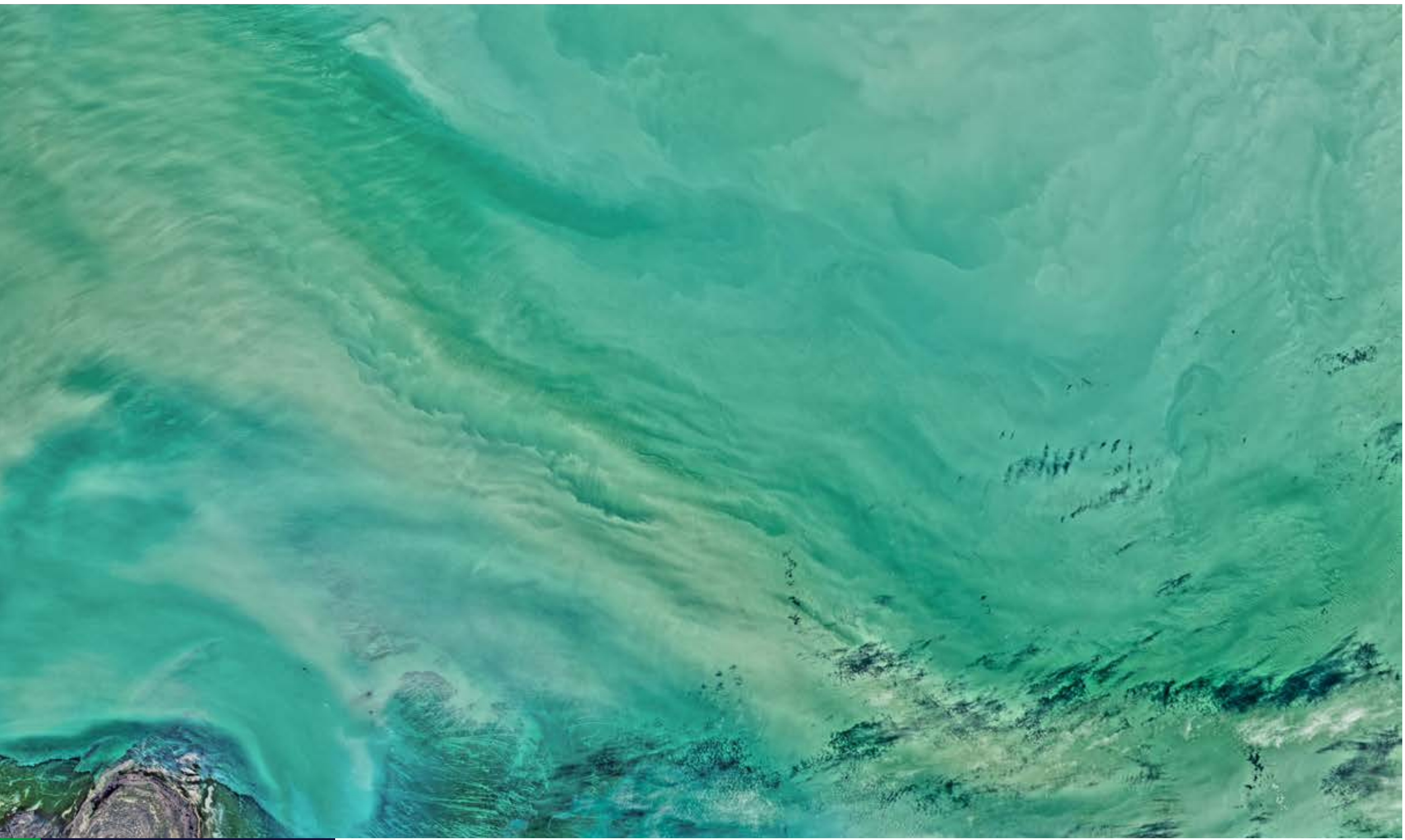

WORLD TRAVEL & TOURISM COUNCIL

TRAVEL & TOURISM
ECONOMIC IMPACT 2017
MIDDLE EAST

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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

MIDDLE EAST

2017 ANNUAL RESEARCH: KEY FACTS [1]

2017 FORECAST

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was USD81.4bn (3.3% of total GDP) in 2016, and is forecast to rise by 4.5% in 2017, and to rise by 4.6% pa, from 2017-2027, to USD133.1bn (3.3% of total GDP) in 2027.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was USD227.1bn (9.1% of GDP) in 2016, and is forecast to rise by 5.2% in 2017, and to rise by 4.8% pa to USD381.9bn (9.7% of GDP) in 2027.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2016 Travel & Tourism directly supported 2,357,000 jobs (3.1% of total employment). This is expected to rise by 2.1% in 2017 and rise by 2.2% pa to 2,986,000 jobs (3.1% 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 7.6% of total employment (5,730,500 jobs). This is expected to rise by 2.7% in 2017 to 5,887,000 jobs and rise by 2.4% pa to 7,433,000 jobs in 2027 (7.7% of total).

VISITOR EXPORTS

Visitor exports generated USD83.2bn (8.0% of total exports) in 2016. This is forecast to grow by 5.1% in 2017, and grow by 5.4% pa, from 2017-2027, to USD148.3bn in 2027 (7.0% of total).

INVESTMENT

Travel & Tourism investment in 2016 was USD49.6bn, or 7.2% of total investment. It should rise by 7.2% in 2017, and rise by 6.4% pa over the next ten years to USD98.9bn in 2027 (9.1% of total).

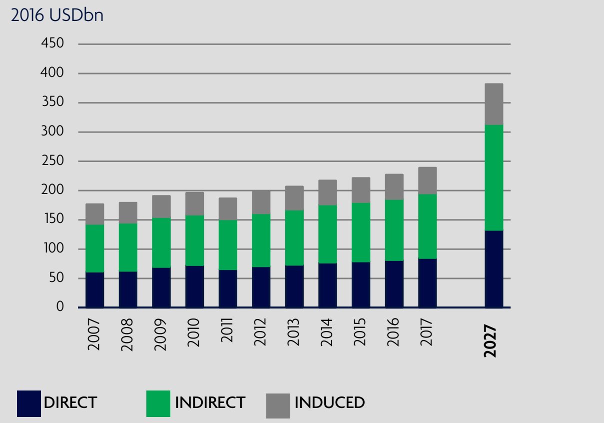
[1] All values are in constant 2016 prices & exchange rates

WORLD RANKING (OUT OF 13 REGIONS):

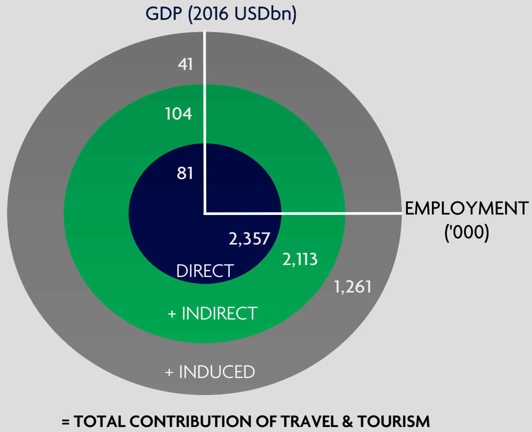
Relative importance of Travel & Tourism's total contribution to GDP

8	6	5	5
ABSOLUTE Size in 2016	RELATIVE SIZE Contribution to GDP in 2016	GROWTH 2017 forecast	LONG-TERM GROWTH Forecast 2017-2027

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
Travel & Tourism contribution

COMMODITIES
- Accommodation
- Transportation
- Entertainment
- Attractions

INDUSTRIES
- Accommodation services
- Food & beverage services
- Retail Trade
- Transportation services
- Cultural, sports & recreational services

SOURCES OF SPENDING
- Residents' domestic T&T spending
- Businesses' domestic travel spending
- Visitor exports
- Individual government T&T spending

INDIRECT
Travel & Tourism contribution

- T&T investment spending
- Government collective T&T spending
- Impact of purchases from suppliers

INDUCED
contribution (spending of direct and indirect employees)

- Food and beverages
- Recreation
- Clothing
- Housing
- Household goods

TOTAL
Travel & Tourism contribution

- To GDP
- To employment

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.

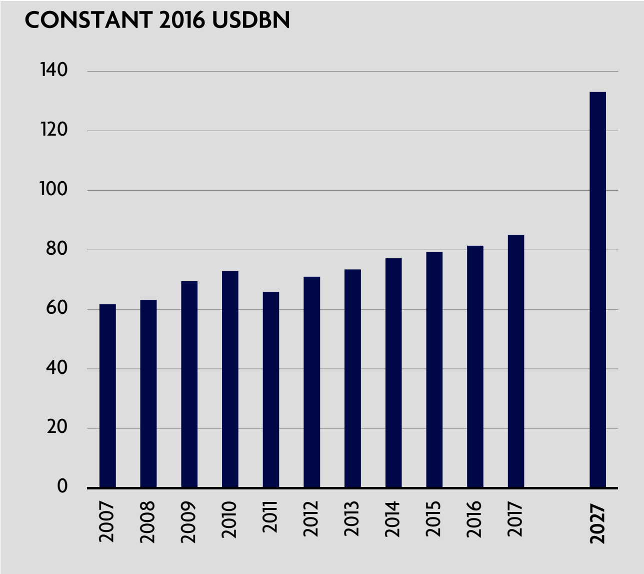
PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.

TRAVEL & TOURISM'S CONTRIBUTION TO GDP[1]

The direct contribution of Travel & Tourism to GDP in 2016 was USD81.4bn (3.3% of GDP). This is forecast to rise by 4.5% to USD85.0bn 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 4.6% pa to USD133.1bn (3.3% of GDP) by 2027.

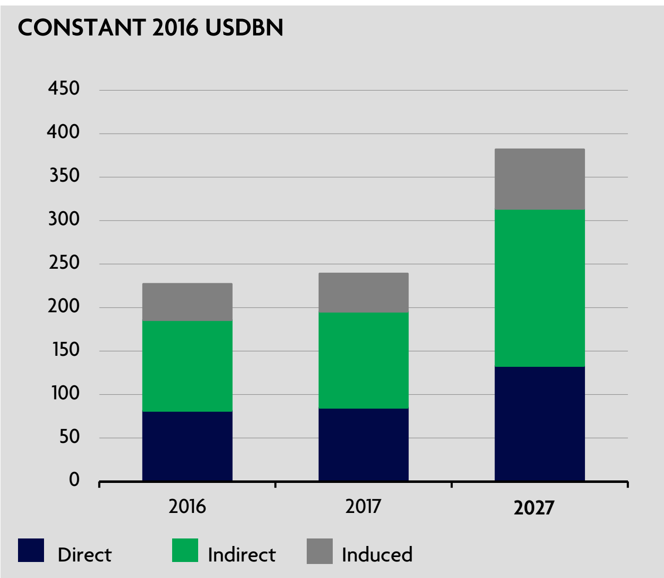
MIDDLE EAST: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

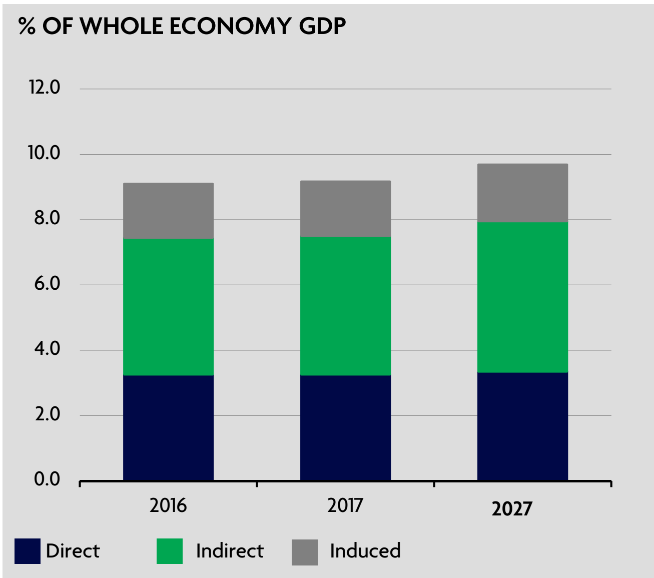


The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was USD227.1bn in 2016 (9.1% of GDP) and is expected to grow by 5.2% to USD239.0bn (9.2% of GDP) in 2017.

It is forecast to rise by 4.8% pa to USD381.9bn by 2027 (9.7% of GDP).

MIDDLE EAST:TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP





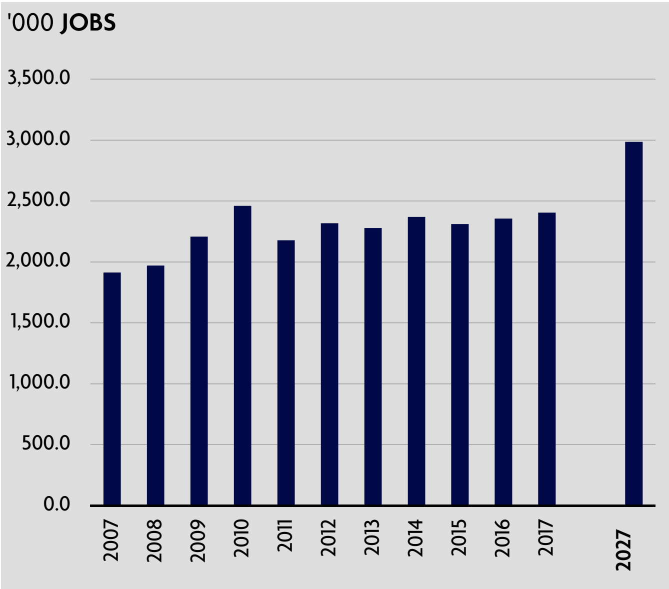
[1] All values are in constant 2016 prices & exchange rates

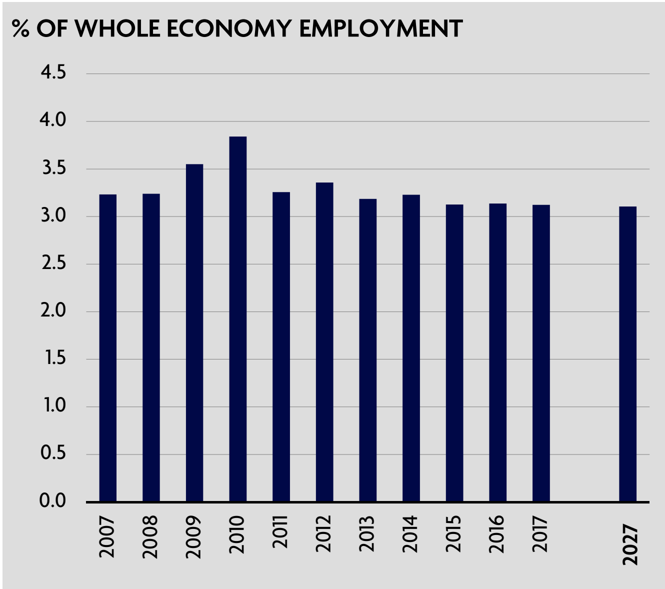
TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT

Travel & Tourism generated 2,357,000 jobs directly in 2016 (3.1% of total employment) and this is forecast to grow by 2.1% in 2017 to 2,406,000 (3.1% 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 2,986,000 jobs directly, an increase of 2.2% pa over the next ten years.

MIDDLE EAST: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

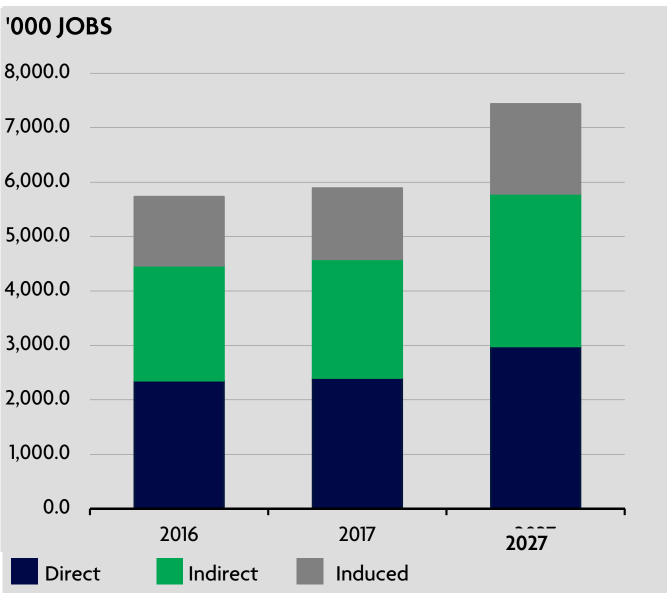


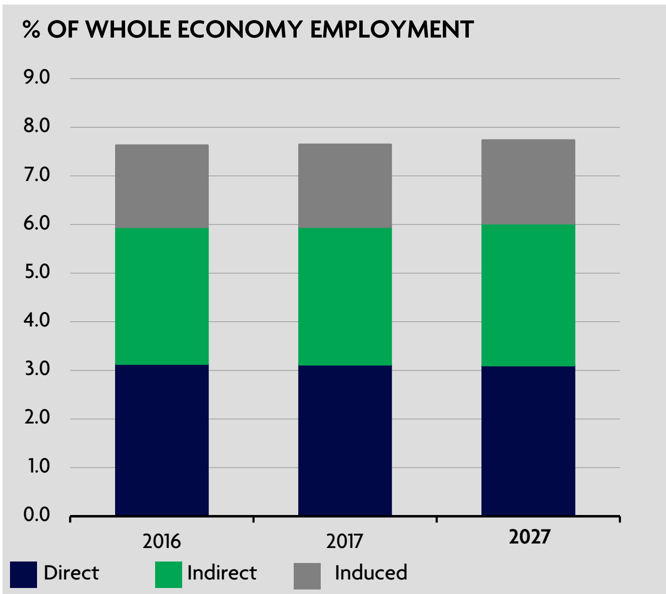


The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 5,730,500 jobs in 2016 (7.6% of total employment). This is forecast to rise by 2.7% in 2017 to 5,887,000 jobs (7.6% of total employment).

By 2027, Travel & Tourism is forecast to support 7,433,000 jobs (7.7% of total employment), an increase of 2.4% pa over the period.

MIDDLE EAST:TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT





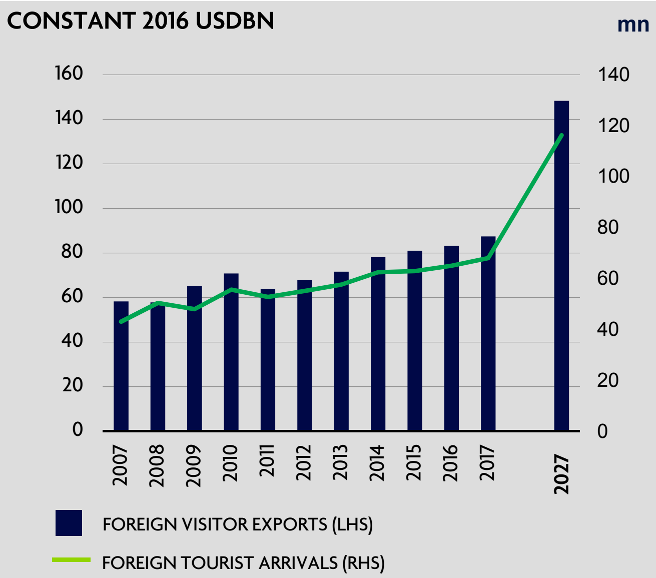
VISITOR EXPORTS AND INVESTMENT[1]

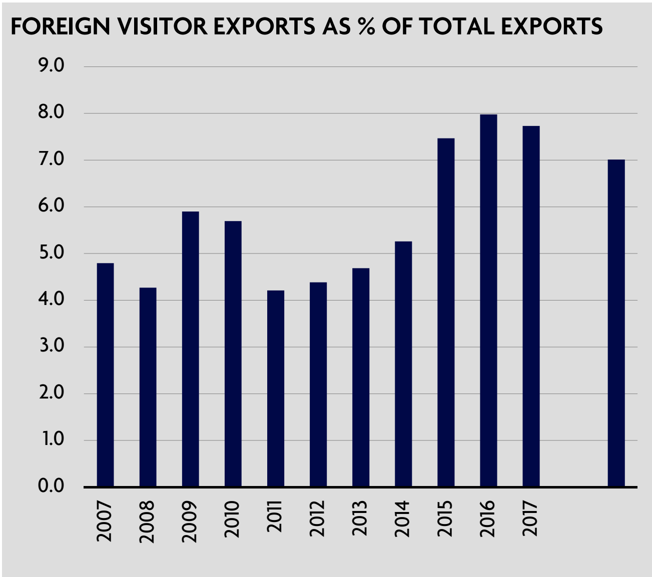
VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2016, Middle East generated USD83.2bn in visitor exports. In 2017, this is expected to grow by 5.1%, and the region is expected to attract 67,998,000 international tourist arrivals.

By 2027, international tourist arrivals are forecast to total 116,230,000, generating expenditure of USD148.3bn, an increase of 5.4% pa.

MIDDLE EAST:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS



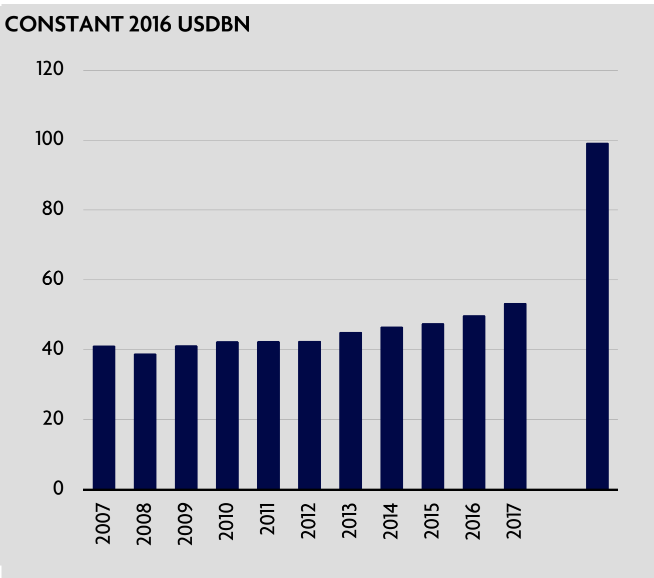


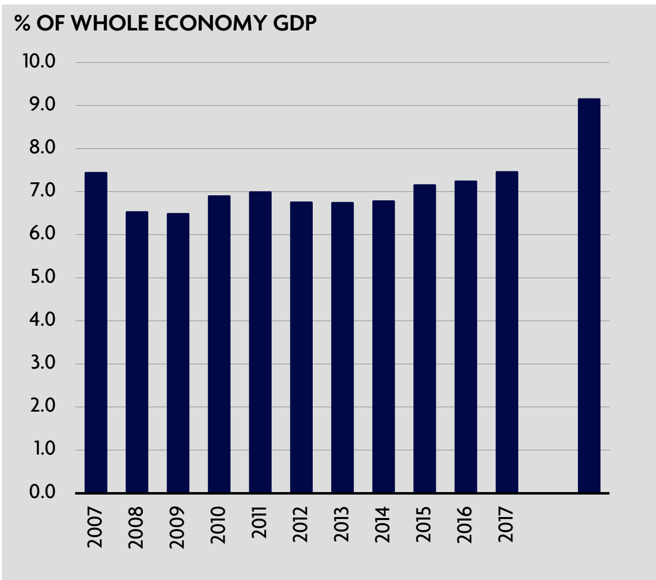
INVESTMENT

Travel & Tourism is expected to have attracted capital investment of USD49.6bn in 2016. This is expected to rise by 7.2% in 2017, and rise by 6.4% pa over the next ten years to USD98.9bn in 2027.

Travel & Tourism's share of total national investment will rise from 7.5% in 2017 to 9.1% in 2027.

MIDDLE EAST:CAPITAL INVESTMENT IN TRAVEL & TOURISM





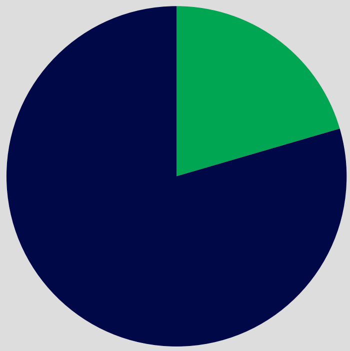
[1] All values are in constant 2016 prices & exchange rates

DIFFERENT COMPONENTS OF TRAVEL & TOURISM[1]

MIDDLE EAST
TRAVEL & TOURISM'S CONTRIBUTION TO GDP:
BUSINESS VS LEISURE, 2016

Leisure spending
79.5%

Business spending
20.5%



Leisure travel spending (inbound and domestic) generated 79.5% of direct Travel & Tourism GDP in 2016 (USD122.5bn) compared with 20.5% for business travel spending (USD31.5bn).

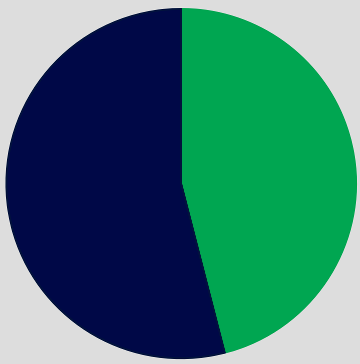
Leisure travel spending is expected to grow by 4.7% in 2017 to USD128.2bn, and rise by 4.5% pa to USD199.9bn in 2027.

Business travel spending is expected to grow by 3.6% in 2017 to USD32.7bn, and rise by 4.8% pa to USD52.2bn in 2027.

MIDDLE EAST
TRAVEL & TOURISM'S CONTRIBUTION TO GDP:
DOMESTIC VS FOREIGN, 2016

Foreign visitor spending
54.0%

Domestic spending
46.0%



Domestic travel spending generated 46.0% of direct Travel & Tourism GDP in 2016 compared with 54.0% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 3.7% in 2017 to USD73.4bn, and rise by 3.5% pa to USD103.9bn in 2027.

Visitor exports are expected to grow by 5.1% in 2017 to USD87.4bn, and rise by 5.4% pa to USD148.3bn in 2027.

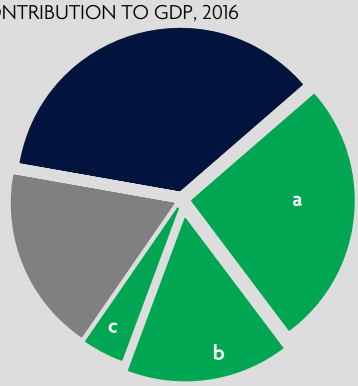
MIDDLE EAST
BREAKDOWN OF TRAVEL & TOURISM'S
TOTAL CONTRIBUTION TO GDP, 2016

Direct
35.8%

Induced
18.2%

Indirect
46.0%

Indirect is the sum of:
(a) Supply chain
26.1%
(b) Investment
15.9%
(c) Government collective
3.9%



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.

[1] All values are in constant 2016 prices & exchange rates

REGIONAL RANKINGS
ABSOULUTE CONTRIBUTION, 2016

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP	2016 (US$bn)
1	European Union	611.3
2	North America	608.2
3	North East Asia	448.4
4	Latin America	121.0
5	South East Asia	119.7
6	South Asia	91.1
7	Other Europe	85.2
8	Middle East	81.4
9	Oceania	51.9
10	Sub Saharan Africa	40.1
11	North Africa	26.3
12	Caribbean	17.9
13	Central Asia	3.4

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP	2016 (US$bn)
1	North America	1771.3
2	European Union	1682.9
3	North East Asia	1522.6
4	Latin America	328.2
5	South East Asia	301.1
6	Other Europe	278.5
7	South Asia	252.9
8	Middle East	227.1
9	Oceania	182.7
10	Sub Saharan Africa	108.0
11	North Africa	57.7
12	Caribbean	56.4
13	Central Asia	10.8

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT	2016 '000 jobs
1	South Asia	28657.5
2	North East Asia	26017.8
3	European Union	11409.2
4	South East Asia	11155.8
5	North America	10088.5
6	Sub Saharan Africa	6171.1
7	Latin America	5925.1
8	Other Europe	2552.8
9	Middle East	2356.9
10	North Africa	2188.2
11	Oceania	918.9
12	Caribbean	725.5
13	Central Asia	573.6

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT	2016 '000 jobs
1	North East Asia	77048.4
2	South Asia	47998.2
3	South East Asia	30154.9
4	European Union	26585.0
5	North America	24239.9
6	Latin America	16108.3
7	Sub Saharan Africa	15770.6
8	Other Europe	9445.1
9	Middle East	5730.7
10	North Africa	4933.4
11	Oceania	2470.1
12	Caribbean	2319.4
13	Central Asia	1546.7

	TRAVEL & TOURISM INVESTMENT	2016 (US$bn)
1	North East Asia	196.1
2	North America	180.3
3	European Union	159.6
4	Middle East	49.6
5	South East Asia	48.6
6	Latin America	42.0
7	South Asia	39.9
8	Other Europe	32.8
9	Oceania	20.2
10	Sub Saharan Africa	16.9
11	North Africa	11.6
12	Caribbean	6.8
13	Central Asia	2.2

	VISITOR EXPORTS	2016 (US$bn)
1	European Union	418.5
2	North East Asia	257.2
3	North America	247.7
4	South East Asia	123.7
5	Middle East	83.2
6	Other Europe	80.5
7	Latin America	44.7
8	Oceania	39.8
9	South Asia	31.6
10	Caribbean	31.4
11	Sub Saharan Africa	27.8
12	North Africa	12.9
13	Central Asia	2.5

The tables on pages 7-10 provide provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world average.

REGIONAL RANKINGS

RELATIVE CONTRIBUTION, 2016

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP	2016 % share
1	Caribbean	4.7
2	South East Asia	4.7
3	North Africa	4.4
4	European Union	3.7
5	Oceania	3.5
6	Middle East	3.3
7	Latin America	3.2
8	South Asia	3.2
9	North America	2.9
10	Sub Saharan Africa	2.6
11	Other Europe	2.6
12	North East Asia	2.5
13	Central Asia	1.6

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP	2016 % share
1	Caribbean	14.9
2	Oceania	12.2
3	South East Asia	11.8
4	European Union	10.2
5	North Africa	9.7
6	Middle East	9.1
7	South Asia	8.9
8	Latin America	8.8
9	Other Europe	8.4
10	North East Asia	8.4
11	North America	8.4
12	Sub Saharan Africa	7.1
13	Central Asia	5.2

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT	2016 % share
1	European Union	5.0
2	South Asia	5.0
3	Oceania	4.9
4	North America	4.6
5	Caribbean	4.2
6	North Africa	4.0
7	South East Asia	3.6
8	Middle East	3.1
9	North East Asia	2.9
10	Latin America	2.9
11	Sub Saharan Africa	2.4
12	Central Asia	1.9
13	Other Europe	1.8

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT	2016 % share
1	Caribbean	13.4
2	Oceania	13.2
3	European Union	11.6
4	North America	11.0
5	South East Asia	9.7
6	North Africa	9.0
7	North East Asia	8.7
8	South Asia	8.3
9	Latin America	7.8
10	Middle East	7.6
11	Other Europe	6.6
12	Sub Saharan Africa	6.0
13	Central Asia	5.1

	TRAVEL & TOURISM INVESTMENT	2016 % share
1	Caribbean	12.3
2	North Africa	7.3
3	Middle East	7.2
4	South East Asia	6.8
5	Latin America	6.0
6	Sub Saharan Africa	5.6
7	Oceania	5.5
8	South Asia	5.4
9	European Union	4.9
10	Other Europe	4.5
11	North America	4.3
12	Central Asia	4.3
13	North East Asia	3.1

	VISITOR EXPORTS	2016 % share
1	Caribbean	20.7
2	Oceania	12.5
3	North Africa	10.7
4	South East Asia	8.6
5	Sub Saharan Africa	8.6
6	North America	8.0
7	Middle East	8.0
8	Latin America	7.3
9	Other Europe	7.0
10	South Asia	6.1
11	European Union	5.9
12	North East Asia	5.6
13	Central Asia	0.4

REGIONAL RANKINGS: REAL GROWTH, 2017

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP	2017 % growth
1	South East Asia	7.3
2	South Asia	6.6
3	North East Asia	5.9
4	Middle East	4.5
5	Sub Saharan Africa	4.4
6	Caribbean	4.0
7	Oceania	3.9
8	European Union	2.9
9	Central Asia	2.9
10	North America	2.7
11	North Africa	2.6
12	Other Europe	2.1
13	Latin America	2.0

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP	2017 % growth
1	South East Asia	6.9
2	South Asia	6.6
3	North East Asia	5.7
4	Middle East	5.2
5	Caribbean	3.7
6	Sub Saharan Africa	3.4
7	Central Asia	3.4
8	Oceania	3.4
9	European Union	2.6
10	North America	2.4
11	Other Europe	2.1
12	Latin America	2.1
13	North Africa	2.0

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT	2017 % growth
1	South East Asia	4.1
2	Sub Saharan Africa	3.8
3	Caribbean	3.2
4	Latin America	3.1
5	Central Asia	2.9
6	European Union	2.8
7	South Asia	2.2
8	Middle East	2.1
9	North America	1.7
10	North East Asia	1.0
11	Other Europe	0.7
12	North Africa	-2.9
13	Oceania	-3.3

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT	2017 % growth
1	South East Asia	3.7
2	Sub Saharan Africa	3.3
3	Caribbean	3.1
4	Middle East	2.7
5	Latin America	2.7
6	Central Asia	2.5
7	European Union	2.2
8	South Asia	2.0
9	North East Asia	1.6
10	North America	1.2
11	Other Europe	0.4
12	Oceania	-2.2
13	North Africa	-2.6

	TRAVEL & TOURISM INVESTMENT CONTRIBUTION TO TOTAL CAPITAL INVESTMENT	2017 % growth
1	Middle East	7.2
2	North East Asia	6.0
3	North Africa	5.4
4	South Asia	5.0
5	Central Asia	4.7
6	South East Asia	4.0
7	Latin America	3.5
8	European Union	3.5
9	North America	2.6
10	Caribbean	2.5
11	Oceania	2.0
12	Other Europe	1.9
13	Sub Saharan Africa	0.7

	VISITOR EXPORTS CONTRIBUTION TO TOTAL EXPORTS	2017 % growth
1	South East Asia	8.5
2	Sub Saharan Africa	6.1
3	South Asia	5.6
4	European Union	5.6
5	Caribbean	5.3
6	Oceania	5.3
7	Middle East	5.1
8	Latin America	4.9
9	North East Asia	4.2
10	Other Europe	3.8
11	North Africa	3.6
12	Central Asia	2.1
13	North America	0.4

REGIONAL RANKINGS: LONG TERM GROWTH, 2017 - 2027

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP	2017 - 2027 % growth pa
1	South Asia	6.6
2	North East Asia	5.9
3	South East Asia	5.7
4	Sub Saharan Africa	4.8
5	Central Asia	4.8
6	Middle East	4.6
7	North Africa	4.0
8	Other Europe	3.7
9	Caribbean	3.6
10	Latin America	3.5
11	North America	3.2
12	Oceania	2.9
13	European Union	2.3

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP	2017 - 2027 % growth pa
1	South Asia	6.6
2	North East Asia	5.8
3	South East Asia	5.7
4	Sub Saharan Africa	4.8
5	Middle East	4.8
6	Central Asia	4.6
7	North Africa	4.3
8	Caribbean	3.6
9	Latin America	3.5
10	Other Europe	3.3
11	North America	3.1
12	Oceania	2.8
13	European Union	2.2

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT	2017 - 2027 % growth pa
1	Central Asia	4.7
2	South East Asia	3.3
3	Sub Saharan Africa	3.3
4	Other Europe	2.7
5	North Africa	2.7
6	Latin America	2.4
7	Caribbean	2.4
8	Middle East	2.2
9	North America	2.1
10	South Asia	2.1
11	North East Asia	1.7
12	European Union	1.5
13	Oceania	1.5

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT	2017 - 2027 % growth pa
1	Central Asia	3.9
2	North East Asia	3.3
3	Sub Saharan Africa	3.2
4	South East Asia	3.0
5	North Africa	2.9
6	Middle East	2.4
7	Latin America	2.3
8	North America	2.3
9	Caribbean	2.1
10	Other Europe	2.1
11	South Asia	2.0
12	Oceania	1.8
13	European Union	1.3

	TRAVEL & TOURISM INVESTMENT CONTRIBUTION TO CAPITAL INVEST	2017 - 2027 % growth pa
1	Middle East	6.4
2	South Asia	5.9
3	North East Asia	5.8
4	South East Asia	5.6
5	North Africa	4.9
6	Sub Saharan Africa	4.9
7	Latin America	4.3
8	Central Asia	4.1
9	North America	3.7
10	Caribbean	3.5
11	Other Europe	2.8
12	European Union	2.8
13	Oceania	2.5

	VISITOR EXPORTS CONTRIBUTION TO EXPORTS	2017 - 2027 % growth pa
1	South East Asia	6.2
2	South Asia	6.1
3	Sub Saharan Africa	5.9
4	North Africa	5.8
5	Latin America	5.8
6	Other Europe	5.5
7	Middle East	5.4
8	Central Asia	4.7
9	Oceania	4.0
10	Caribbean	4.0
11	North America	3.9
12	European Union	3.4
13	North East Asia	3.2

SUMMARY TABLES:

ESTIMATES & FORECASTS

MIDDLE EAST	2016 USDbn[1]	2016 % of total	2017 Growth[2]	USDbn[1]	2027 % of total	Growth[3]
Direct contribution to GDP	81.4	3.3	4.5	133.1	3.3	4.6
Total contribution to GDP	227.1	9.1	5.2	381.9	9.7	4.8
Direct contribution to employment[4]	2,357	3.1	2.1	2,986	3.1	2.2
Total contribution to employment[4]	5,731	7.6	2.7	7,433	7.7	2.4
Visitor exports	83.2	8.0	5.1	148.3	7.0	5.4
Domestic spending	70.8	2.8	3.7	103.9	2.0	3.5
Leisure spending	122.5	2.6	4.7	199.9	2.7	4.5
Business spending	31.5	0.6	3.6	52.2	0.6	4.8
Capital investment	49.6	7.2	7.2	98.9	9.1	6.4

[1]2016 constant prices & exchange rates; [2]2017 real growth adjusted for inflation (%); [3]2017-2027 annualised real growth adjusted for inflation (%); [4]'000 jobs

WORLDWIDE	2016 USDbn[1]	2016 0	2017 Growth[2]	USDbn[1]	2027 0	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	3.9	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

[1]2016 constant prices & exchange rates; [2]2017 real growth adjusted for inflation (%); [3]2017-2027 annualised real growth adjusted for inflation (%); [4]'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 2016 PRICES

MIDDLE EAST (USDbn, real 2016 prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	63.9	67.8	71.6	78.1	81.1	83.2	87.4	148.3
2. Domestic expenditure (includes government individual spending)	58.3	63.2	65.5	67.8	69.0	70.8	73.4	103.9
3. Internal tourism consumption (= 1 + 2)	122.2	131.0	137.1	145.9	150.0	154.0	160.9	252.2
4. Purchases by tourism providers, including imported goods (supply chain)	-56.4	-60.0	-63.7	-68.8	-70.8	-72.6	-75.8	-119.1
5. **Direct contribution of Travel & Tourism to GDP** (= 3 + 4)	65.8	71.0	73.4	77.2	79.3	81.4	85.0	133.1
Other final impacts (indirect & induced) 6. Domestic supply chain	47.5	52.3	54.4	58.6	60.1	61.6	64.6	104.0
7. Capital investment	42.2	42.3	44.8	46.4	47.3	49.6	53.1	98.9
8. Government collective spending	7.3	7.6	8.2	9.3	9.3	9.3	9.4	14.0
9. Imported goods from indirect spending	-11.7	-11.8	-13.1	-14.9	-15.5	-16.1	-16.6	-36.2
10. Induced	35.6	37.9	39.0	40.4	40.9	41.3	43.5	68.0
11. **Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)**	186.6	199.3	206.7	217.0	221.4	227.1	239.0	381.9
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	2,178.7	2,318.9	2,279.0	2,370.1	2,311.2	2,356.9	2,406.0	2,985.7
13. **Total contribution of Travel & Tourism to employment**	5,088.4	5,522.4	5,535.6	5,729.0	5,615.6	5,730.7	5,887.0	7,432.9
Other indicators 14. Expenditure on outbound travel	72.1	71.3	74.5	88.9	87.5	89.9	93.3	124.6

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES

MIDDLE EAST (USDbn, nominal prices)	2011	2012	2013	2014	2015	2016	2017E	2027F
1. Visitor exports	59.4	64.9	70.2	75.2	79.7	83.2	89.2	188.5
2. Domestic expenditure (includes government individual spending)	60.1	67.6	67.7	66.7	68.0	70.8	73.9	133.1
3. Internal tourism consumption (= 1 + 2)	119.5	132.6	137.9	141.9	147.8	154.0	163.1	321.6
4. Purchases by tourism providers, including imported goods (supply chain)	-54.9	-60.3	-64.1	-67.2	-69.7	-72.6	-76.9	-54.9
5. **Direct contribution of Travel & Tourism to GDP** (= 3 + 4)	64.6	72.2	73.8	74.8	78.1	81.4	86.2	171.8
Other final impacts (indirect & induced) 6. Domestic supply chain	46.5	52.7	54.9	57.4	59.3	61.6	65.5	130.6
7. Capital investment	40.6	42.2	44.3	44.5	46.5	49.6	54.1	133.3
8. Government collective spending	7.1	7.6	8.2	9.1	9.1	9.3	9.4	17.4
9. Imported goods from indirect spending	-11.1	-11.5	-13.0	-14.3	-15.2	-16.1	-17.0	-45.2
10. Induced	35.3	38.9	39.4	39.4	40.3	41.3	44.0	89.1
11. **Total contribution of Travel & Tourism to GDP** **(= 5 + 6 + 7 + 8 + 9 + 10)**	182.9	202.3	207.5	210.7	218.1	227.1	242.3	497.1
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	2,178.7	2,318.9	2,279.0	2,370.1	2,311.2	2,356.9	2,406.0	2,985.7
13. **Total contribution of Travel & Tourism to employment**	5,088.4	5,522.4	5,535.6	5,729.0	5,615.6	5,730.7	5,887.0	7,432.9
Other indicators 14. Expenditure on outbound travel	71.4	72.6	76.3	86.8	85.9	89.9	94.9	165.0

*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

MIDDLE EAST Growth[1] (%)	2011	2012	2013	2014	2015	2016	2017E	2027F [2]
1. Visitor exports	-9.8	6.2	5.7	9.1	3.7	2.6	5.1	5.4
2. Domestic expenditure (includes government individual spending)	-3.0	8.4	3.6	3.5	1.7	2.7	3.7	3.5
3. Internal tourism consumption (= 1 + 2)	-6.7	7.2	4.7	6.4	2.8	2.6	4.5	4.6
4. Purchases by tourism providers, including imported goods (supply chain)	-2.9	6.5	6.1	7.9	2.9	2.6	4.5	4.6
5. **Direct contribution of Travel & Tourism to GDP** (= 3 + 4)	-9.7	7.9	3.4	5.1	2.7	2.7	4.5	4.6
Other final impacts (indirect & induced) 6. Domestic supply chain	-3.1	10.1	4.0	7.8	2.5	2.5	4.9	4.9
7. Capital investment	0.0	0.3	6.0	3.4	2.0	4.7	7.2	6.4
8. Government collective spending	-1.9	4.8	8.0	13.2	-0.4	0.7	0.5	4.1
9. Imported goods from indirect spending	-4.9	0.6	11.7	13.4	4.1	3.5	3.5	8.1
10. Induced	-4.0	6.3	2.9	3.8	1.1	0.9	5.4	4.6
11. **Total contribution of Travel & Tourism to GDP** **(= 5 + 6 + 7 + 8 + 9 + 10)**	-4.9	6.8	3.7	5.0	2.0	2.6	5.2	4.8
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	-11.5	6.4	-1.7	4.0	-2.5	2.0	2.1	2.2
13. **Total contribution of Travel & Tourism to employment**	-11.4	8.5	0.2	3.5	-2.0	2.0	2.7	2.4
Other indicators 14. Expenditure on outbound travel	-15.6	-1.1	4.5	19.2	-1.6	2.8	3.7	2.9

[1]2011-2016 real annual growth adjusted for inflation (%); [2]2017-2027 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, ad 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
AFRICA	NORTH AFRICA	Algeria
		Egypt
		Libya
		Morocco
		Tunisia
	SUB-SAHARAN	Angola
		Benin
		Botswana
		Burkina Faso
		Burundi
		Cameroon
		Cape Verde
		Central African Republic
		Chad
		Comoros
		Congo
		Cote d'Ivoire
		Democratic Republic of Congo
		Ethiopia
		Gabon
		Gambia
		Ghana
		Guinea
		Kenya
		Lesotho
		Madagascar
		Malawi
		Mali
		Mauritius
		Mozambique
		Namibia
		Niger
		Nigeria
		Reunion
		Rwanda
		Sao Tome and Principe
		Senegal
		Seychelles
		Sierra Leone
		South Africa
		Sudan and South Sudan
		Swaziland
		Tanzania
		Togo
		Uganda
		Zambia
		Zimbabwe
AMERICAS	CARIBBEAN	Anguilla
		Antigua and Barbuda
		Aruba
		Bahamas
		Barbados
		Bermuda
		British Virgin Islands
		Cayman Islands
		Cuba
		Dominica
		Dominican Republic
		Former Netherland Antillies
		Grenada
		Guadeloupe
		Haiti
		Jamaica
		Martinique
		Puerto Rico
		St Kitts and Nevis
		St Lucia
		St Vincent and the Grenadines
		Trinidad and Tobago
		US Virgin Islands
	LATIN AMERICA	Argentina
		Belize
		Bolivia
		Brazil
		Chile
		Colombia
		Costa Rica
		Ecuador
		El Salvador
		Guatemala
		Guyana
		Honduras
		Nicaragua
		Panama
		Paraguay
		Peru
		Suriname
		Uruguay
		Venezuela
	NORTH AMERICA	Canada
		Mexico
		USA
ASIA-PACIFIC	NORTHEAST ASIA	China
		Hong Kong
		Japan
		South Korea
		Macau
		Mongolia
		Taiwan
	CENTRAL ASIA	Kazakhstan
		Kyrgyzstan
		Tajikistan
		Uzbekistan
	OCEANIA	Australia
		Fiji
		Kiribati
		New Zealand
		Papua New Guinea
		Solomon Islands
		Tonga
		Vanuatu
		Other Oceanic States
	SOUTH ASIA	Bangladesh
		India
		Maldives
		Nepal
		Pakistan
		Sri Lanka
	SOUTHEAST ASIA (ASEAN)	Brunei Darussalam
		Cambodia
		Indonesia
		Laos
		Malaysia
		Myanmar
		Philippines
		Singapore
		Thailand
		Vietnam
EUROPE	EUROPEAN UNION	Austria
		Belgium
		Bulgaria
		Croatia
		Cyprus
		Czech Republic
		Denmark
		Estonia
		Finland
		France
		Germany
		Greece
		Hungary
		Ireland
		Italy
		Latvia
		Lithuania
		Luxembourg
		Malta
		Netherlands
		Poland
		Portugal
		Romania
		Slovakia
		Slovenia
		Spain
		Sweden
		UK
	OTHER EUROPE	Albania
		Armenia
		Azerbaijan
		Belarus
		Bosnia and Herzegovina
		Georgia
		Iceland
		Macedonia
		Moldova
		Montenegro
		Norway
		Russian Federation
		Serbia
		Switzerland
		Turkey
		Ukraine
MIDDLE EAST		Bahrain
		Iran
		Iraq
		Israel
		Jordan
		Kuwait
		Lebanon
		Oman
		Qatar
		Saudi Arabia
		Syria
		United Arab Emirates
		Yemen

WORLD TRAVEL & TOURISM COUNCIL

The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism.

WTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading private sector Travel & Tourism businesses.

Together with Oxford Economics, WTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting over 292 million jobs and generating 10.2% of global GDP in 2016. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 185 economies around the world. In addition to the individual country reports, WTTC produces a world report highlighting the global economic impact and issues, and 24 further reports that focus on regions, sub-regions and economic and geographic groups.

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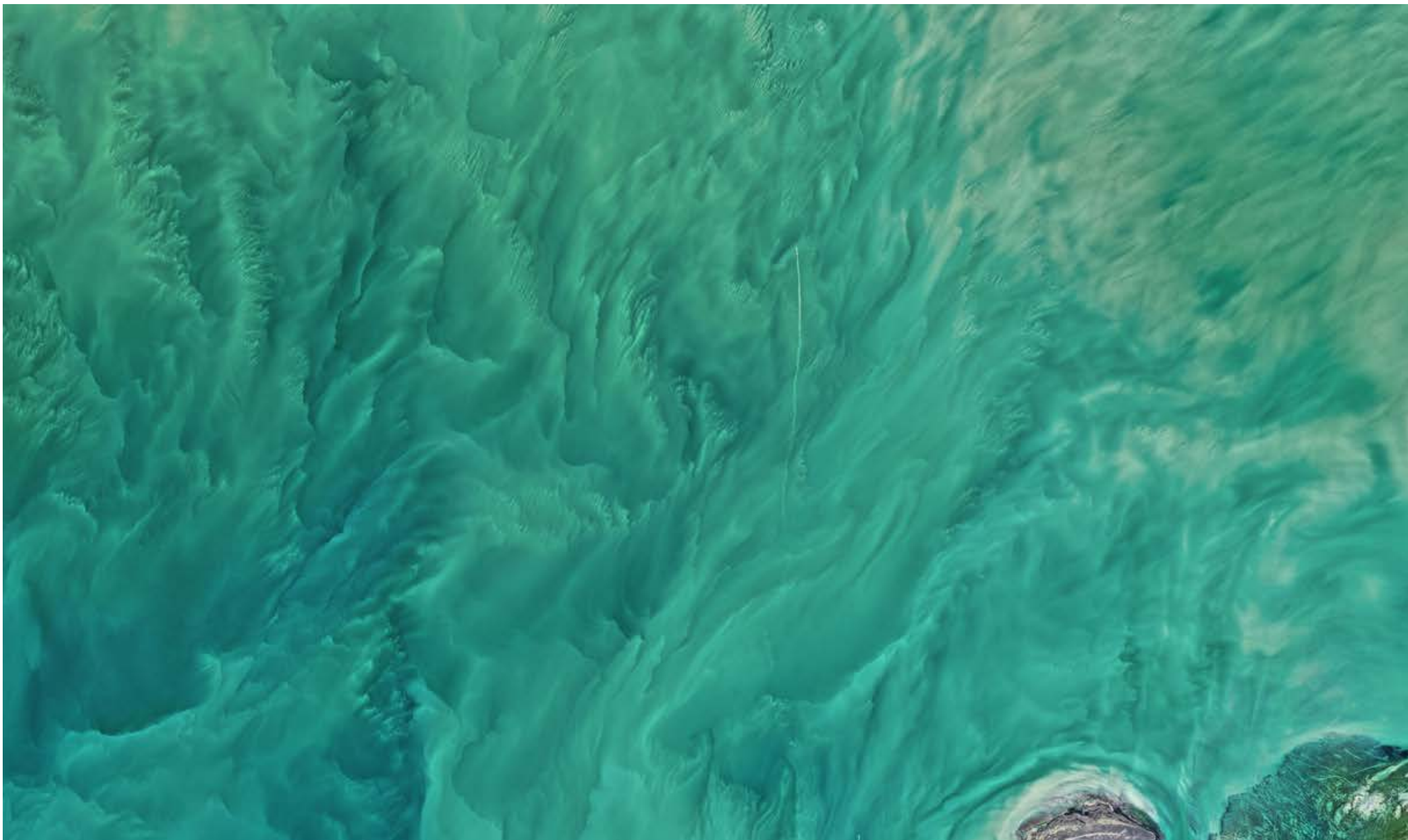
HOW MONEY TRAVELS

THE DIRECT, INDIRECT AND INDUCED EFFECT OF TOURISM SPENDING



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