

2010: A multi-speed recovery

In 2010, world tourism recovered more strongly than expected from the shock it suffered in 2008 and 2009 due to the global financial crisis and economic recession. 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 arrivals, emerging economies were unarguably the drivers of this growth. The multi-speed recovery – slower in most advanced economies, much faster in most emerging and newly industrialised markets – is a reflection of the broader global economic situation, which is set to dominate trends in 2011 and the foreseeable future.

This *UNWTO World Tourism Barometer* and accompanying *Statistical Annex* present the results for international tourism in 2010 and the outlook for 2011. It updates the information disseminated through the Advance Release published in mid-January and includes 2010 full year data on international tourist arrivals for over 100 countries and on international tourism receipts for over 40 countries available at the end of February.

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 the economic conditions, recovery was particularly strong in emerging economies, where arrivals grew faster (+8%) than in advanced ones (+5%).
- 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 incomplete at this time of the year,

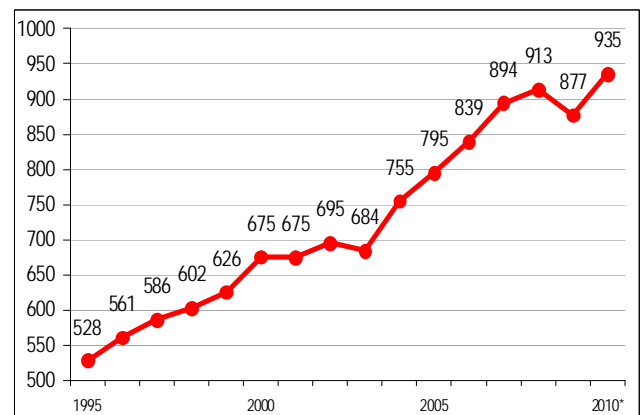
and it anyway tends to be provisional and is often subject to substantial revision. But preliminary results seem to confirm two trends:

- 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 its some 340 members evaluating 2010 even more highly 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 a quick return to growth. The other regions all received positive scores of between 130 and 140.

World: Inbound Tourism

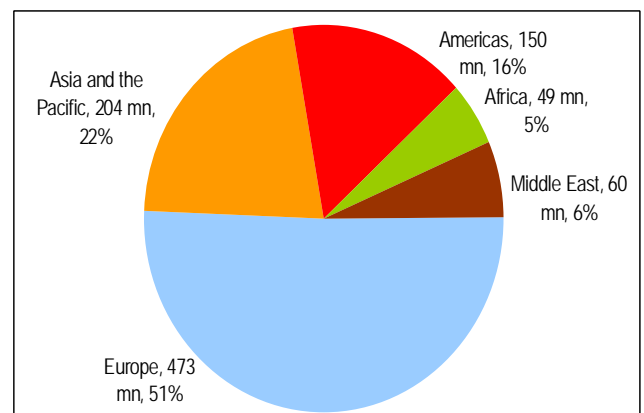
International Tourist Arrivals

(million)



Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2010*



Source: World Tourism Organization (UNWTO) ©

- Air transport data published by the International Civil Aviation Organization (ICAO) confirms the recovery of international traffic demand, with total scheduled passenger traffic

(measured in RPKs) increasing by about 8% in 2010. 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 in 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.

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** (+7%) 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 +11% and Turkey +6%) as well as of emerging ones (as in the Balkans and South Caucasus) contrast with the region's average growth.

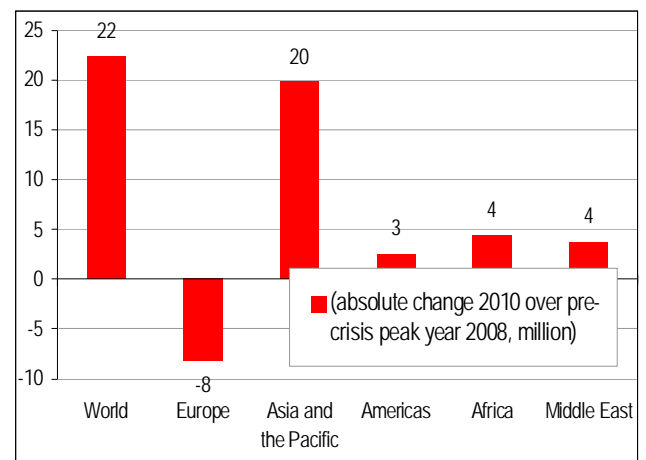
Prospects for 2011

- 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, 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.

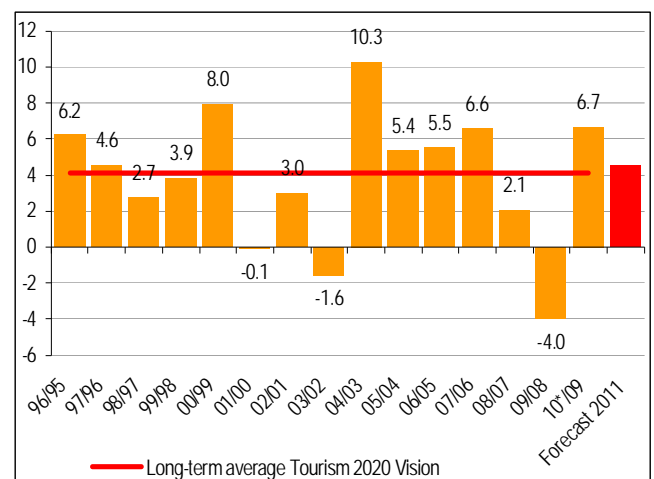
- Tourism's quick recovery in 2010 confirms the sector's resilience in the medium and long term, confirming that it is a key driver of growth and much needed employment in a changing economic setting.
- Mega-events contributed to offset the negative effects of the economic crisis, and displayed their 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).

International Tourist Arrivals (change 2010/2008, million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

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.

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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World Tourism Organization (UNWTO) Publications



UNWTO World Tourism Barometer

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

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



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

Handbook on E-marketing for Tourism Destinations

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

Available in English

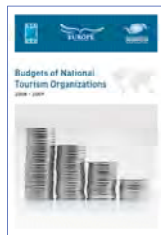


Published: 2008
Price: € 75

Budgets of National Tourism Organizations, 2008-2009

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

Available in English

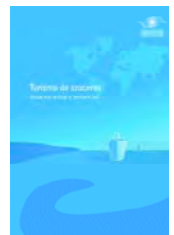


Published: 2010
Price: € 75

Cruise Tourism – Current Situation and Trends

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

Available in English and Spanish



Published: 2008
Price: € 80

Demographic Change and Tourism

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

Available in English



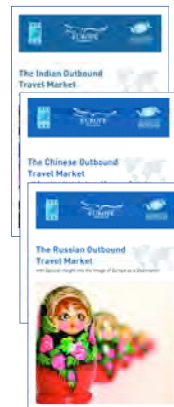
Published: 2010
Price: € 75

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

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

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

Available in English



Published: 2008/2009
Price: € 75 each

Handbook on Tourism Destination Branding

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

Available in English



Published: 2009
Price: € 75

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

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

Available in English



Published: 2011
Price: € 75 each

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

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