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This *UNWTO World Tourism Barometer* and Statistical Annex of include preliminary results for international tourism in the first eight months of 2011.

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.

Europe leads growth, defying economic uncertainty

International tourist arrivals grew by a healthy 4.5% between January and August 2011. Destinations around the world recorded an estimated total of 671 million international tourist arrivals in this period, 29 million more than in the same period of 2010. Europe (+6%), surprisingly, showed the strongest growth amid continuing economic uncertainty.

Tourism growth generally exceeded expectations in the first eight months of 2011, at least in terms of volume, and indications are that growth in receipts is following closely. Trends in international arrivals and airline passenger traffic were very encouraging in most regions of the world, matched by a continuing recovery in hotel performance.

Quick overview of key trends

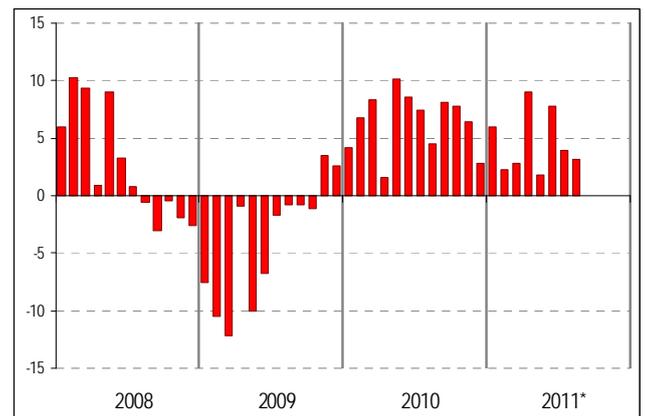
International tourism – 2011 results January-August

- Almost 150 of all 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, 122 show positive figures (82%), of which 57

are in double digits (38%), while only 27 reported negative results (18%). More than 100 countries reported results through August. Based on this sample of destinations, worldwide arrivals growth for January to August 2011 is estimated at 4.5%.

International Tourist Arrivals, monthly evolution

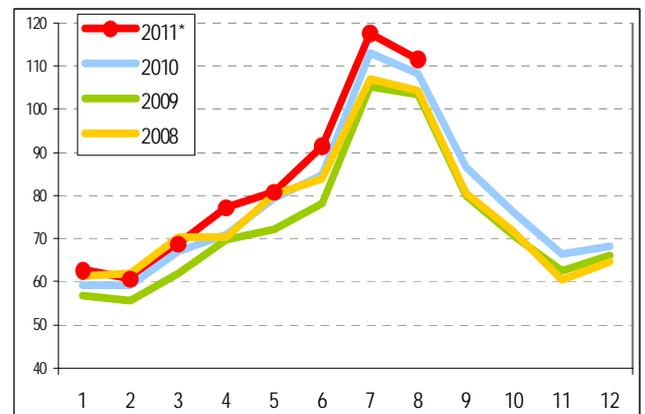
World (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World (million)



Source: World Tourism Organization (UNWTO) ©

- The number of international tourist arrivals reached 671 million January through August, up 29 million over the 642 million in the same period of 2010 (603 million in 2009 and 640 million in 2008). In a regular year, international tourist arrivals in the first eight months of the year account for an average 69% of the yearly total.
- The Northern Hemisphere peak summer season months of July and August showed encouraging results, with growth at close to 4% over 2010, corresponding to an extra 8 million arrivals. At 118 million, July saw the highest number of international tourist arrivals ever recorded in one month (August: 112 million).

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.



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The *UNWTO World Tourism Barometer* is developed as a service for UNWTO Members and published three times a year in English, French and Spanish. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.

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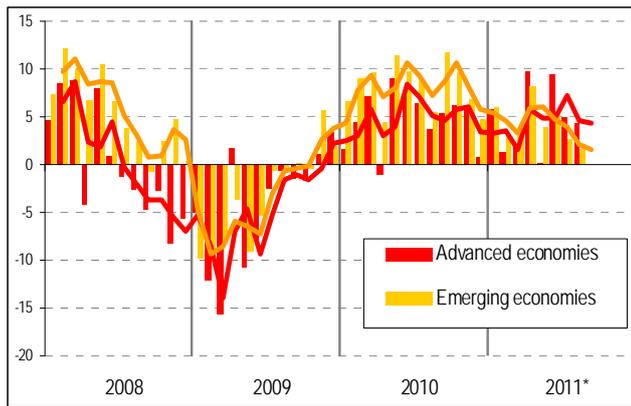
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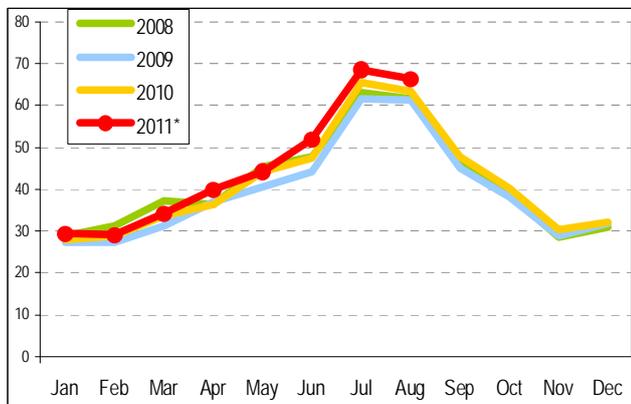
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International Tourist Arrivals, monthly evolution
Advanced economies & Emerging economies (% change)



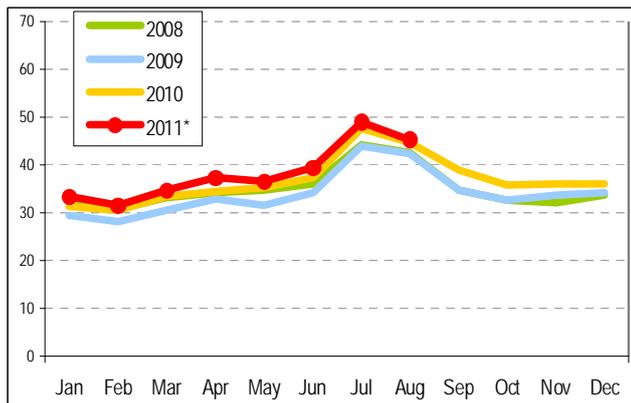
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
Advanced economies (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
Emerging economies (million)

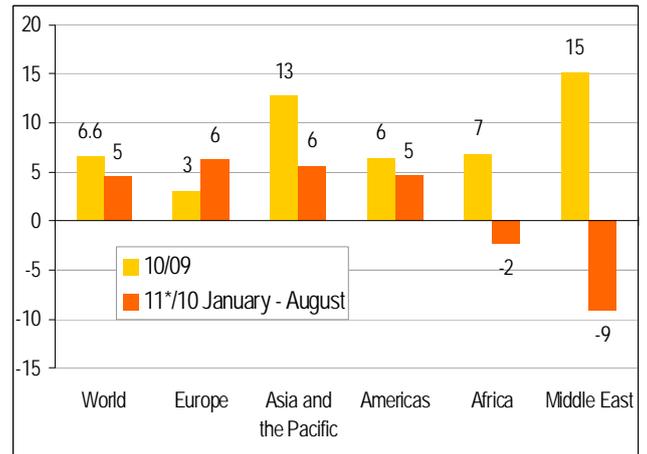


Source: World Tourism Organization (UNWTO) ©

- Contrary to the trend in recent years, growth in arrivals during the first eight months of 2011 was higher in advanced economies (+4.8%) than in emerging ones (+4.2%), due largely to the strong results recorded by Europe. In Northern Europe (+6%) and Central and Eastern Europe (+9%), the recovery which began in 2010 gained momentum this year. The same is true for some Southern European destinations (+8%), which this year also benefited from the shift in travel away from Middle East (-9%) and North Africa (-15%).

- Since the beginning of the year, most emerging economies have continued to prosper, while most advanced economies – apart from the ‘newly industrialised’ economies of Asia – have been sluggish and plagued by uncertainty. Yet, a series of negative shocks, of which the earthquake and tsunami in the Tōhoku region of Japan and the revolutions and protests in various countries of North Africa and the Middle East were by far the most important, had a greater impact on emerging economy destinations than on advanced economies.

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

Regional results

European tourism grows above expectations

- Europe produced the strongest international arrivals figures for the first eight months of this year (+6%). In addition to the diversion of holiday demand away from the Middle East and North Africa (MENA), other factors also contributed to the trend. First, the growth figures are calculated on relatively weak base figures in 2010. Second, the tendency for Europeans to take their holidays at home or within the region has been strongly reinforced by the current atmosphere of economic and political uncertainty. Lastly, the prosperity in many emerging economies, coupled with their strong currencies, has brought long-haul travellers into Europe.
- Many destinations in Europe are reporting large increases in arrivals from various Asian, African and South American markets. Northern Europe and Central and Eastern Europe have been the major beneficiaries of this trend, in both leisure and business travel. On the other hand, the diversion of holiday travel demand from MENA to sun & beach resorts in Greece, Cyprus, Portugal and Spain have reinvigorated these destinations and troubled economies.
- Contrasting with growing economic uncertainty, European Union destinations (+6%) benefited strongly from this growth, bringing some relief for those destinations facing major economic challenges, such as Greece (+14%), Ireland (+10%), Portugal (+11%) and Spain (+8%). Despite current volatility, international tourism is proving to be an important

International Tourist Arrivals by (Sub)region

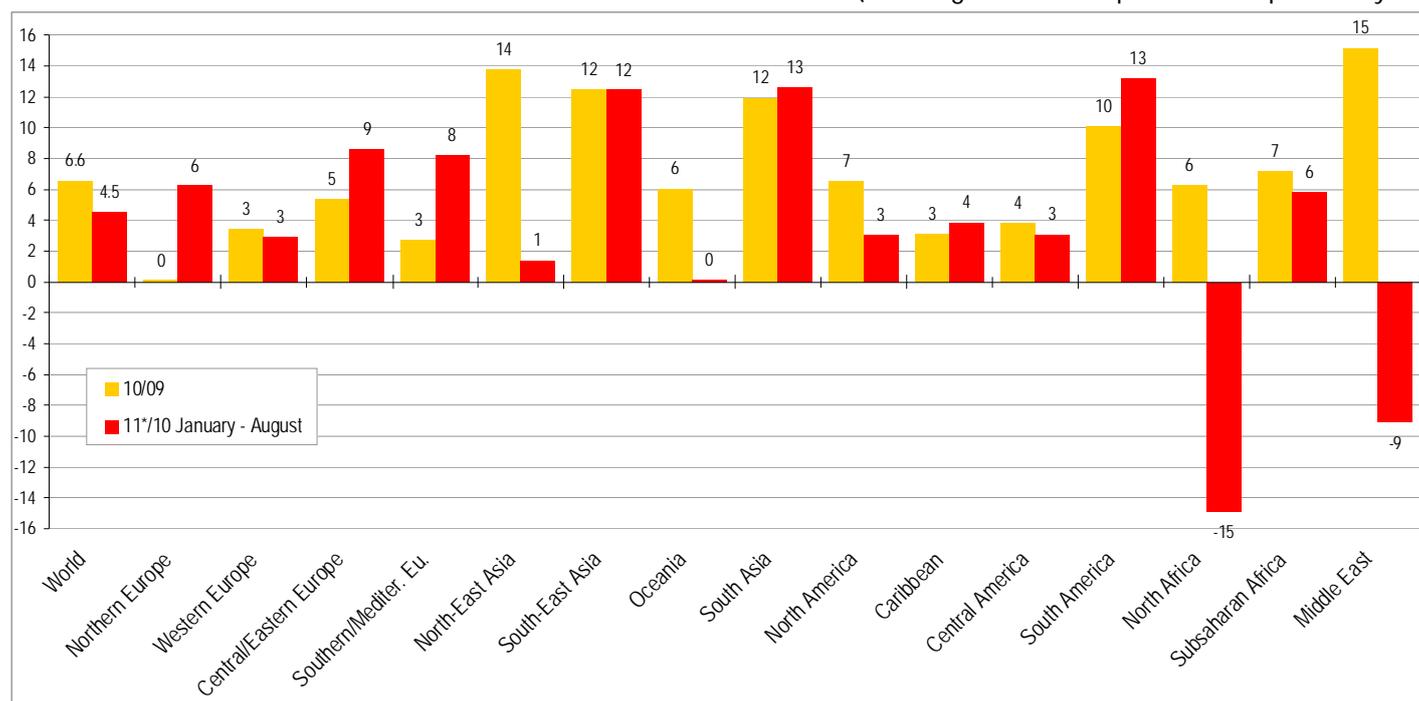
	Full year				Share	Change	Monthly/quarterly data series (percentage change over same period of the previous year)															
	2000	2005	2009	2010*			2010*	09/08	10*/09	2011*									2010*			
	(million)				(%)	(%)	YTD	Q1	Q2	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Q1	Q2	Q3	Q4	
World	674	797	882	940.3	100	-3.8	6.6	4.5	3.6	6.1	5.9	2.2	2.8	9.0	1.8	7.7	4.0	3.2	6.5	6.8	6.6	5.7
Advanced economies	417	453	474	498	53.0	-4.3	5.0	4.8	2.9	6.3	5.7	1.3	1.9	9.8	0.1	9.5	5.0	4.3	4.5	5.5	5.2	4.4
Emerging economies	257	345	408	442	47.0	-3.2	8.4	4.2	4.2	5.8	6.1	3.1	3.6	8.2	4.0	5.4	2.6	1.6	8.4	8.5	8.5	7.0
<i>By UNWTO regions:</i>																						
Europe	385.1	438.7	461.0	475.5	50.6	-4.9	3.1	6.3	4.9	8.4	7.3	2.2	5.2	12.7	1.7	11.4	5.4	4.8	1.3	2.3	3.6	4.5
Northern Europe	43.7	57.3	57.8	57.9	6.2	-5.1	0.1	6.2	5.2	10.9	2.9	2.6	9.6	18.3	4.2	11.5	3.3	1.9	-5.0	-2.3	3.0	2.9
Western Europe	139.7	141.7	148.6	153.7	16.3	-3.0	3.4	2.9	3.1	4.2	7.3	-1.3	3.6	6.9	-5.6	11.3	2.5	0.7	2.1	3.9	4.0	2.7
Central/Eastern Eu.	69.3	87.5	90.2	95.0	10.1	-9.9	5.4	8.6	7.9	10.0	8.2	7.4	8.1	10.5	8.9	10.6	7.7	7.5	0.4	4.0	5.3	10.0
Southern/Mediterr. Eu.	132.5	152.3	164.4	168.9	18.0	-3.5	2.7	8.2	4.6	10.4	8.7	2.4	3.5	17.5	3.5	12.0	7.8	8.0	4.0	1.7	2.7	3.2
- of which EU-27	323.6	349.2	354.0	362.1	38.5	-4.6	2.3	5.5	3.8	7.6	6.4	0.7	4.2	11.8	0.2	11.5	5.0	4.1	1.0	1.5	3.0	3.1
Asia and the Pacific	110.1	153.6	181.0	204.0	21.7	-1.7	12.8	5.7	4.4	5.8	5.8	6.6	1.0	6.0	4.4	7.1	6.9	7.7	13.3	15.8	14.1	8.5
North-East Asia	58.3	85.9	98.0	111.6	11.9	-2.9	13.8	1.4	0.9	-0.1	2.0	4.6	-3.2	0.0	-2.5	2.4	4.5	3.7	11.4	21.0	15.6	7.9
South-East Asia	36.1	48.5	62.1	69.8	7.4	0.5	12.5	12.4	9.1	15.6	10.4	9.3	7.7	14.6	16.5	15.6	11.3	15.0	16.9	10.2	13.6	9.6
Oceania	9.6	11.0	10.9	11.6	1.2	-1.7	6.1	0.2	-0.5	0.7	4.9	0.5	-6.5	5.5	0.1	-3.9	-2.3	3.5	6.5	4.0	8.7	4.9
South Asia	6.1	8.1	9.9	11.1	1.2	-3.6	11.9	12.6	11.7	14.6	12.8	13.4	8.7	21.4	11.5	10.8	13.0	10.0	18.0	10.2	7.7	11.1
Americas	128.2	133.3	140.7	149.8	15.9	-4.9	6.4	4.7	4.5	6.3	5.6	4.4	3.4	11.7	3.1	4.4	4.3	1.7	4.6	7.6	9.0	4.2
North America	91.5	89.9	92.1	98.2	10.4	-5.7	6.5	3.0	1.2	5.3	2.8	1.8	-0.5	10.7	2.3	3.4	3.7	0.7	3.9	9.6	8.5	3.4
Caribbean	17.1	18.8	19.5	20.1	2.1	-2.7	3.1	3.9	3.6	4.9	4.5	4.6	2.0	11.1	0.0	2.9	3.7	1.7	5.6	0.4	3.5	2.6
Central America	4.3	6.3	7.6	7.9	0.8	-7.4	3.8	3.1	2.1	4.8	5.0	4.6	-3.1	9.6	2.0	2.6	4.0	0.5	5.5	6.5	4.2	-0.7
South America	15.3	18.3	21.4	23.6	2.5	-2.3	10.1	13.2	15.6	13.8	13.9	11.5	22.3	18.5	10.5	12.1	8.1	8.2	5.6	5.8	18.6	10.4
Africa	26.5	35.4	46.8	50.1	5.3	3.6	6.8	-2.3	3.2	-3.7	6.5	4.2	-1.0	4.7	-4.8	-9.8	-6.5	-6.1	7.5	6.8	3.3	7.0
North Africa	10.2	13.9	17.6	18.7	2.0	2.5	6.3	-14.9	-13.1	-12.7	-9.1	-9.7	-19.1	-5.4	-22.0	-10.7	-17.2	-19.0	9.2	4.4	4.1	9.3
Subsaharan Africa	16.2	21.5	29.3	31.4	3.3	4.2	7.2	5.8	10.6	1.9	12.7	10.4	8.4	10.2	5.5	-9.2	6.2	3.2	6.7	8.4	2.7	5.8
Middle East	24.1	36.3	52.9	60.9	6.5	-4.3	15.1	-9.1	-8.7	-4.7	-1.1	-20.3	-4.1	-7.5	-3.8	-2.6	-11.1	-20.4	19.6	18.8	15.9	6.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO October 2011)

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

economic driver for many European economies, bringing foreign exchange and helping to ease the pressure on the balance of payments. UNWTO encourages European governments to support tourism and consider the sector as one that can back economic recovery, given its capacity to distribute wealth and create jobs across the region.

Asia and the Pacific destinations showing uneven growth

- Growth in Asia and the Pacific (+6%) was not as strong as usual. While destinations in South-East (+12%) and South Asia (+13%) remained buoyant, arrivals growth was slow in North-East Asia – partly due to the decline in Japanese outbound tourism – and in Oceania.
- The disasters in Japan disrupted travel throughout the region. North-East Asia, with an increase of just 1%, is clearly marked by the 32% decline in arrivals in Japan, but also by the temporary interruption of Japanese outbound travel to the subregion. Arrivals in China were also weak (+1%), but this follows the bumper year of the Shanghai Expo. Growth was stronger elsewhere in the subregion (+5% to 11%). In the Republic of Korea (+9%) much media attention is being given to the success of the 'Korean Wave' or 'Hallyu' (music, video games, food, clothing and culture generally) and shopping tourism.
- By contrast, tourism in South-East Asia is growing strongly, with arrivals up 12%. Tourism in Thailand (+27%) has been recovering rapidly from the troubles of the past years – at least, until the severe flooding in Bangkok in October-November – and is helping to sustain the growth through the Mekong region.
- In South Asia (+13%), India (+10%) has an economy which is growing almost as fast as China's, boosting both inbound and outbound tourism. Sri Lanka (+34%) is beginning to recover and the smaller nations which specialise in tourism (Nepal, Bhutan and the Maldives) are all doing well.
- Arrivals in Oceania (0%) were flat in the first eight months of 2011. The earthquake in Christchurch temporarily curtailed tourism to the South Island of New Zealand. More importantly, the remoteness of Australia and New Zealand from their traditional markets in times of economic uncertainty, coupled with strong currencies and high air fares, is preventing any increase in inbound tourism, as it has done in recent years. Although there are reports that the Chinese are 'discovering' the Pacific islands, few of them are reporting strong increases in arrivals (partly because of countervailing declines from Japan).

South America stands out in the region and the world

- South America (+13%) continues to lead tourism growth in the Americas (+5%) and the world, benefiting from positive economic trends in the subregion and increased regional integration. Results in the other subregions – North America (+3%) Central America (+3%) and the Caribbean (+4%) – were more moderate.

- In many of the booming South American economies, there is a recognition that domestic demand (both government and private) and inflation have been running ahead too quickly and governments are taking steps to restrain them.
- In the USA, the slack economy, weak consumer and business confidence and the weak dollar, have kept holidaymakers close to home, while that weak dollar has brought in visitors from the more prosperous parts of the world. This combination has made tourism performance (domestic plus inbound) more prosperous than even the arrivals figures suggest. Indeed, the Department of Commerce rates tourism as one of the most prosperous sectors of the economy.

'Arab Spring' troubling tourism in the Middle East and Africa

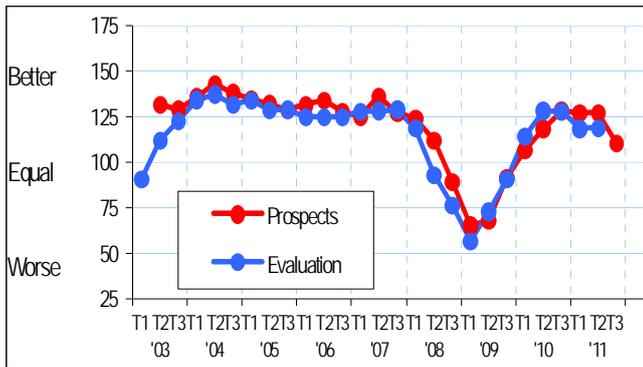
- In Africa arrivals were down by 2% as a result of the downturn in North Africa. Sub-Saharan African destinations grew by +6%.
- Arrivals in the Middle East (-9%) and North Africa (-15%) have been very seriously affected by the 'Arab Spring'. It is not only the directly involved countries, such as Egypt, Tunisia, Syria, Bahrain and Yemen, which have seen arrivals decline. Holidaymakers from Europe tended to stay away from the whole region, while Arabs in general have refrained from travelling within the region or even further afield. Arrivals in Lebanon, for instance, are down 25%.
- However, a number of destinations both inside and outside the region have benefited from diversions. Saudi Arabia continues to grow steadily, as do the United Arab Emirates (and especially Dubai), Oman and Qatar (which were all seeing dynamic growth already). Results of recent months (July and August) also showed an improvement in arrivals in Egypt. Outside the region, Turkey is a major beneficiary, as well as destinations in Southern and Mediterranean Europe in general.
- Arrivals in Sub-Saharan Africa (+6%) maintained strength in the first eight months of 2011 and members of UNWTO's Panel of Experts in the subregion were still very optimistic when surveyed in September. However, the situation in individual destinations varies enormously. Intra-regional markets remain strong, fuelled by the prosperity of the more peaceful regions of Africa. The destinations geared to European and North American markets seem vulnerable to the economic slowdown.

Source markets: Emerging economies lead among spenders

- Data on receipts from and expenditure on international tourism for the first eight months of 2011 confirms the positive trend in arrivals.
- Among the top ten destinations in international tourism receipts, the two main earners – the USA (+11%) and Spain (+10%) – show exports from tourism growing above the rate of arrivals, while growth in Italy (+7%), Germany (+6%) and the UK (+7%) was also significant.

- In terms of source markets, expenditure on travel abroad continued to be very strong from the emerging economies of China (+30%), Russia (+21%), Brazil (+40%) and India (+33%). Major mature markets such as Germany (+3%), the USA (+5%), Canada (+6%), France (+2%) and Italy (+2%) also performed positively, while growth in expenditure on travel abroad from the Scandinavian markets, the Republic of Korea and Australia was particularly strong.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Outlook for full year 2011 and 2012

- The 80 countries that have already reported data up to September suggest that growth continued in this last month at a steady pace.
- UNWTO's Panel of experts evaluated the period May-August at the same rate (119) as for the first four months of the year. However, it was well below the rating for prospects given for the same period at the beginning of the period four months ago (127).
- Prospects expressed for the remaining four months of the year are significantly down (111) on previous periods, reflecting the decline in both business and consumer confidence due to the renewed economic uncertainties in key markets. On the whole, the sentiment remains positive, though. While the overall pattern is down, Africa and the Middle East are on the rise again.
- Growth is expected to soften in the remainder of 2011 and international tourist arrivals are projected to end the year between +4.0% and +4.5%, in line with UNWTO's forecast at the beginning of the year.
- For 2012, growth is forecast to be in the range of +3% to +4%, slightly lower than in 2011 but sustaining the positive results of 2010 (+7%) and 2011.

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 or charge 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 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

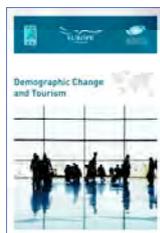


Published: 2008
Price: € 80

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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