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This issue and the accompanying *Statistical Annex of the UNWTO World Tourism Barometer* include a comprehensive analysis of the 2012 international tourism receipts, as well as the top destinations by international tourist arrivals and receipts, and top source markets by international tourism expenditure. It also offers an overview of air transport and hotel performance. Furthermore, preliminary results are included for international tourism in the first months of 2013.

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 receipts up 4% to US\$ 1075 billion in 2012

International tourism receipts recorded 4% growth in real terms in 2012, reaching a total of US\$ 1075 billion (euro 837 billion), while international tourist arrivals (overnight visitors) amounted to 1035 million, following a similar increase of 4%. Asia and the Pacific saw the highest growth across regions with 7% more international tourists, while the Americas achieved the highest tourism earnings (+7%).

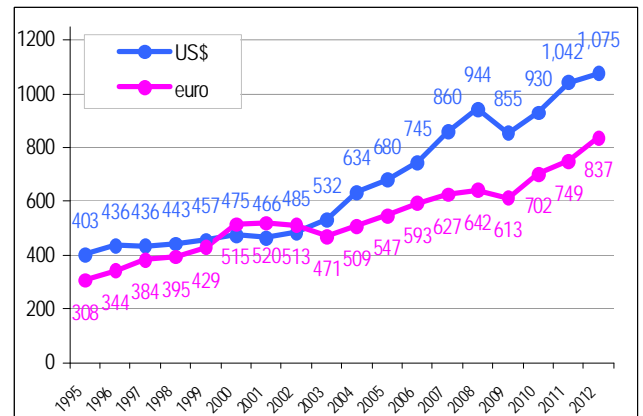
The ranking of top destinations by international tourist arrivals and receipts remained virtually unchanged in 2012. France continues to lead by arrivals, followed by the United States and China, while the United States leads by receipts, followed by Spain and France. Meanwhile, China became the number one source market in terms of tourism expenditure.

The first two months of 2013 recorded close to 4% growth in arrivals, revealing a generally robust tourism sector despite on-going economic challenges in some parts of the world. Arrivals are expected to continue growing at 3% to 4% in 2013, only slightly below 2012 levels (4%) and in line with UNWTO's long term forecast of 3.8% per year for the period 2010 to 2020.

World: Inbound Tourism

International Tourism Receipts

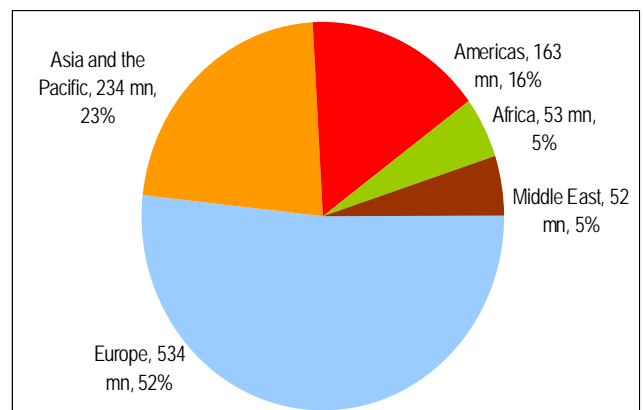
(billion)



Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2012*

(million)

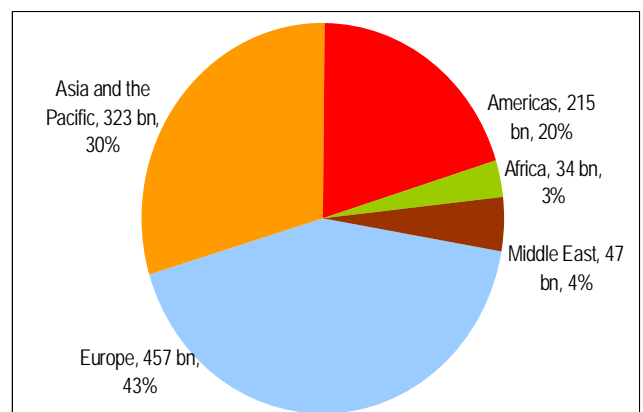


Source: World Tourism Organization (UNWTO) ©

World: Inbound Tourism

International Tourism Receipts, 2012*

(US\$ billion)



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 164 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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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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Quick overview of key trends

International tourism receipts grew 4% in 2012

- International tourism receipts reached an estimated US\$ 1075 billion (euro 837 billion) in 2012, growing 4% in real terms (adjusted for exchange rate fluctuations and inflation) over 2011, when they totalled US\$ 1042 billion (euro 749 billion).
- By region, the Americas saw the largest increase (+7%) followed by Asia and the Pacific (+6%) and Africa (+5%). Europe recorded 2% growth in earnings with mixed results at the subregional level, and the Middle East saw a 2% drop due to the continuing political turbulence in the region.
- In absolute terms Europe recorded US\$ 457 billion in tourism earnings, equivalent to 43% of the world's total tourism receipts, the largest share by region. Destinations in Asia and the Pacific (US\$ 323 billion) accounted for 30% of international tourism receipts and the Americas (US\$ 215 billion) for 20%. In the Middle East (4% share) total tourism receipts reached US\$ 47 billion, and in Africa (3% share) US\$ 34 billion.
- In addition to international tourism receipts (the travel item of the Balance of Payment), tourism also generates export earnings through international passenger transport. The latter totalled an estimated US\$ 219 billion in 2012, bringing total receipts generated by international tourism to US\$ 1.3 trillion, or US\$ 3.5 billion a day on average.
- International tourism (travel and passenger transport) accounts for 30% of the world's exports of services and 6% of overall exports of goods and services. As a worldwide export category, tourism ranks fifth after fuels, chemicals, food and automotive products, while ranking first in many developing countries.
- As a services export on the Balance of Trade of destination countries, tourism receipts are important for markets facing external deficits or general economic adversity, as they contribute to offset trade deficits, and stimulate employment. In 2012 the United States (US\$ 45 billion) and Spain (US\$ 41 billion) saw the highest surplus in tourism trade (i.e. international tourism receipts minus expenditure).

Growth in receipts matches growth in arrivals

- According to revised data, international tourist arrivals grew 4% in 2012 to 1035 million worldwide, equivalent to 39 million more tourists. This is equal to the increase in tourism receipts which also grew 4% (in real terms), reflecting a strong correlation between both indicators.

Only minor changes in the top 10 by arrivals and receipts

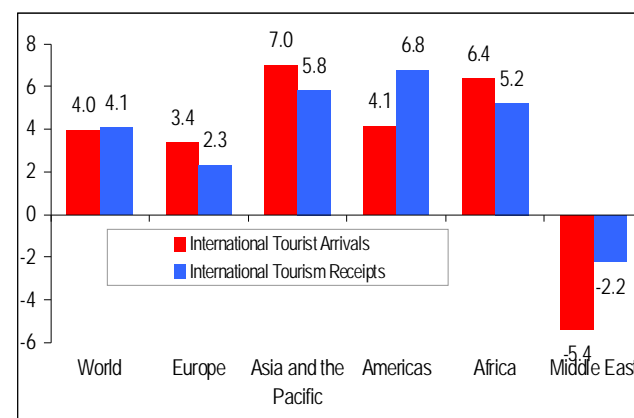
- Two changes took place in the top 10 ranking by international tourist arrivals in 2012. Germany moved up one place to 7th (with 30 million overnight visitors) and the Russian Federation entered the top 10 at number 9, climbing three positions (with 26 million).

- In the top 10 ranking by tourism receipts, Macao and Hong Kong (China Special Administrative Regions) both moved up one place, to 6th (US\$ 38 billion in 2011, 2012 data not yet reported) and 9th (US\$ 32 billion) respectively.

International tourist arrivals and receipts

(local currencies, constant prices)

(% change 2012/2011)



Source: World Tourism Organization (UNWTO) ©

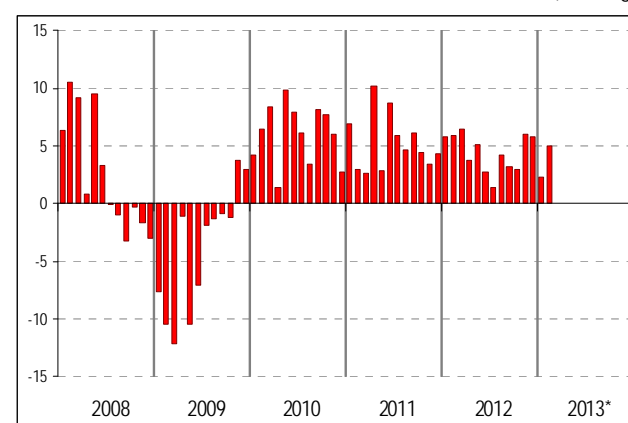
China jumps to first place in the tourism expenditure ranking

- With a total US\$ 102 billion spent in travel abroad, China has become the number one source market in the world in terms of international tourism expenditure, overtaking Germany and the United States of America (both US\$ 84 billion) which are now second and third respectively in the ranking.
- The United Kingdom held on to fourth place with US\$ 52 billion, while the Russian Federation moved up two places to fifth with US\$ 43 billion on the back of an impressive 30% growth. Other changes in the top 10 include Japan's climb to eighth from ninth, and Australia's rise to ninth from tenth, both recording an expenditure of close to US\$ 28 billion.

International Tourist Arrivals, monthly evolution

World

(% change)



Source: World Tourism Organization (UNWTO) ©

Slightly slower pace of growth in the first months of 2013

- A total of 99 countries have so far reported data on international tourist arrivals for one or more months of 2013. Of these, 73 reported an increase in arrivals (73%), of which 20 saw double-digit growth (20%) and 26 (26%) a decline.

- Based on this sample of countries, international tourist arrivals are estimated to have grown somewhat below 4% worldwide in the first two months of 2013 compared to the same period last year, slightly below the rate seen in 2012. (Caution should be exercised when interpreting this figure as it is based on data from a limited number of countries and only covers the first two months of the year, which are often not representative of the full-year trend).



**The 1st UNWTO Regional Conference on
Tourism Partnerships:**

Future Tourism for Asia and the Pacific

**31 May – 2 June 2013
Seoul, Republic of Korea**

The World Tourism Organization (UNWTO) and the Korea Tourism Organization (KTO) are jointly organizing the first UNWTO Regional Conference on Tourism Partnership: Future Tourism for Asia and the Pacific, in collaboration with the Ministry of Culture, Sports and Tourism of the Republic of Korea. The Conference will be held on the occasion of the Korea World Travel Fair (KOTFA), one of the major travel fairs in Asia.

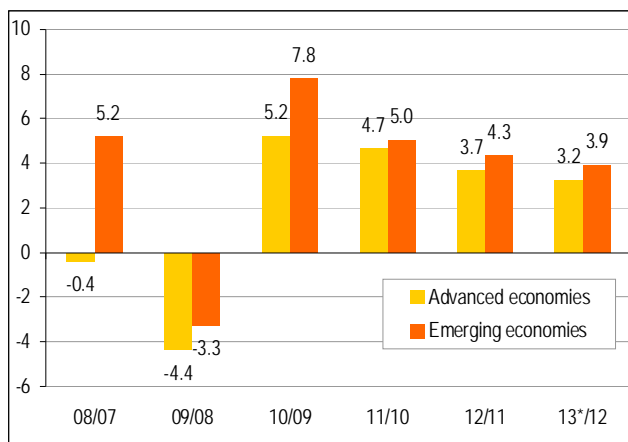
With special emphasis on Asia and the Pacific region, the main objective of the Conference is to create a platform for the participants in the private and public sectors to engage in dialogue and share their vision on how to advance tourism in the context of a technology-driven world using development strategies that are both ethical and sustainable. The conference will:

- Debate issues such as how **Smart Tourism** can be the driver to form strategic alliances for cooperative action among the various stakeholders
- Discuss how alliances of this nature can assist stakeholders to leverage innovation to increase their competitiveness in the global tourism markets; and
- Examine how ethical issues that underpin **Responsible Tourism** can help to make a difference in terms of brand perception and sustainability.

In the context of this event, the first signing ceremony of the **Private Sector Commitment to the UNWTO Global Code of Ethics for Tourism** in Asia will be held. This special signing ceremony will be organized for companies and associations that express an interest in the Commitment to the UNWTO Global Code of Ethics for Tourism. This Commitment constitutes a formal pledge to uphold ethical principles related to the sustainable and, above all, responsible development of tourism, enshrined in the Code.

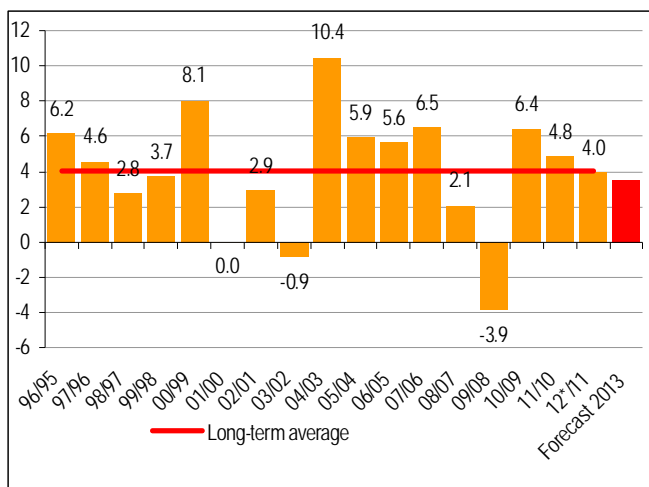
For more information:
www2.unwto.org/en/event/AM/SeoulConference

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

The detailed information in the continuation of the *UNWTO World Tourism Barometer* 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 Chinese Outbound Travel Market and Understanding Chinese Outbound Tourism

China is the fastest-growing tourism source market in the world and the top international tourism spender since 2012. In view of the worldwide interest in this market, ETC and UNWTO have prepared two joint reports on this subject: *The Chinese Outbound Travel Market – 2012 Update*, which offers an overview of the features and rapid evolution of the Chinese outbound tourism market, and *Understanding Chinese Outbound Tourism – What the Chinese Blogosphere is Saying about Europe*, which analyses the trends, themes and behaviour of Chinese tourists based on the analysis of online social media and internet searches.

Available in English



Key Outbound Tourism Markets in South-East Asia

Asia and the Pacific is not only a major tourism destination region but also an increasingly important tourism outbound market. This study, a collaborative project between Tourism Australia (TA) and UNWTO, aims to provide an up-to-date perspective of the major tourism trends in five key outbound markets: Indonesia, Malaysia, Singapore, Thailand and Vietnam. The report includes a regional overview in terms of tourism and travel patterns, a detailed country-specific analysis and a comparative evaluation of current and future potential tourism generating countries.

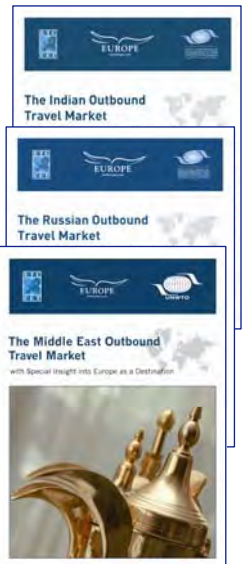
Available in English



The Indian Outbound Travel Market, The Russian Outbound Travel Market and The Middle East Outbound Travel Market

The Middle Eastern, Indian and Russian outbound travel markets are some of the fastest growing, and consequently increasingly important markets in the world. UNWTO and ETC have jointly published in-depth studies of each unique market, which aim to provide the necessary information to understand the structure and trends of these growing markets. Topics covered include: destination choice, purpose of travel, tourism expenditure, holiday activities and market segmentation, as well as the use of the internet and social media.

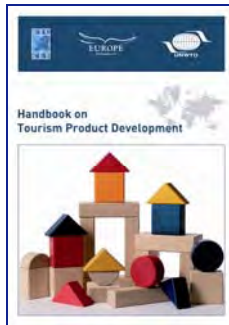
Available in English



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



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.

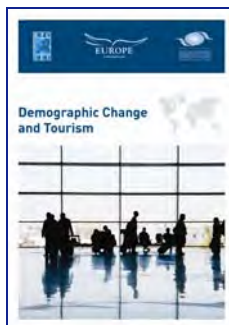
Available in English and Spanish



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 and French



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.

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.



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