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## Advance Release, January 2012

This *Advance Release* and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* present preliminary results for international tourism in 2011 and the outlook for 2012.

This release is available only in electronic format, through the UNWTO eLibrary, and is free of charge for members. The release is provided in English only, while the Statistical Annex is available in English, French, Spanish and Russian.

## International tourism to reach one billion in 2012

International tourist arrivals grew by over 4% in 2011 to 980 million. With growth expected to continue in 2012, at a somewhat slower rate, international tourist arrivals are on track to reach the milestone one billion mark later this year.

## Quick overview of key trends

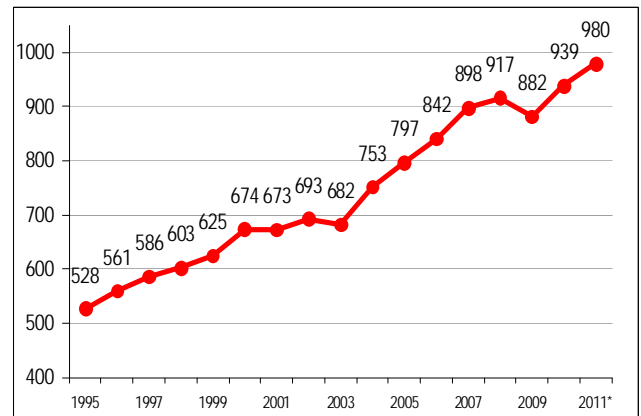
### International tourism – 2011 results

- A total of 150 countries around the world monitored by UNWTO, and virtually all major destinations, have reported monthly or quarterly data on international tourist arrivals for 2011. Of these, 125 show positive figures (83%), of which 52 are in double digits (35%), while only 25 reported negative results (17%). Over 125 countries reported results through September, of which 94 at least to October, 62 to November and 17 for the full year. Based on this sample of destinations, worldwide arrivals growth for 2011 is estimated at 4.4%.

### World: Inbound Tourism

#### International Tourist Arrivals

(million)

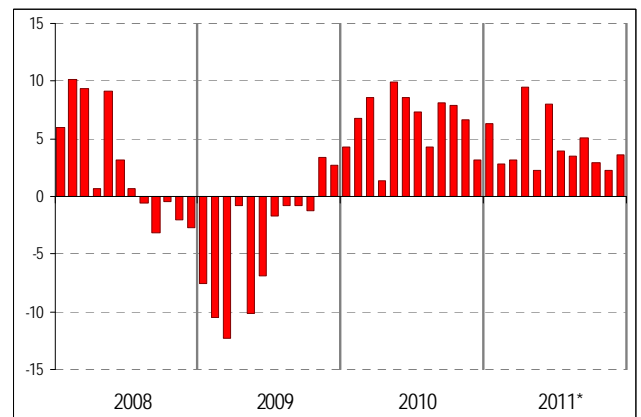


Source: World Tourism Organization (UNWTO) ©

### International Tourist Arrivals, monthly evolution

#### World

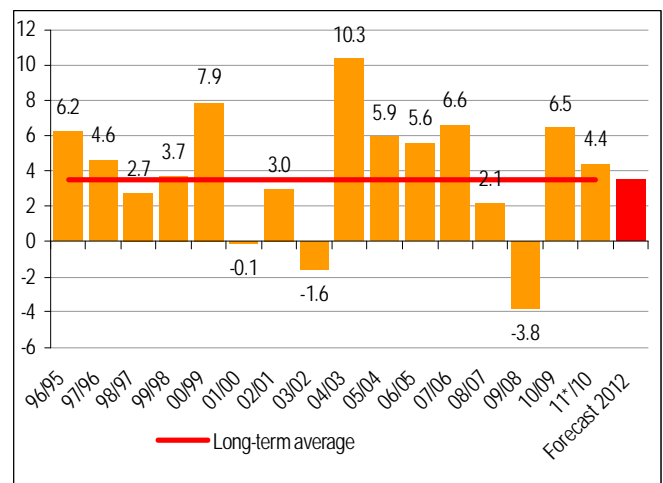
(% change)



Source: World Tourism Organization (UNWTO) ©

### International Tourist Arrivals, World

(% change)



Source: World Tourism Organization (UNWTO) ©

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO). By monitoring short-term tourism trends on a regular basis, UNWTO aims to provide all those involved directly or indirectly in tourism with adequate up-to-date statistics and analysis in a timely fashion.

The *UNWTO World Tourism Barometer* is periodically updated. Issues contains as regular sections: an overview of short-term tourism data from destination and generating countries and air transport; the results of the latest survey among the UNWTO Panel of Tourism Experts, providing an evaluation of and prospects for short-term tourism performance; and selected economic data relevant for tourism. The objective for future editions of the *UNWTO World Tourism Barometer* will be to broaden its scope and improve coverage gradually over time.

The *UNWTO World Tourism Barometer* is prepared by UNWTO's Tourism Trends and Marketing Strategies Programme, with the collaboration of consultants, Nancy Cockerell and David Stevens. The UNWTO Secretariat wishes to express its sincere gratitude to all those who have participated in the elaboration of the *UNWTO World Tourism Barometer*, in particular all institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable contributions.

For more information on the *UNWTO World Tourism Barometer*, including copies of previous issues, please refer to the Facts & Figures section on the UNWTO website at [www.unwto.org/facts/menu.html](http://www.unwto.org/facts/menu.html).

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Calle Capitán Haya, 42, 28020 Madrid, Spain

**UNWTO World Tourism Barometer**  
ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2012 (version 20/01/12)  
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Data collection for this issue was closed mid January 2012.

The next issue of the UNWTO World Tourism Barometer will be published beginning of March 2012.

The *UNWTO World Tourism Barometer* is developed as a service for UNWTO Members and published three times a year in English, French and Spanish. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.

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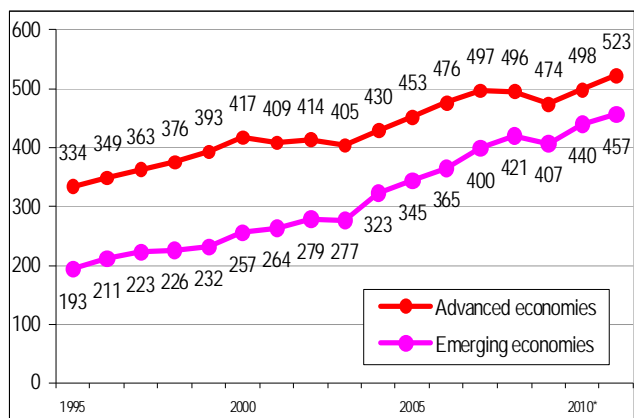
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- International tourist arrivals reached a total of 980 million in 2011, up from 939 million in 2010, in a year characterised by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters in Japan. By region, Europe (+6%) was the best performer, while by subregion South America (+10%) topped the ranking. Contrary to previous years, growth was higher in advanced economies (+5.0%) than in emerging ones (+3.8%), due largely to the strong results in Europe, and the setbacks in the Middle East and North Africa.

tourist arrivals, totalling 55 million. Nevertheless, some destinations such as Saudi Arabia, Oman and the United Arab Emirates sustained steady growth.

Advanced economies & emerging economies: Inbound Tourism International Tourist Arrivals (million)

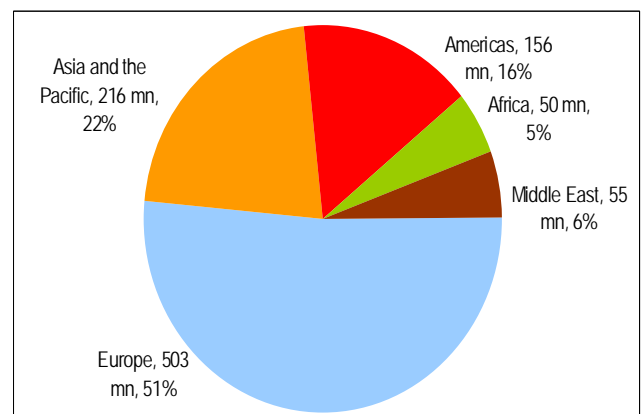


Source: World Tourism Organization (UNWTO) ©

**Europe surpasses the half billion mark in 2011**

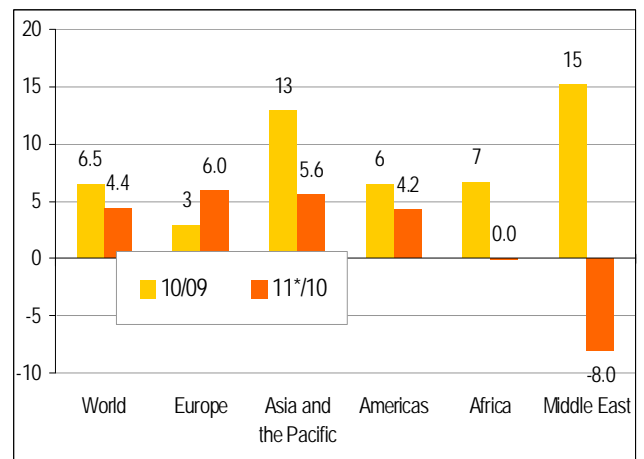
- Despite persistent economic uncertainty, tourist arrivals to **Europe** reached 503 million in 2011, accounting for 28 million of the 41 million additional international arrivals recorded worldwide. Central and Eastern Europe and Southern Mediterranean destinations (+8% each) experienced the best results. Although part of the growth in Southern Mediterranean Europe resulted from a shift in traffic away from the Middle East and North Africa, destinations in the Mediterranean also profited from improved outbound flows from markets such as Scandinavia, Germany and the Russian Federation.
- Asia and the Pacific** (+6%) was up 11 million arrivals in 2011, reaching a total of 216 million international tourists. South Asia and South-East Asia (both +9%) benefited from strong intraregional demand, while growth was comparatively weaker in North-East Asia (+4%) and Oceania (+0.3%), partly due to the temporary decline in the Japanese outbound market.
- The **Americas** (+4%) saw an increase of 6 million arrivals, reaching 156 million in total. South America, up by 10% for the second consecutive year, continued to lead growth. Central America and the Caribbean (both +4%) maintained the growth rates of 2010. North America, with a 3% increase, hit the 100 million arrivals mark in 2011.
- Africa** maintained international arrivals at 50 million, as the gain of two million arrivals for Sub-Saharan destinations (+7%) was offset by the losses in North Africa (-12%). The **Middle East** (-8%) lost an estimated 5 million international

World Inbound Tourism: International Tourist Arrivals, 2011\* (million)



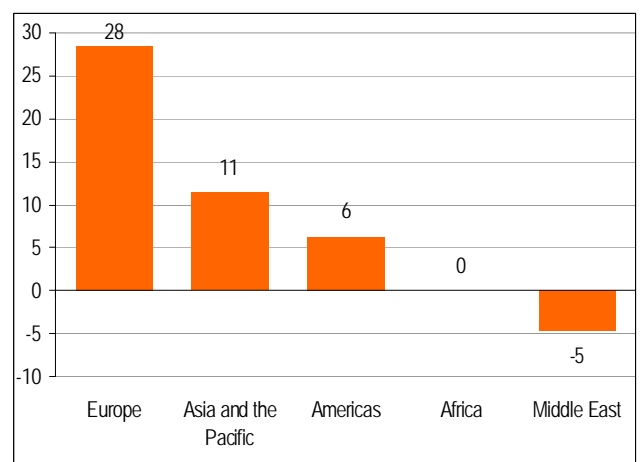
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (absolute change 2011, million)



Source: World Tourism Organization (UNWTO) ©

## International Tourist Arrivals by (Sub)region

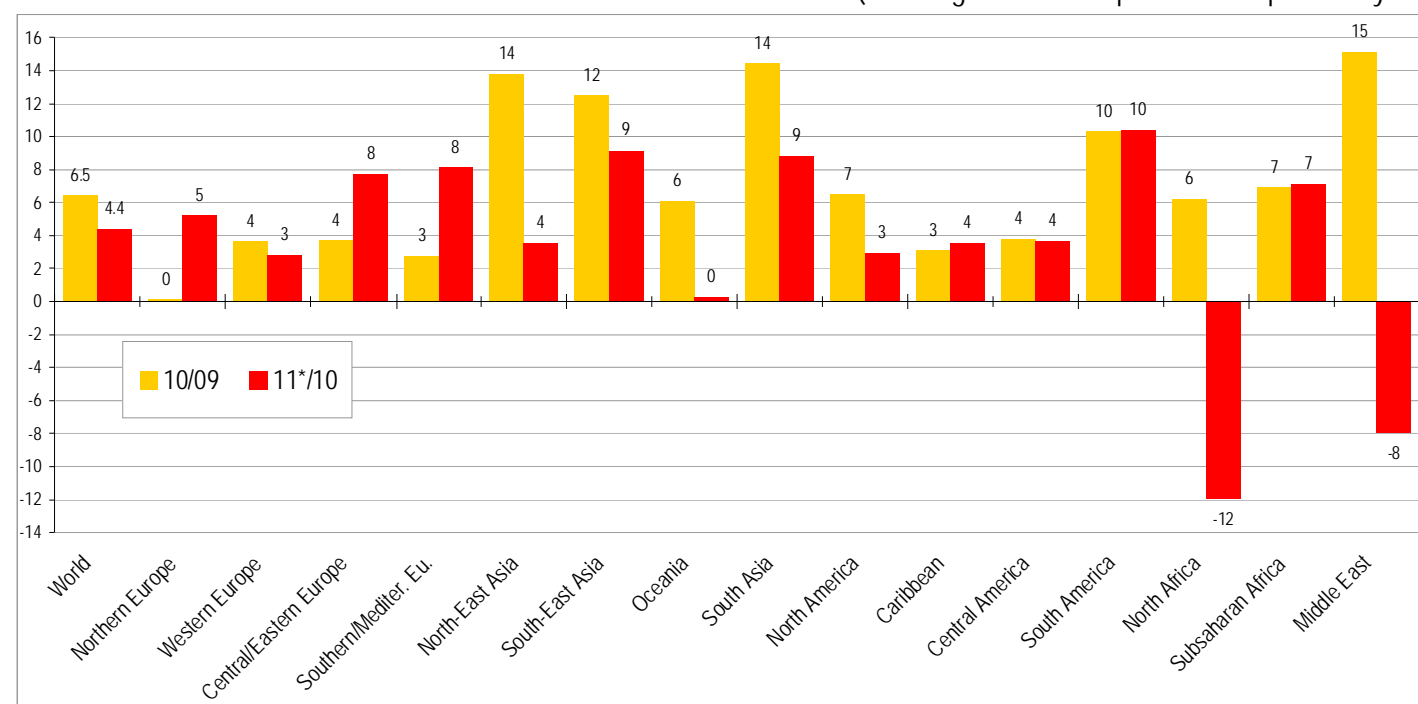
|                             | Full year |       |       |       |       | Share<br>2011*<br>(%) | Change |       |        | Monthly/quarterly data series<br>(percentage change over same period of the previous year) |       |       |       |       |      |       |       |       |      |      |      |      |
|-----------------------------|-----------|-------|-------|-------|-------|-----------------------|--------|-------|--------|--|-------|-------|-------|-------|------|-------|-------|-------|------|------|------|------|
|                             | 2000      | 2005  | 2009  | 2010  | 2011* |                       | 09/08  | 10/09 | 11*/10 | 2011*  |       |       |       | 2010  |      |       |       |       |      |      |      |      |
|                             | (million) |       |       |       |       |                       | %      |       |        | YTD  | Q1    | Q2    | Q3    | Q4    | Sep  | Oct   | Nov   | Dec   | Q1   | Q2   | Q3   | Q4   |
| <b>World</b>                | 674       | 797   | 882   | 939   | 980   | 100                   | -3.8   | 6.5   | 4.4    | 4.4  | 4.0   | 6.5   | 4.1   | 2.9   | 5.0  | 2.9   | 2.2   | 3.6   | 6.7  | 7.1  | 6.9  | 6.0  |
| Advanced economies          | 417       | 453   | 474   | 498   | 523   | 53.4                  | -4.3   | 5.0   | 5.0    | 5.0  | 2.9   | 6.3   | 4.9   | 5.1   | 5.8  | 4.7   | 4.7   | 5.9   | 4.6  | 5.5  | 5.3  | 4.5  |
| Emerging economies          | 257       | 345   | 407   | 440   | 457   | 46.6                  | -3.2   | 8.1   | 3.8    | 3.8  | 5.1   | 6.7   | 2.9   | 0.8   | 4.0  | 0.9   | 0.1   | 1.6   | 8.9  | 9.0  | 9.1  | 7.5  |
| <i>By UNWTO regions:</i>    |           |       |       |       |       |                       |        |       |        |  |       |       |       |       |      |       |       |       |      |      |      |      |
| <i>Europe</i>               | 385.1     | 438.7 | 461.0 | 474.4 | 502.8 | 51.3                  | -4.9   | 2.9   | 6.0    | 6.0  | 5.2   | 8.6   | 5.0   | 5.1   | 6.0  | 5.3   | 4.0   | 5.8   | 1.4  | 2.4  | 3.8  | 4.6  |
| Northern Europe             | 43.7      | 57.3  | 57.8  | 57.9  | 60.9  | 6.2                   | -5.1   | 0.1   | 5.2    | 5.2  | 5.2   | 10.9  | 4.0   | 0.4   | 5.8  | 1.1   | -1.3  | 1.3   | -5.0 | -2.3 | 3.0  | 2.9  |
| Western Europe              | 139.7     | 141.7 | 148.5 | 154.0 | 158.3 | 16.2                  | -3.0   | 3.7   | 2.8    | 2.8  | 3.1   | 4.2   | 1.6   | 3.3   | 2.0  | 3.8   | 2.7   | 3.1   | 2.4  | 4.0  | 4.3  | 2.9  |
| Central/Eastern Eu.         | 69.3      | 87.5  | 90.2  | 93.5  | 100.8 | 10.3                  | -9.9   | 3.7   | 7.7    | 7.7  | 9.2   | 11.0  | 5.1   | 7.1   | 4.6  | 7.4   | 6.9   | 7.0   | 0.4  | 4.0  | 5.3  | 10.0 |
| Southern/Mediterr. Eu.      | 132.5     | 152.3 | 164.5 | 169.0 | 182.8 | 18.6                  | -3.5   | 2.8   | 8.1    | 8.1  | 4.6   | 10.4  | 8.4   | 7.0   | 10.3 | 6.7   | 5.1   | 9.8   | 4.0  | 1.8  | 2.8  | 3.2  |
| - of which EU-27            | 323.6     | 349.2 | 353.9 | 362.4 | 382.4 | 39.0                  | -4.6   | 2.4   | 5.5    | 5.5  | 4.1   | 7.9   | 4.9   | 4.7   | 5.8  | 5.1   | 3.4   | 5.4   | 1.1  | 1.5  | 3.2  | 3.1  |
| <i>Asia and the Pacific</i> | 110.1     | 153.6 | 181.1 | 204.6 | 216.0 | 22.0                  | -1.6   | 12.9  | 5.6    | 5.6  | 4.4   | 5.9   | 6.6   | 5.4   | 5.6  | 5.5   | 5.6   | 5.0   | 13.6 | 15.9 | 14.3 | 8.6  |
| North-East Asia             | 58.3      | 85.9  | 98.0  | 111.6 | 115.5 | 11.8                  | -2.9   | 13.8  | 3.5    | 3.5  | 1.9   | 0.9   | 5.1   | 6.2   | 5.2  | 5.3   | 8.9   | 4.5   | 11.4 | 21.1 | 15.6 | 7.9  |
| South-East Asia             | 36.1      | 48.5  | 62.1  | 69.8  | 76.2  | 7.8                   | 0.5    | 12.5  | 9.2    | 9.2  | 8.3   | 14.6  | 10.0  | 4.6   | 6.7  | 5.4   | 1.3   | 6.8   | 16.9 | 10.1 | 13.6 | 9.6  |
| Oceania                     | 9.6       | 11.0  | 10.9  | 11.6  | 11.6  | 1.2                   | -1.7   | 6.1   | 0.3    | 0.3  | -0.5  | 0.5   | 0.2   | 1.0   | -0.5 | 3.4   | 1.2   | -1.0  | 6.7  | 4.1  | 8.6  | 4.8  |
| South Asia                  | 6.1       | 8.1   | 10.1  | 11.6  | 12.6  | 1.3                   | -1.5   | 14.4  | 8.9    | 8.9  | 8.5   | 12.9  | 8.1   | 7.1   | 10.4 | 10.6  | 5.8   | 5.3   | 21.5 | 11.4 | 10.9 | 13.1 |
| <i>Americas</i>             | 128.2     | 133.3 | 140.7 | 149.8 | 156.2 | 15.9                  | -4.9   | 6.5   | 4.2    | 4.2  | 4.0   | 6.3   | 3.6   | 3.2   | 5.4  | 1.1   | 3.5   | 4.7   | 4.4  | 7.5  | 8.9  | 4.5  |
| North America               | 91.5      | 89.9  | 92.1  | 98.2  | 101.0 | 10.3                  | -5.7   | 6.5   | 2.9    | 2.9  | 1.2   | 5.4   | 3.0   | 1.8   | 5.1  | -0.2  | 1.9   | 3.8   | 3.7  | 9.5  | 8.4  | 3.8  |
| Caribbean                   | 17.1      | 18.8  | 19.5  | 20.1  | 20.8  | 2.1                   | -2.7   | 3.1   | 3.6    | 3.6  | 3.6   | 4.9   | 2.5   | 3.1   | 3.5  | -0.2  | 4.2   | 4.5   | 5.6  | 0.4  | 3.6  | 2.6  |
| Central America             | 4.3       | 6.3   | 7.6   | 7.9   | 8.2   | 0.8                   | -7.4   | 3.8   | 3.7    | 3.7  | 2.6   | 4.8   | 3.6   | 3.9   | 6.3  | 2.4   | 4.7   | 4.4   | 5.5  | 6.5  | 4.2  | -0.7 |
| South America               | 15.3      | 18.3  | 21.4  | 23.6  | 26.1  | 2.7                   | -2.3   | 10.3  | 10.4   | 10.4   | 13.1  | 13.0  | 7.9   | 7.8   | 8.1  | 7.1   | 8.6   | 7.8   | 4.9  | 5.8  | 18.6 | 10.2 |
| <i>Africa</i>               | 26.5      | 35.4  | 46.7  | 49.8  | 49.8  | 5.1                   | 3.2    | 6.7   | 0.0    | 0.0  | 4.5   | -1.5  | -3.5  | 1.6   | 2.6  | -0.5  | 3.7   | 1.8   | 7.9  | 7.8  | 4.0  | 8.0  |
| North Africa                | 10.2      | 13.9  | 17.6  | 18.7  | 16.4  | 1.7                   | 2.5    | 6.2   | -12.0  | -12.0  | -13.2 | -12.8 | -15.1 | -4.9  | -1.7 | -10.6 | 3.2   | -5.6  | 9.2  | 4.4  | 4.1  | 9.3  |
| Subsaharan Africa           | 16.2      | 21.5  | 29.1  | 31.1  | 33.3  | 3.4                   | 3.6    | 6.9   | 7.1    | 7.1  | 12.4  | 5.5   | 6.3   | 4.8   | 5.3  | 5.5   | 3.9   | 5.0   | 7.3  | 10.0 | 3.9  | 7.4  |
| <i>Middle East</i>          | 24.1      | 36.3  | 52.2  | 60.2  | 55.4  | 5.7                   | -4.6   | 15.1  | -7.9   | -8.0   | -4.3  | -2.4  | -7.1  | -16.8 | -5.7 | -18.3 | -16.2 | -16.4 | 22.4 | 21.5 | 18.7 | 8.2  |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2012)

## International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

**Receipts confirm positive trend in arrivals**

- Available data on international tourism receipts and expenditure for 2011 closely follows the positive trend in arrivals.
- Among the top ten tourist destinations, receipts were up significantly in the USA (+12%), Spain (+9%), the UK (+7%) and Hong Kong (China) (+25%). The top spenders were led by emerging source markets – China (+38%), Russia (+21%), Brazil (+32%) and India (+32%) – followed by traditional markets, with the growth in expenditure of travelers from Germany (+4%) and the USA (+5%) above the levels of previous years.

**International tourism on course to hit one billion in 2012**

- UNWTO forecasts continued growth in international tourism in 2012 although at a slower rate. Arrivals are expected to increase by 3% to 4%, reaching the historic one billion mark by the end of the year. Emerging economies will regain the lead with stronger growth in Asia and the Pacific and Africa (4% to 6%), followed by the Americas and Europe (2% to 4%). The Middle East (0% to +5%) is forecast to start to recover part of its losses from 2011.
- These prospects are confirmed by the UNWTO Confidence Index. The over 350 members of the UNWTO Panel of Experts from around the globe expect the tourism sector to perform positively in 2012, albeit rather less strongly than last year.

**Governments urged to facilitate travel**

- As destinations worldwide look to stimulate travel demand under pressing economic conditions, UNWTO is urging governments to consider advancing travel facilitation, an area in which, despite the great strides already made, there is still much room for progress. UNWTO advises countries to make the most of information and communication technologies in improving visa application and processing formalities, as well as the time they take to issue visas, and to analyse the possible impact of travel facilitation in increasing their tourism economies.
- Travel facilitation is closely interlinked with tourism development and can be key in boosting demand. This area is of particular relevance at a time when governments are looking to stimulate economic growth but cannot make major use of fiscal incentives or public investment.

The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the free excerpt of this document.

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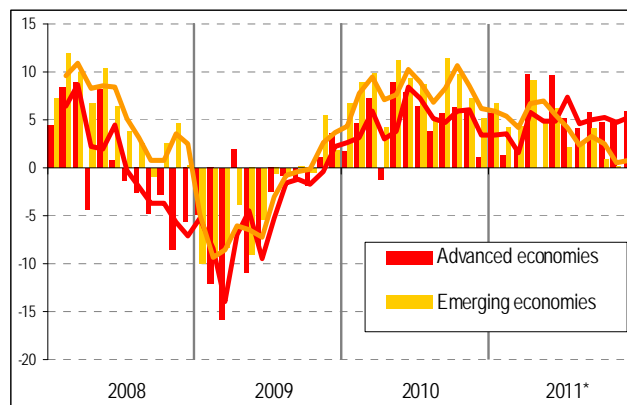
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International Tourist Arrivals, monthly evolution

Advanced economies & Emerging economies

(% change)

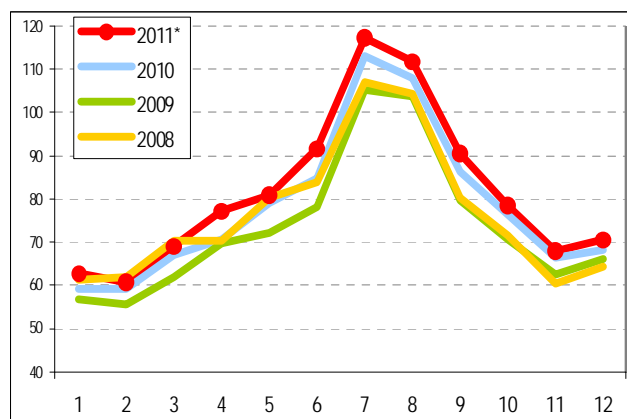


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World

(million)



Source: World Tourism Organization (UNWTO) ©

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## Evaluation by UNWTO's Panel of Tourism Experts

### *Prospects less bullish for 2012, except in emerging markets*

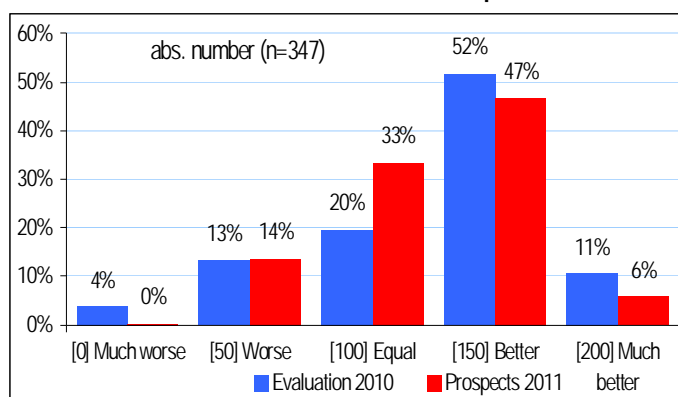
The 350 members of the UNWTO Panel of Experts from around the world who contributed to this issue of the UNWTO World Tourism Barometer are generally satisfied with 2011's tourism performance, evaluating the year with a score of 127 – well above the 'neutral' 100, even if quite below the very high rating (139) given to prospects for 2011 at the beginning of the year. Their score for 'prospects' in 2012 is also well down, at 122, reflecting the uncertain economic outlook worldwide, as well as concerns over political stability in some key regions.

Not surprisingly, the global averages mask fairly wide variations across the different world regions. In line with actual trends, the Americas and Europe were rated the best-performing regions in 2011, with the Middle East trailing in bottom place. In terms of prospects for 2012, Africa and the Americas are expected to outperform all other parts of the world in 2012, with Europe this year expected to be the weakest region.

- Experts in Europe were almost as positive, in line with actual performance, giving a rating of 133 to 2011 overall, much the same as for 2010 (131).
- The rating for Asia and the Pacific for 2011 was very much lower than that given 12 months ago for 2010: down from 161 to 119 – but still above the neutral 100. The catastrophes in Japan were undoubtedly an important factor.
- Ratings for the Middle East have, for obvious reasons, swung wildly. The overall rating for 2011 was only 83 (the only negative rating among the regional averages calculated by UNWTO), down from a euphoric 171 for 2010. By four-month periods, however, the ratings for the latest four months have improved from 83 in T1 to 98 in T2 and to the neutral 100 in T3.
- The rating for Africa for 2011 was only 111, down from 133 for 2010, as the unfavourable evaluations for North Africa dragged down the average.

As usual in recent surveys, respondents in the public sector were more positive than those in the private sector: 133 against 122 for 2011 as a whole. Destinations were altogether more positive, giving ratings of 136 for 2011, as were Consultancy, Research and the Media (125) and General Industry Bodies (127). Global operators were slightly less positive than average (108). Transport (125) and Accommodation and Catering (118) operators were more upbeat than Tour Operators and Travel Agencies (111).

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

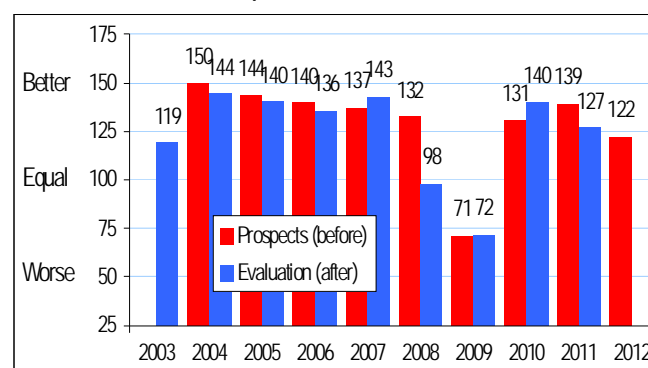
### *Evaluation of 2011*

In their review of 2011, the vast majority of Members of UNWTO's Panel of Experts evaluated the past year as 'better' (52%) or 'much better' (11%) than would reasonably be expected. Only a minority of experts rated the past year as 'equal to' (20%), 'worse' (13%) or 'much worse' (4%). Averaged on a scale of 0 to 200, on which 100 means 'equal' or 'no change', this leads to a score of 127, a level somewhat below previous years but still clearly positive. Experts in advanced economies rated performance slightly higher at 128, while those in the emerging ones gave a rating of 126.

By region, the scores for 2011 were as follows:

- The strongest evaluation was given by experts in the Americas (136, about the same as they gave 12 months ago for 2010).

UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

### *Prospects for 2012*

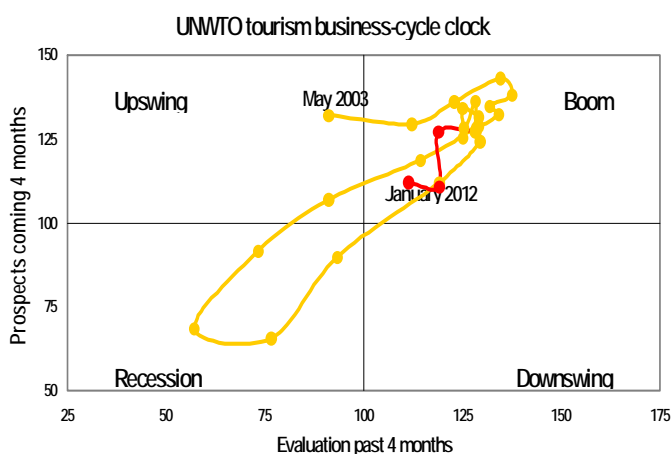
The Panel of Experts' overall ratings for prospects in 2012 are close to their ratings for the outcome in 2011. In other words, they expect continuing growth in activity. However, the overall prospects rating for 2012 is substantially weaker than the one expressed 12 months ago for 2011, indicating a more moderate growth.

The most significant trend seen in the Panel of Experts' responses is that the 2012 prospects rating for the

emerging economies (137) is very much stronger than that for the advanced ones (110).

- Africa provides the strongest expectation for 2012 along with the Americas: 140 for the year as a whole (compared with the 2011 prospects rating of 137 made a year ago before the revolutions in North Africa, and with the 2011 evaluation of 111).
- The growth in tourism in the Americas is expected to continue unabated: the prospects rating for 2012 is 140.
- The prospect for Asia and the Pacific for 2012 (127) is stronger than the evaluation of 2011 (119), but still substantially weaker than the 2011 prospects rating made a year ago (150).
- In Europe, the Panel provides an average prospects rating of 110 for 2012, reflecting a more moderate growth after a strong year and the economic uncertainties in the area.
- The prospects rating for the Middle East (125) are more moderate than those for Africa, but still a clear improvement on recent experience.
- Global operators are least optimistic: their prospects ratings for 2012 (106) is only marginally positive.

Respondents in the private sector are this time only slightly less positive about 2012 than those in the public sector (120 against 125).



### Four-month period: January-April 2012

As might be expected, the evaluation of September-December 2011 and the prospects for January-April 2012 (110) are broadly consistent with the rating for the full year. Emerging economies regain strength, while advanced economies are expected to experience stagnation in tourism activity over the next four months.

The ratings by region show that experts in the Americas (129) and Asia-Pacific (122) have increased expectations. Prospects in Africa (130) remain bullish, while Europe (100) shows less optimism. Expectations have improved in the Middle East (111), but are still only modestly in positive territory.

See corresponding graphs by region and activity in the Statistical Annex.

### The UNWTO Tourism Confidence Index

The UNWTO *Tourism Confidence Index* is based on the results of an email survey conducted by the UNWTO Secretariat among selected representatives of public and private sector organisations participating in the UNWTO *Panel of Tourism Experts*. The survey has been repeated every four months since May 2003 in order to keep track of actual performance, as well as perceived short-term prospects, of the tourism sector. This allows performance and prospects to be compared over time, as well as providing a comparison of the actual performance of the past four months with prospects forecast for the same period four months earlier. Results are also broken down by region and by sector of activity. These breakdowns should, however, be interpreted with caution as they may in some cases be based only on a relatively small number of responses.

*The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey, in particular from countries still not included in the listing below, are kindly invited to send an email to <barom@unwto.org>.*

### How to read this data

For the UNWTO *Tourism Confidence Index* members of the UNWTO Panel of Tourism Experts are asked once every four months by email to answer the following two simple questions:

- *What is your assessment of tourism performance in your destination or business for the four months just ended (or about to end) as against what you would reasonably expect for this time of year?*
- *What are the tourism prospects of your destination or business in the coming four months compared with what you would reasonably expect for this time of year?*

Participants should select one of the following five options: much worse [0]; worse [50], equal [100]; better [150], much better [200]. Results are averaged and broken down by region and by activity. A value above 100 means that the number of participants who evaluate the situation as "better" or "much better", outnumber the participants who reply "worse" or "much worse".

In addition, participants are also invited to include a qualitative assessment in their own words. The analysis contained in the *UNWTO World Tourism Barometer* is in large part based on their comments.

## UNWTO outlook for 2012

### ***Growth to continue, but at a slower rate***

**Following a year of healthy growth, international tourism is expected to continue growing in 2012, although at a slower rate. UNWTO forecasts an increase of arrivals of between 3% and 4%, reaching the historic one billion mark by the end of the year.**

The growth in international tourist arrivals for the full year 2011 has been in line with the projection made at the beginning of the year. For 2012, growth is expected to be in the range of +3% to +4%, slightly lower than in 2011, but sustaining the positive results of 2010 (+6%) and 2011 (+4%). After a 2011 unexpectedly driven by advanced economy destinations, emerging economy destinations will regain the lead in 2012.

These prospects are confirmed by the UNWTO Confidence Index. The over 350 members of the UNWTO Panel of Experts from around the globe expect the tourism sector to perform positively in 2012, albeit rather less strongly than last year.

By region, growth in Asia and the Pacific (+4% to +6%) is expected to remain solid, benefiting from strong intraregional demand and improved outbound flows from Japan. After a zero growth year for Africa, the continuous prosperity in Sub-Saharan Africa accompanied by the ongoing recovery of inbound tourism to North Africa will resume growth in Africa (+4% to +6%) as a whole. In the Americas (+2% to +4%), growth is projected to be close to the world average, although the still weak US economy along with a more moderate growth in South America could weight on the final results. Following a remarkable year, growth is expected to slow in Europe (+2% to +4%) as economic uncertainties persist and pent-up demand dissipates. Finally, the Middle East (0 % to +5%) is forecast to start recovering part of its losses from 2011. However, the political situation has to settle down and a full recovery in tourism might be more difficult and slower than hoped for.

UNWTO's projection for 2012 points to a growth close to the 3.8% average annual rate forecast for the decade 2010-2020 in the UNWTO long-term forecast *Tourism Towards 2030*. This outlook reflects the complicated conditions seen in major advanced economies. The stalled economic recovery and increased financial and fiscal challenges have brought growing uncertainty to the tourism market. The implementation of austerity measures, particularly in Europe, puts pressure on household budgets and undermines consumer confidence, with implications for outbound tourism. In addition,

persistent high unemployment remains a major concern. Finally, rising geopolitical tensions can increase the volatility of oil price.

Nevertheless, the current results reflect the strong resilience of tourism demand, creating much needed exports and jobs in many economies around the world. On the upside, major sports events such as the 2012 London Olympic Games, the UEFA European Football Championship in Poland and Ukraine, and the Africa Cup of Nations co-hosted by Gabon and Equatorial Guinea are expected to boost visitor numbers and image.

#### About these forecasts

These forecasts are developed for UNWTO by the Fundación Premio Arce of the Universidad Politécnica de Madrid and are based on econometric modelling using the series of monthly data on international tourist arrivals available for the five regions. The aim of the model is to analyse the underlying trend in the data and extrapolate this to the short-term future. The model has been tested by comparing forecasts for previous years with actual results for those years. Of course, as with any model, the forecast growth rates assume that the current conditions will not suddenly change as a result of external factors. They also include a margin of error depending on the stability of the underlying data series.

These forecasts need to be read with a certain level of caution, not only because of the above mentioned, but also because the underlying data is not perfect:

- monthly data series are not available for all countries, although the countries with monthly series included represent roughly 90% of worldwide arrivals. Coverage is in particular comparatively limited for the Middle East and Africa, and a considerable margin should be taken into account;
- monthly data is typically preliminary and many countries are expected to revise their statistics at a later date;
- the monthly series is often based on a proxy that is not the same as the indicator used for the yearly data, e.g. for France the monthly series used is arrivals in hotels and similar accommodation (THS), instead of tourist arrivals at frontiers (TF), while for the USA the monthly series does not include arrivals from Mexico in the border areas, etc.

#### Outlook for International Tourist Arrivals

|                      | 2008              | 2009  | 2010  | 2011  | 2012*       |
|----------------------|-------------------|-------|-------|-------|-------------|
|                      | real              |       |       |       | projection  |
|                      | full year, change |       |       |       | between     |
| World                | 2.1%              | -3.8% | 6.5%  | 4.4%  | +3% and +4% |
| Europe               | 0.5%              | -4.9% | 2.9%  | 6.0%  | +2% and +4% |
| Asia and the Pacific | 1.2%              | -1.6% | 12.9% | 5.6%  | +4% and +6% |
| Americas             | 2.7%              | -4.9% | 6.5%  | 4.2%  | +2% and +4% |
| Africa               | 3.4%              | 3.2%  | 6.7%  | 0.0%  | +4% and +6% |
| Middle East          | 20.1%             | -4.6% | 15.1% | -7.9% | +0% and +5% |

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2012)



# World Tourism Organization (UNWTO) Publications



## UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on major routes; a retrospective and prospective evaluation of current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The *UNWTO World Tourism Barometer* is periodically updated.

Available in English, French and Spanish in print and PDF version



Price: € 70 per year (PDF version)  
€ 100 (PDF and print version)

## Handbook on E-marketing for Tourism Destinations

This handbook is the first of its kind for tourism destinations. It is a practical 'how-to' manual designed to help staff at national, regional and city tourism organisations, to improve their e-marketing skills and manage new projects. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advices among others on how to build better content, get distribution of it, use CRM, succeed with online PR and get into mobile marketing. Web analytics, online research methods, and performance measurement get full treatment and new areas like digital television are covered. Also, it includes over 30 examples of e-marketing in action.

Available in English

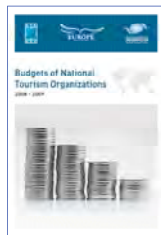


Published: 2008  
Price: € 75

## Budgets of National Tourism Organizations, 2008-2009

*Budgets of National Tourism Organizations, 2008-2009* is a benchmarking reference tool on inbound tourism marketing. This ETC/UNWTO report compiles and analyses updated and comparable information on the budgets that NTOs allocate for the promotion of inbound tourism, as well as their structure, functions and activities, focusing on recent trends and developments. Given the increasing importance of e-marketing, the report also includes a special focus on the use of Information and Communication Technologies (ICT) by NTOs in international tourism promotion. The report covers 62 countries worldwide.

Available in English

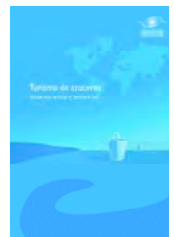


Published: 2010  
Price: € 75

## Cruise Tourism – Current Situation and Trends

Over the past years, worldwide demand for cruise tourism has posted some of the biggest gains within the tourism sector. The constant dynamism in cruise activity, as well as the increasing number of countries that include cruises, as a key product for their tourism development, has led to update and expand the first edition of the UNWTO study of 2003. This new study discusses subjects like the current supply and demand for cruises as well as its characteristics and trends. A new element includes the relationship between destinations and cruise lines, analysing key factors such as legislation, promotion and the economic impact of cruises through reference cases. It presents current trends in this industry in terms of innovation, safety and security, sustainability, and identifies the major lines that will shape the sector.

Available in English and Spanish



Published: 2008  
Price: € 80

## Demographic Change and Tourism

The structure of societies is continuously changing: The world population is forecast to grow to 8.3 billion in 2030, life expectancy is projected to increase in most of the world, households and families are becoming more diverse, and migration is changing the face of societies. All these changes will impact upon the types of tourists, where they originate from, where they travel to, the types of accommodation they require and the activities they engage in while travelling. The UNWTO/ETC Report on *Demographic Change and Tourism* aims to be a reference for destinations and the industry to achieve a better understanding of current and future changes and to anticipate and react upon them in the most competitive way. It includes a comprehensive analysis of major demographic trends and how these will impact on tourism in specific generating markets focusing on three major trends: Population growth and ageing, Household composition and travel parties, and Migration Branding.

Available in English



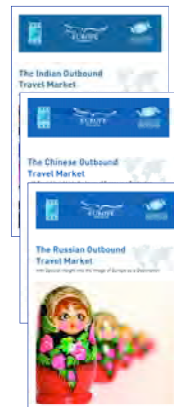
Published: 2010  
Price: € 75

## The Indian Outbound Travel Market, The Chinese Outbound Travel Market and The Russian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

*The Indian, The Chinese and The Russian Outbound Travel Markets* are some of the fastest growing, and consequently increasingly important markets in the world. As a result, the UNWTO and ETC have jointly published in-depth research studies focused on each unique market. The reports aim to provide the necessary information in order to better understand the structure and trends of these growing markets.

The outbound reports cover issues such as travellers' behaviour and patterns – destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the media or internet use trends.

Available in English



Published: 2008/2009  
Price: € 75 each

## Handbook on Tourism Destination Branding

All over, governments have become aware of tourism's power to boost their nation's development and prosperity. As more tourism destinations emerge and competition for visitors becomes more intense, a destination's ability to project itself on the world stage and differentiate itself from others is ever more important. Recognizing the value of successfully building and managing a destination's brand, the ETC and the UNWTO provide a useful and practical handbook for both marketing novices and experienced destination managers. Introduced by Simon Anholt, it offers a step-by-step guide to the branding process accompanied by strategies for brand management. Case studies illustrate the various concepts, present best practices from around the world and provide fresh insight into destination branding. It concludes with a section on evaluating brand impact and a set of practical recommendations.

Available in English



Published: 2009  
Price: € 75

## The Spanish Outbound Travel Market to Africa and the Middle East and Study on Chinese Outbound Travel to Africa

While other regions enjoy their fair share of the tourism cake, Africa only accounts for five percent of international tourist arrivals worldwide. One of the reasons for this low traffic to Africa could be insufficient knowledge about how to tap into markets, especially growing markets, such as the Chinese and Spanish one. As a result, the UNWTO has published two reports aimed at supporting African countries in benefitting from the growing Chinese and Spanish markets; by providing information linked to size, main characteristics, needs and expectations, as well as possible strategies for attracting Spanish and Chinese tourists to Africa.

Available in English



Published: 2011  
Price: € 75 each

The **World Tourism Organization** is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 161 countries and territories and more than 400 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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