



Interim Update, August 2011

This *Interim Update* edition and *Statistical Annex* of the *UNWTO World Tourism Barometer* include preliminary results for international tourism in the first half year of 2011. A comprehensive analysis of international tourism trends will be included in the next full version of the UNWTO World Tourism Barometer scheduled for October 2011.

This release is available in electronic format only through the UNWTO elibrary and is free for members. Its text is edited in English only, while the Statistical Annex is available in English, French, Spanish and Russian.

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Healthy growth of international tourism demand in first half of 2011

International tourism grew by almost 5% in the first half of 2011 totalling a new record of 440 million arrivals. Results confirm that, in spite of multiple challenges, international tourism continues to consolidate the return to growth initiated in 2010.

Quick overview of key trends

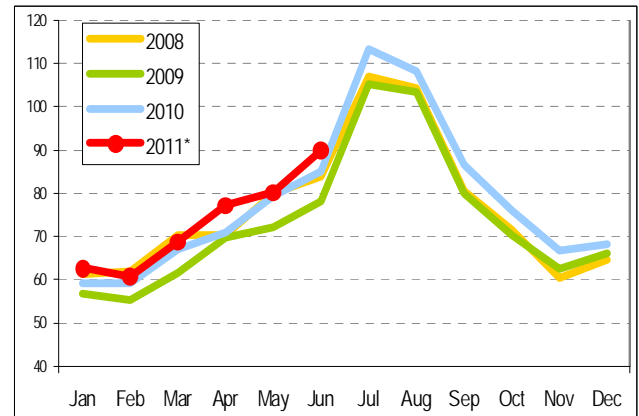
International tourism – 2011 short-term trends

- International tourist arrivals are estimated to have grown by 4.5% in the first half of 2011, consolidating the 6.6% increase registered in 2010. Between January and June of this year, the total number of arrivals reached 440 million, up 19 million on the 421 million in the same period of 2010. In a regular year, international tourist arrivals in the first half of the year account on average for some 45% of the yearly total (as July and August, the traditional high-season months of the Northern hemisphere, attract most arrivals).

International Tourist Arrivals, monthly evolution

World

(million)

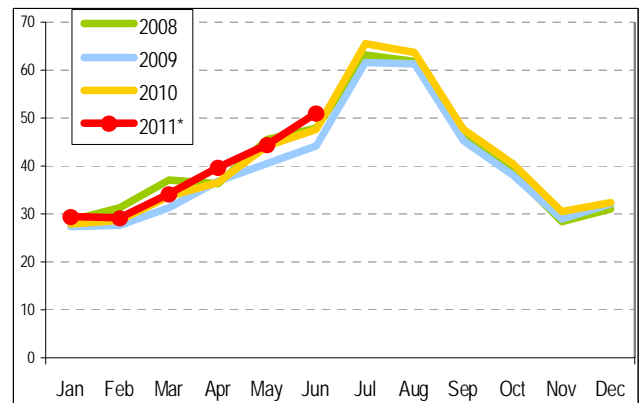


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

Advanced economies

(million)

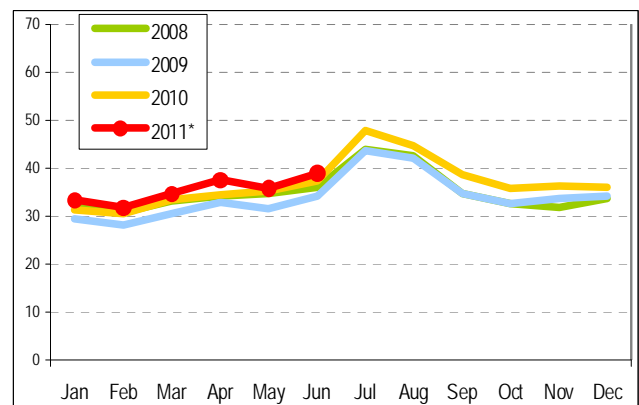


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

Emerging economies

(million)



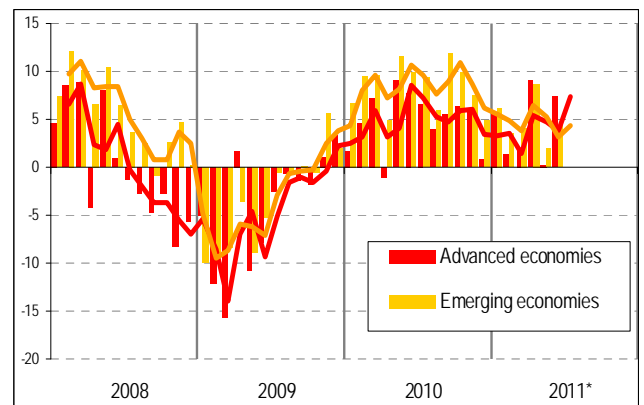
Source: World Tourism Organization (UNWTO) ©

- Growth in advanced economies (+4.3%) has maintained strength and is closing the gap with emerging economies (+4.8%), which have been driving international tourism growth in recent years. This trend reflects the decreases registered in the Middle East and North Africa, as well as a slight slowdown in the growth of some Asian destinations following a very strong 2010.
- All world (sub)regions showed positive trends with the exception of the Middle East and North Africa. Results were better than expected in Europe (+6%), boosted by the recovery of Northern Europe (+7%) and Central and Eastern Europe (+9%), and the temporary redistribution of travel to destinations in Southern and Mediterranean Europe (+7%) due to developments in North Africa (-13%) and the Middle East (-11%). Sub-Saharan Africa (+9%) continued to perform soundly.
- The Americas (+6%) was slightly above the world average, with remarkably strong results for South America (+15%). Asia and the Pacific grew at a comparatively slower pace of 5%, but this more than consolidates its 13% bumper growth of 2010.
- “The sustained growth registered in tourism demand in such challenging times clearly makes the case for the sector and reinforces our call to consider tourism as a priority in national policies. Tourism can play a key role in terms of economic growth and development, particularly at a moment when many economies, for the most part in Europe and North America, struggle for recovery and job creation”, said UNWTO Secretary-General, Taleb Rifai.
- Results from recent months show that destinations such as Egypt, Tunisia or Japan are seeing declines in demand clearly reverting. “We are very encouraged to see demand picking up in such important tourism destinations and call for a continued support to these countries which are today fully ready to receive travellers from all over the world”, added Mr. Rifai.

Continued growth amid increasing uncertainty

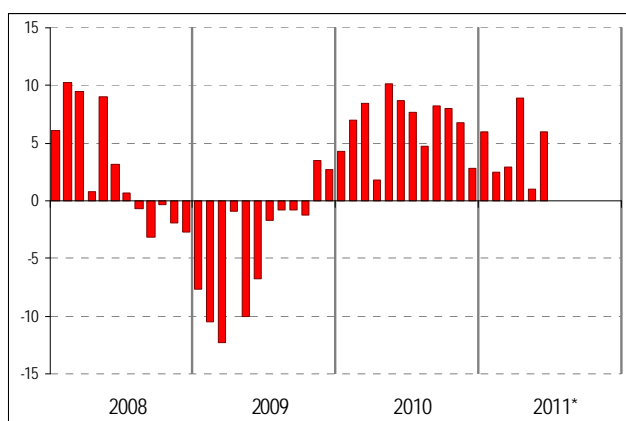
- So far, the growth of international tourism arrivals is very much in line with the initial forecast issued by UNWTO at the beginning of 2011, 4% to 5%, for the full year 2011, a rate slightly above the 4% long-term average.
- As international tourism receipts were more affected by the 2008-2009 crisis and recovered somewhat slower than arrivals in 2010, this year should also see their further improvement.
- Following an encouraging first half of 2011, growth in the remainder of the year is expected to soften somewhat as recent months have brought increased uncertainty, hampering business and consumer confidence.
- “We must remain cautious as the global economy is showing signs of increased volatility”, said Mr. Rifai. “Many advanced economies still face risks posed by weak growth, fiscal problems and persistently high unemployment. Simultaneously, signs of overheating have become apparent in some emerging economies. Restoring sustained and balanced economic growth remains a major task”.

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



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
World (% change)



Source: World Tourism Organization (UNWTO) ©

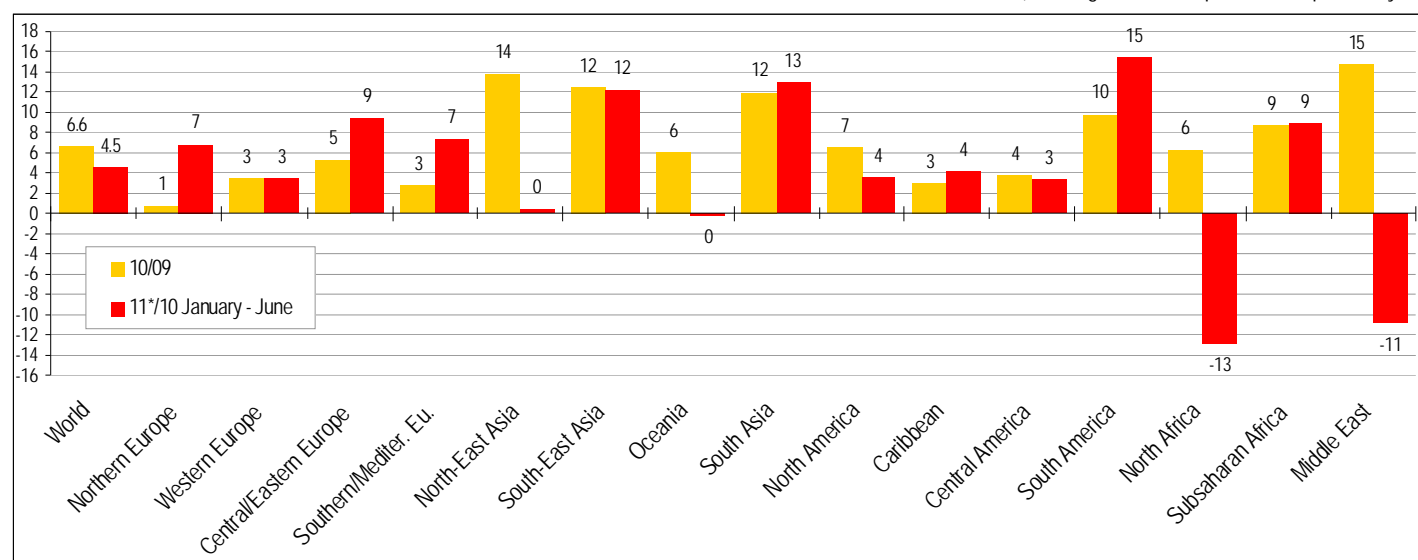
The detailed information in the Statistical Annex of this Interim Update of the *UNWTO World Tourism Barometer* is not included in the free excerpt of this document. The full document is available in electronic format for sale and free for UNWTO members and subscribed institutions through the UNWTO eLibrary 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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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	2008	2009	2010*	2010*	08/07	09/08	10*/09	2011*												
	(million)					(%)			(%)	YTD	Q1	Q2	Jan	Feb	Mar	Apr	May	Jun	Q1	Q2	Q3	Q4
World	674	797	916	881	940	100	2.1	-3.8	6.6	4.5	3.7	5.2	6.0	2.5	2.9	8.9	1.0	6.0	6.6	7.0	6.8	5.9
Advanced economies	417	453	495	474	498	53.0	-0.3	-4.3	5.1	4.3	2.8	5.4	5.7	1.3	1.7	9.1	0.2	7.3	4.6	5.6	5.3	4.4
Emerging economies	257	345	421	407	442	47.0	5.2	-3.2	8.4	4.8	4.6	4.9	6.2	3.6	4.1	8.7	1.9	4.3	8.6	8.7	8.8	7.3
<i>By UNWTO regions:</i>																						
Europe	385.1	438.7	484.4	460.9	475.8	50.6	0.5	-4.9	3.2	6.4	4.8	7.4	7.4	2.2	5.0	12.0	1.9	9.2	1.4	2.4	3.8	4.6
Northern Europe	43.7	57.3	60.8	57.7	58.1	6.2	-2.9	-5.1	0.8	6.8	4.7	8.2	3.0	2.7	8.0	14.1	4.4	7.6	-4.7	-1.7	3.9	3.5
Western Europe	139.7	141.7	153.2	148.6	153.7	16.4	-0.4	-3.0	3.4	3.4	3.1	3.6	7.3	-1.3	3.6	6.8	-5.3	9.5	2.2	3.9	4.0	2.7
Central/Eastern Eu.	69.3	87.5	100.0	90.2	95.0	10.1	3.6	-9.9	5.3	9.4	8.2	10.3	8.5	7.7	8.4	10.8	9.3	10.7	0.4	4.0	5.3	10.0
Southern/Mediterr. Eu.	132.5	152.3	170.4	164.4	169.0	18.0	0.8	-3.5	2.8	7.4	4.4	9.0	8.6	2.2	3.2	16.9	3.7	8.7	4.0	1.8	2.8	3.2
Asia and the Pacific	110.1	153.6	184.1	181.0	204.1	21.7	1.1	-1.7	12.8	5.1	4.4	5.8	5.8	6.6	1.0	5.9	4.3	7.0	13.4	15.8	14.0	8.5
North-East Asia	58.3	85.9	100.9	98.0	111.6	11.9	0.0	-2.9	13.8	0.4	0.9	-0.1	2.0	4.6	-3.2	0.0	-2.5	2.4	11.4	21.0	15.6	7.9
South-East Asia	36.1	48.5	61.8	62.1	69.9	7.4	3.5	0.5	12.5	12.2	9.1	15.6	10.4	9.3	7.7	14.6	16.5	15.6	17.0	10.2	13.5	9.6
Oceania	9.6	11.0	11.1	10.9	11.6	1.2	-0.9	-1.7	6.1	-0.2	-0.5	0.0	4.9	0.5	-6.5	4.7	-0.7	-4.2	6.5	4.0	8.7	4.9
South Asia	6.1	8.1	10.3	9.9	11.1	1.2	1.1	-3.6	11.9	12.9	11.7	14.5	12.8	13.4	8.7	21.4	11.5	10.7	18.0	10.2	7.7	11.1
Americas	128.2	133.3	148.0	140.7	149.7	15.9	2.7	-4.9	6.4	5.6	4.5	6.6	5.6	4.4	3.5	11.8	3.3	5.0	4.6	7.6	9.0	4.1
North America	91.5	89.9	97.7	92.1	98.1	10.4	2.6	-5.7	6.5	3.6	1.3	5.5	2.8	1.7	-0.4	10.7	2.3	3.9	3.9	9.7	8.6	3.2
Caribbean	17.1	18.8	20.0	19.5	20.1	2.1	1.0	-2.7	3.0	4.2	3.7	4.7	4.5	4.6	2.2	10.2	0.6	2.7	5.6	0.4	3.5	2.4
Central America	4.3	6.3	8.2	7.6	7.9	0.8	6.4	-7.4	3.8	3.3	2.1	4.8	5.0	4.6	-3.1	9.5	2.1	2.6	5.5	6.5	4.2	-0.7
South America	15.3	18.3	21.9	21.4	23.5	2.5	3.8	-2.3	9.8	15.4	15.6	15.2	13.9	11.5	22.3	19.6	11.7	14.2	5.6	5.8	18.6	10.4
Africa	26.5	35.4	44.4	46.0	49.6	5.3	2.7	3.7	7.8	1.3	1.8	0.8	5.3	3.1	-2.8	6.2	-3.4	-0.2	8.7	7.7	5.6	9.8
North Africa	10.2	13.9	17.1	17.6	18.7	2.0	4.8	2.5	6.2	-12.9	-13.1	-12.7	-9.1	-9.7	-19.1	-5.4	-22.0	-10.7	9.2	4.4	4.1	9.3
Subsaharan Africa	16.2	21.5	27.2	28.4	30.9	3.3	1.4	4.4	8.7	8.9	8.7	9.2	11.1	8.7	6.0	12.4	7.9	7.2	8.4	9.9	6.9	10.1
Middle East	24.1	36.3	55.2	52.9	60.7	6.5	21.2	-4.3	14.8	-10.8	-5.4	-15.7	0.3	-16.3	0.0	-5.4	-21.8	-21.4	19.8	19.3	16.2	6.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO August 2011)

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 published three times a year (in January, June and October). Each issue contains three regular sections: an overview of short-term tourism data from destination and 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.

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A comprehensive analysis of trends will be included in the next full version of the *UNWTO World Tourism Barometer* scheduled for October 2011.

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UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on major routes; a retrospective and prospective evaluation of current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The *UNWTO World Tourism Barometer* is periodically updated.

Available in English, French and Spanish in print and PDF version



Price: € 70 per year
(PDF version)
€ 100 (PDF and
print version)

Handbook on E-marketing for Tourism Destinations

This handbook is the first of its kind for tourism destinations. It is a practical 'how-to' manual designed to help staff at national, regional and city tourism organisations, to improve their e-marketing skills and manage new projects. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advices among others on how to build better content, get distribution of it, use CRM, succeed with online PR and get into mobile marketing. Web analytics, online research methods, and performance measurement get full treatment and new areas like digital television are covered. Also, it includes over 30 examples of e-marketing in action.

Available in English

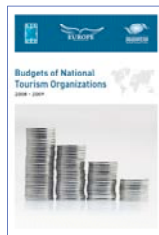


Published: 2008
Price: € 75

Budgets of National Tourism Organizations, 2008-2009

Budgets of National Tourism Organizations, 2008-2009 is a benchmarking reference tool on inbound tourism marketing. This ETC/UNWTO report compiles and analyses updated and comparable information on the budgets that NTOs allocate for the promotion of inbound tourism, as well as their structure, functions and activities, focusing on recent trends and developments. Given the increasing importance of e-marketing, the report also includes a special focus on the use of Information and Communication Technologies (ICT) by NTOs in international tourism promotion. The report covers 62 countries worldwide.

Available in English

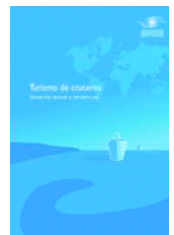


Published: 2010
Price: € 75

Cruise Tourism – Current Situation and Trends

Over the past years, worldwide demand for cruise tourism has posted some of the biggest gains within the tourism sector. The constant dynamism in cruise activity, as well as the increasing number of countries that include cruises, as a key product for their tourism development, has led to update and expand the first edition of the UNWTO study of 2003. This new study discusses subjects like the current supply and demand for cruises as well as its characteristics and trends. A new element includes the relationship between destinations and cruise lines, analysing key factors such as legislation, promotion and the economic impact of cruises through reference cases. It presents current trends in this industry in terms of innovation, safety and security, sustainability, and identifies the major lines that will shape the sector.

Available in English and Spanish

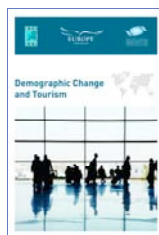


Published: 2008
Price: € 80

Demographic Change and Tourism

The structure of societies is continuously changing: The world population is forecast to grow to 8.3 billion in 2030, life expectancy is projected to increase in most of the world, households and families are becoming more diverse, and migration is changing the face of societies. All these changes will impact upon the types of tourists, where they originate from, where they travel to, the types of accommodation they require and the activities they engage in while travelling. The UNWTO/ETC Report on *Demographic Change and Tourism* aims to be a reference for destinations and the industry to achieve a better understanding of current and future changes and to anticipate and react upon them in the most competitive way. It includes a comprehensive analysis of major demographic trends and how these will impact on tourism in specific generating markets focusing on three major trends: Population growth and ageing, Household composition and travel parties, and Migration Branding.

Available in English



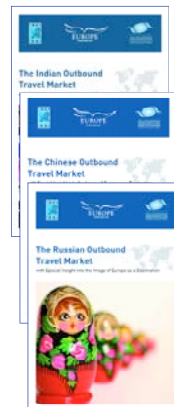
Published: 2010
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The Indian Outbound Travel Market, The Chinese Outbound Travel Market and The Russian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

The Indian, The Chinese and The Russian Outbound Travel Markets are some of the fastest growing, and consequently increasingly important markets in the world. As a result, the UNWTO and ETC have jointly published in-depth research studies focused on each unique market. The reports aim to provide the necessary information in order to better understand the structure and trends of these growing markets.

The outbound reports cover issues such as travellers' behaviour and patterns – destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the media or internet use trends.

Available in English



Published: 2008/2009
Price: € 75 each

Handbook on Tourism Destination Branding

All over, governments have become aware of tourism's power to boost their nation's development and prosperity. As more tourism destinations emerge and competition for visitors becomes more intense, a destination's ability to project itself on the world stage and differentiate itself from others is ever more important. Recognizing the value of successfully building and managing a destination's brand, the ETC and the UNWTO provide a useful and practical handbook for both marketing novices and experienced destination managers. Introduced by Simon Anholt, it offers a step-by-step guide to the branding process accompanied by strategies for brand management. Case studies illustrate the various concepts, present best practices from around the world and provide fresh insight into destination branding. It concludes with a section on evaluating brand impact and a set of practical recommendations.

Available in English



Published: 2009
Price: € 75

The Spanish Outbound Travel Market to Africa and the Middle East and Study on Chinese Outbound Travel to Africa

While other regions enjoy their fair share of the tourism cake, Africa only accounts for five percent of international tourist arrivals worldwide. One of the reasons for this low traffic to Africa could be insufficient knowledge about how to tap into markets, especially growing markets, such as the Chinese and Spanish one. As a result, the UNWTO has published two reports aimed at supporting African countries in benefitting from the growing Chinese and Spanish markets; by providing information linked to size, main characteristics, needs and expectations, as well as possible strategies for attracting Spanish and Chinese tourists to Africa.

Available in English



Published: 2011
Price: € 75 each

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