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This issue and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* present an update of the preliminary international arrivals data presented in January. Currently over a hundred countries and territories have reported 2011 full year data with regards to international tourist arrivals. Data on international tourism receipts is available for around fifty countries. Furthermore, first data is included for international tourist arrivals in January 2012.

The next issue scheduled for late April will include a comprehensive analysis of international tourism receipts in 2011, as well as the top destinations by international tourist arrivals and receipts and top source markets by international tourism expenditure.

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.

Quick overview of key trends

International tourism – 2011 results

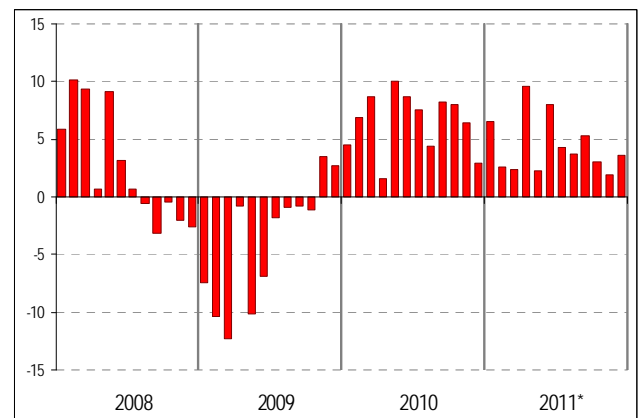
- At this moment in time, a total of over 100 countries around the world, including virtually all major destinations, have reported full year data on international tourist arrivals for 2011. Of these, 88 show positive figures (85%), of which 34 are in double digits (33%), while only 15 reported negative results (15%).
- The worldwide growth of 4.4% for 2011 over 2010 and the total of 980 million arrivals estimated in January have been maintained. By regions, changes are only minor; see for reference the updated table on page 3.
- Of all countries and territories with 2011 full year international arrivals data already available, fastest growth has been reported by Saudi Arabia (+60%), Bhutan (+39%), Georgia (+39%), Sri Lanka (+31%), Palau (+27%), Myanmar (+26%), the Former Yugoslav Republic of Macedonia (+25%), Azerbaijan (+23%), Uruguay (+22%), Cambodia (+20%), Thailand (+20%), Vietnam (+19%), Republic of Moldova (+18%), Maldives (+18%), Estonia (+16%), Algeria (+16%),

Madagascar (+15%), Finland (+14%), New Caledonia (+14%), Singapore (+13%) and Romania (+13%).

- Due to the social and political developments and changes in the Middle East and North Africa, Syria (-41%), Egypt (-32%), Tunisia (-31%) and Lebanon (-24%) reported negative growth, as well as Japan (-28%) due to the natural disaster.

International Tourist Arrivals, monthly evolution

World (% change)

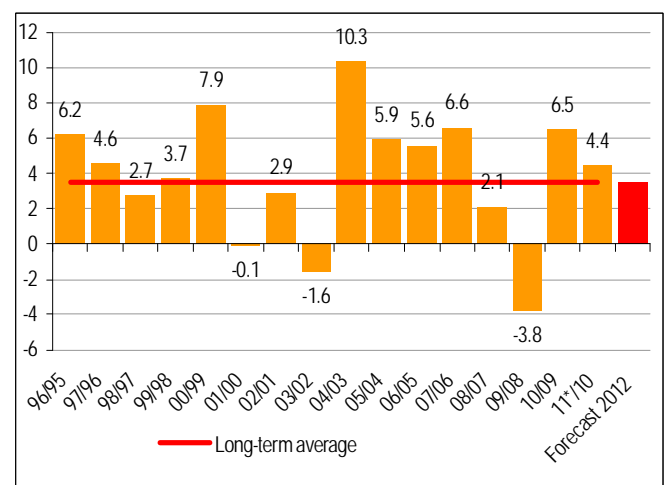


Source: World Tourism Organization (UNWTO) ©

- Full year data on international tourism receipts has so far been reported by some 50 countries and territories. However, for many fourth quarter data is still missing, and is to be expected within the coming month.
- A comprehensive analysis of international tourism receipts in 2011, as well as the top destinations by international tourist arrivals and receipts and top source markets by international tourism expenditure will be included in the next issue of the *UNWTO World Tourism Barometer* scheduled for late April.

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 contain as regular sections: an overview of short-term tourism data from destinations, 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.

We welcome your comments and suggestions at barom@unwto.org, tel +34 915678205 / fax +34 915678217.



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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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International Tourist Arrivals by (Sub)region

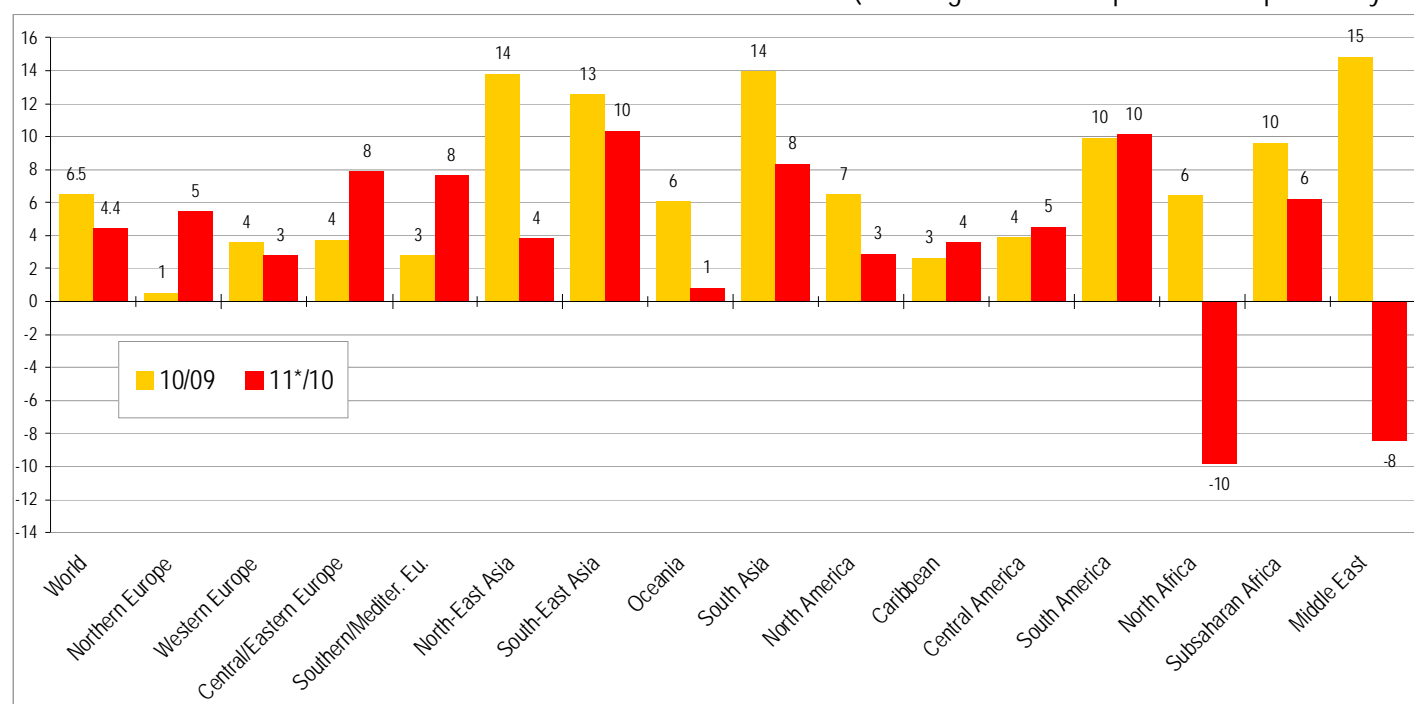
	Full year					Share 2011* (%)	Change			Monthly/quarterly data series (percentage change over same period of the previous year)												
	2000	2005	2009	2010	2011*		09/08	10/09	11*/10	2011*												
	(million)						%			YTD	Q1	Q2	Q3	Q4	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	674	797	881	939	980	100	-3.8	6.5	4.4	4.4	3.7	6.5	4.4	2.9	5.3	3.1	1.9	3.6	6.9	7.3	7.0	6.1
Advanced economies	417	453	474	498	522	53.3	-4.3	5.1	4.7	4.7	2.9	6.2	4.9	4.3	5.9	4.4	4.3	4.2	4.7	5.6	5.3	4.4
Emerging economies	256	344	407	440	458	46.7	-3.2	8.2	4.1	4.1	4.6	6.9	3.6	1.5	4.6	1.6	-0.2	3.0	9.2	9.3	9.3	7.9
<i>By UNWTO regions:</i>																						
<i>Europe</i>	385.1	438.8	461.1	474.6	502.3	51.2	-4.9	2.9	5.8	5.8	5.1	8.7	5.1	4.0	6.4	4.8	2.8	3.8	1.5	2.5	3.8	4.6
Northern Europe	43.7	57.3	57.8	58.2	61.4	6.3	-5.1	0.5	5.5	5.5	5.2	11.0	4.1	1.1	7.0	-0.3	-1.1	5.5	-4.6	-1.9	3.4	3.4
Western Europe	139.7	141.7	148.5	153.8	158.1	16.1	-3.0	3.6	2.8	2.8	2.9	3.9	1.6	3.7	2.1	3.9	3.6	3.5	2.3	4.1	4.2	2.6
Central/Eastern Eu.	69.3	87.5	90.2	93.6	101.0	10.3	-9.9	3.7	7.9	7.9	9.2	11.9	5.8	5.7	5.6	5.7	5.3	6.0	0.4	4.0	5.2	10.1
Southern/Mediterr. Eu.	132.5	152.3	164.5	169.0	181.8	18.5	-3.5	2.8	7.6	7.6	4.8	10.4	8.3	4.1	10.2	6.8	2.0	1.6	4.0	1.8	2.8	3.2
- of which EU-27	323.6	349.2	353.9	362.5	381.9	39.0	-4.6	2.4	5.4	5.4	4.1	7.8	4.9	4.1	6.0	5.0	2.6	4.3	1.2	1.7	3.2	3.2
<i>Asia and the Pacific</i>	110.1	153.6	181.1	204.5	217.1	22.1	-1.6	12.9	6.1	6.2	4.3	5.7	7.6	6.8	6.1	5.9	6.6	7.9	13.5	15.8	14.3	8.7
North-East Asia	58.3	85.9	98.0	111.6	115.9	11.8	-2.9	13.8	3.8	3.8	1.9	0.9	5.1	7.3	5.2	5.2	8.9	8.0	11.4	21.1	15.6	7.9
South-East Asia	36.1	48.5	62.1	69.9	77.1	7.9	0.5	12.5	10.4	10.4	8.0	14.3	13.0	6.8	8.5	6.6	4.1	9.3	16.8	10.1	13.6	9.8
Oceania	9.6	11.0	10.9	11.6	11.7	1.2	-1.8	6.1	0.8	0.8	-0.5	0.5	0.1	3.0	-0.6	4.3	2.6	2.5	6.7	4.1	8.5	4.8
South Asia	6.1	8.1	10.1	11.5	12.4	1.3	-1.5	14.0	8.0	8.3	8.3	11.2	8.3	6.6	7.6	10.1	5.4	4.8	20.9	10.7	11.0	13.9
<i>Americas</i>	128.2	133.3	140.7	149.7	156.0	15.9	-4.9	6.4	4.2	4.2	4.0	6.1	3.5	3.3	5.2	0.7	4.5	4.6	4.2	7.5	9.1	4.1
North America	91.5	89.9	92.1	98.2	101.0	10.3	-5.7	6.5	2.9	2.9	1.2	5.3	2.9	1.9	4.9	-0.8	3.0	3.5	3.9	9.6	8.6	3.3
Caribbean	17.1	18.8	19.5	20.0	20.7	2.1	-2.7	2.6	3.6	3.6	3.6	4.9	2.5	3.3	3.7	-0.6	5.0	4.5	4.7	0.1	3.6	1.1
Central America	4.3	6.3	7.6	7.9	8.3	0.8	-7.4	3.9	4.8	4.5	4.5	4.5	3.3	5.6	5.9	2.3	7.0	6.8	1.6	5.2	6.7	2.8
South America	15.3	18.3	21.4	23.6	26.0	2.6	-2.3	10.0	10.1	10.1	12.6	12.6	7.6	7.7	7.8	6.9	8.6	7.7	5.6	5.8	18.6	10.2
<i>Africa</i>	26.2	35.0	46.0	49.9	50.0	5.1	3.5	8.4	0.2	0.2	4.8	-1.3	-2.6	1.0	2.5	-0.2	2.2	1.0	11.9	10.9	5.7	10.3
North Africa	10.2	13.9	17.6	18.7	16.9	1.7	2.5	6.5	-9.9	-9.8	-9.8	-10.1	-11.9	-6.2	-0.3	-8.3	-3.4	-6.4	10.8	4.3	4.1	9.4
Subsaharan Africa	16.0	21.0	28.5	31.2	33.1	3.4	4.1	9.6	6.2	6.2	11.4	4.2	5.2	4.5	4.2	4.6	4.8	4.2	12.4	15.2	7.0	10.8
<i>Middle East</i>	24.1	36.3	52.1	59.9	54.8	5.6	-4.6	14.9	-8.4	-8.4	-7.9	-2.2	-6.7	-16.2	-5.2	-12.6	-18.8	-16.2	22.5	21.5	18.7	8.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO March 2012)

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

International tourism – January 2012

- Some 50 countries around the world monitored by UNWTO already reported international tourist arrivals data for January 2012. Of these, 37 show positive figures (71%), of which 22 are in double digits (42%), while 15 reported negative results (29%).

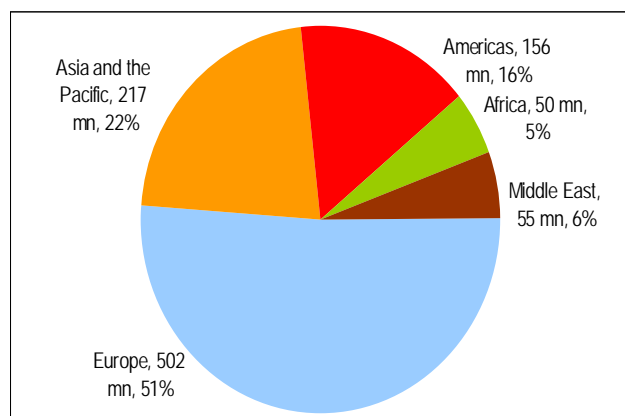
Air transport Industry:

- According to the International Civil Aviation Organization (ICAO), 2011 saw 2.7 billion passengers travel by air on international and domestic airline services, up 5.1% from the previous year.
- International traffic in passenger-km grew by 7.4% over 2010's level, with airlines in the Middle East, Latin America and the Caribbean and Europe reporting the strongest results. Comparatively, airlines in North America, Asia Pacific and Africa registered lower growth figures despite a significant rise in absolute numbers.
- Encouraging figures from Latin America, Asia Pacific and Middle East airlines contributed to a 4.9% increase in domestic air traffic, which was held back by relatively lower growth rates posted by North America, Europe and Africa.
- The International Air Transport Association (IATA) reported a 5.9% rise in 2011 full-year passenger demand measured in revenue-passenger-kilometres (RPK), in line with long-term growth trends. As capacity (+6.3%) increased slightly more than demand, the average passenger load factor fell to 78.1% in 2011, down from 78.3% in 2010.
- Statistics from the Airports Council International (ACI) show that worldwide passenger numbers in sampled airports increased by 4.9%, with international traffic growing by 6.2% and domestic traffic at 3.7%.

Hospitality Sector:

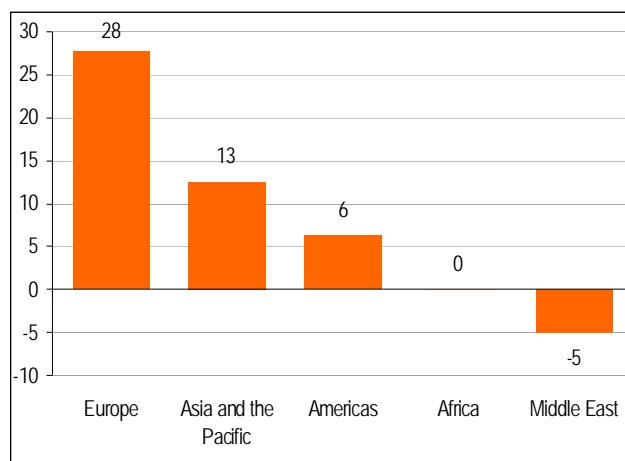
- According to industry data reported by STR Global and STR, the global hospitality sector in 2011 further improved on the decreases recorded in 2008-2009. Overall, occupancy was up, even with substantial additions to capacity.
- Both Europe and the Americas rose occupancy by some 2%, as well as increased average daily room rates (ADR) and revenue per available room.
- Contrastingly, Africa and the Middle East registered mostly negative results, in light of the Arab uprisings, with a 4% decrease in occupancy to 57%. While performance of Egypt was severely impacted, substantial increases in occupancy, however, were experienced by Abu Dhabi, Kuwait, Dubai and Saudi Arabia.
- Occupancy growth in Asia Pacific was virtually flat in 2011, but the average daily rate (ADR), as was the revenue per available room (revPAR) were up by almost 10%.

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



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (absolute change 2011, million)



Source: World Tourism Organization (UNWTO) ©

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. The full document is available in electronic format for sale and free of charge for UNWTO members and subscribed institutions through the UNWTO eLibrary at <www.e-unwto.org/content/w83v37>. For more information on the *UNWTO World Tourism Barometer*, please refer to the Facts & Figures section on the UNWTO website at <www.unwto.org/facts>. Copyright © 2012 World Tourism Organization

Transport

For the global airline industry 2011 turned out to be a pretty good year overall, at least in terms of passenger traffic. But increasing signs of weakness in the airfreight sector, which both reflects and impacts on business travel demand, are causing concern in different regions, as well as contributing to muddying the waters in terms of the outlook for 2012.

Global domestic and international passenger traffic

According to preliminary figures from the International Civil Aviation Organization (ICAO), some 2.7 billion passengers travelled by air in 2011 on international and domestic airline services – including low-cost flights – up 5.1% over the previous year. The increase in total scheduled passenger traffic, expressed in terms of passenger-km performed (PKPs), reflects the overall positive economic growth worldwide, despite multiple headwinds such as the implementation of fiscal austerity policies in key European economies.

Traffic growth overall has been fuelled both by positive economic prospects worldwide, based on a 3% increase in world real GDP, and by a strong demand for air travel, which points to improved household balance sheets and robust business cash flows.

International traffic grew by 7.4% over 2010's level – somewhat less than in the previous year – but with strong demand in business and leisure travel, particularly in emerging markets. Domestic traffic grew by 4.9%, due in large part to an estimated 10% increase in demand for domestic air travel in China. Growth in domestic markets was, however, significantly lower than that registered the previous year.

The highest growth for international traffic was registered by airlines in the Middle East, Latin America and the Caribbean, and Europe, which benefited from the ability of low-cost carriers (LCCs) to expand their point-to-point markets. Airlines in North America, Asia Pacific and Africa registered comparatively lower growth figures, though, still representing a significant increase in absolute numbers. Meanwhile, the negative economic growth in Japan continued to exert pressure on air travel in the Asia Pacific region.

On the domestic market side, the relatively lower growth rates registered in North America, Europe and Africa were offset by the robust growth rates of Latin America, Asia Pacific and Middle East airlines.

Air cargo

Air cargo traffic, expressed in freight tonne-km (FTKs), posted a marginal increase of 0.7%, with a volume of 49 million tonnes of freight carried. Performance was

adversely affected by the heavier economic climate in Europe, coupled with the slowdown in Chinese exports and strong competition in maritime transport.

Industry trends

The world's two major aircraft manufacturers, Airbus and Boeing, delivered an estimated 900-plus new aircraft in 2011, as well as taking an impressive number of orders for around 2,000 new aircraft to be delivered in the coming years. Thanks to more efficient operations implemented by the airline industry, as well as an improved air traffic management system, these environmentally friendly aircraft are expected to contribute significantly to sustainable air transport development.

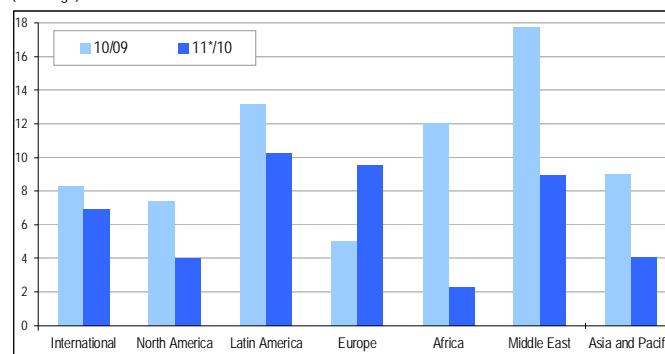
IATA's Monthly International Statistics (MIS)

The International Air Transport Association (IATA) reported a 5.9% rise in 2011 full-year passenger demand measured in revenue-passenger-kilometres (RPK), in line with long-term growth trends. Growth in demand lagged a capacity increase of 6.3%, putting downward pressure on load factors. The average passenger load factor for 2011 was 78.1%, slightly down from 78.3% in 2010. In contrast, cargo markets contracted by 0.7% over the year.

International scheduled traffic

International air traffic on member and non-member airlines monitored by IATA rose 6.9% last year, although the majority of this growth occurred in the first half of the year. International capacity climbed 8.2%, pushing the passenger load factor down to 77.4%. Given the weak conditions in Western economies the passenger market held up well in 2011, said recently appointed Director General & CEO of IATA, Tony Tyler. But 2011 was a year of contrasts overall.

International traffic of IATA reporting carriers by region of airline registration (% change)



Source: compiled by UNWTO from IATA

Latin American airlines led the industry in traffic growth in 2011 with a 10.2% rise in demand compared to 2010. This was also the only region in which demand growth outstripped capacity growth for the full year, with capacity up 9.2%, lifting the load factor by 0.7 percentage

points to 77.2%. Latin American air traffic is supported by healthy domestic economic conditions and trade activity with North America and Asia.

European carriers posted the second highest growth rates. Demand rose 9.5% last year while capacity climbed 10.2%, resulting in an average seat load factor of 78.9%.

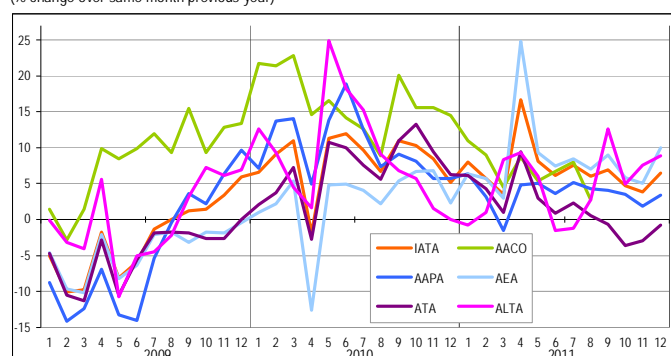
North American carriers had the industry's highest load factor for the year, of 80.7%, demonstrating tight capacity management, as the industry coped with demand increases of an average of just 4% for the 12 months. Nevertheless, capacity still expanded a little faster than demand, with an increase of 6%, resulting in a 1.5 percentage drop in seat load factor.

Asia Pacific airlines experienced the widest traffic/capacity gap for the year, with annual traffic up 4.1% versus a 6.4% climb in capacity. A significant part of this slowdown was due to the earthquake and tsunami in Japan, the impact of which on air travel should be temporary. But the sharp fall in airfreight in the region as Western demand for manufactured goods declined also reduced business travel for the region's airlines. Average load factor for the year was 75.9%.

Middle Eastern carriers' traffic rose 8.9% for the year, against a 9.7% climb in capacity, putting pressure on load factors (75.4%). Airlines in this region have slowed the pace at which they have expanded, but price-competitive products and geographically well-positioned hubs are enabling Middle East carriers to continue to improve their share of long-haul markets.

African airlines saw travel demand rise 2.3% for the full year. Good economic performance in the region has also been generating significant demand for air travel, but African airlines were unable to fully benefit and their low growth represents a loss of market share. Load factors were the weakest in the industry, averaging 67.2% for the full year.

Air traffic on international routes by month (RPKs)
(% change over same month previous year)



Source: compiled by UNWTO from IATA, AACO, AAPA, AEA, ATA and ALTA

Domestic passenger markets

Demand in domestic markets for the full year rose 4.2% compared to a 3.1% rise in capacity, leading to a load factor of 79.3%. Once again, individual markets varied dramatically in their performance.

US demand rose just 1.3% for the year – the result of market maturity and a sluggish US economy – but with nearly flat capacity growth of 0.5%, load factors led the industry at 83%, helping to boost airline unit revenues.

Chinese domestic demand rose a solid 10.9% for the year on a 7.8% lift in capacity, strengthening load factors to 82.2%, which helped the profitability of the country's airlines. Economic growth slowed but by most standards still remained strong, underpinning air travel demand.

India had the strongest annual growth with demand up 16.4%, but capacity rose 18.6% and the load factor was 74.7%. The deterioration in load factors generated by this demand/capacity gap is one of the factors behind the losses being reported by Indian airlines, in contrast to the current situation in China.

The impact of last year's earthquake and tsunami meant Japan's airlines ended the year with demand down 15.2% on a capacity decline of 11.5%. By December, however, the domestic market had recovered to levels 4.7% below pre-earthquake levels. But, even with an 8.7% drop in capacity, load factors were the lowest among the group at just 58.8%.

Brazilian carriers saw a 13.7% jump in demand from their home market last year on an 11.2% rise in capacity. Load factors remain below the industry average at 69.3%.

The bottom line

In summary, healthy passenger growth in 2011, primarily in the first half of the year, was offset by a declining cargo market.

Improving business confidence and encouraging news from the US economy are heartening developments, IATA says. But it is far too early to start predicting a soft landing for 2012. The eurozone crisis is far from over, and failure to achieve a durable solution will have dire consequences for economies around the world. It would most certainly tip the airline industry into the red.

Airlines have made massive investments in new fuel-efficient, environmentally friendly aircraft. The challenge is to deploy them profitably in a dynamic and uncertain market. Governments, meanwhile, need to take a strategic view of the airline industry that recognises its value as a catalyst for economic growth. Airlines transport about 3 billion people a year. And over a third of the value of goods that are traded internationally is transported by air.

Getting people and goods to their destinations more efficiently improves competitiveness. Infrastructure investments to enable aircraft to land and take off with a minimum of delay, and fly the most fuel and carbon efficient trajectories, will return a far greater payout to global GDP than what IATA sees as short-sighted and narrowly focused 'tax grabs'.

Air transport data

The air transport data presented here refers to traffic on airlines of Member States of the International Civil Aviation Organization (ICAO), to IATA members' scheduled international passenger traffic, according to region of airline registration, as well as to the traffic of the member airlines of the major regional airline associations broken down by routes operated. For IATA and the regional associations it should be taken into account that their data reflects the majority of, but not all air traffic, as the member carriers included are mostly full-service airlines and the traffic operated by charter and low-cost airlines is only reflected to a rather limited extent.

Airline data is a particularly good indicator of short-term trends in medium- and long-haul traffic. For short-haul traffic, however, air transport is in competition with alternative modes of transport (in particular land-based, but also over water), and might be subject to shifts between different means of transport (depending on relative price, perception of safety, etc.). Furthermore, traffic is not expressed here in numbers of passengers carried, but rather measured in terms of revenue passenger-kilometres (RPK), with one RPK representing one paying passenger transported over one kilometre. This means that each long-haul passenger contributes more to total traffic measured in RPK than each short-haul passenger does.

Capacity on offer is measured in terms of Available Seat Kilometres (ASK), which is the number of seats carriers have available multiplied by the number of kilometres flown. The ratio of available seat-kilometres (ASK) to revenue passenger-kilometres (RPK) is called Passenger Load Factor, i.e. the percentage of capacity used.

Airports

The general trends recorded by ICAO and IATA are confirmed by statistics from the world airports' body, Airports Council International (ACI), which reports that in the full 12 months of 2011, worldwide passenger numbers in sampled airports increased by 4.9%, with international traffic growing by 6.2% and domestic traffic at 3.7%. Overall, airports in Latin America and Caribbean recorded the strongest gain in passenger numbers (+8.8%). Growth in international passenger numbers was highest in Europe (8.1%), followed by the Middle East (+7.7%) and Latin America and Caribbean (+6.8%). Latin America and Caribbean (+10.1%) lead growth in domestic passenger numbers.

ACI World's Director of Economics Rafael Echevarne commented, "Based on our latest survey results of major airports globally, 2011 was another banner year for overall passenger growth in face of the myriad of global economic risks and environmental calamities. From a global perspective, the international traveller in 2011 appears to have been immune to these manifestations. Air freight, on the other hand, appeared to be more elastic or sensitive to

the economic situation within countries and among trading partners. As governments slowly adopt the necessary austerity measures to deleverage their balance sheets, certain economies may experience an economic slowdown in the short run thereby having an impact on international trade. However, as business confidence resumes, so will global trade in air freight.

Regional airline associations

North America

Airlines for America (A4A) – formerly the Air Transport Association of America (ATA) – the industry trade organisation for the leading US airlines, reported a 1.6% increase in traffic (RPKs) 2011 on scheduled mainline services, in line with its 1.7% increase in capacity. Traffic on domestic services, including USA-Canada routes, was up 1.6%, while international services recorded a slightly lower growth of 1.5% growth.

There was nevertheless a fairly marked difference between different international route networks. Latin America performed best (+3.9%) as against +1.7% for the Pacific and stagnation on the Atlantic.

In terms of financial performance, ATA member carriers earned a combined US\$ 390 million in 2011, or less than half a cent on every US\$ 1 of revenue generated for the year. Following more than US\$ 50 billion in losses accumulated in the preceding ten years, A4A said this second consecutive year of meagre profits underscores the need for a National Airline Policy that would help rationalise the industry's regulatory and tax environment, improve infrastructure, and ensure that US airlines can compete globally. The US\$ 390 million profit (0.3% net margin) includes the results of 11 US passenger airlines and represents an 86% drop from the US\$ 2.7 billion net profit (2.2% net margin) that these same carriers earned in 2010.

Latin America & Caribbean

Members of the Association of Latin American Airlines (Asociación Latinoamericana de Transporte Aéreo – ALTA), which also includes the Caribbean carriers, carried 139 million passengers in 2011, up 3.8% from the previous year. Traffic (RPKs) grew 5.1% and capacity (ASKs) increased 2.9%, taking average load factor to 74.9%, 1.6 percentage points higher than in 2010.

"The results clearly show the solid growth of the aviation industry in the Latin American and Caribbean region", said Alex de Gunten, ALTA's Executive Director. "Passenger traffic growth in the region in the last five years, at 7.7%, has outpaced the global industry average of 3.8%".

Europe

The Association of European Airlines (AEA) has released preliminary traffic figures for 2011, which point to a year-on-year growth rate of 7.1% in passenger numbers. 7.1% growth year on year in passenger numbers.

Over the full 12 months of 2011, Europe’s network airlines carried a total of 363 million passengers. This provisional figure, covering 31 of AEA’s 35 members, is 24 million up on 2010. Traffic (measured in RPKs) rose by 8%, but capacity growth (ASKs) remained a step ahead at 8.9%. This slight shortfall in demand caused AEA’s average load factor to slip by 0.6 of a percentage point to 77.3%.

Based on this positive traffic performance, AEA expects its member airlines to post a collective €1.5 billion EBIT profit (earnings before interest and taxation) in 2011, up from 0.5 billion euros in 2010.

“There is much to encourage us in the 2011 figures. In times of austerity and financial turmoil, European citizens continue to vote for air travel in unprecedented numbers”, said AEA Secretary General, Ulrich Schulte-Strathaus.

The 2010 baseline was depressed by several significant events, notably the closure of European airspace in April due to the perceived risk of volcanic ash contamination and airport closures in late 2010 as facilities failed to cope with the winter weather.

Even after adjusting for the exceptional events of 2010, AEA still saw 6% underlying RPK growth. But this buoyancy is not expected to last. Airfreight – a key barometer for the industry – has been slowing since May. Meanwhile, fuel costs remain cripplingly high and aviation continues to be a target for additional regulatory burdens, further impacting financial stability, said Schulte-Strathaus.

Asia and the Pacific

The Association of Asia Pacific Airlines (AAPA) recorded continued growth in international passenger demand to, from and within the region in 2011, though at slower rate than in 2010 (+9.5%). Asia Pacific airlines carried 190 million international passengers, 3.5% more than in 2010 while traffic (RPKs) grew by 3.7%. Capacity was up 6.3%, resulting in a 2.0 percentage point fall in the average seat load factor, to 76.4%. Although satisfactory, the results show that demand was somewhat affected by Japan’s devastating earthquake and tsunami in March 2011.

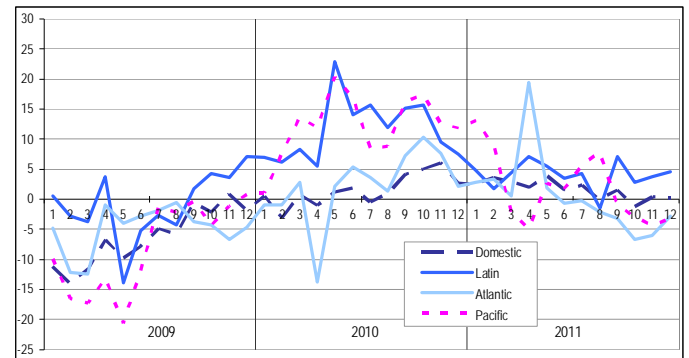
AAPA’s current concern is largely about airfreight demand, which weakened in 2011 (-4.8% in FTKs), following a strong rebound the previous year – largely as a result of the surge in restocking following the recession.

Uncertainty over prospects for the global economy have rather overshadowed the immediate outlook, said Andrew Herdman, AAPA Director General, and airlines are bracing themselves for another challenging year ahead. Nevertheless, he remains optimistic about longer-term prospects for the region’s aviation industry.

Middle East and North Africa

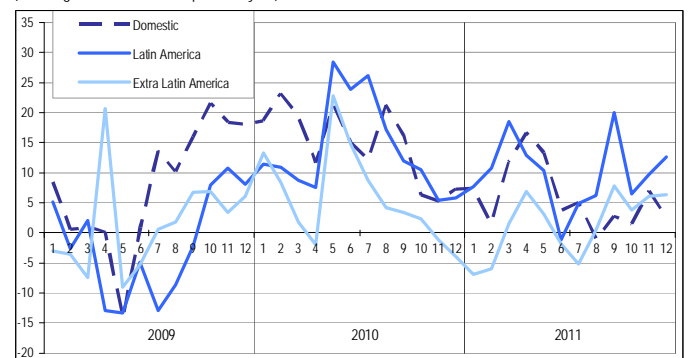
Members of the Arab Air Carriers Organization (AACO) recorded a 6.5% increase in traffic (expressed in RPKs) in 2011, down from 16.9% in 2010. This compared with a capacity growth of 8.5%, which resulted in a drop in average seat load factor to 68.4% from 74.1%. The total number of passengers carried was up 4.9%.

ATA: Air traffic on selected routes by month (RPKs) (% change over same month previous year)



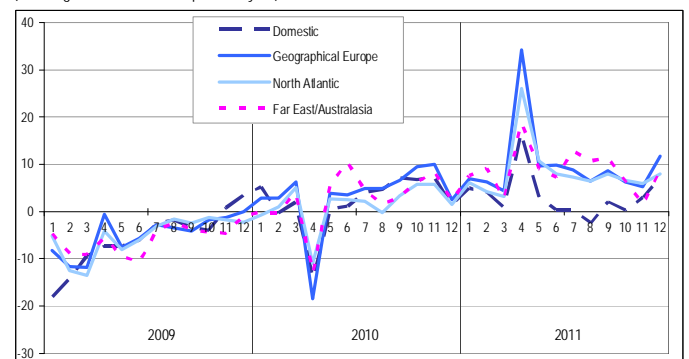
Source: compiled by UNWTO from ATA

ALTA: Air traffic on selected routes by month (RPKs) (% change over same month previous year)



Source: compiled by UNWTO from ALTA

AEA: Air traffic on selected routes by month (RPKs) (% change over same month previous year)



Source: compiled by UNWTO from AACO

Hospitality



Continued recovery in the hotel sector's performance

The global hospitality industry generally had a good 2011. Room rates and revenues continued to rise after the lows suffered in 2008-2009 – even with some substantial additions to capacity. However, with so many natural disasters, revolutions and other events around the world, and some quite dramatic shifts in exchange rates and price competitiveness, there were wide variations between the results in individual countries and individual cities.

Europe

According to STR Global European hotels performed well, with only 15 of the 157 monitored cities and destinations suffering declining demand. The region overall saw increases in virtually every month of the year for occupancy and average daily room rates (ADR). Overall, occupancy increased by 2 percentage points (pp) to 66.3%. ADR was up 2.6% in euro terms to €100. Revenue per

available room (RevPAR) increased by 5.8% in euro terms to €66. Rather stronger results were posted by hotels in Russia and (for occupancy, but not room rates) Spain, and rather weaker results by hotels in the UK.

STR Global feels that the outlook in Europe for 2012 is less certain, because of the weakening economic expectations during the second half of 2011 and the continuing worries about the eurozone. Based on current market conditions, its latest forecasts for 2012 have been revised downward across 39 markets in Europe. But it also expects to see demand growth in Berlin (+5%), London (+4%) and Vienna (+4%), as well as in another 27 European markets in 2012.

Americas

In the Americas there was a 2.4 percentage point increase in occupancy in 2011 to 60.2%. ADR increased by 3.8% to US\$ 104, and RevPAR rose 8.2% to US\$ 63.

Among the key cities in the region, the largest increases in occupancy were reported by Cancun (+7.2 pp to 63.7%), Santiago (+6.2 pp to 71.5%), Rio de Janeiro (+5.0 pp to 75.7%), Mexico City (+4.7 pp to 62.8%), and in the US by Miami (+5.2 pp to 75.7%) and Houston (+4.9 pp to 60.0%). Only few cities reported minor decreases, with the largest one by Vancouver – a 1.3 point decline to 66.5%.

Hotel performance by region

	Occupancy (%)			Average Room Rate			RevPAR		
	Full year			Full year			Full year		
	2011*	2010	Change	2011*	2010	Change	2011*	2010	Change
		(%)	(%p)	US\$		(%)	US\$		(%)
Americas	60.2	57.8	2.4	104	100	3.8	63	58	8.2
North America	60.1	57.7	2.5	103	99	3.6	62	57	8.0
Caribbean	61.8	60.3	1.5	168	163	2.6	104	98	5.2
Central America	60.7	60.0	0.7	114	115	-0.7	69	69	0.5
South America	66.6	65.0	1.7	142	121	16.5	94	79	19.5
Asia and the Pacific	66.8	66.7	0.2	140	128	9.5	94	85	9.8
North-East Asia	64.9	65.9	-1.0	127	119	6.3	82	79	4.6
South-East Asia	69.4	66.0	3.4	140	124	12.9	97	82	18.8
Australia & Oceania	73.0	72.0	1.0	174	148	17.7	127	107	19.4
Central & South Asia	60.8	61.0	-0.2	161	162	-0.7	98	99	-1.0
Africa & Middle-East	57.1	61.3	-4.1	163	155	5.3	93	95	-1.8
North Africa (incl. Egypt)	44.8	69.2	-24.4	89	91	-1.3	40	63	-36.2
Southern Africa	57.4	56.6	0.9	137	142	-3.6	79	80	-2.1
Middle East	62.3	60.5	1.8	202	199	1.1	126	121	4.1
				euro		(%)	euro		(%)
Europe	66.3	64.3	2.0	100	97	2.6	66	63	5.8
Northern Europe	70.6	68.4	2.2	92	91	1.6	65	62	4.9
Western Europe	66.1	65.1	1.0	114	110	3.6	75	72	5.2
Eastern Europe	58.2	54.8	3.4	85	83	2.4	49	45	8.8
Southern Europe	62.5	60.0	2.4	101	98	3.1	63	59	7.2

Source: STR (North America) and STR Global. © 2012 STR and STR Global. All rights reserved; (%p: percentage points)

Hotel performance, selected cities (full year)

		Occupancy (%)		
		2011*	2010	Change (%p)
Europe		66.3	64.3	2.0
Northern Europe		70.6	68.4	2.2
Denmark	Copenhagen	66.0	64.9	1.1
Iceland	Reykjavik	63.4	52.8	10.6
Ireland	Dublin	71.0	67.2	3.8
Norway	Oslo	63.0	60.1	2.9
United Kingdom	London	82.4	82.4	0.0
Western Europe		66.1	65.1	1.0
Austria	Vienna	72.2	72.5	-0.2
Belgium	Brussels	67.2	67.0	0.2
France	Paris	79.0	77.7	1.2
Germany	Frankfurt	66.2	65.4	0.8
	Berlin	69.5	68.9	0.6
Luxembourg	Luxembourg	67.8	67.8	0.0
Netherlands	Amsterdam	74.8	74.2	0.6
Switzerland	Geneva	65.4	65.2	0.2
	Zurich	71.0	72.7	-1.8
Eastern Europe		58.2	54.8	3.4
Czech Rep	Prague	66.9	62.1	4.8
Hungary	Budapest	62.0	57.8	4.1
Poland	Warsaw	68.1	66.2	1.9
Russian Federation	Moscow	64.5	63.2	1.3
Slovakia	Bratislava	46.5	41.9	4.7
Southern Europe		62.5	60.0	2.4
Greece	Athens	59.1	57.8	1.2
Israel	Tel Aviv	76.5	75.5	1.0
Italy	Milan	63.1	59.8	3.3
	Rome	67.5	66.9	0.6
Portugal	Lisbon	65.6	64.4	1.2
Spain	Madrid	70.8	67.7	3.0
	Barcelona	66.3	63.9	2.4
Turkey	Istanbul	69.9	73.0	-3.1
Source: STR Global			= up	
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Asia and the Pacific

In the Asia Pacific region, STR Global's figures show that occupancy was virtually flat in 2011, with an increase of just 0.2 pp to 66.8%, but ADR increased 9.5% to US\$ 140 and RevPAR was up 9.8% to US\$ 94. Room supply, which had increased by an average of 3.3% a year in 2005-10, rose by less than 3% in 2011.

Among key cities in the region, the largest increases in occupancy were achieved by Bangkok (+9.5 pp to 63.2%) and Phuket (+6.2 pp to 69.5%). Shanghai (after the Olympics and Expo in 2010) reported the largest decrease in occupancy (-7.3 pp to 56.7%), and occupancy in Tokyo was down 6.9 pp to 74.5%, and in Delhi down 5.1 pp to 63.7%.

Hotel performance, selected cities (full year)

		Occupancy (%)		
		2011*	2010	Change (%p)
Americas		60.2	57.8	2.4
North America		60.1	57.7	2.5
Canada	Montreal	65.2	62.8	2.4
	Toronto	67.9	68.3	-0.4
	Vancouver	66.5	67.8	-1.3
Mexico	Cancun	63.7	56.4	7.2
	Mexico City	62.8	58.1	4.7
United States	Phoenix, AZ	58.0	55.7	2.3
	Anaheim, CA	70.9	67.8	3.1
	Los Angeles, CA	71.7	67.7	4.0
	San Diego, CA	68.9	66.4	2.5
	San Francisco, CA	79.0	75.1	3.9
	Washington, DC	67.4	67.0	0.4
	Miami, FL	75.7	70.4	5.2
	Orlando, FL	67.7	63.9	3.8
	Atlanta, GA	59.2	57.4	1.8
	Oahu Island, HI	80.8	78.1	2.7
	Chicago, IL	64.2	61.8	2.4
	New Orleans, LA	64.2	64.4	-0.3
	New York, NY	81.2	80.8	0.4
	Dallas, TX	59.0	54.7	4.4
	Houston, TX	60.0	55.2	4.9
Central America		60.7	60.0	0.7
Costa Rica	San Jose	59.2	57.2	2.0
South America		66.6	65.0	1.7
Argentina	Buenos Aires	70.1	70.5	-0.4
Brazil	Rio de Janeiro	75.7	70.6	5.0
	Sao Paulo	68.0	66.0	1.9
Chile	Santiago	71.5	65.3	6.2
Peru	Lima	68.0	65.7	2.2
Source: STR Global			= up	
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Data for North America sourced STR				
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Africa and the Middle East

In Africa and the Middle East STR Global found mostly negative results for hotels in 2011. On average, there was a 4.1 percentage point decline in occupancy to 57.1%, a 5.3% increase in ADR to US\$ 163, and a 1.8% decline in RevPAR to US\$ 93. However, with the revolutions and political developments there were wide variations in individual countries.

By way of example, in Egypt, there was a 29% decline in occupancy in Cairo to 36% and a 30% decline in Sharm El Sheikh to 48. Occupancy was also down, but to a lesser degree, in Beirut (-8.5%), Amman (-4.1%) and Oman (-3.3%). The largest increases in occupancy were in Abu Dhabi (+5.7 pp to 64.6%), Kuwait (+5.2 pp to 54.9%) and Dubai (+4.9 pp to 75.4%). According to STR Global,

Saudi Arabia also recorded excellent results, with occupancy up by 8.6% to 58.2%, ADR up 8.0% and RevPAR up 17.2%. In post-2010 FIFA World Championship South Africa, occupancy was flat in Cape Town and down by 5.9% in Johannesburg.

Hotel performance, selected cities (full year)

		Occupancy (%)		
		Change		
		2011*	2010	(%p)
Asia and the Pacific		66.8	66.7	0.2
North-East Asia		64.9	65.9	-1.0
China	Beijing	68.5	63.3	5.2
	Shanghai	56.7	64.0	-7.3
Hong Kong (China)	Hong Kong	84.7	82.2	2.4
Japan	Osaka	78.7	78.7	-0.1
	Tokyo	74.5	81.4	-6.9
Korea, Republic of	Seoul	82.8	83.0	-0.2
Taiwan (pr. of China)	Taipei	71.8	75.2	-3.4
South-East Asia		69.4	66.0	3.4
Indonesia	Bali	72.9	73.1	-0.3
	Jakarta	71.5	68.2	3.3
Malaysia	Kuala Lumpur	73.2	70.6	2.6
Philippines	Manila	71.9	70.7	1.1
Singapore	Singapore	84.0	83.3	0.8
Thailand	Bangkok	63.2	53.7	9.5
	Phuket	69.5	63.3	6.2
Vietnam	Hanoi	64.1	68.9	-4.8
Australia & Oceania		73.0	72.0	1.0
Australia	Sydney	82.2	82.4	-0.2
New Zealand	Auckland	76.4	73.9	2.5
Central & South Asia		73.0	72.0	1.0
India	Bangalore	58.3	60.2	-1.9
	Delhi - NCR	63.7	68.8	-5.1
	Mumbai	63.6	60.1	3.6

Source: STR Global = up
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Hotel performance, selected cities (full year)

		Occupancy (%)		
		Change		
		2011*	2010	(%p)
Africa & Middle-East		57.1	61.3	-4.1
Middle East		62.3	60.5	1.8
Jordan	Amman	56.6	60.7	-4.1
Kuwait	Kuwait	54.9	49.8	5.2
Lebanon	Beirut	55.1	63.6	-8.5
Oman	Muscat	52.3	55.6	-3.3
Qatar	Doha	60.7	60.6	0.1
Saudi Arabia	Riyadh	61.9	60.4	1.5
Untd Arab Emirates	Abu Dhabi	64.6	58.9	5.7
	Dubai	75.4	70.5	4.9
North Africa (incl. Egypt)		44.8	69.2	-24.4
Egypt	Cairo	36.1	65.6	-29.5
	Sharm El-Sheikh	48.1	78.4	-30.3
Southern Africa		57.4	56.6	0.9
Kenya	Nairobi	67.7	63.5	4.3
South Africa	Cape Town	57.2	57.0	0.2

Source: STR Global = up
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Hospitality industry data

The hotel data presented in this section has been kindly provided by STR Global Ltd and Smith Travel Research, Inc.

STR Global and STR track hotel performance data from over 44,000 hotels worldwide which represent all segments of mainly branded hotel supply. Hotel performance results for the majority of capital and gateway cities across the world is available.

Occupancy = rooms sold / rooms available, i.e. the percentage of available rooms that were sold during a specified period of time. Occupancy is calculated by dividing the number of rooms sold by rooms available. Occupancy takes both account of demand and supply growth. If demand grows, but is outstripped by supply growth, occupancy will decrease.

ADR (Average Daily Rate) = room revenue / rooms sold, i.e. a measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold.

RevPAR (Revenue per available room) = room revenue / rooms available (or = occupancy x ADR), i.e. the total guest room revenue divided by the total number of available rooms. RevPAR differs from ADR because RevPAR is affected by the amount of unoccupied available rooms, while ADR shows only the average rate of rooms actually sold.

For methodology see further:
www.strglobal.com/Resources/Glossary.aspx.

For further information on STR Global and STR please visit:
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World Tourism Organization UNWTO Publications

UNWTO World Tourism Barometer

The UNWTO World Tourism Barometer aims at providing all those involved in tourism with up-to-date statistics and adequate analysis, in a timely fashion. Issues cover short-term tourism trends, a retrospective and prospective evaluation of current tourism performance by the UNWTO Panel of Experts, and a summary of economic data relevant for tourism. The information is updated throughout the year.

Available in English, French, Spanish and Russian



The Middle East Outbound Travel Market

The Middle East region is one of the fastest growing tourist generating regions in the world. Outbound travel from the Middle East has more than quadrupled from 8 million in 1990 to 36 million in 2010. Published jointly by ETC and UNWTO, The Middle East Outbound Market, provides an in depth analysis of the structure and trends of this market, helping destinations and commercial operators plan ahead with greater foresight.

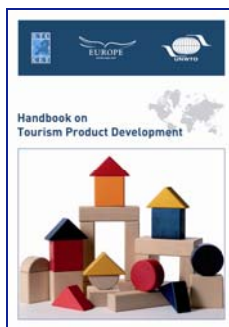
Available in English



Handbook on Tourism Product Development

The UNWTO/ETC Handbook on Tourism Product Development outlines the essential elements in the process of tourism product development planning and implementation. It demonstrates a range of successful approaches and case studies from around the world and sets out best practice examples and benchmarks by which destinations can assess their own product development system and methods.

Available in English



The Chinese Outbound Travel Market, The Indian Outbound Travel Market and The Russian Outbound Travel Market

The Indian, the Chinese and the Russian Outbound Travel Markets are some of the fastest growing, and consequently increasingly important markets in the world. The UNWTO and ETC have jointly published detailed studies on each unique market, which aim to provide the necessary information to better understand the structure and trends of these growing markets. Topics covered include: destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the use of the internet and social media.

Available in English



Handbook on Tourism Destination Branding

This handbook is a recognition by UNWTO and ETC of the value of successfully building and managing a destination's brand. With an Introduction by Simon Anholt, the handbook presents a step-by-step guide to the branding process, accompanied by strategies for brand management. Given case studies illustrate concepts, present best practices from around the world and provide fresh insight into destination branding.

Available in English and Spanish



Global Report on LGBT Tourism

As the global visibility of the lesbian, gay, bisexual and transgender (LGBT) community increases, there has been a steady increase in interest in this community as a consumer group, a trend which is particularly evident in the travel industry. With the knowledge and support of the International Gay and Lesbian Travel Association, as well as the UNWTO Affiliate Members, this report examines LGBT tourism from a social, political and economic perspective.

The Power of Youth Travel

With outbound travel from the world's emerging economies being boosted by new, affluent travellers and the age bracket for youth travel expanding across the world, young people are quickly becoming a consumer group to take seriously. The Power of Youth Travel features commentary from specialists, UNWTO Affiliate Members and other selected organizations on the importance of Youth Travel for economic development, global development and young travellers themselves.

Available in English



Handbook on E-marketing for Tourism Destinations

This handbook is a practical 'how-to' manual designed to help staff in national, regional and city tourism organisations, to improve their e-marketing skills. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advises how to build better content, assure distribution, use CRM, succeed with online PR and get into mobile marketing.

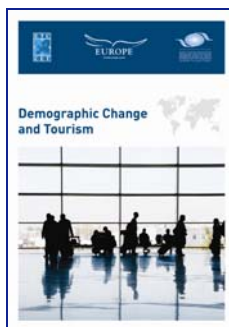
Available in English and Spanish



Demographic Change and Tourism

The UNWTO/ETC report on Demographic Change and Tourism aims to be a reference for destinations and the industry, a means to achieve a better understanding of current and future demographic changes (e.g. population growth and ageing, migration and family diversification) and how these will impact upon tourism, how to anticipate and react upon them in the most competitive way.

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