



Interim Update, June 2011

This *Interim Update* edition and *Statistical Annex* of the *UNWTO World Tourism Barometer* include preliminary results for international tourism in the first four months of 2011, as well as the evaluation of January-April and the outlook for May-August by the UNWTO Panel of Tourism Experts.

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, Spanish and Russian.

International tourism maintains momentum despite challenges

Despite new challenges emerging since the beginning of the year, international tourist arrivals increased by 4.5% between January and April 2011 compared with the same period of 2010. Growth was positive in all regions with the exception of the Middle East. Emerging economies (+6%) continued to grow at a faster pace than advanced ones (+3%). Some sub-regions achieved double-digit growth: South America (+17%), South Asia (+14%) and South-East Asia (+10%).

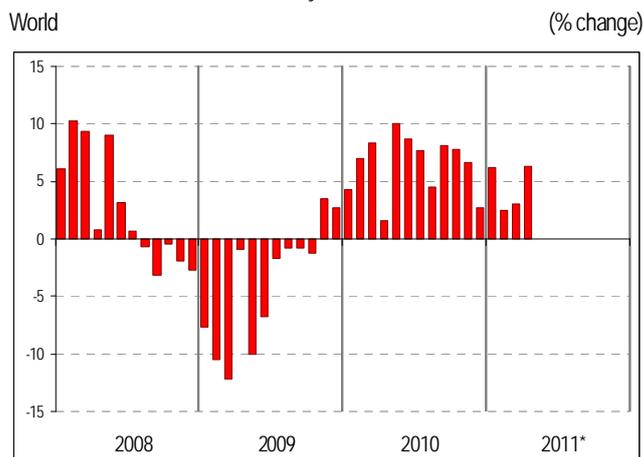
Quick overview of key trends

International tourism – 2011 short-term trends

- At this moment in time, 125 countries have reported data on international tourist arrivals for one or more months of 2011. The large majority (104 countries, 83%) have reported positive growth, with double-digit growth for 46 countries (37%), and 21 countries (17%) have recorded negative growth.
- 80 countries have reported results for at least the first four months of 2011. Based on this sample of destinations, the growth of international tourist arrivals worldwide from January to April 2011 is estimated to have reached 4.5%.
- Between January and April 2011 destinations worldwide recorded an estimated 268 million international tourist arrivals, some 12 million more than the 256 million registered during the same period of 2010.
- April was the strongest month, with an estimated increase of over 6%. This reflects a late Easter holiday and contrasts with the weak April of 2010 when European airspace was

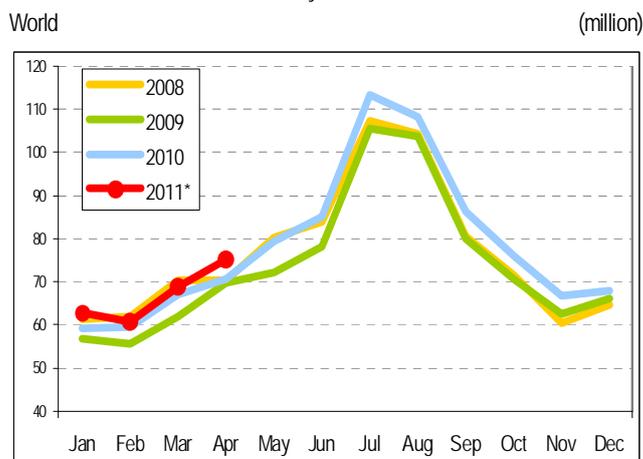
closed for nearly a week due to the ash cloud following the volcanic eruption in Iceland. January (+6%) was also a strong month, while February and March were comparatively weaker (both at around +3%).

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



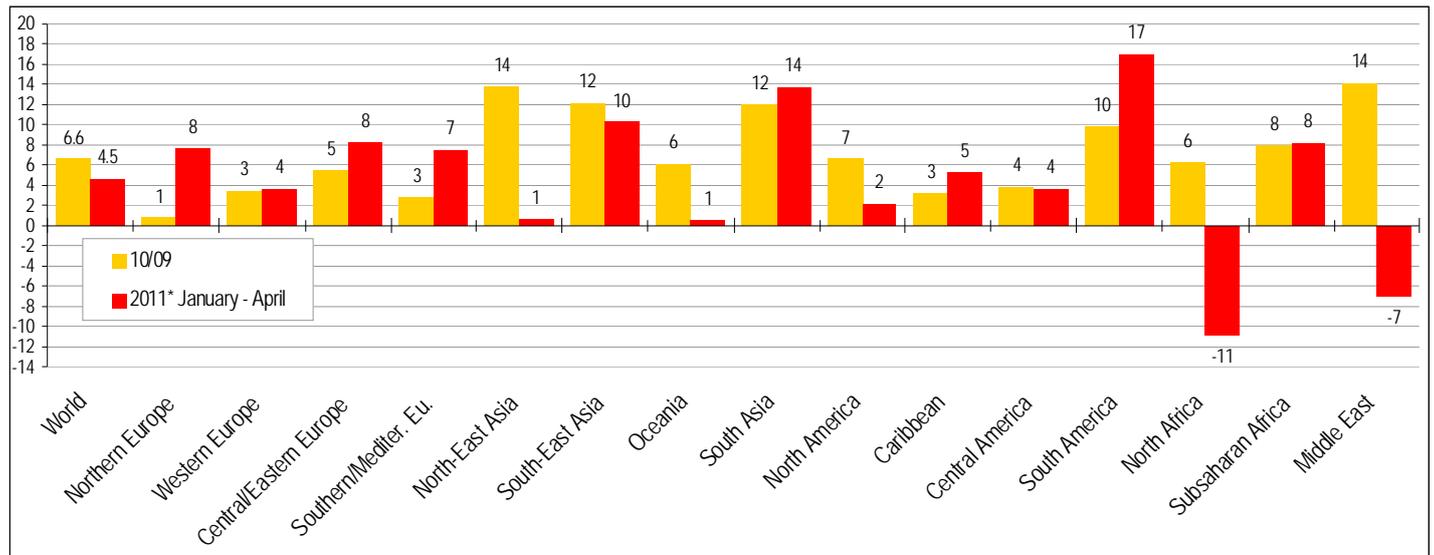
Source: World Tourism Organization (UNWTO) ©

Europe leading tourism growth

- Europe exceeded expectations (+6%) and posted the highest growth in the first four months of 2011. Results reflect a delayed recovery in various European destinations and source markets, the late Easter holiday, and compensation for the negative trend in April 2010, which was affected by the volcanic ash cloud. Destinations in Northern, Eastern and Southern Europe performed particularly well.
- Growth in Asia and the Pacific (+5%) was in line with the world average, but slightly below previous prospects. Asia, and in particular North-East Asia, suffered the impact of the earthquake and tsunami in Japan, which affected both the country's inbound and outbound travel, as well as intra-regional travel from other markets.

International Tourist Arrivals

(% change over same period of the previous year)



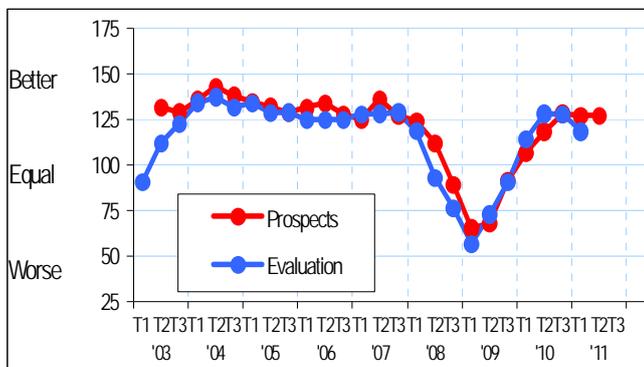
Source: World Tourism Organization (UNWTO) ©

- In the Americas, international tourist arrivals increased by 5%, mostly driven by the strong results of South America.
- The Middle East (-7%) and North Africa (-11%) have been considerably affected by recent developments. Nonetheless, some destinations in the Middle East, such as Saudi Arabia and Dubai (United Arab Emirates), have shown particularly positive results, demonstrating the dynamism of the sector in the region. Within Africa (+2%), arrivals in Sub-Saharan Africa (+8%) stand out.

remains high in Africa, but lower than might have been expected in Asia and the Pacific. Understandably, experts in the Middle East are the least optimistic.

- The sustained optimism reflected in the UNWTO Confidence Index is reassuring, especially as tourism still faces many challenges which could dampen growth. The UNWTO remains alert to persisting uncertainties such as high unemployment, increased public austerity measures, concerns over fiscal stability in the USA and Europe, social unrest, and volatile oil prices.
- Global tourism continues to consolidate the 2010 recovery despite the impact of recent developments in the Middle East and North Africa, as well as the tragic events in Japan. However, the impact on tourism is expected to be limited to the destinations directly involved. In the short term, alternative destinations will pick up most of the slack, while most of the destinations currently facing difficulties are expected to see demand gradually recover towards the end of the year. It is time to support those destinations and help their tourism sectors to rebound, contributing to overall economic and social stability and progress.
- UNWTO maintains its forecast for international tourist arrivals in 2011 at between 4% and 5%, slightly above the long-term average and in line with previous assessments. The developments in the Middle East, North Africa and Japan are not expected to significantly alter the global forecast.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Positive outlook for the remainder of the year

- The close to 40 countries that have already reported data up to May suggest that the current trend will continue.
- As the peak tourist season gets underway in the Northern Hemisphere, short-term prospects remain positive. This is reflected in the UNWTO Confidence Index, a short-term outlook based on over 350 experts' survey responses worldwide, which remains largely optimistic for the period May-August 2011.
- There are, however, marked differences in the confidence levels for different world regions, with experts in the Americas and Europe anticipating the best outcomes. Confidence

The detailed information in the continuation of this *Interim Update* 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>.

Copyright © 2011 World Tourism Organization

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

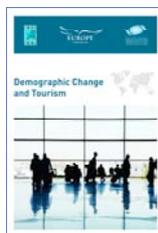


Published: 2008
Price: € 80

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.

Two easy ways to order UNWTO publications:
www.unwto.org/infoshop for printed publications,
www.e-unwto.org for publications in electronic version.

For further information, please contact:
UNWTO Publications Department
Tel. (34) 91 567 8107 – Fax: (34) 91 571 3733
e-mail: pub@unwto.org