2010: A multi-speed recovery

In 2010, world tourism recovered more strongly than expected from the shock it suffered in 2008 and 2009 due to the global financial crisis and economic recession. The vast majority of destinations worldwide reported positive and often double-digit increases, sufficient to offset recent losses or bring them close to this target. While all regions posted positive growth in international arrivals, emerging economies were unarguably the drivers of this growth. The multi-speed recovery – slower in most advanced economies, much faster in most emerging and newly industrialised markets – is a reflection of the broader global economic situation, which is set to dominate trends in 2011 and the foreseeable future.

This UNWTO World Tourism Barometer and accompanying Statistical Annex present the results for international tourism in 2010 and the outlook for 2011. It updates the information disseminated through the Advance Release published in mid-January and includes 2010 full year data on international tourist arrivals for over 100 countries and on international tourism receipts for over 40 countries available at the end of February.

Quick overview of key trends

International tourism – 2010 preliminary results

- Worldwide, international tourism rebounded strongly, with international tourist arrivals up 6.7% over 2009 to 935 million. The increase more than offsets the decline caused by the economic downturn, with an additional 22 million arrivals over the former peak year 2008.
- As a reflection of the economic conditions, recovery was particularly strong in emerging economies, where arrivals grew faster (+8%) than in advanced ones (+5%).
- All world regions posted positive growth in international tourist arrivals over 2009. For the vast majority of destinations, real growth returned in 2010 or is imminent.
- At sub-regional level, this different pace of growth produced four modes of recovery, ranging from the continuous growth of destinations that bucked the crisis, through the full or partial recovery of destinations that have recorded results slightly above or below previous peaks, to destinations still under the lasting effects of the crisis.
- For most countries, data on international tourism receipts and expenditure is still incomplete at this time of the year, and it anyway tends to be provisional and is often subject to substantial revision. But preliminary results seem to confirm two trends:
  - The growth in receipts lags somewhat behind that of arrivals, as is typical in periods of recovery;
  - Emerging economies are also leading the recovery in terms of the growth in expenditure abroad.
- Full recovery is confirmed by the UNWTO Panel of Experts, with its some 340 members evaluating 2010 even more highly than the positive expectations expressed one year ago (140 against 131). Panel results also reflect the multi-speed recovery: in Asia and the Pacific (160) and the Middle East (171) optimism was converted into real enthusiasm for a year marked by a quick return to growth. The other regions all received positive scores of between 130 and 140.

World: Inbound Tourism

International Tourist Arrivals (million)

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
</tr>
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<tbody>
<tr>
<td>1995</td>
<td>528</td>
</tr>
<tr>
<td>2000</td>
<td>586</td>
</tr>
<tr>
<td>2005</td>
<td>626</td>
</tr>
<tr>
<td>2010*</td>
<td>935</td>
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</tbody>
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Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2010*

- Asia and the Pacific, 204 mn, 22%
- Americas, 150 mn, 16%
- Africa, 48 mn, 5%
- Middle East, 60 mn, 6%
- Europe, 473 mn, 51%

Source: World Tourism Organization (UNWTO) ©

- Air transport data published by the International Civil Aviation Organization (ICAO) confirms the recovery of international traffic demand, with total scheduled passenger traffic...
Regional results

- **Asia and the Pacific (+13%)**, the first region to recover, has been growing strongly with international tourist arrivals at a new historic record of 204 million in 2010. A double-digit growth rate is a common result for destinations in this region, where international travel is boosted by a strong development of the local economies. With 23 million additional visits the region has secured a share of 22% of the international tourism market.

- **Rapid growth for the Middle East (+14%)**, but on depressed figures in 2009. Boosted by intraregional travel favoured by high oil prices, the region reached 60 million arrivals.

- **Growth in the Americas (+7%)** is mostly explained by economic factors, namely the signs of recovery from the US economy and the vitality of Latin American countries. The increasing regional integration in Central and South America has also favoured recovery.

- **Africa’s 6% growth** is an increase on the positive results of 2009. Supported by worldwide exposure created by the FIFA World Football Cup, hosted by South Africa, the region maintained momentum in 2010, achieving a total of 49 million arrivals.

- **The effects of the crisis have been slowly fading away in Europe (+3%)**, the region hardest hit. But the closure of its airspace in April and uncertainty about the economy have not helped to speed up recovery in the region. Outstanding performances of some large destinations (e.g. Germany +11% and Turkey +6%) as well as of emerging ones (as in the Balkans and South Caucasus) contrast with the region’s average growth.

Prospects for 2011

- **Growth is set to continue in 2011**, yet at a more moderate pace. UNWTO predicts an increase in international tourist arrivals worldwide this year in the range of 4% to 5%, somewhat above the long-term average of 4%.

- **Emerging destinations**, especially in Asia and the Pacific, are expected to continue leading the growth, taking advantage of a far from exhausted demand from neighbouring countries. In the advanced economies, major challenges to the projected growth are linked to the economic outlook, including high unemployment and weak consumer confidence.

- **2011’s prospects** expressed by UNWTO’s Panel of Experts also remain very optimistic overall (139), with expectations in Asia and the Pacific (151) and in the Americas (143) at the highest. By sector, the Tour Operators and Travel Agencies are the most optimistic about the outlook for 2011 with a rating at 146.

- **Tourism’s quick recovery in 2010** confirms the sector’s resilience in the medium and long term, confirming that it is a key driver of growth and much needed employment in a changing economic setting.

- **Mega-events** contributed to offset the negative effects of the economic crisis, and displayed their extraordinary ability to promote and boost arrivals in emerging destinations, such as South Africa (FIFA World Cup), Shanghai (Expo 2010) and India (Commonwealth Games), as well as mature ones like Canada (Winter Olympic Games).