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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

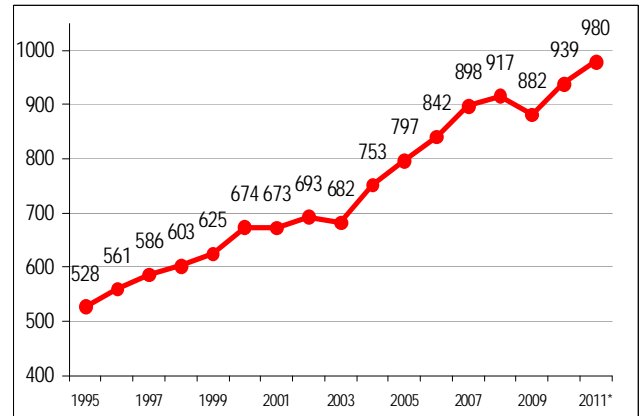
International tourism – 2011 results

- 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)

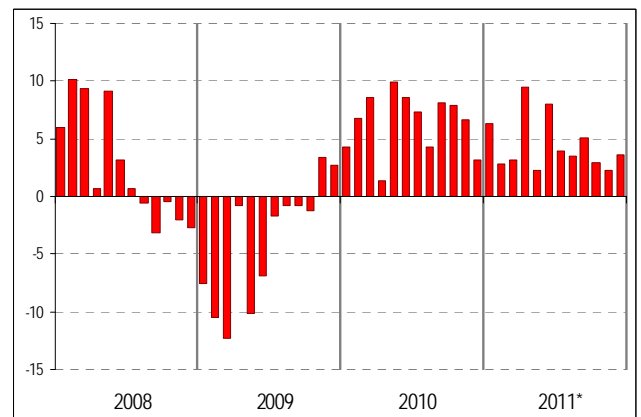


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World

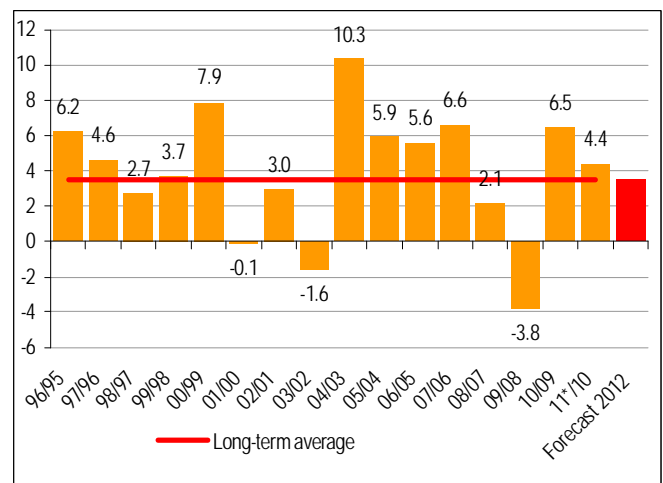
(% change)



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.

We welcome your comments and suggestions at barom@unwto.org, tel +34 915678206 / fax +34 915678217.



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 162 countries and territories and over 400 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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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.

If you are interested in receiving the *UNWTO World Tourism Barometer* and you are not a UNWTO Member, you can subscribe to the next three issues for € 70 (pdf version delivered electronically) or € 100 (pdf plus hard copy).

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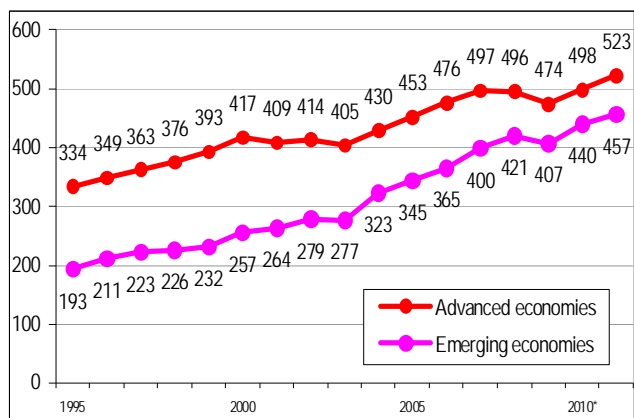
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- International tourist arrivals reached a total of 980 million in 2011, up from 939 million in 2010, in a year characterised by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters in 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)

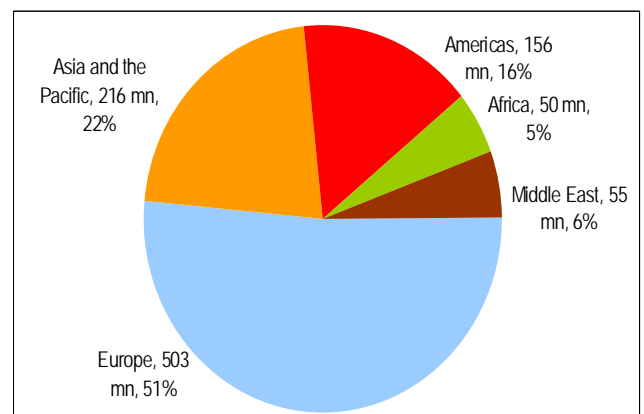


Source: World Tourism Organization (UNWTO) ©

Europe surpasses the half billion mark in 2011

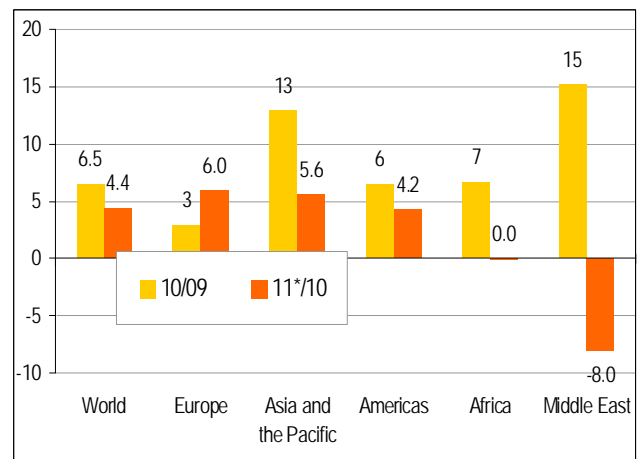
- Despite persistent economic uncertainty, tourist arrivals to **Europe** reached 503 million in 2011, accounting for 28 million of the 41 million additional international arrivals recorded worldwide. Central and Eastern Europe and Southern Mediterranean destinations (+8% each) experienced the best results. 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)



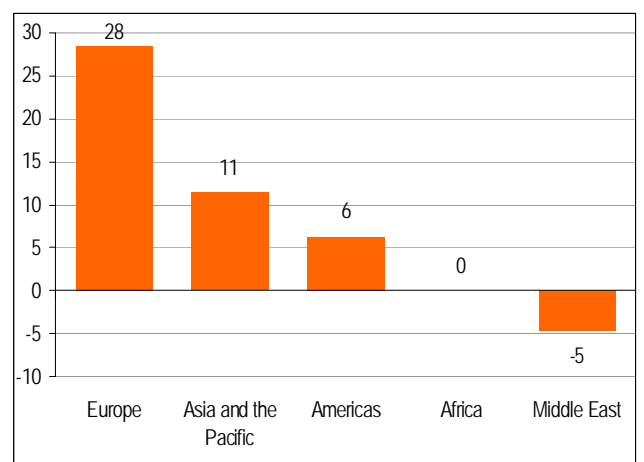
Source: World Tourism Organization (UNWTO) ©

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

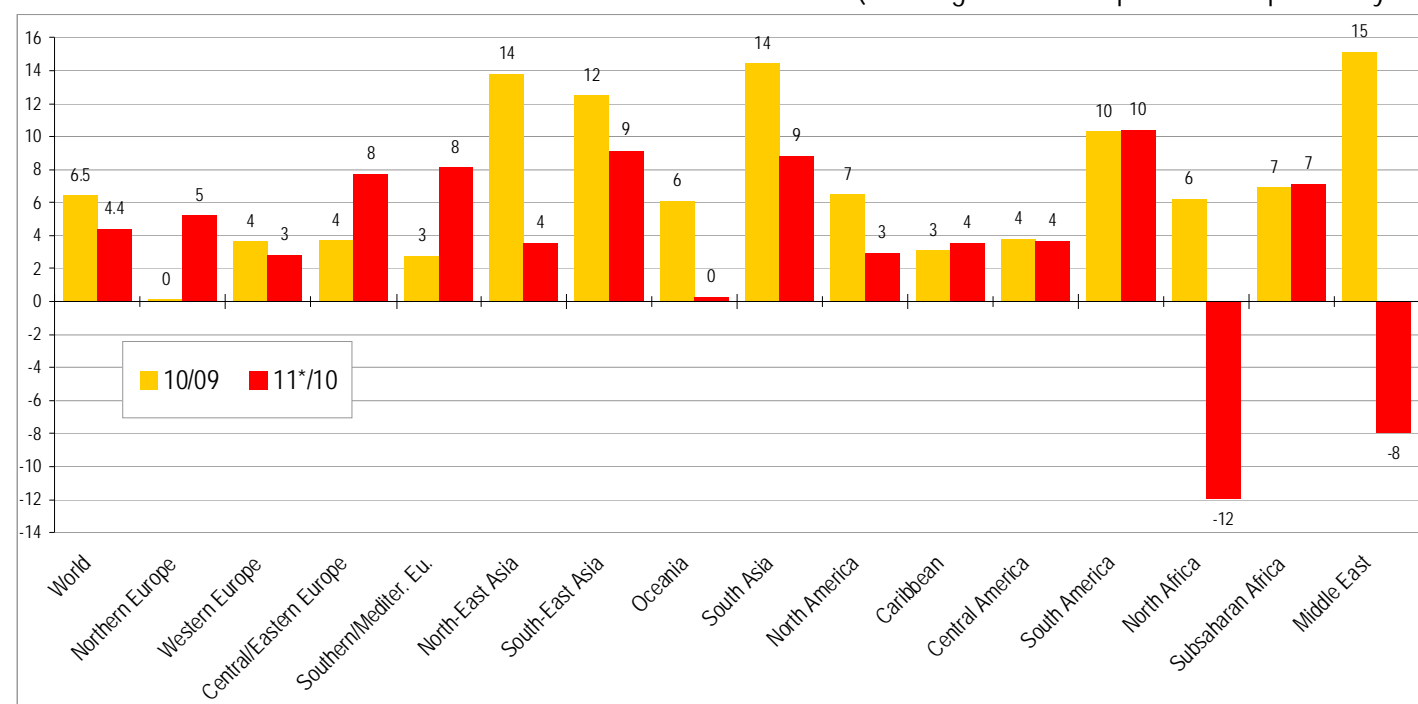
	Full year					Share 2011* (%)	Change			Monthly/quarterly data series (percentage change over same period of the previous year)												
	2000	2005	2009	2010	2011*		09/08	10/09	11*/10	2011*				2010								
	(million)						%			YTD	Q1	Q2	Q3	Q4	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	674	797	882	939	980	100	-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.

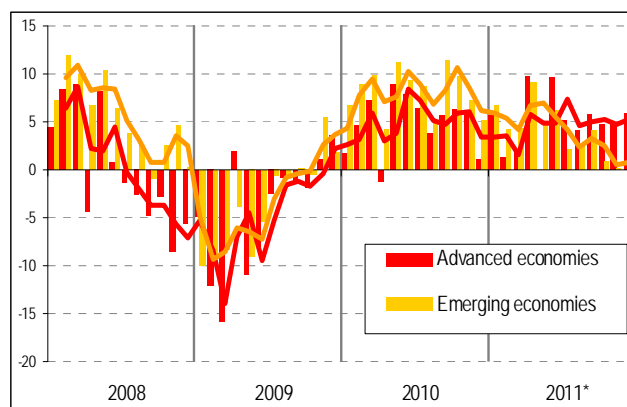
The full document is available in electronic format for sale and free of charge for UNWTO members and subscribed institutions through the UNWTO eLibrary at <www.e-unwto.org/content/w83v37>.

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>.

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International Tourist Arrivals, monthly evolution

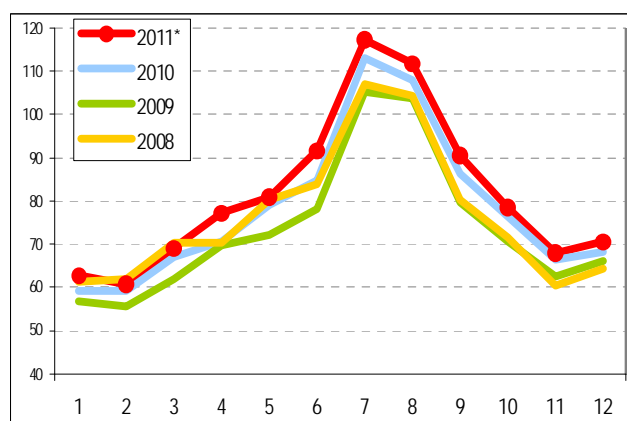
Advanced economies & Emerging economies (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World (million)



Source: World Tourism Organization (UNWTO) ©

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One of the most comprehensive sources of tourism information prepared by the UNWTO

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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

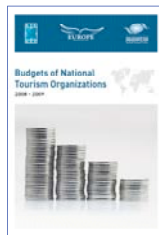


Published: 2008
Price: € 75

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

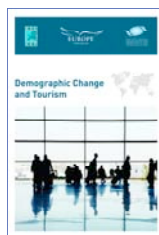


Published: 2008
Price: € 80

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



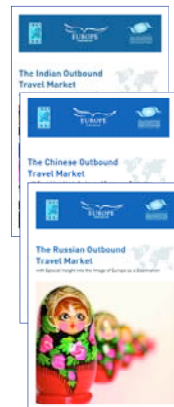
Published: 2010
Price: € 75

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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