indirect & induced)	111,188	117,697	122,831	134,025	144,021	152,339	158,927	273,156
6 Domestic supply chain								
7. Capital investment	117,332	129,522	136,529	167,266	174,079	180,886	186,152	352,864
8. Government collective spending	69,143	75,125	81,984	85,635	93,206	96,455	101,064	178,944
9. Imported goods from indirect spending	-32,494	-39,183	-43,587	-51,355	-55,114	-55,576	-57,073	-79,112
10. Induced	117,235	122,742	128,802	143,896	157,843	169,795	178,225	332,873
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	547,656	580,829	609,115	678,660	728,084	770,310	803,499	1,464,700
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	1,617.9	1,691.6	1,750.0	1,842.7	1,897.2	1,944.2	1,977.6	2,516.9
13. Total contribution of Travel & Tourism to employment	5,497.5	5,732.1	5,924.6	6,366.6	6,545.4	6,708.6	6,820.1	9,080.5
Other indicators								
14. Expenditure on outbound travel	78,650	85,472	104,181	112,733	117,670	115,220	128,580	460,142

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES

INDONESIA (IDRbn, nominal prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	79,002	88,340	106,917	136,414	160,675	173,433	185,086	513,348
2. Domestic expenditure (includes government individual spending)	159,209	174,552	183,767	199,079	215,902	234,679	256,326	591,806
3. Internal tourism consumption (= 1 + 2)	238,211	262,892	290,684	335,493	376,577	408,112	441,412	1,105,154
4. Purchases by tourism providers, including imported goods (supply chain)	-103,405	-114,780	-128,496	-148,957	-167,653	-181,701	-196,850	-484,410
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	134,806	148,112	162,188	186,536	208,924	226,411	244,562	620,744
Other final impacts (indirect & induced)	90,703	99,656	109,126	125,509	140,572	152,339	164,551	417,661
6. Domestic supply chain								
7. Capital investment	95,715	109,668	121,296	156,638	169,911	180,886	192,740	539,536
8. Government collective spending	56,404	63,609	72,837	80,194	90,974	96,455	104,641	273,609
9. Imported goods from indirect spending	-26,509	-33,177	-38,723	-48,092	-53,793	-55,577	-59,094	-120,966
10. Induced	95,636	103,927	114,431	134,753	154,064	169,795	184,532	508,970
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	446,754	491,795	541,154	635,538	710,651	770,310	831,933	2,239,550
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	1,617.9	1,691.6	1,750.0	1,842.7	1,897.2	1,944.2	1,977.6	2,516.9
13. Total contribution of Travel & Tourism to employment	5,497.5	5,732.1	5,924.6	6,366.6	6,545.4	6,708.6	6,820.1	9,080.5
Other indicators								
14. Expenditure on outbound travel	64,159	72,370	92,558	105,569	114,852	115,220	133,130	703,566

*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

INDONESIA								
Growth ¹ (%)	2011	2012	2013	2014	2015	2016	2017E	2027F ²
1. Visitor exports	6.6	7.7	15.3	21.0	13.0	5.4	3.1	6.5
2. Domestic expenditure (includes government individual spending)	5.4	5.6	0.3	2.8	4.1	6.1	5.5	4.6
3. Internal tourism consumption (= 1 + 2)	5.8	6.3	5.4	9.5	7.7	5.8	4.5	5.4
4. Purchases by tourism providers, including imported goods (supply chain)	6.8	6.9	6.7	10.0	8.0	5.8	4.6	5.2
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	5.0	5.9	4.4	9.1	7.5	5.8	4.3	5.6
Other final impacts (indirect & induced)	5.0	5.9	4.4	9.1	7.5	5.8	4.3	5.6
6. Domestic supply chain								
7. Capital investment	12.2	10.4	5.4	22.5	4.1	3.9	2.9	6.6
8. Government collective spending	7.2	8.7	9.1	4.5	8.8	3.5	4.8	5.9
9. Imported goods from indirect spending	22.5	20.6	11.2	17.8	7.3	0.8	2.7	3.3
10. Induced	4.4	4.7	4.9	11.7	9.7	7.6	5.0	6.4
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	5.7	6.1	4.9	11.4	7.3	5.8	4.3	6.2
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	-0.6	4.6	3.5	5.3	3.0	2.5	1.7	2.4
13. Total contribution of Travel & Tourism to employment	0.1	4.3	3.4	7.5	2.8	2.5	1.7	2.9
Other indicators								
14. Expenditure on outbound travel	-7.4	8.7	21.9	8.2	4.4	-2.1	11.6	13.6

¹2011-2016 real annual growth adjusted for inflation (%); ²2017-2027 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 Travel & Tourism. 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 sector plus its indirect and induced impacts (see below).

TOTAL CONTRIBUTION TO EMPLOYMENT

The number of jobs generated directly in the Travel & Tourism sector 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 services (eg museums) or recreational services (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 industries directly involved in Travel & Tourism. 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:** 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 industries within Travel & Tourism 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). This involves the 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 include Albania, Indonesia, and Mauritius bringing our total of countries in our benchmarking dataset to 54. Furthermore, we have sourced updated TSAs for 28 countries.

In 2017, we have also been able to add a new country, Tajikistan, taking our coverage to 185 countries. WTTC also produces reports on 25 other regions, sub-regions and economic and geographic groups. This year, there are 10 reports for special economic and geographic groups with GCC and the Organisation of Islamic Cooperation being included for the first time.

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.

FORMER NETHERLANDS ANTILLES

Bonaire, Curacao, Sint Maarten, Saba and Sint Eustatius.

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.

GCC (GULF COOPERATION COUNCIL)

Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

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.

(OIC) ORGANISATION FOR ISLAMIC COOPERATION**

Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei Darussalam, Burkina Faso, Cameroon, Chad, Comoros, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Ivory Coast, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Lebanon, Libya, Malaysia, Maldives, Mali, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Qatar, Saudi Arabia, Senegal, Sierra Leone, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Turkey, UAE, Uganda, Uzbekistan, Yemen.

OTHER OCEANIA

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

PACIFIC ALLIANCE

Chile, Colombia, Mexico, Peru.

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.

* included in European Union

** no data for Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Palestine, Somalia or Turkmenistan

ECONOMIC IMPACT REPORTS:

REGIONS, SUB REGIONS & COUNTRIES

WORLD								
REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY
AFRICA	NORTH AFRICA	Algeria	AMERICAS	CARIBBEAN	Anguilla	ASIA-PACIFIC	NORTHEAST ASIA	China
		Egypt			Antigua and Barbuda			Hong Kong
		Libya			Aruba			Japan
		Morocco			Bahamas			South Korea
		Tunisia			Barbados			Macau
	SUB-SAHARAN	Angola			Bermuda		CENTRAL ASIA	Mongolia
		Benin			British Virgin Islands			Taiwan
		Botswana			Cayman Islands			Kazakhstan
		Burkina Faso			Cuba			Kyrgyzstan
		Burundi			Dominica		OCEANIA	Tajikistan
		Cameroon			Dominican Republic			Uzbekistan
		Cape Verde			Former Netherland Antillies			Australia
		Central African Republic			Grenada			Fiji
		Chad			Guadeloupe		SOUTH ASIA	Kiribati
		Comoros			Haiti			New Zealand
		Congo			Jamaica			Papua New Guinea
		Cote d'Ivoire			Martinique			Solomon Islands
		Democratic Republic of Congo			Puerto Rico		EUROPE	Tonga
		Ethiopia			St Kitts and Nevis			Vanuatu
		Gabon			St Lucia			Other Oceanic States
		Gambia			St Vincent and the Grenadines		OTHER EUROPE	Albania
		Ghana			Trinidad and Tobago			Armenia
		Guinea			US Virgin Islands			Azerbaijan
		Kenya		LATIN AMERICA	Argentina		SOUTHEAST ASIA (ASEAN)	Belarus
		Lesotho			Belize			Bosnia and Herzegovina
		Madagascar			Bolivia			Georgia
		Malawi			Brazil		EUROPEAN UNION	Iceland
		Mali			Chile			Macedonia
		Mauritius			Colombia			Moldova
		Mozambique			Costa Rica			Montenegro
		Namibia			Ecuador		MIDDLE EAST	Norway
		Niger			El Salvador			Russian Federation
		Nigeria			Guatemala			Serbia
		Reunion			Guyana			Switzerland
		Rwanda			Honduras			Turkey
		Sao Tome and Principe			Nicaragua			Ukraine
		Senegal			Panama		EUROPE	Bahrain
		Seychelles			Paraguay			Iran
		Sierra Leone			Peru			Iraq
		South Africa			Suriname			Israel
		Sudan and South Sudan			Uruguay			Jordan
		Swaziland			Venezuela			Kuwait
		Tanzania		NORTH AMERICA	Canada			Lebanon
		Togo			Mexico		EUROPE	Oman
		Uganda			USA			Qatar
		Zambia						Saudi Arabia
		Zimbabwe						Syria
								United Arab Emirates
								Yemen



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Contributing data to the WTTTC Economic Impact Model

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HOW MONEY TRAVELS

THE DIRECT, INDIRECT AND INDUCED EFFECT OF TOURISM SPENDING



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WORLD TRAVEL & TOURISM COUNCIL (WTTTC), The Harlequin Building, 65 Southwark Street, London SE1 0HR, United Kingdom
Tel: +44 (0) 207 481 8007 | Email: enquiries@wttc.org | www.wttc.org