UNWTO World Tourism Barometer

Committed to Tourism, Travel and the Millennium Development Goals

Advance Release, January 2011

Contents

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This *Advance Release* and *Statistical Annex* of the *UNWTO World Tourism Barometer* present preliminary results for international tourism in 2010 and the outlook for 2011.

This release is available in electronic format only through the UNWTO elibrary and is free for members. Its text is edited in English only, while the Statistical Annex is available in English, French and Spanish. A comprehensive analysis of international tourism trends will be included in the next full version of the *UNWTO World Tourism Barometer* scheduled for the end of February.

2010: A multi-speed recovery

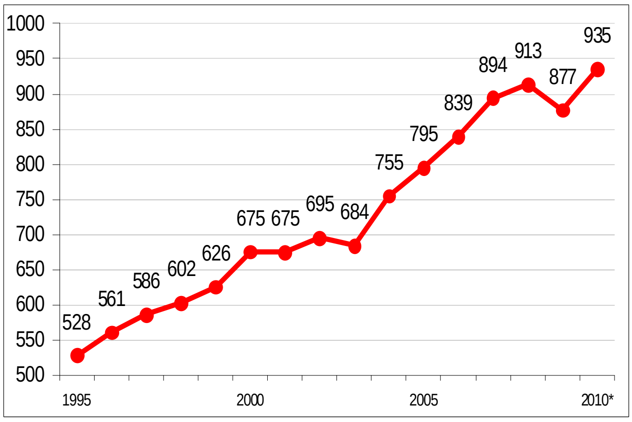
International tourism recovered strongly in 2010 from the blow it suffered due to the global financial crisis and economic recession. International tourist arrivals were up by almost 7% to 935 million, following the exceptional 4% decline in 2009. However, recovery came at different speeds and was primarily driven by emerging economies.

Boosted by improved confidence and economic conditions worldwide, international tourism has recovered faster than expected from the impacts of the global financial crisis and economic recession of late 2008 and 2009. Worldwide, the number of international tourist arrivals is estimated to have reached 935 million, up 58 million (+6.7%) compared with 2009 (877 million) and 22 million (+2.4%) more than during the pre-crisis peak year 2008 (913 million).

The vast majority of destinations worldwide reported positive and often double-digit increases, sufficient to offset recent losses or bring them close to this target. While all regions posted positive growth in international tourist arrivals, emerging economies remain the main drivers of this recovery. This multi-speed recovery – slower in advanced economies, faster in emerging ones – is a reflection of the broader global economic situation and is set to dominate 2011 and the foreseeable future.
(Continued on page 5)

World: Inbound Tourism

International Tourist Arrivals (million)

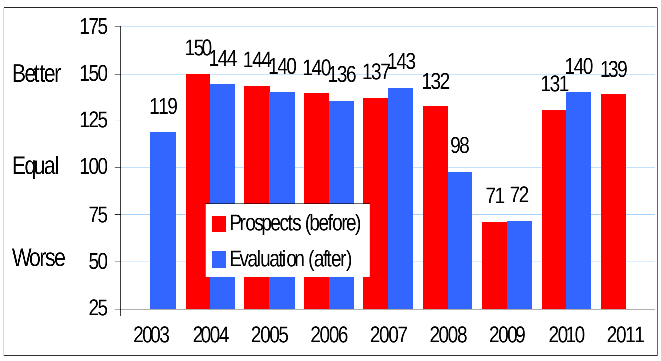


Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts
Confidence reigns

The over 330 members of UNWTO's Panel of Experts from around the world who contributed to this issue of the *UNWTO World Tourism Barometer*, have evaluated 2010's tourism performance at an average of 140, well above their expectations expressed at the beginning of the year (131). At the same time they remain upbeat about the outlook for the coming 12 months of 2011, giving an average score of 139. (Continued on page 10)

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

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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 published three times a year (in January, June and October). Each issue contains three 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. 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 915679319 / fax +34 915678217.

Explanation of abbreviations and signs used

* = provisional figure or data
.. = figure or data not (yet) available
| : change of series
mn: million (1,000,000)
bn: billion (1,000,000,000)

Q1: January, February, March
Q2: April, May, June
Q3: July, August, September
Q4: October, November, December

T1: January, February, March, April
T2: May, June, July, August
T3: September, October, November, December

YTD: Year to date, variation of months with data available compared with the same period of the previous year. The (sub)regional totals are approximations for the whole (sub)region based on trends for the countries with data available.

Series International Tourist Arrivals
TF: International tourist arrivals at frontiers (excluding same-day visitors);
VF: International visitor arrivals at frontiers (tourists and same-day visitors);
THS: International tourist arrivals at hotels and similar establishments;
TCE: International tourist arrivals at collective tourism establishments;
NHS: Nights of international tourists in hotels and similar establishments;
NCE: Nights of international tourists in collective tourism establishments.

Series International Tourism Receipts and Expenditure
All percentages are derived from non-seasonally adjusted series in local currencies, unless otherwise indicated: $: US$; €: euro; sa: seasonally adjusted series.

UNWTO
World Tourism Organization

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

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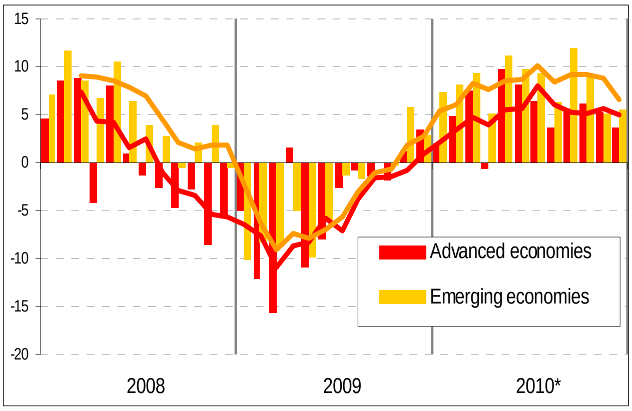
UNWTO World Tourism Barometer, January 2011

Quick overview of key trends

International tourism – 2010 preliminary results

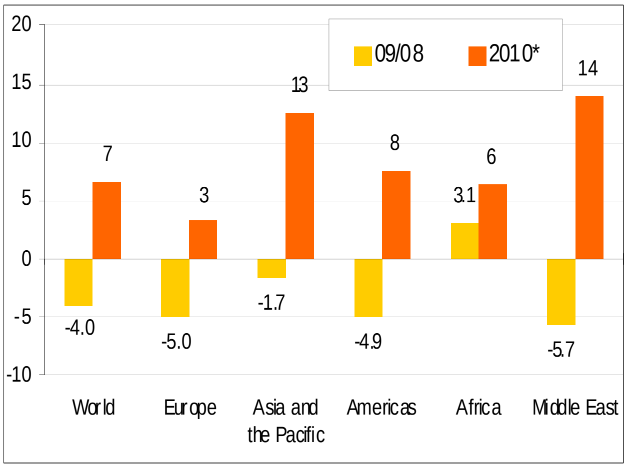
- Worldwide, international tourism rebounded strongly, with international tourist arrivals up 6.7% over 2009 to 935 million. The increase more than offsets the decline caused by the economic downturn, with an additional 22 million arrivals over the former peak year 2008.
- As a reflection of economic conditions, recovery was particularly strong in emerging economies, where arrivals grew faster (+8%) than in advanced ones (+5%). This multi-speed growth is expected to continue over the foreseeable future.
- All world regions posted positive growth in international tourist arrivals over 2009. For the vast majority of destinations, real growth returned in 2010 or is imminent.
- At sub-regional level, this different pace of growth produced four modes of recovery, ranging from the continuous growth of destinations that bucked the crisis, through the full or partial recovery of destinations that have recorded results slightly above or below previous peaks, to destinations still under the lasting effects of the crisis.
- For most countries, data on international tourism receipts and expenditure is still far from complete at this time of the year, and it anyway tends to be provisional and is often subject to substantial revision. But preliminary results seem to confirm two trends:
  - The growth in receipts lags somewhat behind that of arrivals, as is typical in periods of recovery;
  - Emerging economies are also leading the recovery in terms of the growth in expenditure abroad.
- Full recovery is confirmed by the UNWTO Panel of Experts, with the evaluation of its 330-plus members for 2010 even higher than the positive expectations expressed one year ago (140 against 131). Panel results also reflect the multi-speed recovery: in Asia and the Pacific (160) and the Middle-East (171) optimism was converted into real enthusiasm for a year marked by quick return to growth. From the other regions, positive evaluations which scored between 130 and 140.
- Preliminary air transport data published by the International Civil Aviation Organization (ICAO) confirms the full recovery of international traffic demand, with total scheduled passenger traffic (measured in RPKs) increasing by about 8% year on year. Recovery has been led by international traffic (+9%), due to a strong rebound in business and leisure long-haul travel, particularly from emerging markets. The general trend is confirmed by statistics published by Airports Council International (ACI), which reports a growth of nearly 8% in international traffic and 6% for domestic passengers up to November 2010.
- There was a steady recovery for the hospitality industry in 2010, as reported by Deloitte based on STR Global data. Asia and the Pacific led the recovery with growth in revPAR in excess of 20% or higher overall and in major cities.

International Tourist Arrivals, monthly evolution
Advanced economies & Emerging economies (% change)



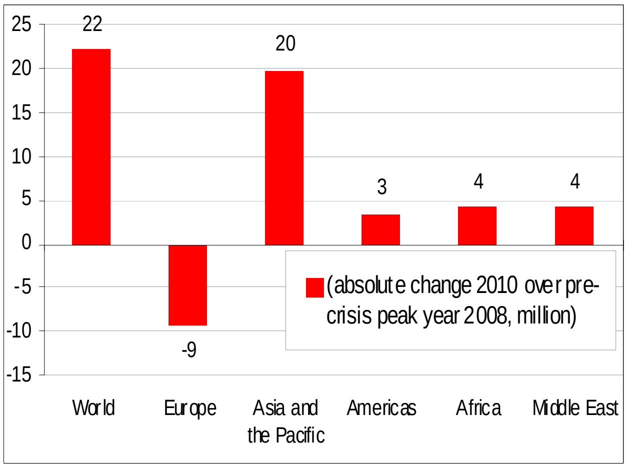
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (change 2010/2008, million)



Source: World Tourism Organization (UNWTO) ©

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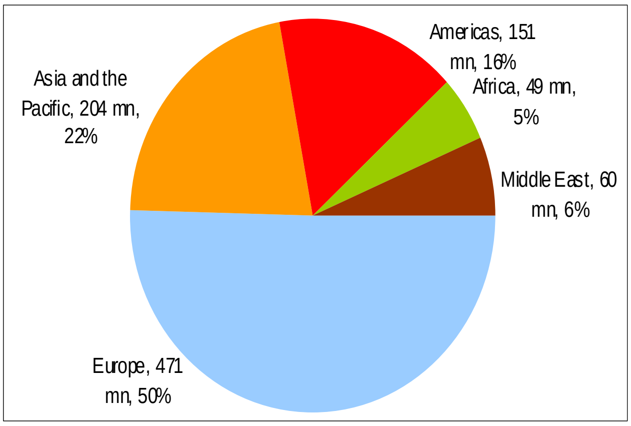
Regional results

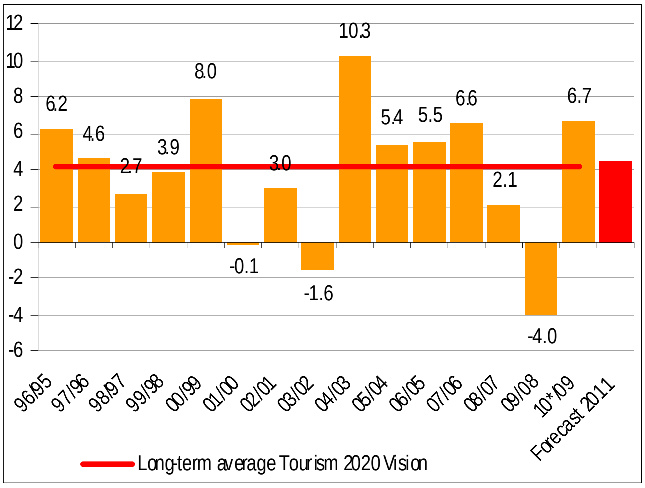
- **Asia and the Pacific** (+13%), the first region to recover, has been growing strongly with international tourist arrivals at a new historic record of 204 million in 2010. A double-digit growth rate is a common result for destinations in this region, where international travel is boosted by a strong development of the local economies. With 23 million additional visits the region has secured a share of 22% of the international tourism market.
- Rapid growth for the **Middle-East** (+14%), but on depressed figures in 2009. Boosted by intraregional travel favoured by high oil prices, the region reached 60 million arrivals.
- Growth in the **Americas** (+8%) is mostly explained by economic factors, namely the signs of recovery from the US economy and the vitality of Latin American countries. The increasing regional integration in Central and South America has also favoured recovery.
- **Africa**'s 6% growth is an increase on the positive results of 2009. Supported by worldwide exposure created by the FIFA World Football Cup, hosted by South Africa, the region maintained momentum in 2010, achieving a total of 49 million arrivals.
- The effects of the crisis have been slowly fading away in **Europe** (+3%), the region hardest hit. But the closure of its airspace in April and uncertainty about the economy have not helped to speed up recovery in the region. Outstanding performances of some large destinations (e.g. Germany +12% and Turkey +6%) as well as of emerging ones (as in the Balkans and South Caucasus) contrast with the region's average growth.

World Inbound Tourism: International Tourist Arrivals, 2010*



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

Prospects for 2011

- Growth is set to continue in 2011, yet at a more moderate pace. UNWTO predicts an increase in international tourist arrivals worldwide this year in the range of 4% to 5%, somewhat above the long-term average of 4%.
- Emerging destinations, especially in Asia and the Pacific and the Middle-East, are expected to continue leading the growth, taking advantage of a far from exhausted demand from neighbouring countries. In the advanced economies, major challenges to the projected growth are linked to the economic outlook, including high unemployment and weak consumer confidence.
- 2011's prospects expressed by UNWTO's Panel of Experts also remain very optimistic overall (139), with expectations in Asia and the Pacific (151) and in the Americas (143) at the highest. By sector, the Tour Operators and Travel Agencies are the most optimistic about the outlook for 2011 with a rating at 146.
- Tourism's quick recovery in 2010 confirms the sector's resilience in the medium and long term, confirming that it is a key driver of growth and much needed employment in a changing economic setting.
- During a year marked by economic uncertainty, natural disasters and political and social unrest, international travel showed its vulnerability towards shocks in the short term. The implementation of measures to mitigate this impact would reduce the sector's vulnerability.
- Mega-events contributed to offset the negative effects of the economic crisis, and displayed their extraordinary ability to promote and boost arrivals in emerging destinations, such as South Africa (FIFA World Cup), Shanghai (Expo 2010) and India (Commonwealth Games), as well as mature ones like Canada (Winter Olympic Games).

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Inbound Tourism: short-term trends 2010

World

(Continued from page 1)

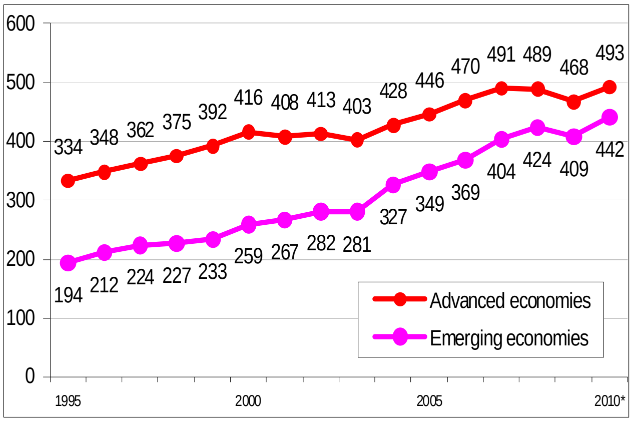
Growth positive in all world regions

At this moment in time, over 150 countries, two thirds of the total number and including virtually all major destinations, have reported data on international tourist arrivals for a number of months varying from 3 to 12 for 2010. Of those, 27 are still negative (18%), while 126 show positive figures (82%), of which 56 are in double digits (37%). A total of 134 countries, spread over all regions, have reported data for at least the first three quarters of the year, of which 89 at least through October, 70 through November and 23 countries already reported full year results.

Based on this sample of destinations, arrivals growth worldwide for 2010 is estimated to have been 6.7%. Emerging economies rebounded more quickly and led the recovery, growing at a rate of 8% compared with 5% for advanced economies. As for the broader economic situation, the tourism sector now faces the challenge of a multi-speed growth, which will last for the foreseeable future.

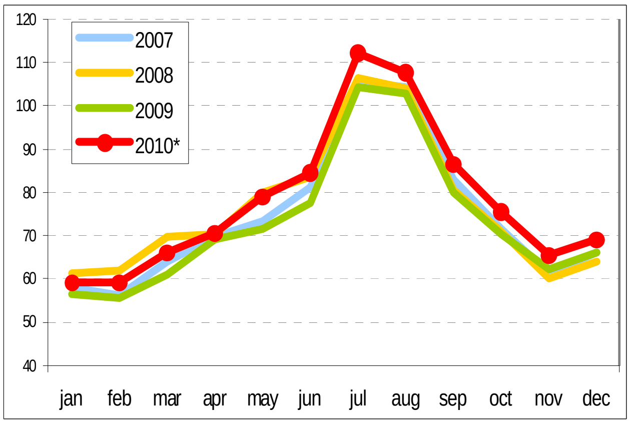
Estimated full year results were positive in all world regions. Africa, the only region to show positive figures in 2009, maintained growth during 2010 at 6%. Asia and the Pacific posted a remarkable 13% growth in 2010, following an only modest 2% decline in 2009, making it the fastest growing region over the past two years. The Middle East was the strongest growing region in 2010 (+14%), but following a significant decline in 2009. The Americas (+8%) also rebounded from the decline in 2009 and reached a new high. In Europe (+3%), recovery was slower than in other regions. However, the sector gained momentum from the second half of the year and several individual countries performed well above the regional average.

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



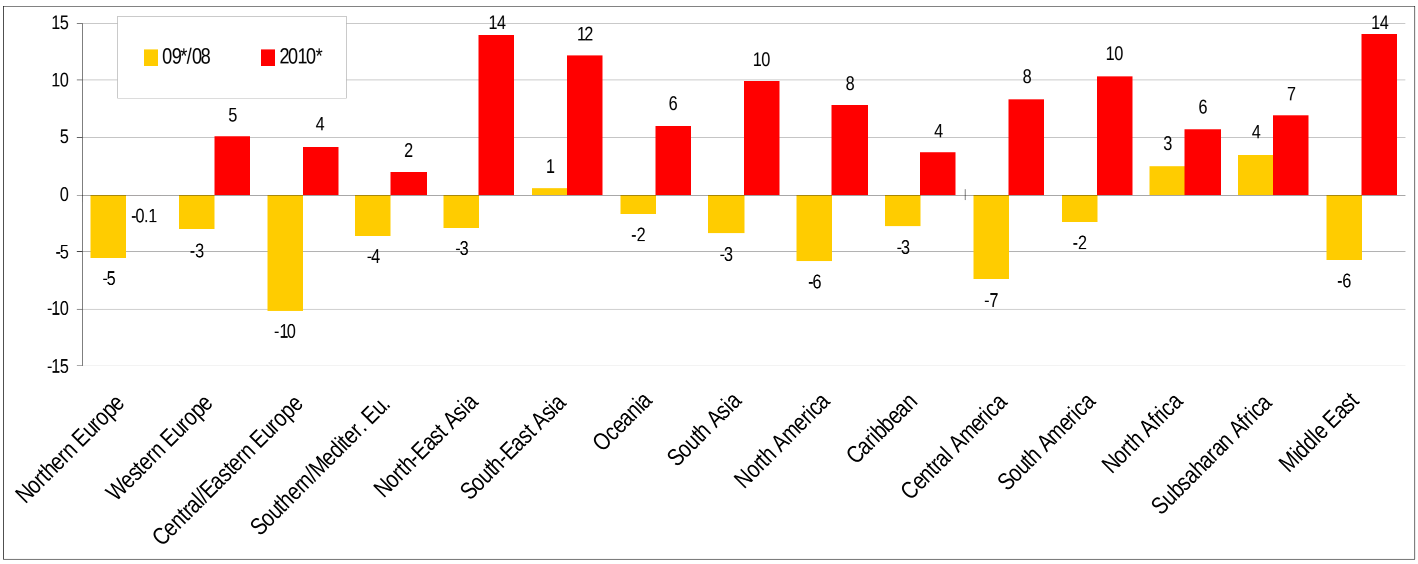
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
World (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

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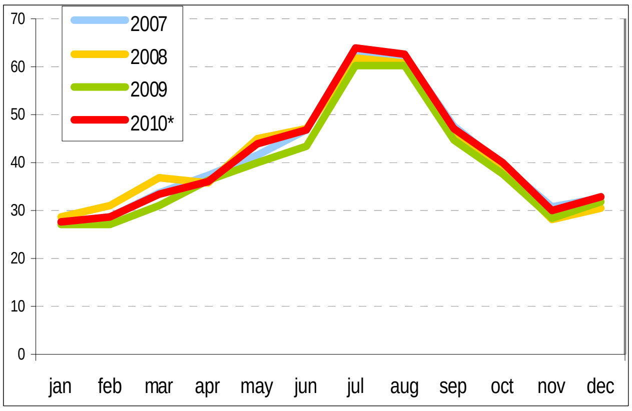
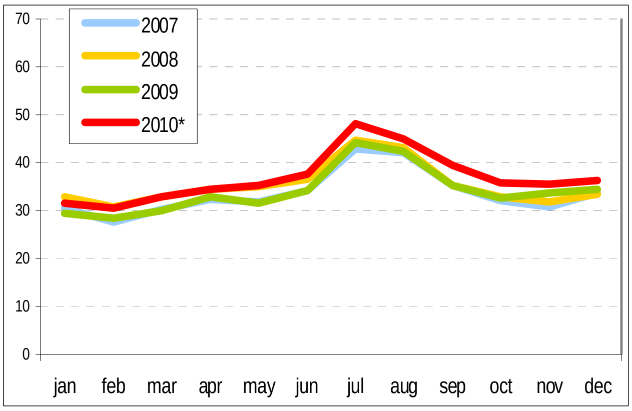
International Tourist Arrivals, monthly evolution
Advanced economies (million)



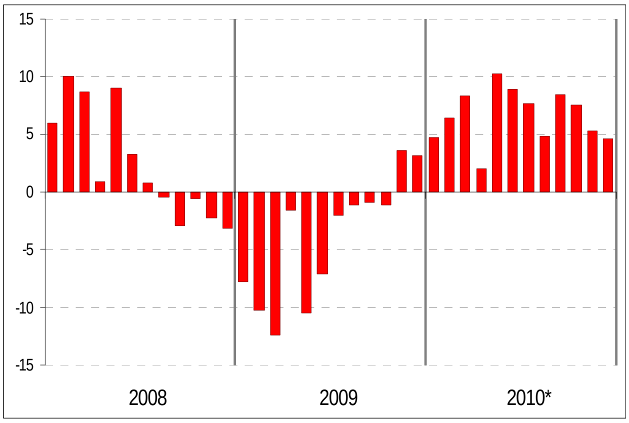
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
Emerging economies (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
World (% change)



Source: World Tourism Organization (UNWTO) ©

Multi-speed recovery for international tourism

The tourism sector gained momentum from June, when monthly volumes consistently started to reach new record levels, exceeding those of the same month in previous years. Uncertainty still dominated the first part of 2010, with high growth rates merely due to the depressed base of the previous year, and a disappointing slowdown in April (+2%), when the ash clouds after the eruption of a volcano in Iceland caused the closure of European airspace.

In the second half of the year the growth rate was anticipated to slow, as the base figures in the same period of 2009 were no longer so depressed. However, growth remained stronger than expected, in particular in the shoulder season months of September and October. This could be explained on the one hand by the resurgence of business tourism and, on the other hand, by additional leisure trips outside the typical season. Not many countries have yet reported data for December, but traffic is expected to have been weak because of the adverse weather conditions in North America and Europe.

Looking back on the impact, that the financial crisis and economic recession have had on tourism, a month-by-month analysis shows a near-perfect V-shape of 15 consecutive months of negative growth, from August 2008 to October 2009, with the biggest decline in March 2009 (-12%). This is followed by a rebound in the shape of a mirror image of high growth on a serious depressed base. A comparable V-shape can be seen in the four-month scores for prospects and evaluation of the UNWTO Panel of Experts Confidence Index, first falling sharply and then climbing out of the trough again.

For most regions, the shape of the downturn has been very similar, but with considerable variation in depth and length. In Europe the period of consecutive months of negative growth lasted 19 months, from July 2008 to January 2010, with a low of -16% in March 2009. In Asia and the Pacific the downturn just lasted 12 months from August 2008 to July 2009, with a low of -11% in February 2009. The Americas experienced 13 consecutive months of negative growth, from September 2008 to September 2009, with a low of -13% in March 2009. In the Middle East and Africa the pattern was a bit more irregular. The Middle East had a sharp but short decline from January 2009 to May 2009, and Africa had some negative months but overall had no real downturn.

Sub-regional results clearly reflect this multi-speed recovery. The different pace of growth shows the existence of four groups:

- Sub-regions that reported continuous growth over the past years: North and Subsaharan Africa and South-East Asia;
- Sub-regions negatively impacted by the crisis, that already made up for the losses during 2010 and are back at, or have exceeded, pre-crisis levels: North-East and South Asia, Oceania, North and South America. Western Europe saw arrivals growth in 2010 fully compensate for previous losses, while the Caribbean and Central America are just back to 2008 levels;
- Sub-regions that recovered in 2010, but whose rates of growth only partially compensated for lost tourist flows of previous years: Central and Eastern Europe, Southern and Mediterranean Europe; and finally
- Sub-regions exposed to the enduring effects of the crisis and continuing to post negative results in 2010: Northern Europe.

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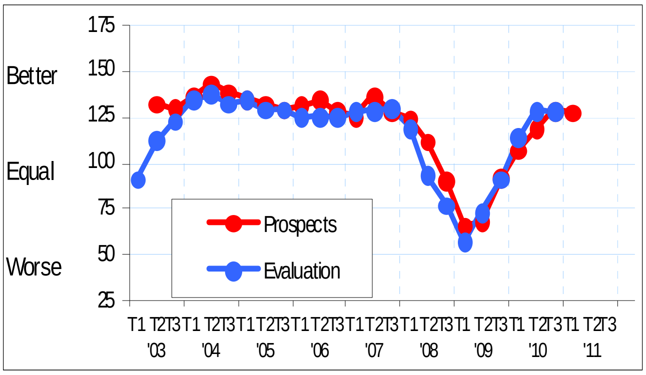
UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Receipts and expenditure still to catch up

At this time in the year, most countries have only reported data on international tourism receipts and expenditure for the first three quarters of the year. Moreover, this data is most often provisional and subject to substantial revision. Furthermore, for a comprehensive analysis, exchange rates and inflation also need to be taken into account. A full analysis of these indicators can only be provided in April when fourth-quarter data has been issued by the majority of countries. But preliminary results seem to confirm two trends:

- International tourism receipts' growth is lagging somewhat behind the growth in arrivals, as is typical of recovery periods. Following major shocks, volume (arrivals) tends to recover faster than income (receipts), as competition is tougher and suppliers try hard to contain prices, and travellers tend to travel closer to home, for shorter periods of time, and seek greater value for money. Of the 50 largest destinations in terms of international tourism receipts, 47 have reported results for at least the first three quarters of 2010. One out of four, or 12 destinations, still posted declines (26%). Of the 35 destinations that reported positive growth (74%), 14 show double-digits (30%). Emerging destinations report strongest growth, but there are notable increases also for the Netherlands, Japan, Portugal and Israel.
- Emerging economies are also leading the recovery in terms of expenditure abroad. Among the top outbound tourism markets in terms of expenditure abroad, emerging economies stand out: China (+17%), the Russian Federation (+26%), Saudi Arabia (+28%) and Brazil (+52%).
- Of the traditional source markets, Australia (+9%), Canada (+8%), Japan (+7%) and France (+4%) rebounded, while more modest growth at 2% came from the USA, Germany and Italy. On the opposite side of the spectrum, expenditure abroad from the UK was still down by 4% in 2010.

2010 in review

International tourism demand held up well in 2010, despite persistent economic uncertainty in some major markets, the natural disasters suffered in some countries, political and social unrest in others, the serious disruption of air travel following the volcanic eruption in Iceland last April, and the problematic weather conditions in parts of Europe in December.

Tourism has once again proved to be a reasonably resilient sector. Nevertheless, the recession has been a serious test and has more than ever shown the need to work more closely together, and better, towards increased integration and cooperation between all players involved in the tourism value chain. This will ensure we increase our competitiveness and respond more effectively to challenges such as the ones that emerged from the closure of European air space last April.

2010 also saw the rise in importance of mega-events – sport, culture and exhibitions – in terms of their extraordinary ability to attract visitors and position host countries as attractive tourism destinations. Notable examples include the Winter Olympics in Canada, the Shanghai Expo in China, the FIFA World Cup in South Africa and the Commonwealth Games in India.

Growth to continue in 2011

The over 330 experts from around the globe who constitute the UNWTO Panel of Experts confirmed the trend of 2010 and evaluated overall performance very positively, and significantly above their expectations at the beginning of the year. The Panel maintained an upbeat outlook for 2011. (See further page 10)

Following a year of global recovery in 2010, growth is expected to continue for the tourism sector in 2011 but at a more moderate pace. UNWTO forecasts an increase in international tourist arrivals worldwide in the range of 4% to 5%, somewhat above the long-term average of 4%. In particular for some of the large destinations there is still some room left for further recovery, while emerging destinations and markets are expected to consolidate the gains of 2010 and will grow close to their long-term potential. (See further page 13)

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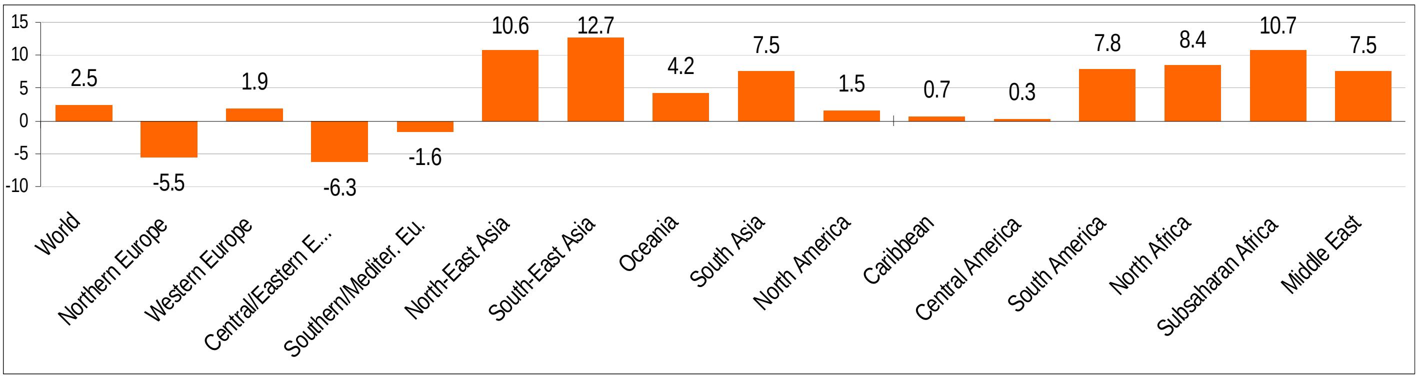
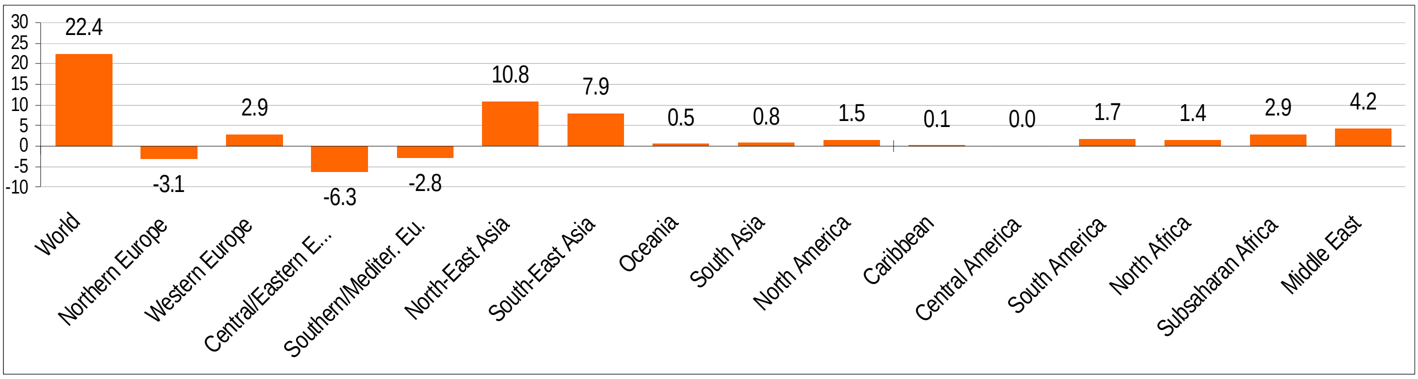
International Tourist Arrivals (% change 2010 over pre-crisis peak year 2008)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (absolute change 2010 over pre-crisis peak year 2008, million)



Source: World Tourism Organization (UNWTO) ©

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International Tourist Arrivals by (Sub)region

	Full year						Share	Change			Monthly/quarterly data series (percentage change over same period of the previous year)											
	2000	2005	2007	2008	2009	2010*	2010*	08/07	09/08	10*/09	2010*								2009			
						(million)	(%)			(%)	Q1	Q2	Q3	Q4	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
World	675	795	894	913	877	935	100	2.1	-4.0	6.7	6.6	7.2	6.9	5.9	8.5	7.5	5.3	4.6	-10.2	-6.5	-1.4	1.7
Advanced economies	*416*	*446*	*491*	*489*	*468*	*493*	*52.7*	*-0.3*	*-4.3*	*5.3*	*4.9*	*6.0*	*5.2*	*5.1*	*5.6*	*6.1*	*5.3*	*3.6*	*-11.4*	*-6.3*	*-1.6*	*0.6*
Emerging economies	*259*	*349*	*404*	*424*	*409*	*442*	*47.3*	*5.0*	*-3.5*	*8.2*	*8.3*	*8.7*	*9.1*	*6.6*	*12.0*	*9.1*	*5.2*	*5.5*	*-9.1*	*-6.9*	*-1.1*	*2.8*
By UNWTO regions:																						
Europe	*385.7*	*435.0*	*478.4*	*480.8*	*456.9*	*471.5*	*50.4*	*0.5*	*-5.0*	*3.2*	*1.5*	*2.9*	*3.7*	*4.0*	*5.2*	*4.9*	*3.7*	*3.0*	*-12.5*	*-6.9*	*-1.4*	*-2.2*
Northern Europe	43.7	52.8	58.1	56.4	53.4	53.3	5.7	-2.9	-5.5	-0.1	-5.1	-2.7	2.6	3.4	-0.9	5.3	3.9	0.9	-11.6	-5.9	-4.2	-0.7
Western Europe	139.7	141.7	153.9	153.2	148.6	156.1	16.7	-0.4	-3.0	5.1	3.0	5.2	5.4	6.0	8.2	7.1	6.2	4.5	-11.9	-4.6	2.0	-1.6
Central/Eastern Eu.	69.3	87.5	96.6	100.0	89.9	93.7	10.0	3.5	-10.1	4.2	0.8	4.4	5.7	4.5	6.1	4.2	4.7	4.6	-14.4	-12.9	-6.6	-8.2
Southern/Mediter. Eu.	133.0	153.1	169.8	171.2	165.1	168.4	18.0	0.8	-3.5	2.0	3.3	1.9	1.5	2.0	3.9	3.4	0.7	1.0	-11.9	-5.7	-0.8	1.0
Asia and the Pacific	*110.1*	*153.6*	*182.0*	*184.1*	*181.0*	*203.8*	*21.8*	*1.1*	*-1.7*	*12.6*	*13.0*	*15.3*	*13.8*	*8.9*	*12.8*	*10.4*	*9.1*	*7.5*	*-7.5*	*-6.3*	*0.7*	*6.5*
North-East Asia	58.3	86.0	101.0	101.0	98.1	111.7	11.9	0.0	-2.9	13.9	11.4	21.0	15.6	8.3	14.7	9.8	8.2	6.9	-7.6	-7.5	-0.5	4.1
South-East Asia	36.1	48.5	59.7	61.8	62.1	69.6	7.4	3.5	0.5	12.1	16.1	8.9	12.9	10.8	11.4	13.4	9.9	9.3	-7.1	-5.5	3.5	11.7
Oceania	9.6	11.0	11.2	11.1	10.9	11.6	1.2	-0.9	-1.6	6.0	6.5	3.9	8.6	5.0	7.2	3.4	7.0	4.7	-5.7	-3.1	-0.7	2.8
South Asia	6.1	8.1	10.1	10.3	9.9	10.9	1.2	1.1	-3.4	10.1	16.2	8.4	6.6	8.4	8.9	6.5	14.5	4.8	-11.9	-1.6	-3.1	3.3
Americas	*128.2*	*133.3*	*143.9*	*147.8*	*140.5*	*151.2*	*16.2*	*2.7*	*-4.9*	*7.7*	*5.3*	*8.4*	*10.0*	*6.5*	*8.2*	*9.2*	*7.2*	*3.8*	*-7.2*	*-7.5*	*-5.8*	*1.3*
North America	91.5	89.9	95.3	97.7	92.1	99.2	10.6	2.6	-5.8	7.8	4.8	10.4	9.4	5.8	6.8	8.6	6.9	2.3	-7.7	-9.6	-5.7	0.1
Caribbean	17.1	18.8	19.9	20.1	19.5	20.3	2.2	1.0	-2.8	3.9	5.8	0.9	4.2	3.5	4.6	5.4	2.4	3.2	-8.1	-2.4	0.1	2.9
Central America	4.3	6.3	7.8	8.2	7.6	8.3	0.9	6.4	-7.4	8.3	7.0	9.6	8.7	8.3	3.9	13.4	6.1	6.7	-7.0	-10.9	-8.4	-3.5
South America	15.3	18.3	21.0	21.8	21.3	23.5	2.5	3.8	-2.3	10.4	6.0	5.8	19.9	11.3	19.6	12.9	12.3	9.0	-4.8	0.0	-10.3	6.6
Africa	*26.5*	*35.4*	*43.2*	*44.4*	*45.8*	*48.7*	*5.2*	*2.7*	*3.1*	*6.4*	*6.2*	*8.0*	*5.5*	*6.3*	*10.5*	*8.6*	*5.1*	*5.2*	*1.6*	*6.4*	*2.2*	*2.9*
North Africa	10.2	13.9	16.3	17.1	17.6	18.6	2.0	4.8	2.5	5.8	9.3	4.4	4.1	7.2	17.5	14.0	3.4	3.0	2.3	7.6	-1.6	4.5
Subsaharan Africa	16.2	21.5	26.9	27.3	28.2	30.1	3.2	1.5	3.5	6.9	4.8	10.6	6.7	5.9	6.6	5.6	5.9	6.1	1.2	5.6	5.7	2.2
Middle East	*24.9*	*37.8*	*46.9*	*55.9*	*52.7*	*60.0*	*6.4*	*19.2*	*-5.7*	*13.9*	*19.2*	*17.9*	*16.3*	*4.8*	*29.9*	*13.5*	*-1.2*	*5.1*	*-21.1*	*-11.2*	*1.1*	*10.8*

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO January 2011)

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

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

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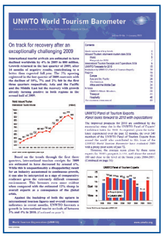
World Tourism Organization (UNWTO) Publications

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 updated in January, June and October.

Prices:
€ 70, 3 issues
(PDF version)

€ 100
(PDF and print version)

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

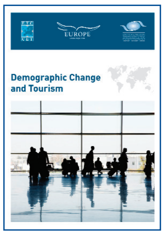
Cruise Tourism - Current Situation and Trends

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, and sustainability, and identifies the major lines that will shape the sector.

Published: 2008
Price: € 80

Available in English and Spanish

Demographic Change and Tourism

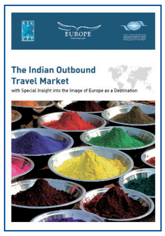


The structure of societies is continuously changing: The world population is forecast to grow to 8.3 billion in 2030, life expectancy is projected to increase in most of the world, households and families are becoming more diverse, and migration is changing the face of societies. All these changes will 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; Migration.

Published: 2009
Price: € 75

Available in English

The Indian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

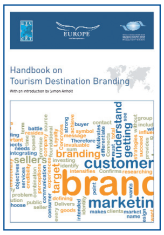


India is one of the fastest-growing outbound travel markets in the world. Trips abroad have grown from 3.7 (1997) to 9.8 million (2007) and international tourism expenditure has increased from US$ 1.3 (1997) to US$ 8.2 billion (2008). With more than 1.1 billion inhabitants and GDP increasing by more than 8% every year, the country offers enormous potential for future growth in outbound travel. Recognizing the importance of this market, the ETC and the UNWTO have undertaken detailed research on the Indian outbound market. This publication covers 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. The report also sets out recommendations on how to best promote a destination in the Indian market.

Published: 2009
Price: € 75

Available in English

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.

Published: 2009
Price: € 75

Available in English

The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination

China is one of the fastest growing outbound markets in the world. Rising incomes and relaxation of restrictions on foreign travel led to a growth of 22% a year in trips abroad since 2000 (34.5 million in 2006). China ranks 5th worldwide in terms of spending on international tourism (US$ 30 billion in 2007). In 1995, the World Tourism Organization (UNWTO) predicted that China would generate 100 million arrivals worldwide by 2020, making it the fourth largest market in the world (Tourism 2020 Vision). In view of recent trends, China may reach that target well before 2020. To better understand the structure and trends of this market is the aim of the new ETC/UNWTO report *The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination.*

Published: 2008
Price: € 75

Available in English

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.

Published: 2008
Price: € 75

Available in English

The Russian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

Russia is the 9th biggest outbound travel market in the world, generating in 2007 US$ 22 billion in spending abroad. To better understand the structure and trends of this growing market is the aim of this ETC/UNWTO report, which identifies key trends in the Russian outbound travel – among others, the market size and value, growth in trip volume and spending, purpose of trip, destination choice, the role of the travel trade and online distribution. In addition, the publication provides information on government policy affecting outbound travel, notably visa issues and traffic rights for foreign airlines operating to/from the country. All this information is critical to helping destinations and commercial operators plan ahead with greater foresight, providing guidance on the short term opportunities and the longer-term potential for investment in this market.

Published: 2009
Price: € 75

Available in English

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 154 countries, 7 territories, 2 permanent observers 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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