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Advance Release, January 2013

This *Advance Release* and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* present preliminary results for international tourism in 2012 and the outlook for 2013 based on preliminary data for international overnight visitors reported by destinations around the world. This analysis is complemented by data on receipts from and expenditure on international tourism for the first part of 2012. Furthermore, it includes an evaluation by the UNWTO Panel of Experts of the full year as well as the last four months of 2012, and an outlook for the full year and the first four months of 2013. Finally, it presents an overview of air transport trends in 2012 and booking trends for the first four months of 2013 based on business intelligence tool Forwardkeys.

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.

International tourism expected to see robust growth in 2013

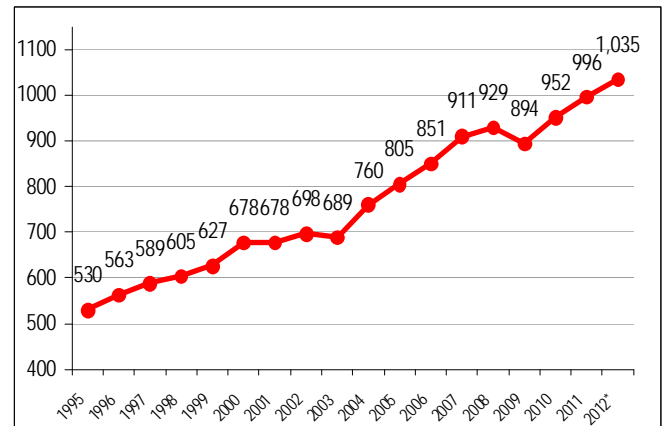
International tourist arrivals (overnight visitors) grew by 4% in 2012 surpassing a record 1 billion tourists globally for the first time in history. Asia and the Pacific saw the highest growth of all regions with 7% more international tourists. With an additional 39 million tourists, international arrivals reached 1,035 million, up from 996 million in 2011. Demand held well throughout the year, with a stronger than expected fourth quarter.

Despite ongoing economic challenges, the growth of international arrivals worldwide is expected to continue in 2013 at a similar to slightly slower pace (+3% to +4%) and in line with UNWTO's long-term outlook *Tourism Towards 2030*, which projects an average growth of 3.8% per year between 2010 and 2020.

World: Inbound Tourism

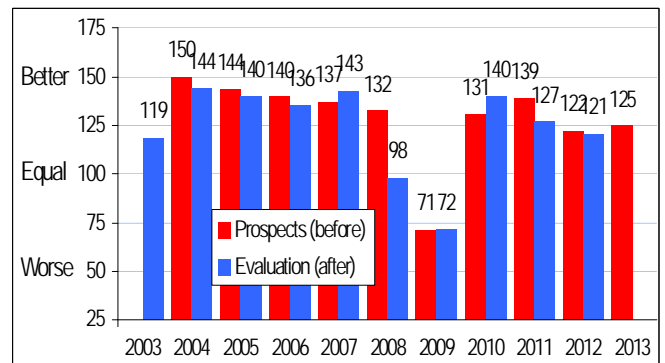
International Tourist Arrivals

(million)



Source: World Tourism Organization (UNWTO) ©

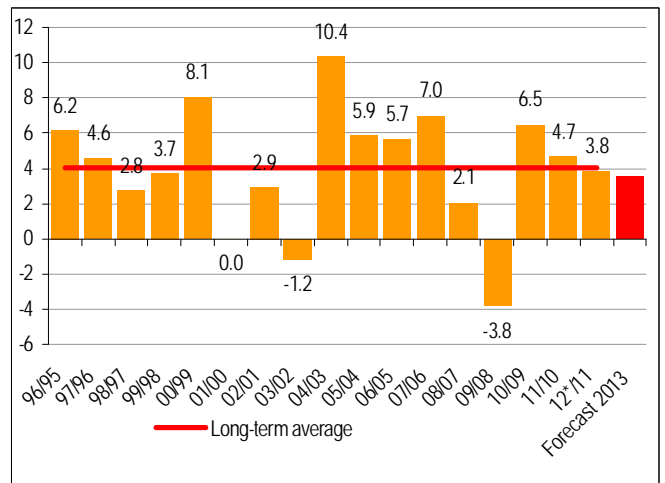
UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World

(% change)



Source: World Tourism Organization (UNWTO) ©

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.

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Data collection for this issue was closed end of January 2013.

The next issue of the *UNWTO World Tourism Barometer* will be published March 2013.

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).

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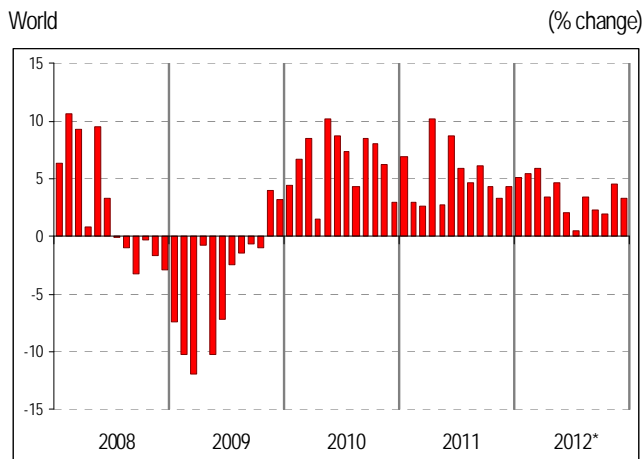
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Quick overview of key trends

International tourism – 2012 results

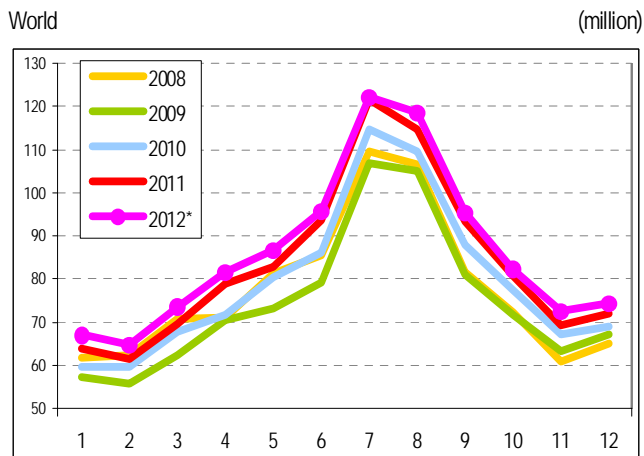
- A total of 149 countries around the world monitored by UNWTO, including virtually all major destinations, have reported monthly or quarterly data on international tourist arrivals (overnight visitors) for 2012. Of these, 124 saw an increase in arrivals (83%), of which 40 double-digit growth (27%), while only 25 reported a decline (17%). Out of these, 130 countries reported results through September, of which 106 at least to October and 92 to November, while 56 already reported preliminary results for the full year. Based on this sample of destinations, worldwide growth in tourist arrivals is estimated at 3.8% for 2012.
- International tourist arrivals exceeded the figure of 1 billion for the first time ever in 2012, reaching a total of 1.035 billion tourists, 39 million more than in 2011.
- Demand held up well throughout the year despite the economic difficulties in many parts of the world, with a stronger than expected fourth quarter (+4%). Strongest month was March (+6%) and weakest month was July (+1%).

International Tourist Arrivals, monthly evolution



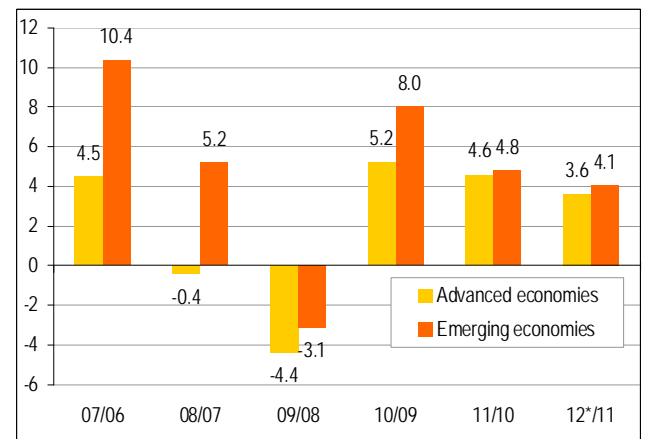
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

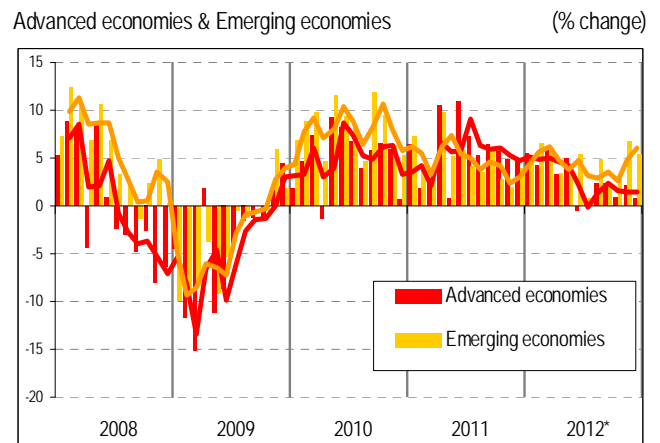
International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

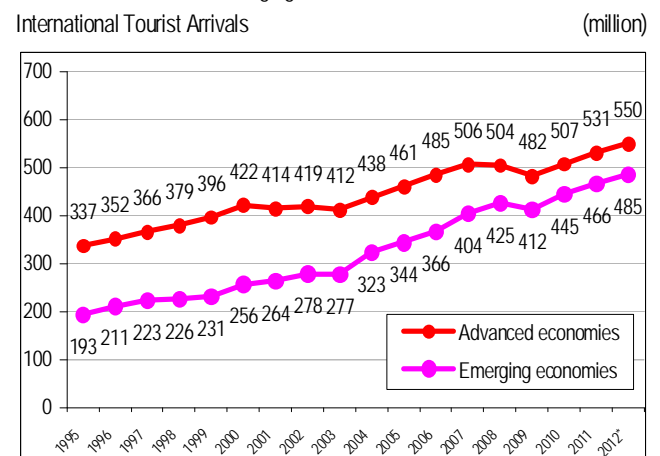
- Emerging economies (+4.1%) performed moderately better than advanced economies (+3.6%).
- By UNWTO region, Asia and the Pacific (+7%) saw the highest relative growth, while by subregion South-East Asia and North Africa (both +9%) recorded the largest increase in arrivals, followed by Central & Eastern Europe (+8%). (For results by region see further pages 7-10.)

International Tourist Arrivals, monthly evolution



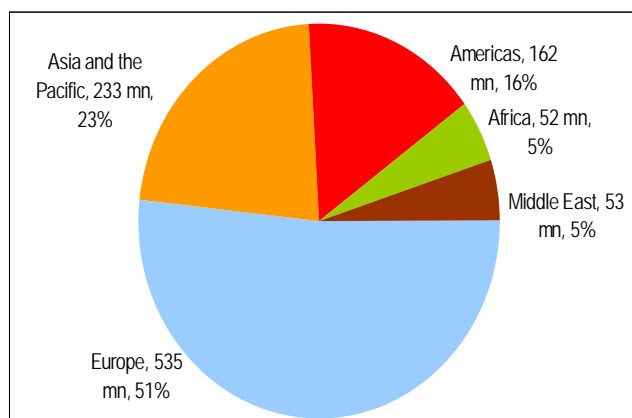
Source: World Tourism Organization (UNWTO) ©

Advanced economies & emerging economies: Inbound Tourism



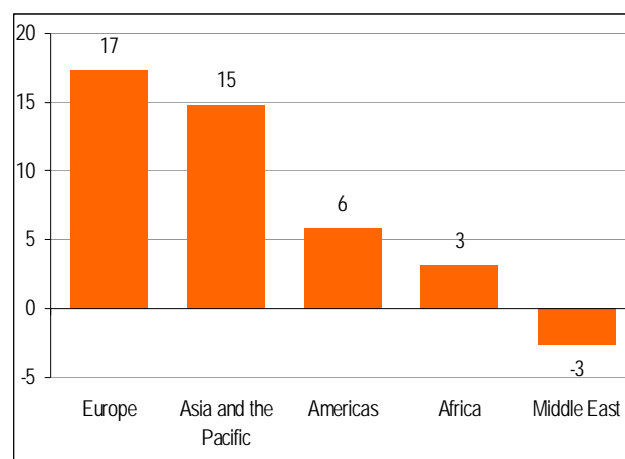
Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2012* (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals (absolute change 2012, million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year					Share	Change	Monthly/quarterly data series															
	2000	2005	2010	2011	2012*			2012*	10/09	11/10	12*/11	(percentage change over same period of the previous year)											
	(million)					(%)																	
World	678	805	952	996	1,035	100	6.5	4.7	3.8	5.9	3.9	2.6	3.7	4.0	2.7	2.4	5.0	3.7	4.1	7.1	5.5	4.0	
Advanced economies ¹	422	461	507	531	550	53.1	5.2	4.6	3.6	6.4	3.7	2.8	2.4	3.7	3.4	2.0	3.4	1.9	3.5	7.3	6.3	5.1	
Emerging economies ¹	256	344	445	466	485	46.9	8.0	4.8	4.1	5.4	4.1	2.3	4.9	4.5	1.9	2.9	6.4	5.3	4.6	6.8	4.4	2.9	
<i>By UNWTO regions:</i>																							
Europe	389.4	447.0	487.6	517.5	534.8	51.7	3.0	6.1	3.3	4.8	3.3	2.9	2.8	3.6	4.0	2.3	3.8	2.5	5.9	9.4	6.8	5.6	
Northern Europe	47.8	62.4	63.8	64.8	65.1	6.3	1.8	1.6	0.4	4.1	1.5	-2.8	1.7	-4.0	0.8	-1.0	7.5	-0.8	10.6	16.4	12.2	5.6	
Western Europe	139.7	141.7	154.3	161.0	165.8	16.0	3.9	4.3	3.0	5.9	3.4	1.9	2.1	1.5	4.5	3.4	1.2	1.3	3.9	5.4	3.3	5.3	
Central/Eastern Eu.	69.3	90.4	95.9	105.3	113.7	11.0	3.4	9.8	8.0	9.2	9.5	7.0	7.0	7.0	7.1	7.2	7.4	6.3	7.7	9.7	6.9	8.2	
Southern/Mediterr. Eu.	132.6	152.5	173.5	186.4	190.2	18.4	2.4	7.4	2.0	0.8	0.7	3.5	0.8	6.2	2.9	0.0	1.4	1.8	4.9	10.2	8.0	4.2	
- of which EU-27	328.1	358.1	372.0	390.9	400.1	38.7	2.6	5.1	2.3	4.5	2.3	1.9	1.5	2.4	3.0	1.0	2.7	0.8	5.2	9.0	6.6	5.2	
Asia and the Pacific	110.1	153.6	205.1	218.1	232.9	22.5	13.2	6.4	6.8	8.7	7.8	4.8	6.1	6.5	4.7	4.2	8.8	5.3	4.8	6.0	8.1	6.9	
North-East Asia	58.3	85.9	111.5	115.8	122.8	11.9	13.8	3.8	6.0	8.4	8.6	5.4	2.3	7.1	4.6	2.0	2.6	2.2	2.1	0.7	5.1	7.3	
South-East Asia	36.1	48.5	70.0	77.3	84.0	8.1	12.5	10.4	8.7	9.8	7.5	4.3	13.2	6.2	5.8	8.8	20.2	10.9	7.7	14.1	14.1	6.3	
Oceania	9.6	11.0	11.6	11.7	12.1	1.2	6.1	0.9	4.0	4.6	6.4	3.3	2.5	5.3	3.0	0.7	5.7	1.3	-0.5	0.6	0.2	3.0	
South Asia	6.1	8.1	12.0	13.4	14.0	1.4	19.5	12.0	4.4	8.8	2.4	3.8	2.5	3.6	1.6	1.4	2.7	3.5	16.0	17.9	10.2	10.4	
Americas	128.2	133.3	150.3	156.3	162.1	15.7	6.4	4.0	3.7	6.9	3.0	2.8	2.4	4.0	2.5	2.0	2.8	2.6	2.8	6.2	3.7	3.1	
North America	91.5	89.9	99.3	102.1	105.6	10.2	6.7	2.8	3.4	7.6	1.8	2.6	2.4	4.0	1.9	2.3	2.8	2.1	0.6	5.1	3.4	1.7	
Caribbean	17.1	18.8	19.5	20.1	20.9	2.0	1.6	3.0	4.0	5.2	5.7	3.4	1.6	4.4	5.0	0.7	1.6	2.1	2.5	3.5	1.4	4.3	
Central America	4.3	6.3	7.9	8.3	8.8	0.8	4.0	4.4	6.0	7.0	6.9	5.1	4.9	6.1	4.9	1.6	5.3	6.8	2.7	4.2	2.8	4.7	
South America	15.3	18.3	23.6	25.8	26.9	2.6	10.0	9.4	4.2	6.1	4.9	2.8	2.5	2.9	3.0	1.6	2.6	3.2	9.7	15.3	7.7	7.0	
Africa	26.2	34.8	49.8	49.2	52.3	5.1	8.5	-1.1	6.3	4.9	6.9	6.9	6.1	17.6	7.0	5.6	4.7	7.8	4.1	-3.2	-2.8	3.7	
North Africa	10.2	13.9	18.8	17.1	18.5	1.8	6.7	-9.1	8.7	9.5	11.8	8.9	4.5	37.1	4.3	6.6	-1.8	8.2	-11.1	-8.6	-11.9	-3.4	
Subsaharan Africa	16.0	20.9	31.0	32.2	33.8	3.3	9.7	3.7	5.0	3.2	4.1	5.5	6.8	6.3	8.5	5.1	7.5	7.6	11.0	0.1	5.0	7.2	
Middle East	24.1	36.3	59.2	55.3	52.6	5.1	13.5	-6.7	-4.9	-0.3	-4.7	-13.7	0.7	-12.5	-22.3	-6.2	3.7	3.4	-6.2	1.6	-5.5	-13.2	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2013)

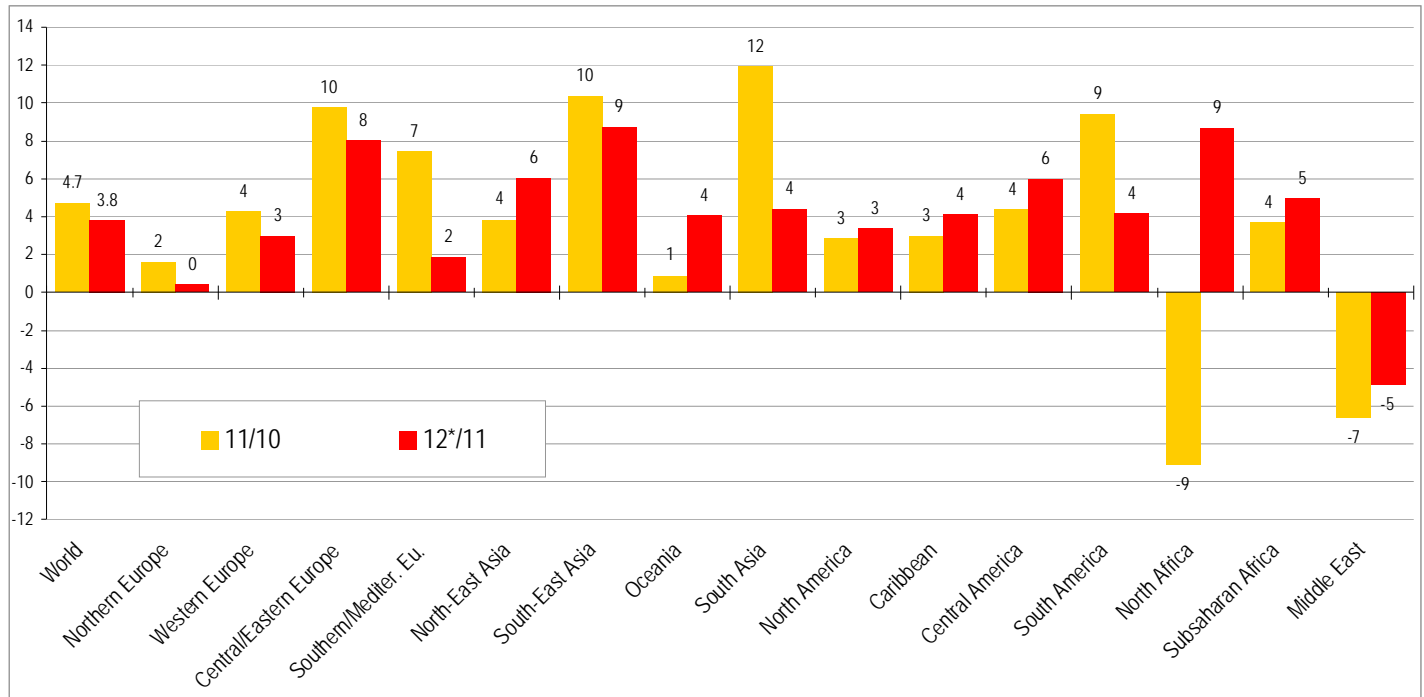
¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177,

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

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

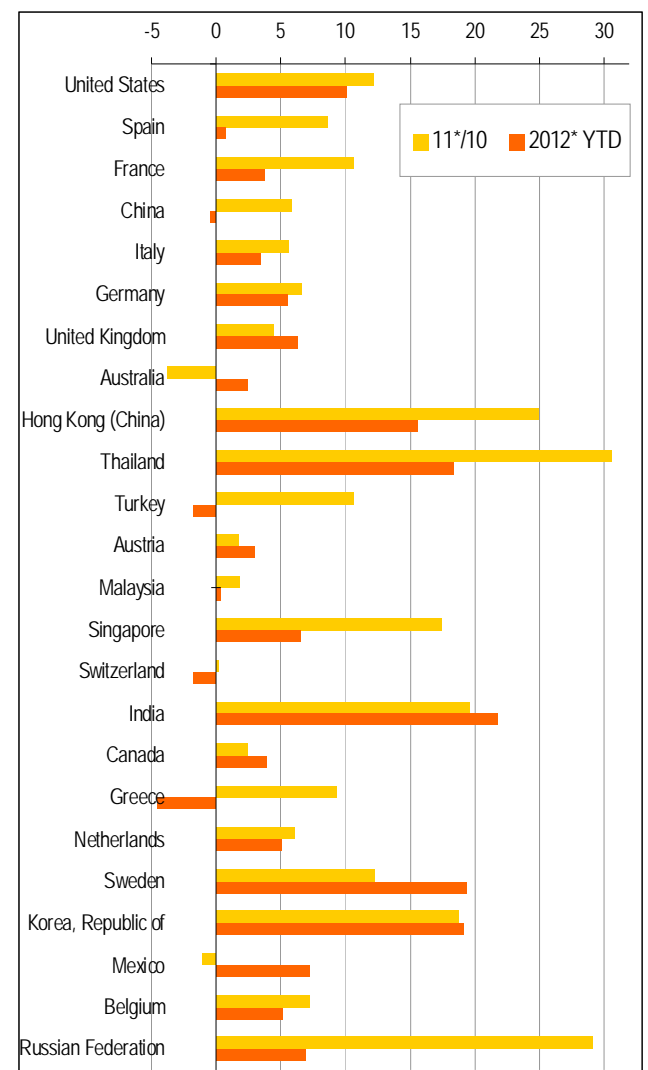
International Tourism Receipts and Expenditure

Tourism receipts follow the positive trend in arrivals

- According to countries that reported data for the first nine to twelve months of the year, tourism receipts are following the growth trend seen in arrivals.
- Of 119 destinations reporting tourism receipts data for the first part of 2012, 99 countries (83%) saw growth in earnings, of which 41 in double digits (34%), while 20 (17%) saw declines.
- Among the top ten destinations, international tourism receipts increased significantly in the first nine to twelve months of the year in the United States (top tourism earner) with an increase of 10% in 2012, and Hong Kong (10th largest earner) with a growth of 16%. Germany (6th) posted 6% growth in receipts, as did the United Kingdom (8th) which hosted the London Summer Olympics, while Spain (2nd), France (3rd), Italy (5th) and Australia (9th) posted between 1% and 4% growth. China (4th) reported a slight decrease (-1%).
- At the same time, a significant number of destinations around the world saw receipts from international tourism increase by 15% or more – Japan (+37%), India and South Africa (both +22%), Sweden and the Republic of Korea (both +19%), Thailand (+18%) and Poland (+16%), which co-hosted the European Football Championship.
- Receipts of some of the Middle Eastern and North African destinations also rebounded strongly on the 2011 declines, such as Tunisia (+33%), Jordan (+18%) and Egypt (+15%).

International Tourism Receipts

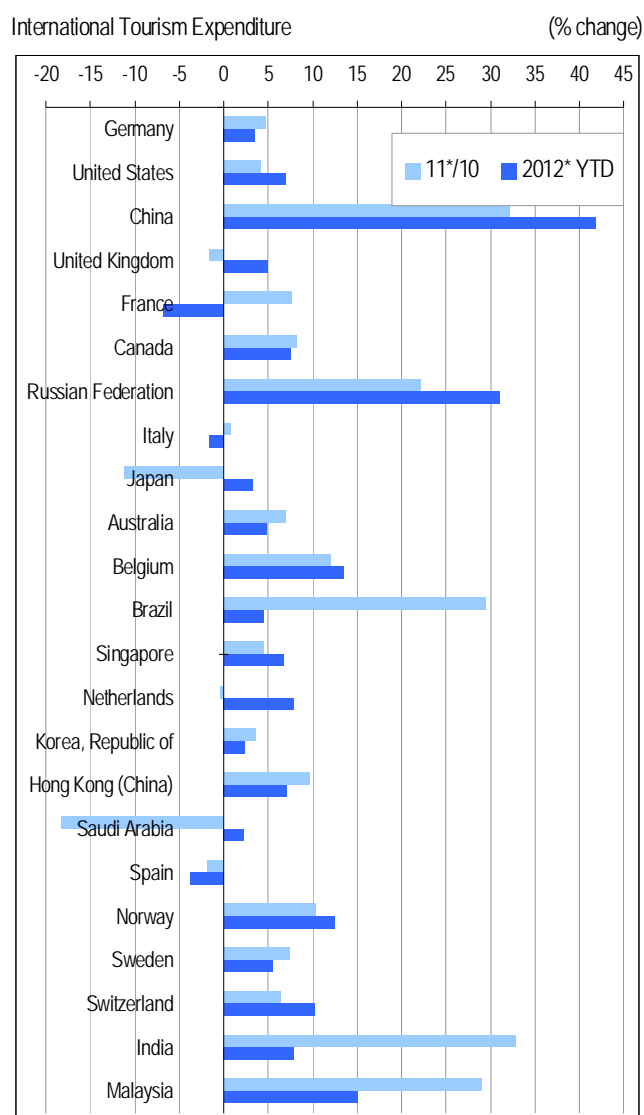
(% change)



Source: World Tourism Organization (UNWTO) ©

Top emerging markets see surge in tourism expenditure, while traditional source markets show renewed dynamism

- International tourism expenditure last year was marked by impressive growth in the world's two largest emerging markets. China (world's 3rd largest tourism spender) saw a surge of 42% in expenditure abroad in the first three quarters of 2012 compared to the same period of the previous year, while the Russian Federation (7th) recorded an outstanding 31% growth in the same period.
- Although the highest growth rates in expenditure abroad among the ten top markets came from emerging economies, important traditional source markets showed particularly good results. In Europe, and despite economic pressures, expenditure on international tourism by top spender Germany held up well at +3%, while the UK (+5%) returned to growth after two flat years. In the Americas, both the USA and Canada grew at 7%. In Asia and the Pacific, Australia increased expenditure by 5% and Japan by 3%. On the other hand, France (-7%) and Italy (-2%) registered declines in travel expenditure.



Source: World Tourism Organization (UNWTO) ©

- Other source markets with double-digit growth included Venezuela (+31%), Poland (+19%), Philippines (+17%), Malaysia (+15%), Belgium (+13%), Norway and Argentina (both +12%), as well as Switzerland and Indonesia (both +10%).

Prospects bright for 2013 led by Asia and the Pacific

- Despite ongoing economic challenges, UNWTO is forecasting growth of international arrivals worldwide to continue in 2013 at a similar to slightly slower pace (+3% to +4%) (see further page 13). This rate is well in line with its long-term outlook *Tourism Towards 2030*, which projects an average growth of 3.8% per year between 2010 and 2020.
- This outlook is supported by the UNWTO Confidence Index (compiled from feedback of some 300 experts worldwide), which reflects a positive expectation for 2013, similar to the assessment of 2012 (125 points for 2013 against 122 for 2012) (see further page 11).
- By UNWTO region, prospects for 2013 are led by Asia and the Pacific (+5% to +6%), followed by Africa (+4% to +6%), the Americas (+3% to +4%), Europe (+2% to +3%) and the Middle East (0% to +5%).
- Trends in the Middle East are the hardest to forecast due to the volatile environment and the widely varying trends across countries (for this reason growth is projected in a rather wider range). However, as some countries continue to recover from the recent conflicts, and others continue to push ahead in the development of their tourism industry, figures are expected to be positive in 2013.
- Air transport booking data from business intelligence tool Forwardkeys point to robust prospects for the first four months of 2013. At the end of December 2012, total reservations for flights in the period January to April 2013 were up by 4% compared to the same moment a year before, thanks to the continuation of the positive growth trend in international air travel (+5%) and a modest pick-up of domestic air travel (+1%). Reservations of international trips, both within the same region and between different regions, show a trend similar to what was seen in 2012 (see further page 15).

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.

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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.

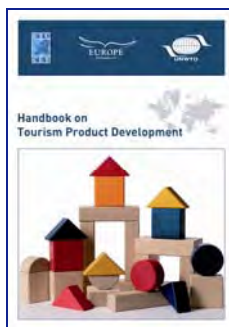
Available in English



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.

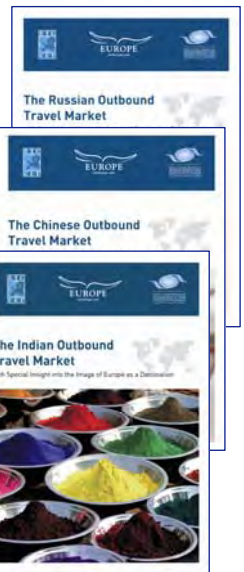
Available in English



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

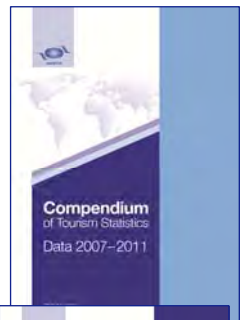
This handbook is a recognition by UNWTO and ETC of the value of successfully building and managing a destination's brand. With an Introduction by Simon Anholt, the handbook presents a step-by-step guide to the branding process, accompanied by strategies for brand management. Given case studies illustrate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

Available in English and Spanish



Compendium of Tourism Statistics, 2013 Edition, Data 2007-2011

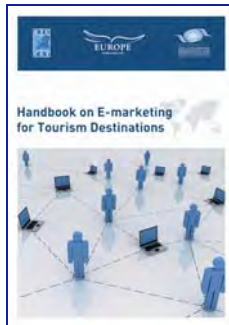
The Compendium of Tourism Statistics provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on the number and types of tourism industries, the number of employees by tourism industries, and macroeconomic indicators related to international tourism. The 2013 edition presents data for 205 countries from 2007 to 2011, with methodological notes in English, French and Spanish.



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



Yearbook of Tourism Statistics, 2013 Edition, Data 2007-2011

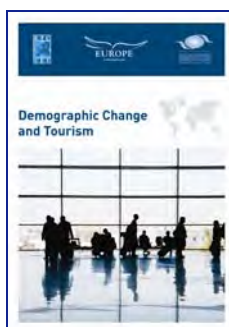
The Yearbook of Tourism Statistics focuses on data related to inbound tourism (total arrivals and overnight stays), broken down by country of origin. The 2013 edition presents data for 199 countries and territories from 2007 to 2011, with methodological notes in English, French and Spanish.



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.

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