



Contents

Quick overview of key trends	1
Transport	7
Hospitality	10
Meetings industry	14
Business intelligence	16
Statistical Annex	Annex-1 to Annex-29

This issue and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* include an analysis of preliminary results for international tourist arrivals as reported by destinations around the world, air transport and hotel performance for the first half of 2012.

This release is available only in electronic format, through the UNWTO eLibrary, and is free of charge for members. The release is provided in English only, while the Statistical Annex is available in English, French, Spanish and Russian.

22 million more international arrivals in the first half of 2012

In a context of lasting concerns over the global economy, international tourism demand continued to show resilience in the first half of 2012. Some 22 million (+5%) more international arrivals were reported by destinations around the world between January and June compared to the same period of 2011. Arrivals through June totalled 467 million. In normal years the first six months account for approximately 45% of the total volume of the year (as July and August, the traditional high-season months of the Northern Hemisphere, attract most arrivals).

Quick overview of key trends

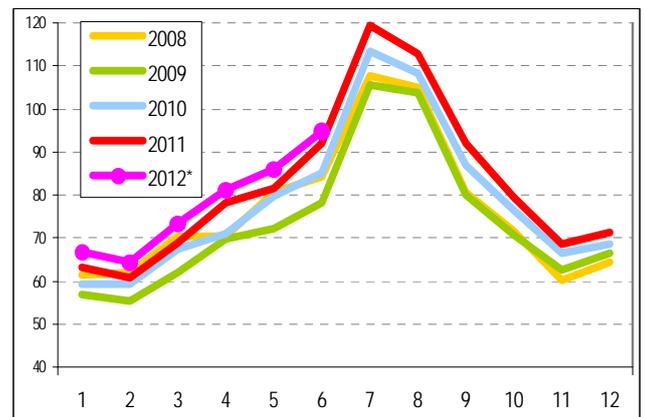
International tourism on track to hit one billion by the end of 2012

- A total of 142 countries and territories have so far reported data on international tourist arrivals for one or more months of 2012 (out of 220). Of these, 119 countries (84%) have reported an increase in tourist arrivals, with 48 (34%) reporting double-digit growth. Only 23 countries (16%) have posted a decrease.

- 116 countries have reported results for at least the first six months of 2012. Based on this sample of destinations, it is estimated that destinations worldwide recorded 467 million international tourists between January and June 2012, some 22 million more (+5%) than the 445 million recorded in the same period in 2011.

International Tourist Arrivals, monthly evolution

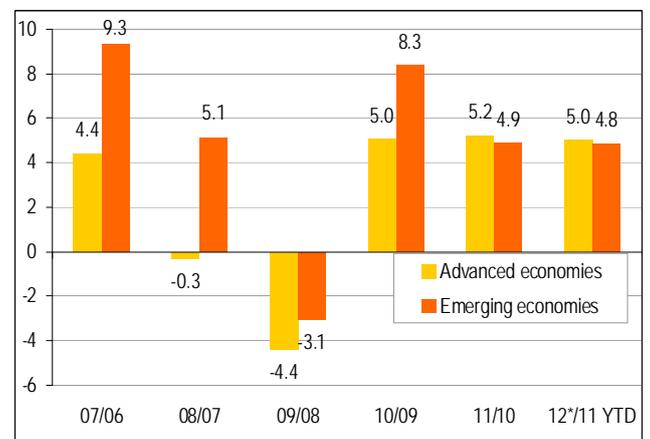
World (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

(% change)



Source: World Tourism Organization (UNWTO) ©

- The best growth was recorded in March, when international tourist arrivals grew close to 7% compared to the same month last year. January and February 2012 were also strong in tourism activity (both up 6%). April was somewhat weaker (+4%), but this was partly due to the shift in the Easter holiday date from late April in 2011 to early April in 2012, resulting in a share of the Easter holiday arrivals taking place in March. May showed a robust 5%, while for June growth is estimated at a more modest 3%.
- The over 50 countries that have already reported data up to July indicate that growth is slowing somewhat, as most countries report weaker results than in previous months.

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 contain as regular sections: an overview of short-term tourism data from destinations, 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 915678205 / fax +34 915678217.



The World Tourism Organization is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 162 countries and territories and over 400 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

Copyright © 2012 World Tourism Organization
Calle Capitán Haya, 42, 28020 Madrid, Spain

UNWTO World Tourism Barometer
ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2012 (version 17/09/12)
All rights reserved

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the Secretariat of the World Tourism Organization concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

All UNWTO publications are protected by copyright. Therefore and unless otherwise specified, no part of an UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications. For permission to photocopy UNWTO material, refer to the UNWTO website at www.unwto.org/pub/rights.htm.

The contents of this issue may be quoted provided the source is given accurately and clearly. Distribution or reproduction in full is permitted for own or internal use only. Please do not post electronic copies on publicly accessible websites, UNWTO encourages you to include a link to the Facts & Figures section of the UNWTO website instead at www.unwto.org/facts/menu.html.

World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain
Tel (34) 91 567 81 00 / Fax (34) 91 571 37 33
barom@unwto.org

www.unwto.org

Data collection for this issue was closed early September 2012.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published early November 2012.

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

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

To place your order, please consult the infoshop on UNWTO's website at www.unwto.org/infoshop or contact us by telephone.



4 easy ways to order:

 infoshop@unwto.org

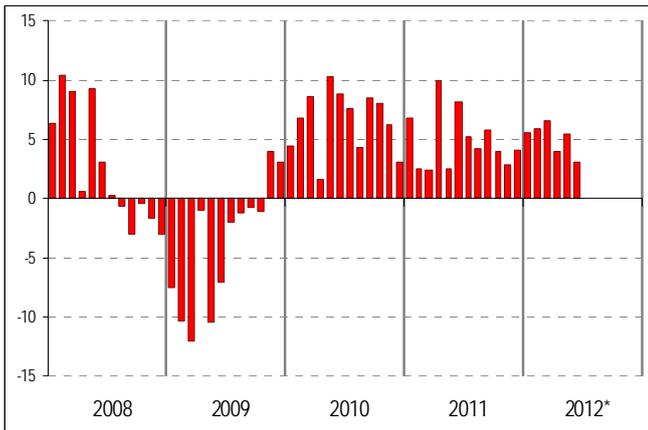
 (+34) 91 567 81 07

 (+34) 91 571 37 33

www.unwto.org/pub

International Tourist Arrivals, monthly evolution

World (% change)

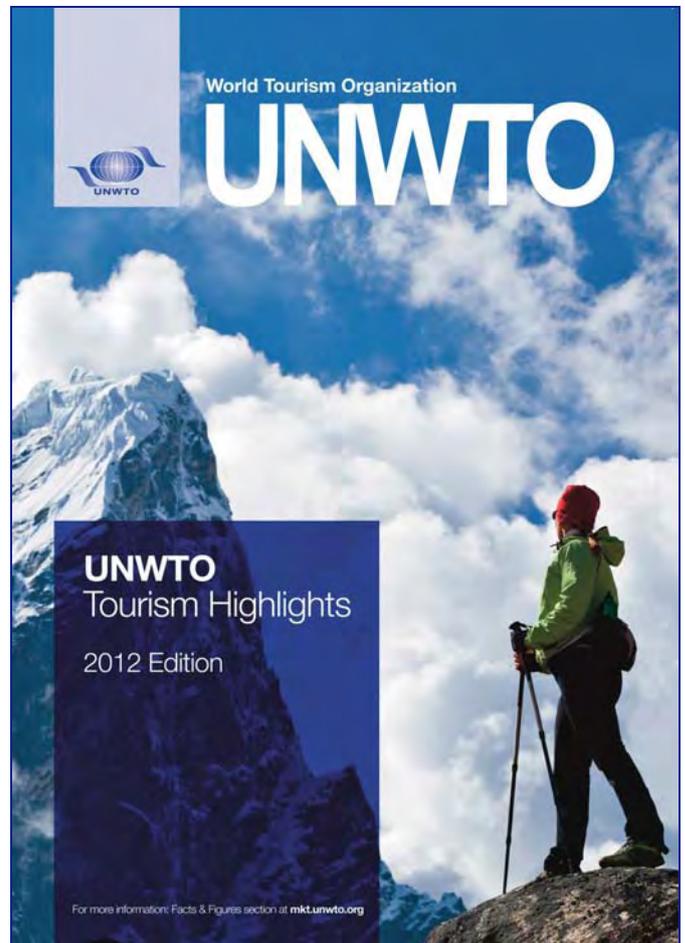


Source: World Tourism Organization (UNWTO) ©

- Although a slight slowdown in demand can be expected for the rest of the year, international arrivals are forecast to surpass one billion by the end of 2012. For the full year, results are expected to be in line with the 3% to 4% increase forecast by UNWTO at the beginning of 2012. In 2011, international tourist arrivals grew by 5% to reach 990 million (figures revised upwards due to updated data of among others France, Norway, Kyrgyzstan, Iran, the United States, Mexico). Receipts from international tourism (including international passenger transport) – exports from tourism – totalled US\$ 1.2 trillion or close to 6% of the world's exports of goods and services.
- "Amid the current economic uncertainty, tourism is one of the few economic sectors in the world growing strongly, driving economic progress in developing and developed countries alike and, most importantly, creating much needed jobs," said UNWTO Secretary-General, Taleb Rifai. "As we lead up to the milestone of one billion, we need to ensure that the tourism sector is supported by adequate national policies and that we work to reduce existing barriers to the expansion of the sector, such as complicated visa procedures, increased direct taxation or limited connectivity," he added.

UNWTO Tourism Highlights, 2012 Edition

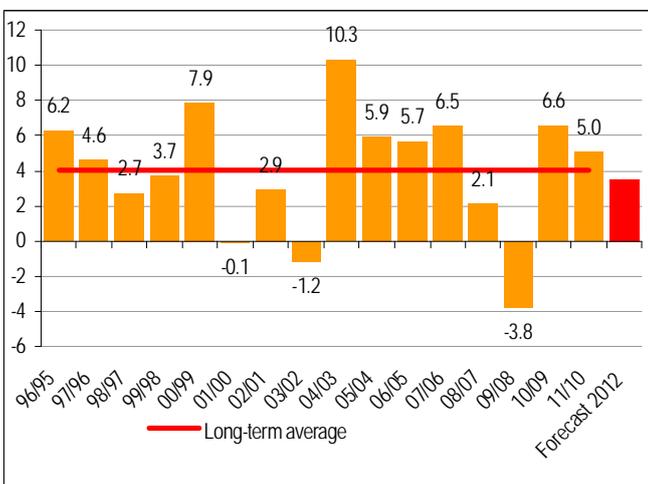
UNWTO has just released its *UNWTO Tourism Highlights, 2012 Edition*, presenting a concise overview of international tourism in the world based on the results for the year 2011.



UNWTO Tourism Highlights aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. The *2012 Edition* presents in 16 pages a snapshot of international tourism in the world for 2012 based on the latest available information collected from national sources. Trends and results are analysed for the world, regions and major regional destinations, with statistics included on international tourist arrivals and international tourism receipts. Furthermore, it provides the ranking of top tourism destinations by arrivals and receipts, as well as information on outbound tourism generating regions and a list of top source markets in terms of spending.

Electronic copies can be downloaded free of charge from the Facts & Figures section of the UNWTO website <www.unwto.org/facts>.

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

All regions up, with Asia in the lead

- International tourist arrivals were up in all regions of the world between January and June, with advanced and emerging economy destinations growing at about the same pace.
- **Asia and the Pacific (+8%)** led the growth by region, boosted by the recovery of Japanese inbound and outbound tourism as well as by the continued strong performance of other major source markets throughout the region. Destinations in South Asia and South-East Asia (both +9%) showed some of the best results worldwide. Countries like Myanmar (+36%), Cambodia (+26%), Singapore (+12%), Philippines (+12%), Vietnam (+11%) and Thailand (+8%) fuelled the strong growth. "Although Asia was affected by the economic crisis of 2008-2009 due to its strong linkages with other economies, the region has bounced back quickly and is today a leader in the global economy. This is clearly reflected in its tourism figures," said Mr. Rifai.
- **Europe (+4%)**, the most visited destination in the world, consolidated its record growth of 2011, despite continuing economic volatility in the Eurozone. Results were above the regional average in Central and Eastern Europe (+7%) where many destinations such as Georgia (+54%), Kazakhstan (+15%), Russian Federation (+15%), Poland (+13%), Romania (+12%) and Lithuania (+12%) saw double-digit growth. Western Europe also fared well (+5%) thanks to results in large destinations like Germany, the Netherlands (both +8%) and France (+5%). By contrast, demand in Southern and Mediterranean Europe (+2%) slowed, but on top of a very strong 2011, and partly due to the recovery of destinations in North Africa and the Middle East. Nevertheless, top destination, Spain, Portugal and the Balkan countries all saw arrivals increase by 3% or more in the first half of 2012.

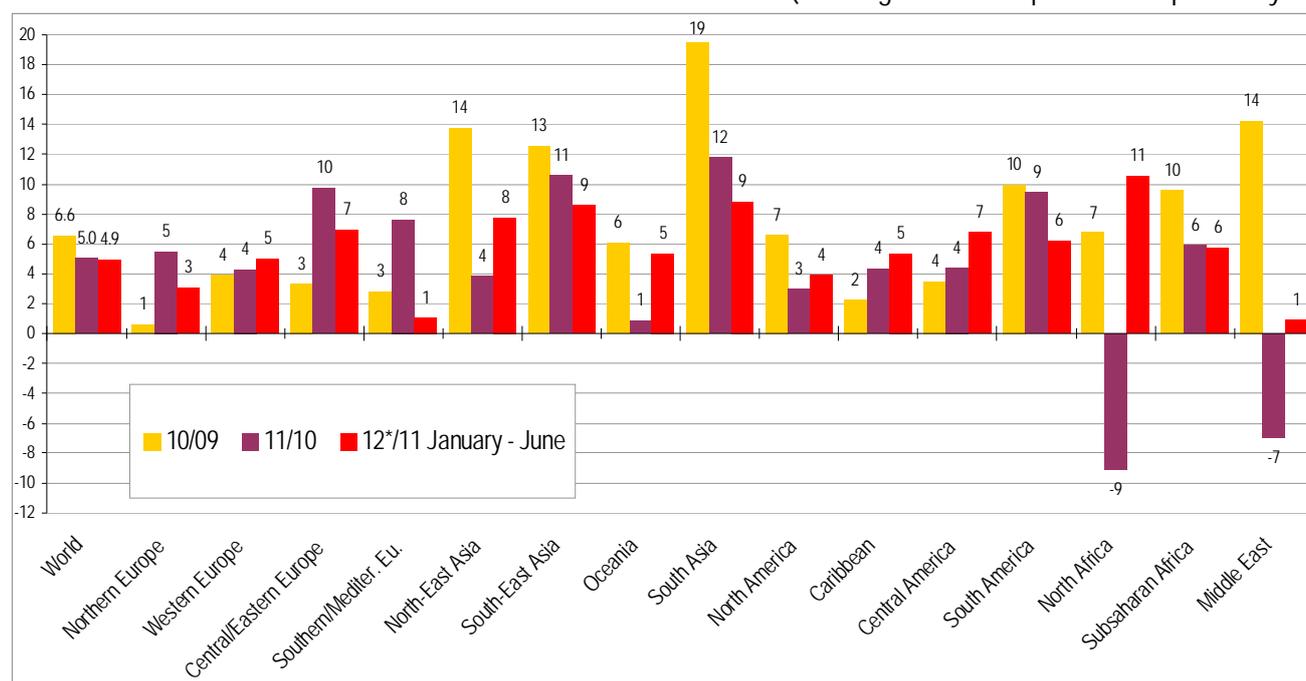
- The **Americas (+5%)** grew in line with the world average, with Central America (+7%) and South America (+6%) recording the strongest results. In fact, South America has been one of the subregions with the fastest tourism growth of recent years (+10% and +9% respectively in 2010 and 2011). Venezuela (+37%), Paraguay (+17%), Chile (+15%), Ecuador (+14%) Nicaragua (+12%) and Peru (+11%) all reported double-digit results. Destinations in North America grew at 4%, a relatively high rate for a mature subregion, with the United States and Canada recording increases of respectively 6% and 4%. Meanwhile, the Caribbean (+5%) remained buoyant, consolidating 2011 results. Major destinations like the Dominican Republic and Cuba achieved 7% and 5% growth respectively.
- In **Africa (+7%)**, the return of tourist flows to Tunisia (+42%) is reflected in the results of North Africa (+11%). Likewise, the rebound of Egypt (+23%) brings the **Middle East** back to positive figures (+0.7%), though the conflict in Syria is still preventing stronger growth. Destinations in Sub-Saharan Africa (+6%) continued to show strong results, following the good growth rates of this subregion in previous years. Growth was driven by the region's top destination South Africa (+11%), as well as by Sierra Leone (+17%), Cape Verde (+15%) and Madagascar (+13%).

Healthy demand from both emerging and advanced economy source markets

- In terms of outbound markets, and among the top ten countries by expenditure on travel abroad, growth was significant in China (+30%), the Russian Federation (+15%), USA (+9%), Germany (+6%) and Canada (+6%). In Japan, an 8% increase in spending on overseas tourism confirms the recovery of this important market. On the other hand, growth was comparatively slow or negative in the UK, Australia, Italy and France.

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

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	2011		2011	09/08	10/09	11/10	2012*						2011					
	(million)					(%)	(%)			YTD	Q1	Q2	Jan	Feb	Mar	Apr	May	Jun	Q1	Q2	Q3	Q4
World	674	800	885	943	990	100	-3.8	6.6	5.0	4.9	6.0	4.1	5.5	5.9	6.5	4.0	5.5	3.0	3.8	6.8	5.0	3.7
Advanced economies ¹	418	456	477	501	527	53.3	-4.4	5.0	5.2	5.0	6.6	3.9	6.8	5.6	7.2	4.7	6.3	1.2	3.1	6.7	5.4	4.8
Emerging economies ¹	256	344	407	441	463	46.7	-3.1	8.3	4.9	4.8	5.4	4.3	4.4	6.1	5.8	3.2	4.4	5.4	4.6	6.9	4.4	2.6
<i>By UNWTO regions:</i>																						
Europe	385.3	441.9	463.5	477.3	509.4	51.4	-5.0	3.0	6.7	3.8	4.7	3.2	5.8	5.2	3.4	2.9	5.9	1.1	5.2	8.8	5.8	5.4
Northern Europe	43.7	57.3	57.8	58.2	61.4	6.2	-5.1	0.6	5.5	3.1	4.4	2.3	5.9	6.1	1.7	6.5	6.2	-3.7	5.5	10.6	4.0	1.7
Western Europe	139.7	141.7	148.5	154.3	161.0	16.3	-3.0	3.9	4.3	5.0	5.9	4.4	3.9	7.9	5.9	2.4	9.9	1.5	3.9	5.4	3.3	5.3
Central/Eastern Eu.	69.3	90.4	92.6	95.7	105.0	10.6	-10.3	3.3	9.8	6.9	8.5	5.8	9.2	7.8	8.6	5.8	6.0	5.6	7.7	10.1	6.4	8.8
Southern/Mediter. Eu.	132.6	152.5	164.5	169.1	182.0	18.4	-3.6	2.8	7.6	1.0	0.9	1.1	5.3	-0.3	-1.4	0.3	2.7	0.3	4.9	10.4	8.2	4.5
- of which EU-27	323.7	352.4	356.8	365.4	387.0	39.1	-4.7	2.4	5.9	3.4	4.5	2.8	5.3	5.4	3.2	2.7	6.4	-0.2	4.4	8.2	5.5	4.6
Asia and the Pacific	110.1	153.6	181.1	205.0	218.1	22.0	-1.6	13.2	6.4	8.0	8.5	7.5	7.8	6.8	10.7	8.1	6.8	7.6	4.9	6.0	8.2	6.9
North-East Asia	58.3	85.9	98.0	111.5	115.8	11.7	-2.9	13.8	3.8	7.8	7.7	7.9	6.7	5.3	10.8	9.2	7.1	7.2	2.1	0.7	5.1	7.3
South-East Asia	36.1	48.5	62.1	69.9	77.3	7.8	0.5	12.5	10.6	8.6	9.7	7.4	9.2	9.9	10.1	7.6	6.8	7.8	8.0	14.3	14.2	6.5
Oceania	9.6	11.0	10.9	11.6	11.7	1.2	-1.8	6.1	0.9	5.4	4.6	6.4	4.1	-0.3	10.3	3.8	4.1	11.7	-0.5	0.5	0.2	3.1
South Asia	6.1	8.1	10.0	12.0	13.4	1.4	-2.1	19.5	11.8	8.9	11.1	6.0	12.0	7.4	14.0	4.7	5.6	7.7	16.9	16.5	11.7	8.8
Americas	128.2	133.3	141.7	150.7	157.1	15.9	-4.4	6.3	4.2	4.7	7.2	2.2	4.8	7.8	9.1	2.1	1.3	3.2	3.2	6.5	3.9	3.4
North America	91.5	89.9	93.0	99.2	102.1	10.3	-5.1	6.6	3.0	3.9	8.1	0.5	4.6	7.2	12.0	0.4	-0.7	1.8	0.8	5.2	3.5	1.9
Caribbean	17.1	18.8	19.6	20.0	20.9	2.1	-2.7	2.2	4.4	5.3	5.2	5.5	2.4	6.0	7.0	3.8	6.4	6.5	4.1	5.3	3.1	5.9
Central America	4.3	6.3	7.6	7.9	8.3	0.8	-7.0	3.5	4.4	6.8	7.0	6.5	5.1	7.9	8.3	2.8	7.0	10.1	2.7	4.2	2.8	4.7
South America	15.3	18.3	21.4	23.6	25.8	2.6	-2.3	10.0	9.4	6.2	6.6	5.6	7.0	10.7	2.0	7.3	5.0	4.4	9.6	15.1	7.4	6.8
Africa	26.2	34.8	45.9	49.7	49.9	5.0	3.4	8.5	0.3	7.2	6.3	8.1	6.5	4.0	8.3	9.7	7.4	7.1	4.4	-1.8	-2.7	-1.2
North Africa	10.2	13.9	17.6	18.8	17.1	1.7	2.5	6.7	-9.1	10.5	8.9	11.7	9.7	5.2	11.6	12.7	15.0	8.6	-9.1	-9.7	-11.3	-6.1
Subsaharan Africa	16.0	20.9	28.3	31.0	32.8	3.3	3.9	9.6	5.9	5.7	5.3	6.1	5.4	3.5	7.0	8.3	3.9	6.0	10.6	3.1	4.5	1.3
Middle East	24.1	36.3	52.4	59.9	55.7	5.6	-4.3	14.2	-7.0	0.9	-0.4	2.0	-4.9	2.3	1.7	-2.4	5.3	3.6	-6.9	0.4	-4.5	-12.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2012)

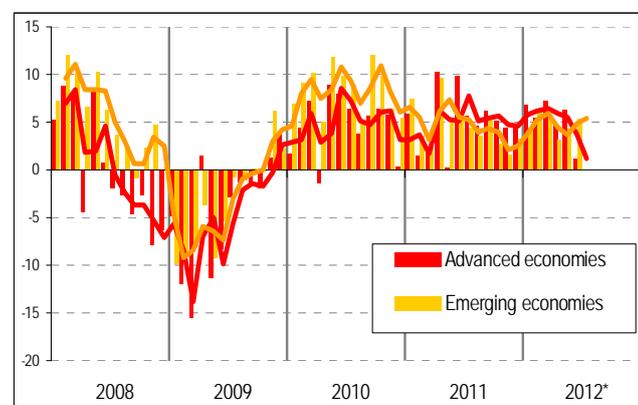
¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177,

at www.imf.org/external/pubs/ft/weo/2012/01.

See box at page 'Annex-1' for explanation of abbreviations and signs used

International Tourist Arrivals, monthly evolution

Advanced economies & Emerging economies (% change)



Source: World Tourism Organization (UNWTO) ©

The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the complimentary excerpt of this document.

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

For more information on the *UNWTO World Tourism Barometer*, please refer to the Facts & Figures section on the UNWTO website at www.unwto.org/facts.

Copyright © 2012 World Tourism Organization



World Tourism Day **Sept27**

2012

Tourism and Sustainable Energy 

World Tourism Day (WTD), held every year on 27 September, will be celebrated in 2012 under the theme **Tourism & Sustainable Energy: Powering Sustainable Development.**

With Spain as this year's host, official celebrations will take place in the town of Maspalomas, Gran Canaria, and include a Think Tank on the 2012 theme. Speakers already confirmed include the President of Acciona Energy, one of the world's largest providers of renewable energy sources, and representatives from Etihad Airways and IATA.

Join

UNWTO, tourism leaders & energy experts to debate the use of sustainable energy in tourism.

Learn

more about the latest sustainable energy initiatives in tourism.

Share

how you will be celebrating WTD in your own country.

Follow

the WTD conversation on twitter @UNWTO – hashtag **#WTD2012**

For more information on attending official WTD celebrations in Spain, or for ideas on how you can get involved, visit the WTD website www.wtd.unwto.org



World Tourism Organization UNWTO Publications

UNWTO World Tourism Barometer

The UNWTO World Tourism Barometer aims at providing all those involved in tourism with up-to-date statistics and adequate analysis, in a timely fashion. Issues cover short-term tourism trends, a retrospective and prospective evaluation of current tourism performance by the UNWTO Panel of Experts, and a summary of economic data relevant for tourism. The information is updated throughout the year.

Available in English, French, Spanish and Russian



The Middle East Outbound Travel Market

The Middle East region is one of the fastest growing tourist generating regions in the world. Outbound travel from the Middle East has more than quadrupled from 8 million in 1990 to 36 million in 2010. Published jointly by ETC and UNWTO, The Middle East Outbound Market, provides an in depth analysis of the structure and trends of this market, helping destinations and commercial operators plan ahead with greater foresight.

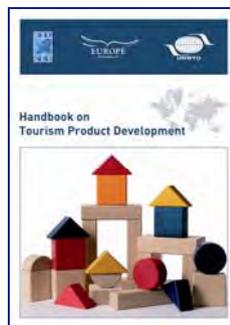
Available in English



Handbook on Tourism Product Development

The UNWTO/ETC Handbook on Tourism Product Development outlines the essential elements in the process of tourism product development planning and implementation. It demonstrates a range of successful approaches and case studies from around the world and sets out best practice examples and benchmarks by which destinations can assess their own product development system and methods.

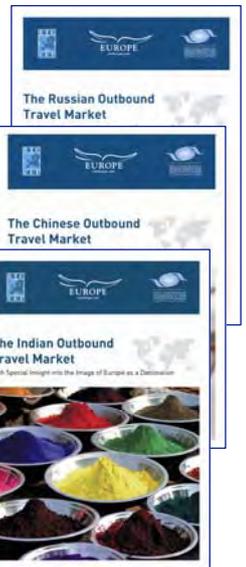
Available in English



The Chinese Outbound Travel Market, The Indian Outbound Travel Market and The Russian Outbound Travel Market

The Indian, the Chinese and the Russian Outbound Travel Markets are some of the fastest growing, and consequently increasingly important markets in the world. The UNWTO and ETC have jointly published detailed studies on each unique market, which aim to provide the necessary information to better understand the structure and trends of these growing markets. Topics covered include: destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the use of the internet and social media.

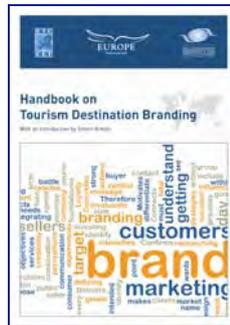
Available in English



Handbook on Tourism Destination Branding

This handbook is a recognition by UNWTO and ETC of the value of successfully building and managing a destination's brand. With an Introduction by Simon Anholt, the handbook presents a step-by-step guide to the branding process, accompanied by strategies for brand management. Given case studies illustrate concepts, present best practices from around the world and provide fresh insight into destination branding.

Available in English and Spanish



Global Report on LGBT Tourism

As the global visibility of the lesbian, gay, bisexual and transgender (LGBT) community increases, there has been a steady increase in interest in this community as a consumer group, a trend which is particularly evident in the travel industry. With the knowledge and support of the International Gay and Lesbian Travel Association, as well as the UNWTO Affiliate Members, this report examines LGBT tourism from a social, political and economic perspective.

The Power of Youth Travel

With outbound travel from the world's emerging economies being boosted by new, affluent travellers and the age bracket for youth travel expanding across the world, young people are quickly becoming a consumer group to take seriously. The Power of Youth Travel features commentary from specialists, UNWTO Affiliate Members and other selected organizations on the importance of Youth Travel for economic development, global development and young travellers themselves.

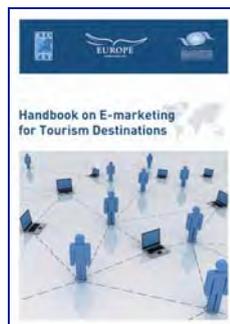
Available in English



Handbook on E-marketing for Tourism Destinations

This handbook is a practical 'how-to' manual designed to help staff in national, regional and city tourism organisations, to improve their e-marketing skills. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advises how to build better content, assure distribution, use CRM, succeed with online PR and get into mobile marketing.

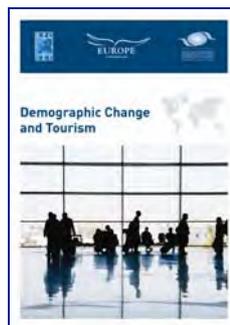
Available in English and Spanish



Demographic Change and Tourism

The UNWTO/ETC report on Demographic Change and Tourism aims to be a reference for destinations and the industry, a means to achieve a better understanding of current and future demographic changes (e.g. population growth and ageing, migration and family diversification) and how these will impact upon tourism, how to anticipate and react upon them in the most competitive way.

Available in English



The easy way to obtain UNWTO publications in print or electronic format and download full catalogue:
www.unwto.org/pub