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This issue of the *UNWTO World Tourism Barometer* and its accompanying *Statistical Annex* include an analysis of preliminary results for international tourism for the period January-April 2013 based on arrivals and receipts data reported by destinations around the world. Furthermore, it includes an outlook for the period May-August based on the UNWTO Panel of Experts and air transport bookings data from 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.

An extra 12 million international arrivals in January-April 2013

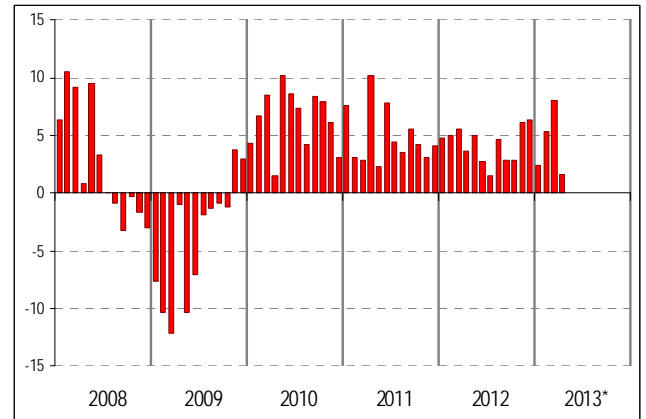
A total of 298 million international tourists (overnight visitors) travelled worldwide between January and April 2013, up 12 million on the 286 million registered in the same period last year (+4.3%). Results were positive in all UNWTO regions, with the strongest growth in Asia and the Pacific, Europe and the Middle East, and weaker growth in the Americas and Africa. By subregion, South-East Asia (+12%) and Central and Eastern Europe (+9%) continued to be the star performers.

Prospects remain positive for the period May-August, the Northern Hemisphere's summer peak season, with around 435 million tourists expected to travel abroad during the four months. The pace of growth might slow somewhat, as shoulder seasons tend to show faster growth than the peak season.

International air travel reservations for the May-August period from business intelligence tool Forwardkeys support this outlook with a 4% increase in bookings for that period. Flight reservations for travel within the same region (+5%) are stronger than those between regions (+3%). The highest growth is recorded in international flight reservations from Africa and the Middle East (+7%) and the Americas (+5%), followed by Europe (+3%) and Asia and the Pacific (+2%).

International Tourist Arrivals, monthly evolution

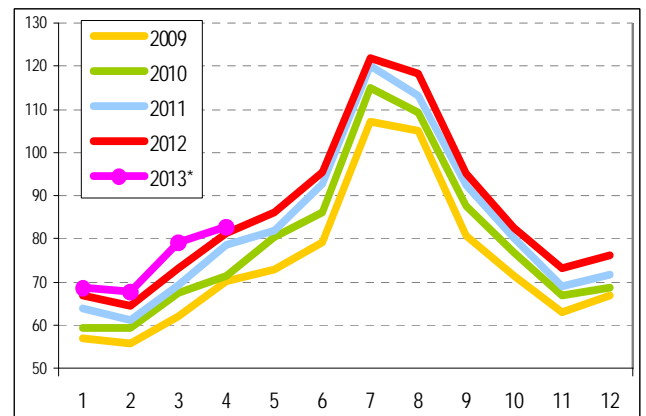
World (% change)



Source: World Tourism Organization (UNWTO) ©

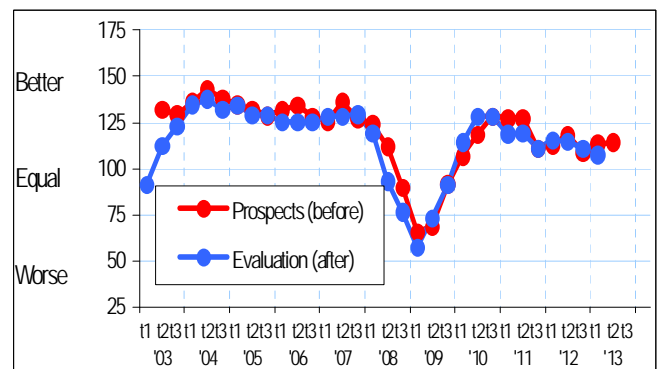
International Tourist Arrivals, monthly evolution

World (million)



Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts



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

The next issue of the *UNWTO World Tourism Barometer* will be published August 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).

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



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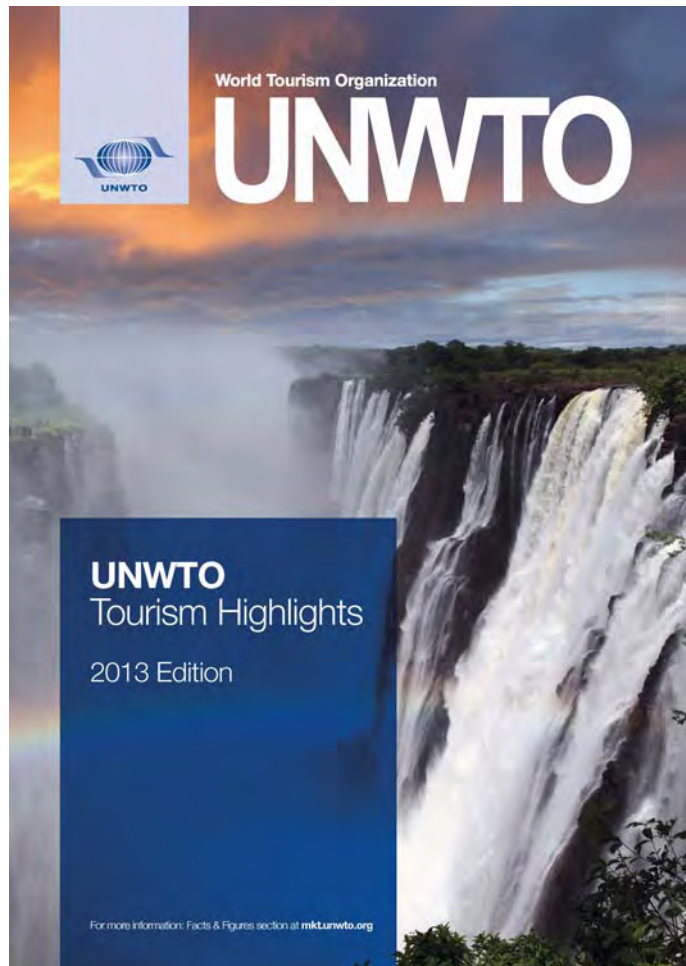
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UNWTO Tourism Highlights, 2013 Edition

UNWTO has just released its *UNWTO Tourism Highlights, 2013 Edition*, presenting a concise overview of international tourism in the world based on the results for the year 2012.



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 *2013 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.

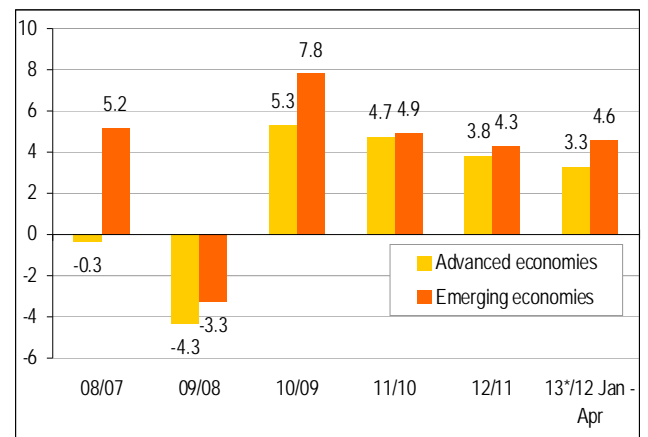
Electronic copies can be downloaded free of charge from the Facts & Figures section of the UNWTO website <www.unwto.org/facts>.

Quick overview of key trends

International tourist arrivals up 4% in January-April 2013 compared to the same period of 2012

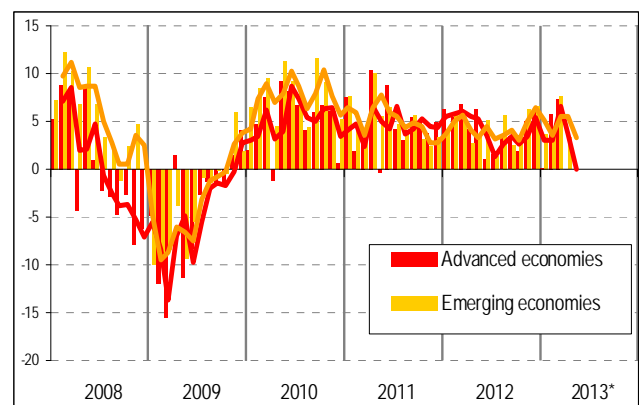
- A total of 128 countries and territories have so far reported data on international tourist arrivals (overnight visitors) for one or more months of 2013 (out of 220). Of these, 91 countries (71%) have reported an increase in tourist arrivals, with 28 (22%) double-digit growth, while 37 countries (29%) have posted a decrease. 87 countries have reported results for at least the first four months of 2012.
- Based on this sample of destinations that reported data, it is estimated that destinations worldwide recorded 298 million international tourists between January and April 2013, some 12 million more than the 287 million recorded in the same period of 2012.
- This increase in the first four months of 2013 corresponds to a growth of 4%, reflecting a generally robust tourism sector despite on-going economic challenges in some parts of the world. Emerging economies (+4.6%) grew 1 percentage point faster than advanced economies (+3.3%).

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

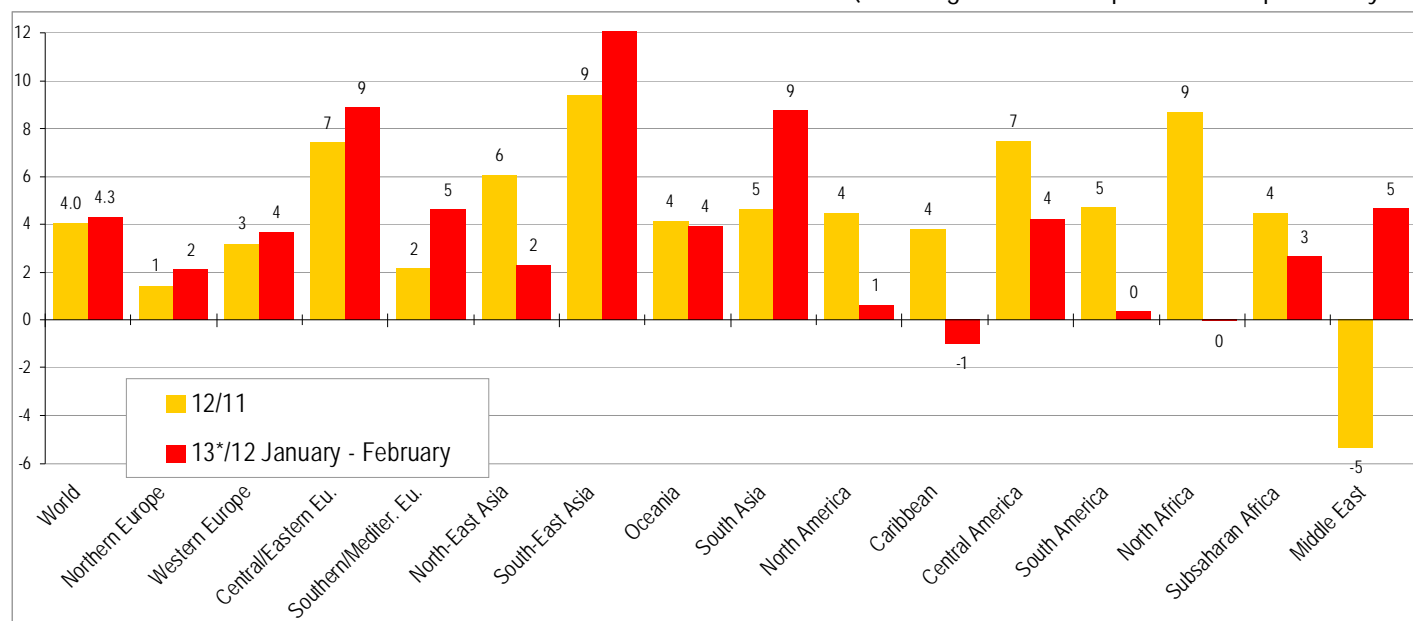
International Tourist Arrivals, monthly evolution
Advanced economies & Emerging economies (% change)



Source: World Tourism Organization (UNWTO) ©

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	2010	2011	2012*	2012*	10/09	11/10	12*/11	2013*	2012*				2011								
	(million)					(%)			(%)	YTD	Jan	Feb	Mar	Apr	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
World	677	807	949	995	1035	100	6.4	4.8	4.0	4.3	2.4	5.3	8.1	1.6	5.7	3.8	2.9	4.8	4.4	6.6	4.4	3.7	
Advanced economies ¹	420	459	506	530	551	53.2	5.3	4.7	3.8	3.3	0.2	5.9	7.3	0.1	6.2	3.7	2.8	4.1	4.0	6.2	4.1	4.6	
Emerging economies ¹	256	348	443	465	484	46.8	7.8	4.9	4.3	4.6	3.7	3.5	7.7	3.4	5.2	3.9	3.1	5.6	4.8	7.2	4.7	2.9	
<i>By UNWTO regions:</i>																							
Europe	388.0	448.9	485.6	516.4	534.2	51.6	3.0	6.4	3.4	4.9	1.9	7.2	9.0	2.2	4.5	3.2	3.2	4.5	6.4	8.3	4.8	5.1	
Northern Europe	46.4	60.4	62.8	64.0	64.9	6.3	2.1	2.0	1.4	2.1	-0.8	9.9	3.5	-2.1	4.8	2.4	-1.7	5.5	3.0	7.0	-0.4	-1.0	
Western Europe	139.7	141.7	154.4	161.5	166.6	16.1	3.9	4.6	3.2	3.6	-1.2	5.2	10.0	0.3	5.0	3.2	1.9	3.9	8.4	5.4	1.7	6.2	
Central/Eastern Eu.	69.3	90.4	95.0	103.9	111.6	10.8	3.1	9.4	7.4	8.9	8.2	10.1	9.7	7.9	8.0	8.0	7.7	8.4	7.4	9.5	6.6	8.0	
Southern/Mediter. Eu.	132.6	156.4	173.5	187.0	191.1	18.5	2.5	7.8	2.2	4.6	1.7	6.0	9.7	1.7	1.3	1.0	3.5	1.9	5.2	10.6	8.3	4.6	
- of which EU-27	326.8	356.1	371.0	390.9	400.2	38.7	2.7	5.4	2.4	2.8	-0.4	5.3	7.3	-0.6	4.2	2.1	1.7	3.0	5.9	7.6	4.0	4.4	
Asia and the Pacific	110.1	153.6	205.1	218.2	233.6	22.6	13.2	6.4	7.0	6.3	4.7	6.9	10.3	3.4	8.8	7.8	5.0	7.8	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	2.3	1.8	1.7	7.1	-1.5	8.5	8.6	5.4	2.3	2.1	0.7	5.1	7.3	
South-East Asia	36.1	48.5	70.0	77.3	84.6	8.2	12.5	10.4	9.4	12.1	9.2	13.2	15.1	10.7	10.0	7.2	3.8	16.6	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	4.1	3.9	-1.8	7.8	8.8	0.3	4.5	5.2	2.9	4.0	-0.4	0.7	0.2	2.9	
South Asia	6.1	8.1	12.0	13.5	14.1	1.4	19.5	12.6	4.6	8.7	6.2	9.6	10.3	8.9	8.2	6.2	11.7	8.9	16.0	17.9	10.2	10.4	
Americas	128.2	133.3	150.6	156.0	163.1	15.8	6.6	3.6	4.6	0.5	1.2	0.3	2.9	-2.5	7.1	3.1	3.9	4.0	2.4	5.6	3.2	2.7	
North America	91.5	89.9	99.5	102.1	106.7	10.3	7.0	2.6	4.5	0.6	2.2	1.8	1.4	-2.5	7.9	2.1	4.0	4.6	0.4	4.8	3.2	1.6	
Caribbean	17.1	18.8	19.5	20.1	20.9	2.0	1.6	3.0	3.8	-1.0	-0.9	-3.8	3.2	-3.1	3.9	4.4	2.8	1.2	2.6	3.6	1.3	4.1	
Central America	4.3	6.3	7.9	8.3	8.9	0.9	4.0	4.4	7.5	4.2	2.9	3.4	6.6	4.1	8.0	7.8	5.9	8.1	2.7	4.2	2.8	4.7	
South America	15.3	18.3	23.6	25.5	26.7	2.6	10.2	7.8	4.7	0.3	-0.2	-1.2	6.3	-4.0	7.2	4.7	3.4	2.3	8.1	12.6	5.3	4.9	
Africa	26.2	34.8	49.9	49.4	52.4	5.1	8.7	-0.9	5.9	1.8	-1.4	0.0	8.8	0.2	2.5	5.7	6.8	1.5	5.3	-1.6	-1.8	2.5	
North Africa	10.2	13.9	18.8	17.1	18.5	1.8	6.7	-9.1	8.7	-0.1	-1.6	-3.2	8.4	-3.8	9.5	11.8	8.9	4.5	-11.1	-8.6	-11.9	-3.4	
Subsaharan Africa	16.0	20.9	31.1	32.4	33.8	3.3	10.0	4.1	4.4	2.6	-1.3	1.3	9.0	2.4	0.0	2.2	5.2	0.2	12.9	2.8	6.8	5.4	
Middle East	24.1	36.3	58.2	54.9	52.0	5.0	11.6	-5.6	-5.4	4.7	3.7	5.8	7.6	2.0	-0.8	-5.0	-13.9	0.1	-4.9	2.8	-3.9	-11.7	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 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



UNWTO-ETC e-marketing master class

¡Save the date!

The World Tourism Organization, the European Travel Commission and the Government of Croatia are pleased to announce the

**UNWTO-ETC e-marketing master class:
Optimise your skills in developing, integrating and
evaluating e-marketing strategies and tactics**

**23-24 October 2013
Zadar, Croatia**

The UNWTO-ETC e-marketing master class will be the occasion for the official launch of the brand new *ETC-UNWTO Handbook on e-marketing for tourism destinations – fully revised and extended version 3.0*.

The master class aims to coach tourism professionals in optimising the integration of e-marketing into their strategies operations and planning, and take full advantage of the opportunities it offers, striving for excellence in e-marketing to manage strong brands in a dynamic digital environment. The master class will involve and engage participants and build on latest insights in trends and opportunities, with special attention to social media, mobile marketing and the measurement and evaluation of e-marketing activities.

The UNWTO-ETC e-marketing master class will gather renowned experts and key industry representatives to share their views on current practices in e-marketing for tourism destinations. During this two-day event, experts and participants will discuss trends, challenges and opportunities in e-marketing techniques for tourism destinations.

¡For further information regularly check the website <http://europe.unwto.org/en>! The full programme and additional information on the event will be available shortly.

We look forward to welcoming you to Zadar!



- Boosted by an early Easter holiday, the best figures were recorded in March, when tourist arrivals grew an estimated 8% compared to the same month last year. February 2013 was also strong in tourist activity (+5%). On the other hand, January and April were rather weaker (both +2%), but for April this was principally due the Easter holiday date shift from early April in 2012 to late March in 2013.
- Growth was positive in all UNWTO regions, though results were rather mixed. Asia and the Pacific (+6%) saw the highest relative growth, in particular boosted by arrivals in South-East Asia (+12%) and South Asia (+9%), while growth in North-East Asia (+2%) was more subdued.
- Europe (+5%) also showed above-average growth. Central and Eastern Europe (+9%) continues to drive growth, while Southern and Mediterranean Europe (+5%) also turned in strong results. For the Middle East growth is also estimated at 5%, though some caution should be exercised when interpreting this figure as it is based on still rather limited data.
- Africa (+2%) and the Americas (+1%) reported rather weak growth in the first four months of 2013, though following strong results in 2012 (+6% and +5% growth respectively). At the subregional level, results were mixed in the Americas, with a small decline in the Caribbean (-1%) and firm growth in Central America (+4%). In Africa, 3% growth in Sub-Saharan Africa contrasts with zero growth in North Africa, though this is predominantly based on information from a limited number of destinations.

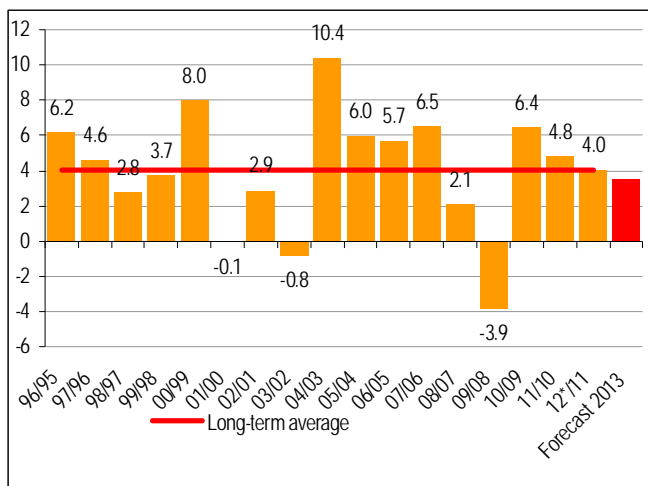
Some 435 million tourists expected worldwide in the May-August peak season

- As the summer season gets underway in the Northern Hemisphere, the short-term outlook for international tourism remains positive.
- Respondents to this edition of the UNWTO Panel of Experts survey showed sustained confidence, but with variations by region and activity. Confidence picked up significantly in Europe, the Middle East, among Global operators and among Tour operators and travel agencies. On the other hand confidence decreased among experts in Asia and the Pacific, the Americas and Africa, as well as among experts in the Transport sector.
- UNWTO expects some 435 million tourists to travel internationally between May and August, the peak season in most of the world's leading outbound markets and tourism destinations. In past years these four months represented roughly 41% of the yearly total.
- However, the pace of growth is likely to slow somewhat in the peak season, as volume tends to grow faster in the shoulder season with capacity being less of a constraint and price can be used to stimulate extra demand.
- Prospects are confirmed by data on air transport bookings from business intelligence tool ForwardKeys, which shows that reservations for international air travel worldwide for the period May-August are 4% higher than in the same period

last year. Flight reservations for travel within the same region (+5%) are stronger than those between regions (+3%). Air transport is an important tourism indicator as it represents around half of all international travel worldwide according to UNWTO destinations' data.

- According to UNWTO's forecasts for 2013 published in the January edition of the *UNWTO World Tourism Barometer*, international tourist arrivals are expected to increase 3% to 4% in the full year. The expected pace of growth is 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.

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.

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.

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¡Save the date!

The 7th UNWTO/PATA Forum on
Tourism trends and outlook

**Tourism Development: New
Knowledge, Practices and Challenges**

21-23 October, 2013
Guilin, China

This 7th edition of the Forum is jointly organised by the World Tourism Organization (UNWTO) and the Pacific Asia Travel Association (PATA), hosted by Guilin Municipal People's Government and in collaboration with Hong Kong Polytechnic University.

The forum will provide a platform for governments, industry and academics to share information, to analyse global trends and the broader environment impacting on tourism, and to map out the appropriate course of actions.

The two-day forum will be divided into two sessions:

- The technical sessions (on the first day) are aimed at a selected audience. The session will provide practitioners and academics with the opportunity to exchange the latest tourism research results, trends and views on tourism development with best practices and examples from both public and private sector perspective.
- The plenary sessions (on the second day) are open to a broad audience. These sessions, conducted by renowned international speakers from the tourism sectors, will be devoted to the current issues in tourism of the year.

The Forum is aimed at participants from the following areas:

- Senior tourism policy, management, marketing and research officials from National Tourism Administrations, National Tourism Organizations, regional and local Tourism Administrations and Tourism Organizations
- Practitioners from tourism industries (tour operators, hotels, transport services, financial bodies, consultancy firms, etc)
- Research institutions and universities

More information will be posted shortly on:
www.unwto.org/asia/guilinforum/en/guilin.php





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.

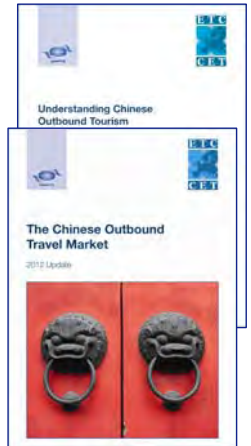
Available in English, French, Spanish and Russian



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.

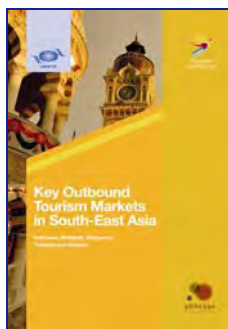
Available in English



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 an overview of tourism demand and travel patterns, a detailed country-specific analysis and a comparative evaluation of current and future tourism potential.

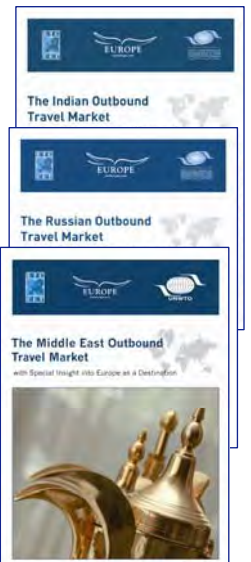
Available in English



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.

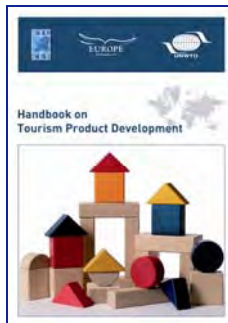
Available in English



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.

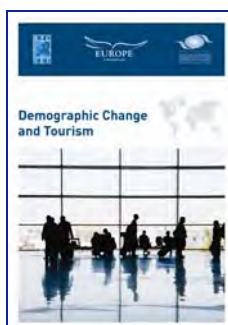
Available in English and Spanish



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



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

The Compendium of Tourism Statistics provides 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 2012 edition presents data for 209 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 inbound tourism-related data (total arrivals and overnight stays), broken down by country of origin. The 2012 Edition presents data for 199 countries from 2007 to 2011, with methodological notes in English, French and Spanish.



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