



## Contents

Quick overview of key trends	1
International Tourism Receipts 2011	5
World's Top Tourism Destinations 2011	11
Outbound Tourism: World's Top Spenders 2011	13
Inbound Tourism: short-term trends 2012	15

Statistical Annex	Annex-1 to Annex-25
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This issue and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* includes a comprehensive analysis of the 2011 international tourism receipts, as well as the top destinations by international tourist arrivals and receipts and top source markets by international tourism expenditure. Furthermore, preliminary results are included for international tourism in the first months 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.

## International tourism off to a strong start in 2012

International tourist arrivals grew by 5.7% in the first two months of 2012, consolidating a growth trend that started in 2010, after the 2009 crisis. Growth was positive in all world regions except the Middle East, where the impact of the Arab Spring is still being felt. All regions also posted higher growth figures than in 2011 except for Europe. South-East Asia and South Asia led growth with both a strong 10%. Other fast-growing subregions were Central and Eastern Europe, North Africa and South America (all 8%).

## Quick overview of key trends

### International tourism receipts surpass US\$ 1 trillion in 2011

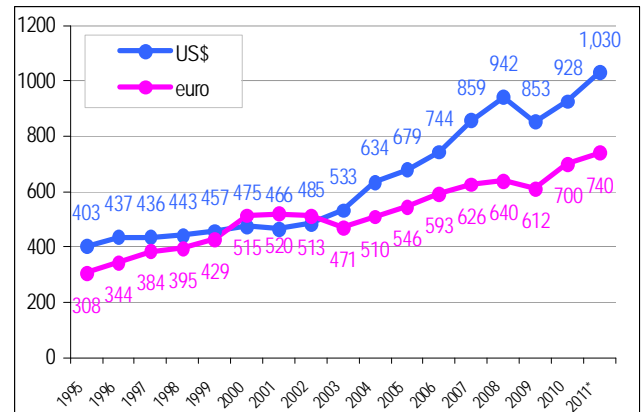
- International tourism receipts continued to recover from the losses of crisis year 2009 and hit new records in most destinations, reaching an estimated US\$ 1,030 billion (euro 740 bn) worldwide in 2011, up from US\$ 928 billion (euro 700 bn) in 2010.
- In real terms (adjusted for exchange rate fluctuations and inflation), international tourism receipts grew by 3.8%, while international tourist arrivals increased by 4.6% in 2011 to 982

million. This confirms the close correlation between both indicators, with the growth of receipts tending to lag slightly behind the growth of arrivals in times of economic constraints.

World: Inbound Tourism

International Tourism Receipts

(billion)

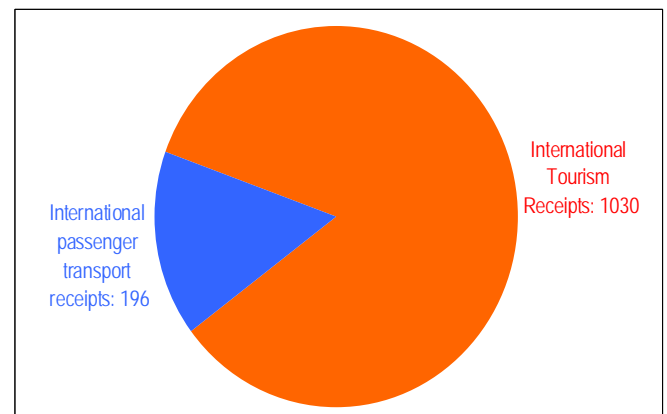


Source: World Tourism Organization (UNWTO) ©

World: Inbound Tourism, 2011

Receipts from international tourism and passenger transport

(US\$ billion)



Source: World Tourism Organization (UNWTO) ©

- 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 amounted to an estimated US\$ 196 billion in 2011, bringing total receipts generated by international tourism to US\$ 1.2 trillion, or US\$ 3.4 billion a day on average.
- As a result, international tourism (travel and passenger transport) currently 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 fourth after fuels, chemicals and food, while ranking first in many developing countries.

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](http://www.unwto.org/facts/menu.html).

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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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The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published end of June 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).

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- By region, the Americas (+5.7%) recorded the largest increase in receipts in 2011, followed by Europe (+5.2%), Asia and the Pacific (+4.3%) and Africa (+1.6%). The Middle East was the only region posting negative growth (-14%).
- Europe holds the largest share of international tourism receipts in absolute numbers (45% share), reaching US\$ 463 billion (euro 333 bn) in 2011, followed by Asia and the Pacific (28% share or US\$ 289 billion, and the Americas (19% share or US\$ 200 bn). The Middle East (4% share) earned US\$ 46 billion and Africa (3% share) US\$ 33 billion.
- The past two years have shown healthy demand for international tourism out of many markets, even though economic recovery has been uneven. This is particularly important news for countries facing fiscal pressure and weak domestic consumption, where international tourism, a key export and a labour intensive activity, is increasingly strategic to balancing external deficits and stimulating employment.
- UNWTO trusts that governments worldwide will progressively recognise this and engage in measures that support tourism, including fairer tax policies and the facilitation of visas and travellers' movements, as these have proven to stimulate economic growth and job creation

**Increases in receipts in emerging and advanced economy destinations alike**

- Both advanced and emerging economy destinations benefited from last year's growth in arrivals and reported significant increases in receipts. Destinations where international tourism receipts grew by US\$ 5 billion or more in absolute terms include the United States (increasing by US\$ 13 bn to US\$ 116 bn), Spain (by US\$ 7 bn to US\$ 60 bn), France (by US\$ 7 bn to US\$ 54 bn), Thailand (by US\$ 6 bn to US\$ 26 bn) and Hong Kong (China) (by US\$ 5 bn to US\$ 27 bn).
- Furthermore, significant increases on lower base values were reported by Singapore (by US\$ 4 bn to US\$ 18 bn), the Russian Federation (by US\$ 3 bn to US\$ 11 bn), Sweden (by US\$ 3 bn to US\$ 14 bn), India (by US\$ 3 bn to US\$ 18 bn), the Republic of Korea (by US\$ 2 bn to US\$ 12 bn) and Turkey (by US\$ 2 bn to US\$ 23 bn).

**Strong growth in international tourism expenditure from the BRIC countries**

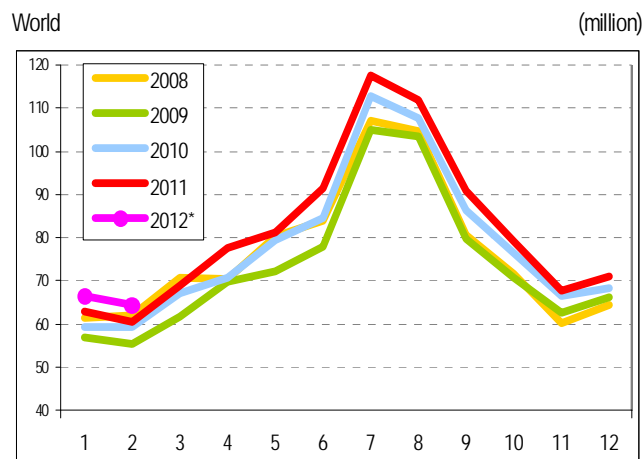
- Many source markets generated strong demand in 2011. However, it was the BRIC countries (Brazil, Russia, India, China) that continued to stand out. China's expenditure on international tourism increased by US\$ 18 billion to US\$ 73 billion, the Russian Federation increased by US\$ 6 billion to US\$ 33 billion, Brazil by US\$ 5 billion to US\$ 21 billion and India by US\$ 3 billion to US\$ 14 billion. Together, their increases accounted for an additional US\$ 32 billion, a value equivalent to the eighth largest source market by expenditure.
- Of the advanced economy source markets, Germany (increasing by US\$ 6 to US\$ 84 bn), Australia (by US\$ 5 to

US\$ 27 bn), Norway (by US\$ 3 to US\$ 16 bn), Belgium (by US\$ 3 to US\$ 22 bn) and Canada (by US\$ 3 to US\$ 33 bn) reported the biggest absolute growth.

**International tourism off to a strong start in 2012**

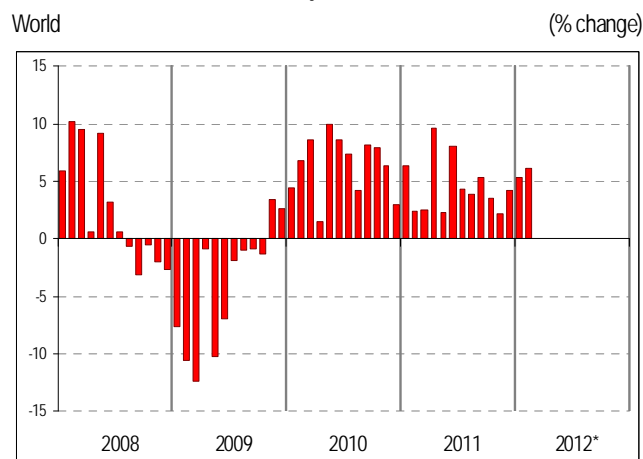
- At this moment in time, 109 countries have reported data on international tourist arrivals for one or more months of 2012. The large majority (89 countries, 82%) have reported positive growth, with double-digit growth for 33 countries (30%), and 20 countries (18%) have recorded negative growth.
- Over 90 countries have reported results for at least the first two months of 2012. Based on this sample of destinations, the growth of international tourist arrivals worldwide in January and February 2012 is estimated to have reached 5.7%.
- It should however be noted that 2012 is a leap year, with one extra day in February. So if this additional day is factored out of the calculations, the growth would have been somewhat over 4% in the first two months.
- Worldwide, international tourist arrivals surpassed 131 million in the first two months of 2012, up from 124 million in the same period of 2011.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



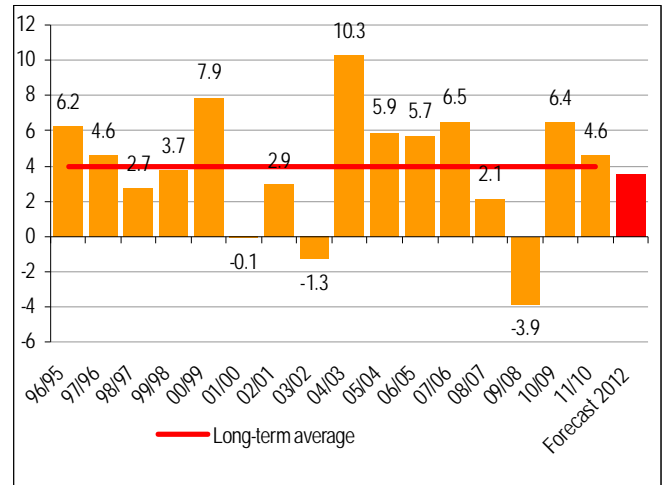
Source: World Tourism Organization (UNWTO) ©



- In the first months of 2012, growth was positive in all regions, with the exception of the Middle East (-1%), where there were nonetheless encouraging signs of recovery, such as in Egypt (+32% in the first quarter). South-East Asia and South Asia (both at +10%) led growth by subregion.
- Africa was the fastest-growing region with an increase of over 7% in international tourist arrivals thanks to continued growth in Sub-Saharan Africa (+7%) and a clear rebound in North Africa (+8%) as Tunisia (+53% in the first quarter) started to recover.
- In Europe (+5%) results were above expectations, boosted by the strong growth in arrivals to Central and Eastern Europe (+8%) as well as to destinations of Northern Europe and Western Europe (both +6%). Europe's performance is a continuation of an already solid 2011, when international arrivals increased by 6% overall to over 500 million. Demand has held up surprisingly well in the comparatively mature advanced economy destinations of Northern, Western and parts of Southern and Central Europe, despite continued concerns about the economy. At the same time, international tourism has been particularly buoyant in many emerging economy destinations in Eastern Europe.
- Asia and the Pacific saw a 7% increase in tourist arrivals, led by South Asia and South-East Asia (both +10%). North-East Asia (+6%) recorded higher growth as well, with arrivals to Japan up by almost 10% in the first quarter.
- The Americas also reported significant growth (+6%), driven by the sustained strong demand in South America (+8%) and Central America (+7%).
- According to the forecast prepared by UNWTO at the beginning of the year, international tourist arrivals are

projected to increase by some 3% to 4% in 2012. For the year as a whole, the number of international tourist arrivals is expected to reach one billion for the first time.

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 free excerpt of this document.

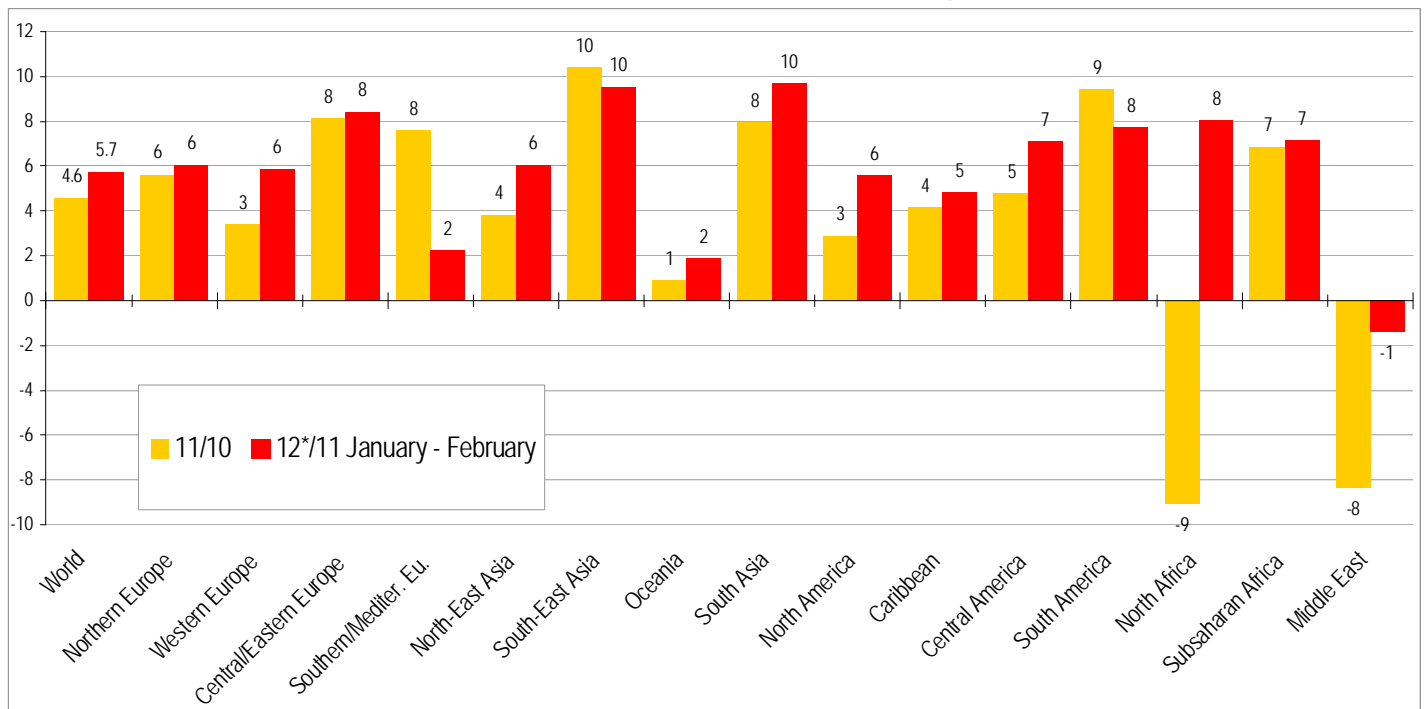
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International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©



# 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



## 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 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 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



## 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.

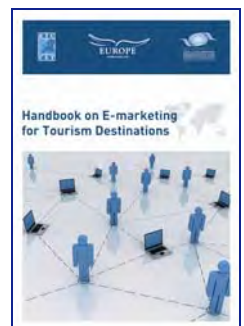
Available in English



## Handbook on 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



## Compendium of Tourism Statistics, 2012 Edition

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 2006 to 2010, with methodological notes in English, French 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



## Yearbook of Tourism Statistics, 2012 Edition

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 2006 to 2010, with methodological notes in English, French and Spanish.

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