



International Tourist Arrivals back at 2008 pre-crisis peak level

Results through August 2010 prove that international tourism continues to recover from the decline of 4.2% suffered last year under the impact of the financial and economic crisis. In the first eight months of this year, the number of international tourist arrivals exceeded the record achieved during the same period of the pre-crisis year 2008. Based on monthly or quarterly data series available for 150 destination countries, the number of international tourist arrivals worldwide between January and August 2010 is estimated at 642 million. This is some 40 million more than in same months of 2009 (+7%) and one million more than in the same period of the record year 2008. Based on current trends, international tourist arrivals are projected to increase in the range of 5%-6% over the full year. In 2011, growth is expected to continue at a more moderate pace, at around the long-term average of 4%.

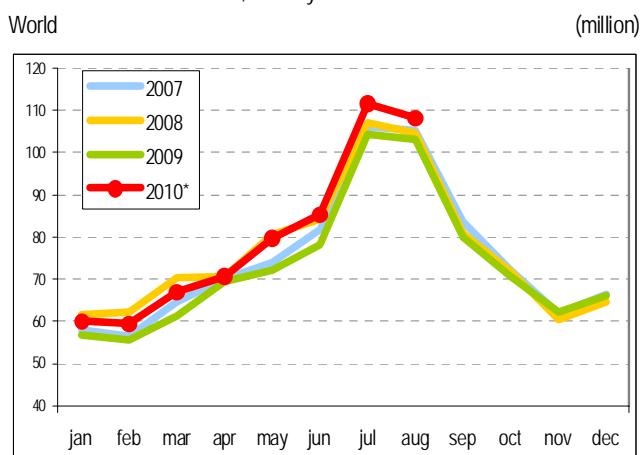
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UNWTO Panel of Tourism Experts *Sharp rise in business confidence*

The improved performance of the travel and tourism industry in the four months from May through August 2010, anticipated by UNWTO's Panel of Experts in the last issue of the Barometer, is firmly confirmed by the latest 'evaluation'. With an average score of 128, the overall rating has not been as positive since late 2007. The score is up 14 points on the evaluation given four months ago for the January through April period, and 9 points higher than the prospect expressed four months ago at the start of that period. Confidence has continued to rise as the year progressed, as confirmed by the rating of 129 given by the Panel for 'prospects' for September to December 2010. Prospects are up for the fifth consecutive time since the trough in January-April 2009. (Continued on page 16)

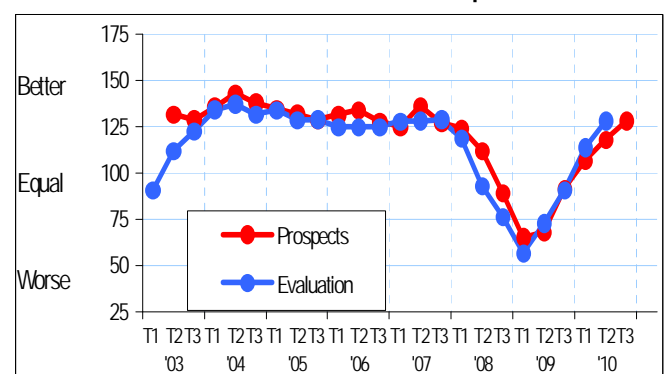
International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

July and August, the traditional high-season months of the Northern Hemisphere, clearly set new records, attracting respectively 112 million and 108 million international arrivals. These 220 million represented an extra 8 million arrivals over arrivals in the peak year 2008, and 12 million more compared with the crisis year 2009. (Continued on page 5)

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 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.

We welcome your comments and suggestions at barom@unwto.org, tel +34 915678206 / fax +34 915678217.

Explanation of abbreviations and signs used

* = provisional figure or data
 .. = figure or data not (yet) available
 | = change of series
 n/a = not applicable
 mn = million (1,000,000)
 bn = billion (1,000,000,000)

Q1: January, February, March T1: from January to April
 Q2: April, May, June T2: from May to August
 Q3: July, August, September T3: from September to December
 Q4: October, November, December

H1: from January to June
 H2: from July to December

YTD: Year to date, variation of months with data available compared with the same period of the previous year. The (sub)regional totals are approximations for the whole (sub)region based on trends for the countries with data available.

Series International Tourist Arrivals

TF: International tourist arrivals at frontiers (excluding same-day visitors);
 VF: International visitor arrivals at frontiers (tourists and same-day visitors);
 THS: International tourist arrivals at hotels and similar establishments;
 TCE: International tourist arrivals at collective tourism establishments;
 NHS: Nights of international tourists in hotels and similar establishments;
 NCE: Nights of international tourists in collective tourism establishments.

Series International Tourism Receipts and Expenditure

All percentages are derived from non-seasonally adjusted series in local currencies, unless otherwise indicated: \$: US\$; €: euro; sa: seasonally adjusted series.



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 161 countries and territories and more than 400 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain
 Tel (34) 91 567 81 00 / Fax (34) 91 571 37 33
barom@unwto.org

www.unwto.org

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The next full issue of the *UNWTO World Tourism Barometer* will be published mid January 2011 by the occasion of the Spanish tourism fair Fitur.

UNWTO World Tourism Barometer, October 2010

Quick overview of key trends

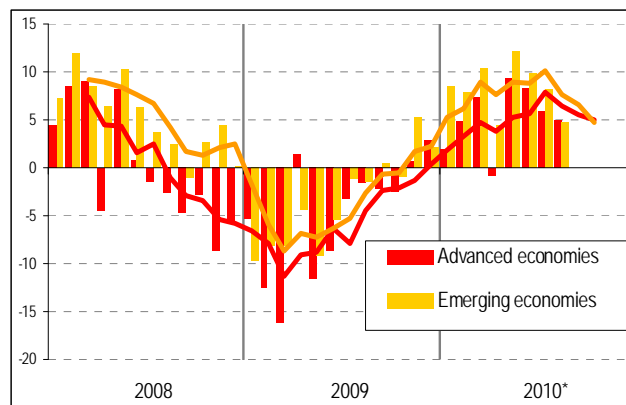
International tourism January-August 2010

- Worldwide, International Tourist Arrivals increased by 7% between January and August 2010, thus continuing the recovery trend started in the last quarter of 2009. Results are positive in all world regions, although emerging economies are leading the way, growing at a rate of 8% compared with 5% for advanced economies.
- Based on monthly or quarterly data for 150 destination countries, the number of International Tourist Arrivals worldwide in the first eight months of this year is estimated at 642 million, some 40 million up from the same period in 2009 and 1 extra million compared to pre-crisis peak year 2008.
- July and August, the traditional high-season months of the Northern Hemisphere, clearly set new records, attracting 220 million international arrivals, representing an extra 8 million arrivals over the peak year 2008, and 12 million more compared with the crisis year 2009.
- International Tourism Receipts show a similar trend to that of arrivals, but growing at a somewhat more moderate pace (+5% to +6%). This gap may be explained by persisting price competition, shorter stays and larger volumes of arrivals in value for money destinations.
- Emerging economies are leading with regard to the rebound of International Tourism Expenditure, with Brazil (+54%), the Russian Federation (+26%) and China (+22%) posting the strongest growth among the major spenders. Expenditure among the advanced economies has generally been restrained, but there has been a modest growth from the USA (+3%), Italy (+3%), Germany (+2%) and France (+2%), as well as a return in spending by Japanese on outbound tourism (+8%).
- All world regions showed positive results, but with different speeds of recovery:
 - Asia and the Pacific**, the region to have first shown signs of a rebound at the end of 2009, posted an impressive +14%. Compared with the pre-crisis year of 2008, the region has already gained an extra 10 million international tourist arrivals. Most destinations have registered double-digit growth rates, many even above 20%, showing once again resilience and a strong capacity for recovery.
 - Growth was also strong in the **Middle East** (+16%), although this was on a very depressed first eight months in 2009.
 - Africa** (+9%), the only region to show growth in 2009, maintained the momentum, further helped by the worldwide publicity created by the FIFA World Football Cup hosted by South Africa.
 - In the **Americas** (+8%), growth has been strong in North and Central America (+9% each). South America (+7%) is on a par with the worldwide average, while the Caribbean (+3%) is showing a lower rate of growth.

International Tourist Arrivals, monthly evolution

Advanced economies & Emerging economies

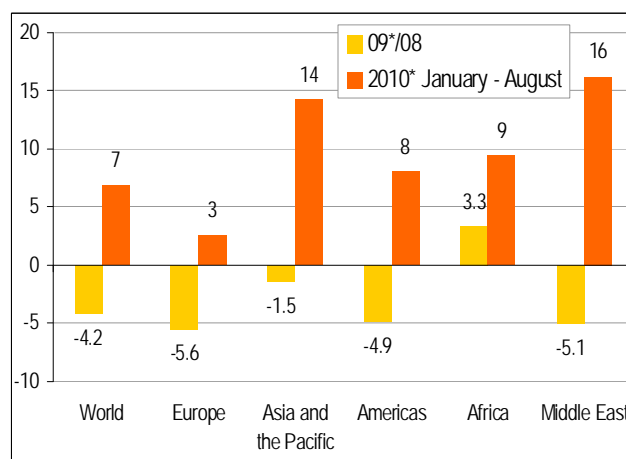
(% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

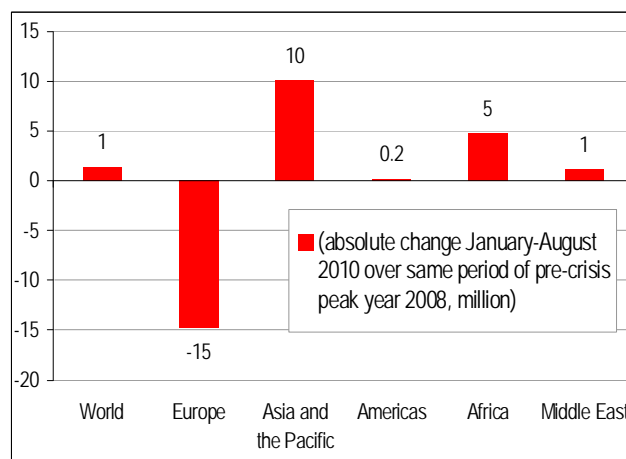
(% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

(change 2010/2008, million)

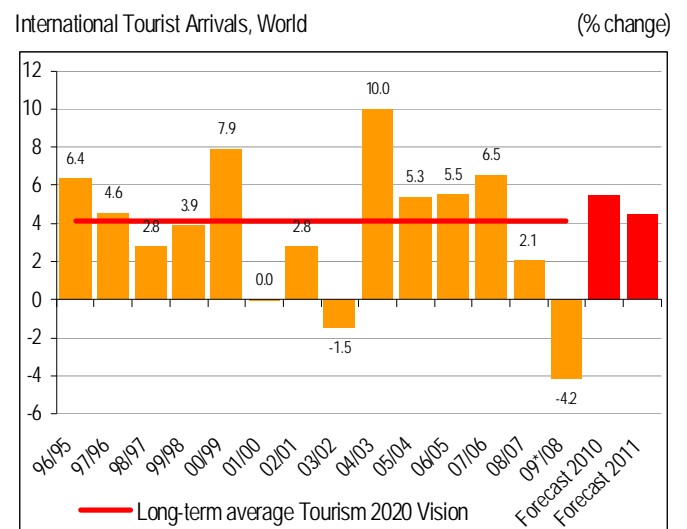


Source: World Tourism Organization (UNWTO) ©

- **Europe** (+3%) is recovering at a slower pace, due to the uneven economic recovery and the impact of the volcanic ash cloud in April. However, most destinations reported positive figures from May, in particular in Western Europe (+4%), Central and Eastern Europe (+4%) and Southern and Mediterranean Europe (+2%). Northern Europe (-3%) is the only sub-region in the world still registering negative results, pulling the average of the region down.
- The pace of recovery of international tourism is confirmed by air transport data. The International Air Transport Association (IATA) reported an 8% increase in passenger traffic on international scheduled routes, expressed in revenue passenger-km (RPK), for January through September. The recovery of international traffic demand is led by a strong return of business and long-haul travel. Airport Council International (ACI) reports a 7% growth in international passengers and 6% growth for domestic passengers for the world's airports through September.
- The hospitality industry continued to gather momentum, during the first eight months of the year, as reported by Deloitte based on STR Global data. Again, Asia and the Pacific led the growth, although none of the world regions is expected to return to 2008 peak performance.

Prospects for the full year 2010 and 2011

- The positive trend during 2010 is reflected in the steady rise of the UNWTO Tourism Confidence Index. Through the year the evaluation consistently exceeded prospects and confidence is now up to the level seen before the crisis in 2007. The rating of prospects for the period September-December has also further improved, and is up for the fifth consecutive period from the deep trough a year ago.
- Preliminary September data, available for some 50 countries, together with the air transport data, clearly point to another sound month.
- For the last quarter of the year the pace of growth is expected to slow down, as it compares with an already positive last quarter of 2009. The faster than expected recovery has led UNWTO to revise its forecast for international tourist arrivals for the full year 2010 at +5% to +6%, thus exceeding 2009's total by some 45 million to 50 million, and even improving on the record, pre-crisis 2008 count by 5 million to 10 million. By the end of the current year all regions are expected to have returned to real growth, with exception of Europe.
- In 2011, growth is expected to continue at a more moderate pace. The first assessment for 2011 points to an increase in international tourist arrivals worldwide in the range of 4% to 5%, somewhat above the long-term average of 4%.
- The two-speed economy in which we currently live, and which will last for the foreseeable future, favours emerging destinations, which will quickly gain market share of international tourist arrivals. Almost all of the members of Euromonitor's 'Millionaires Departure Club', that is countries generating an excess of 1 million new departures between 2009 and 2014, are emerging economies.
- Emerging destinations will continue to lead the growth, taking advantage of a far from exhausted demand from neighbouring countries. In domestic tourism the shift in power has already occurred, mostly thanks to China's, India's and Brazil's large domestic markets.
- Serious challenges remain, such as the return of financial stability, deficit-reduction policies and the central issue of unemployment, which almost exclusively affect advanced economies. A possible increase in the number of taxes on travel and tourism (a popular cash cow), and tougher visa restrictions would further contribute to dampening demand in the short and possibly longer term.
- Tourism has been seriously impacted by the global crisis, but less than other export sectors, proving to be one of the most dynamic economic sectors, and a key driver in creating so much needed growth and employment. The end of a turbulent period should be welcomed as the appropriate time to reflect on the critical issues highlighted by the crisis and to strengthen the resilience of the sector.



Source: World Tourism Organization (UNWTO) ©

Inbound Tourism: short-term trends 2010

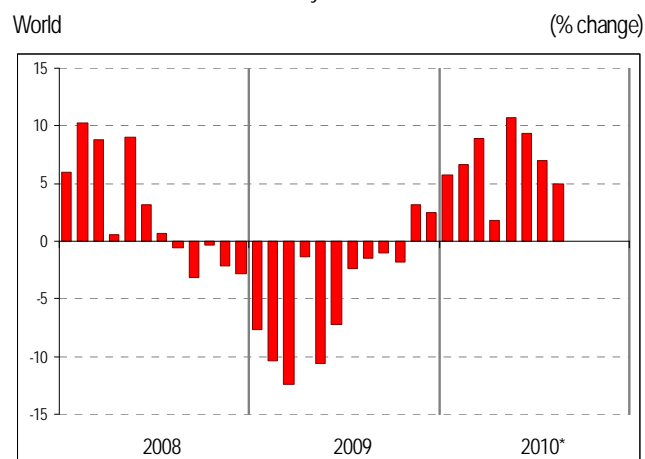
World

(Continued from page 1)

Worldwide, international tourist arrivals grew by 7% in the first eight months of 2010 compared to the same period of 2009. An analysis of monthly growth trends since the beginning of the year confirms that May was the best month (+11%), following a disappointing April (+2%) when demand was negatively affected by the suspension of flights due to the ash clouds from Iceland's erupting volcano. Since then, despite a slight slowdown in August (attributed in part to the impact of Ramadan), monthly growth rates have been well above the long-term average, confirming the resilience of the recovery. Of course it should be remembered that the first half of 2010 contrasts with the seriously negative trend during those same months a year earlier, while in the second half of 2009 recovery was already underway in many subregions (which means the base level for comparison was higher).

Results are positive in all world regions. Emerging economies however continue to lead the way, growing through August at a rate of 8% compared with 5% for advanced economies. Although recovery is still lagging in

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

parts of Europe and the Americas, many destinations are already showing real growth and setting new records.

Asia and the Pacific has once again shown resilience and a strong capacity for recovery. The region was caught quite early and suddenly by the economic crisis but was also the first to show signs of recovery, posting an impressive 14% growth in international arrivals through August 2010. Most destinations have registered double-digit growth rates, many even above 20%. Growth was

International Tourist Arrivals by (Sub)region

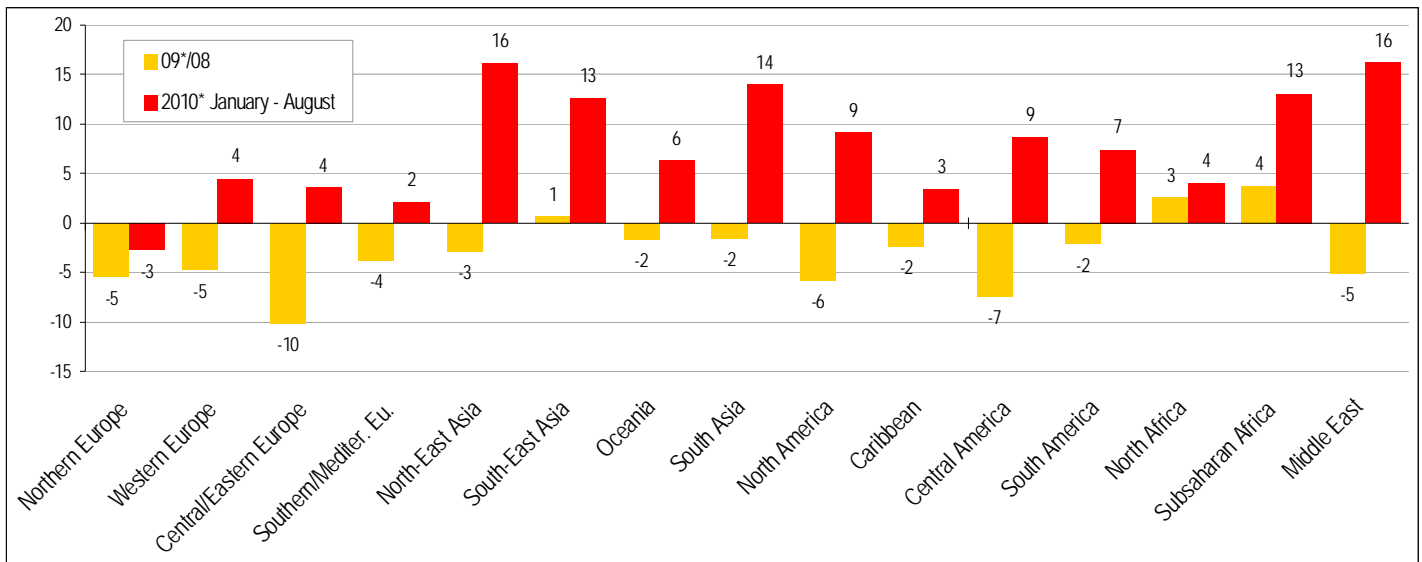
	Full year				Share	Change		Monthly or quarterly data series														
	2000	2005	2008	2009		2009	08/07	09/08	(percentage change over same period of the previous year)													
	(million)	(million)	(million)	(million)	(%)	(%)	(%)	2010*	2009													
								YTD	Q1	Q2	Mar	Apr	May	Jun	Jul	Aug	J.-J.	J.-D.	Q1	Q2	Q3	Q4
World	683	801	919	880	100	2.1	-4.2	6.8	7.1	7.4	8.9	1.8	10.7	9.3	7.0	5.0	-8.3	-0.6	-10.3	-6.7	-1.8	1.6
Advanced economies	423	451	495	470	53.4	-0.3	-4.9	5.4	4.9	5.9	7.3	-0.8	9.4	8.3	5.9	5.0	-9.0	-1.5	-11.8	-6.9	-2.4	0.1
Emerging economies	260	350	424	410	46.6	5.0	-3.3	8.1	8.9	8.8	10.3	4.4	12.2	9.9	8.2	4.8	-7.5	0.5	-9.0	-6.7	-1.1	3.0
<i>Europe</i>	392.2	439.9	486.3	459.3	52.2	0.5	-5.6	2.6	1.5	2.8	4.0	-2.5	5.8	4.2	3.2	2.8	-9.6	-2.3	-12.9	-7.4	-2.1	-2.7
Northern Europe	43.7	52.8	56.4	53.4	6.1	-2.9	-5.5	-2.7	-5.6	-3.6	-8.4	-11.4	1.1	-1.7	1.0	-0.7	-8.3	-3.0	-11.6	-5.9	-4.2	-0.7
Western Europe	139.7	141.7	153.2	146.0	16.6	-0.4	-4.7	4.5	3.1	5.4	9.0	1.7	7.9	5.9	5.2	3.6	-9.2	-1.1	-13.1	-6.3	-0.1	-3.1
Central/Eastern Eu.	69.3	87.5	100.0	89.9	10.2	3.5	-10.1	3.6	0.8	4.4	0.9	3.3	5.3	4.7	4.3	5.2	-13.5	-7.2	-14.4	-12.9	-6.6	-8.1
Southern/Mediterr. Eu.	139.5	158.0	176.7	170.0	19.3	0.7	-3.8	2.1	3.4	1.9	6.2	-6.3	5.8	4.3	1.6	2.0	-8.1	-0.4	-12.3	-5.9	-0.9	0.7
<i>Asia and the Pacific</i>	110.1	153.6	184.1	181.2	20.6	1.1	-1.5	14.2	13.0	15.3	13.5	8.8	18.2	20.0	17.7	11.3	-6.8	3.9	-7.5	-6.2	0.8	6.7
North-East Asia	58.3	86.0	101.0	98.1	11.1	0.0	-2.9	16.1	11.4	21.0	13.7	11.1	26.1	28.1	20.2	12.1	-7.5	1.8	-7.6	-7.5	-0.5	4.1
South-East Asia	36.1	48.5	61.8	62.2	7.1	3.5	0.6	12.6	16.1	8.6	13.4	7.5	7.7	10.6	16.4	9.8	-6.2	7.8	-7.0	-5.3	3.7	11.8
Oceania	9.6	11.0	11.1	10.9	1.2	-0.9	-1.7	6.3	6.5	3.9	8.4	-3.7	3.6	13.5	9.7	8.4	-4.7	1.1	-5.7	-3.1	-0.8	2.8
South Asia	6.1	8.1	10.3	10.1	1.1	1.1	-1.5	13.9	17.0	11.5	18.2	4.4	18.4	12.4	10.8	14.4	-6.2	5.3	-11.6	-0.2	-1.1	7.3
<i>Americas</i>	128.9	134.0	147.8	140.6	16.0	2.7	-4.9	8.0	5.3	8.3	8.8	-0.1	14.3	11.6	10.5	11.4	-7.2	-2.6	-7.0	-7.3	-5.8	1.3
North America	91.5	89.9	97.7	92.1	10.5	2.6	-5.8	9.1	4.8	10.4	8.9	0.2	17.8	14.1	11.1	12.9	-8.7	-3.2	-7.7	-9.6	-5.7	0.1
Caribbean	17.1	18.8	20.0	19.6	2.2	0.9	-2.3	3.4	5.7	1.0	10.3	-0.4	0.9	2.6	4.1	2.4	-5.6	1.5	-8.2	-2.3	0.2	2.9
Central America	4.3	6.3	8.2	7.6	0.9	6.4	-7.4	8.7	7.0	9.6	12.4	-1.0	18.7	13.7	10.3	10.2	-8.8	-5.9	-7.0	-10.9	-8.4	-3.5
South America	15.9	19.0	21.8	21.3	2.4	3.9	-2.1	7.4	5.8	5.5	5.8	-0.9	10.4	7.9	14.7	12.5	-2.0	-2.2	-3.8	2.0	-10.5	7.0
<i>Africa</i>	26.5	35.4	44.5	46.0	5.2	2.8	3.3	9.4	8.7	11.6	8.5	1.6	11.6	21.3	10.4	4.6	7.1	0.3	1.3	7.9	3.8	4.4
North Africa	10.2	13.9	17.1	17.6	2.0	4.8	2.5	4.0	9.3	4.4	11.2	-5.5	8.8	9.2	5.3	-6.4	5.3	0.6	2.2	7.5	-1.6	4.4
Subsaharan Africa	16.3	21.5	27.4	28.4	3.2	1.5	3.8	13.1	8.5	16.4	7.2	5.9	13.4	30.7	16.3	13.5	8.1	0.2	0.9	8.2	8.9	4.4
<i>Middle East</i>	24.9	37.8	55.9	53.0	6.0	19.2	-5.1	16.2	25.6	18.8	24.5	16.4	25.8	14.8	9.7	-4.6	-16.1	6.1	-20.4	-10.8	0.3	10.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO October 2010)

International Tourist Arrivals

(% change over same period of the previous year)



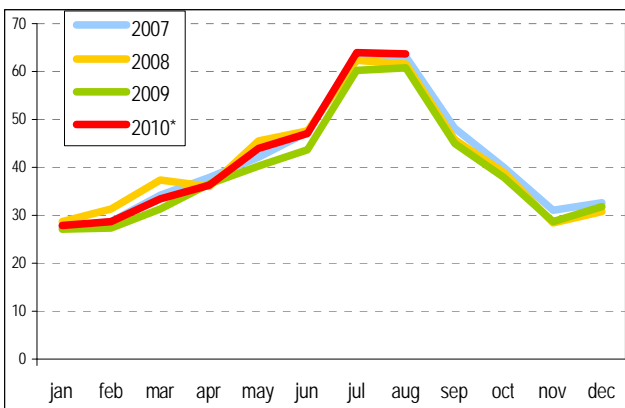
Source: World Tourism Organization (UNWTO) ©

strong in North and Central America (+9% each). South America (+7%) is on a par with the worldwide average, while the Caribbean (+3%) is showing the lowest rate. Europe (+3%) is recovering at a slower pace, due to the uneven economic recovery and the impact of the closure of European airspace because of the volcanic ash cloud in April. However, most destinations reported positive figures for the period May to August, in particular in Western Europe (+4%), Central and Eastern Europe (+4%) and Southern and Mediterranean Europe (+2%). Northern Europe (-3%) is the only sub-region in the world still registering negative results, pulling the average for the region down.

International Tourist Arrivals, monthly evolution

Advanced economies

(million)



Source: World Tourism Organization (UNWTO) ©

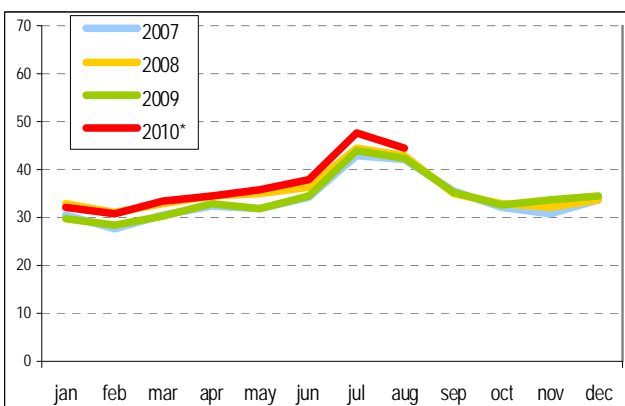
Growth compared to pre-crisis peak year 2008

The return to growth in 2010, in contrast to the depressed base of the same months of 2009 that represented the worst of the economic crisis (in which arrivals declined by -6% through August), needs of course to be viewed with caution. While many destinations are already recording new peak figures showing real growth, recovery is still lagging in parts of Europe and the Americas. Compared to the same period of the pre-crisis peak year 2008, Asia and the Pacific has already gained an extra 10 million international tourist arrivals through August (+8%). Africa has increased its numbers by almost 5 million (+16%) and the Middle East by just over 1 million (+4%). The Americas is currently at the same level as it was in 2008 (0%), while Europe is still showing a deficit of 15 million (-4%).

International Tourist Arrivals, monthly evolution

Emerging economies

(million)



Source: World Tourism Organization (UNWTO) ©

also strong in the Middle East (+16%), although this was on a very depressed first eight months in 2009. Africa (+9%), the only region to achieve growth in 2009, maintained its momentum, further helped by the worldwide publicity created by the FIFA World Football Cup hosted by South Africa. In the Americas (+8%), growth has been

Tourism Receipts and Expenditure still lagging behind

Most countries have so far only reported receipts and expenditure data for the first half of 2010. As is generally the trend in recovery periods, international tourism receipts

continue to lag somewhat behind arrivals in many destinations. The same trend is observed in tourism expenditure from the major source markets. Following major shocks, volume (arrivals) tends to recover faster than income (receipts), as competition is tougher and suppliers try hard to contain prices, and travellers tend to travel closer to home, for shorter periods of time, and seek to value for money. Despite the resilience of the travel and tourism industry, many stakeholders are still hurting from the past two years and are doing little but keep the hatches battened down, keeping costs low, and focusing only on business offering the best returns.

Among the top ten markets, in terms of expenditure abroad, positive but modest increases have come from traditional source markets, particularly from Germany (+1.5%), the USA (+2.5%), France (+2%), Italy (+3%) and Japan (+8%). As in recent years, emerging economies are driving the market's growth and showing strong increases in tourism expenditure abroad, most notably China (+22%), the Russia Federation (+26%) and Brazil (+54%).

Outlook for the full year 2010 and 2011

As on previous occasions, such as after the 9/11 attacks in 2001 and the SARS outbreak in 2003, tourism has again confirmed a strong capacity for recovery. Following a decline of 4% in international tourist arrivals in 2009, the sector is showing real growth and is expected to beat previous records by the end of 2010.

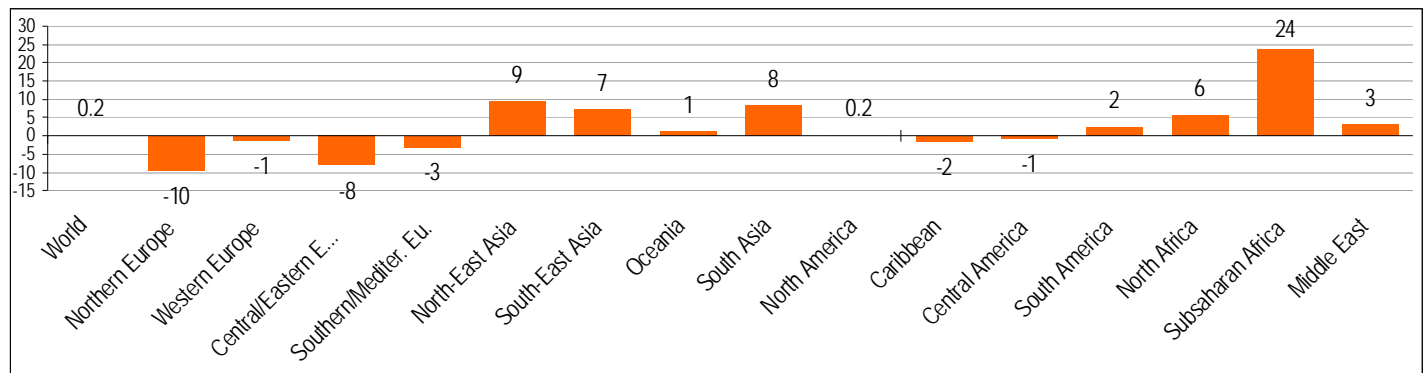
The positive trend during 2010 is reflected in the steady rise of the UNWTO Tourism Confidence Index. A clear majority of the members of the UNWTO Panel of Experts evaluated the past eight months of 2010 as “better” or “much better”. Through the year the evaluation (of recent months) consistently exceeded prospects (for the same months, as given four months earlier) and confidence is now up to the level seen before the crisis in 2007. The rating of prospects for the period September-December has also further improved, and is up for the fifth consecutive period from the deep trough a year ago.

So far the rebound in arrivals numbers has turned out to be stronger than initially anticipated. In a normal year, international tourist arrivals in the first eight months of the year usually account for about 70% of the yearly total. The 50 countries that have already reported September data, together with the air transport data, clearly point to another sound month. For the last quarter of the year the pace of growth is expected to slow down, as it compares with an already positive last quarter of 2009. Based on the current trend, international tourist arrivals are projected to increase by 5%-6% for the full year of 2010, thus exceeding 2009's total by some 45 million to 50 million, and even improving on the record, pre-crisis 2008 count by 5 million to 10 million.

In 2011, growth is expected to continue at a gradually more moderate pace. The first assessment for 2011 points to an increase in international tourist arrivals worldwide in the range of 4% to 5%, somewhat above the long-term average of 4%. (See further page 15)

International Tourist Arrivals

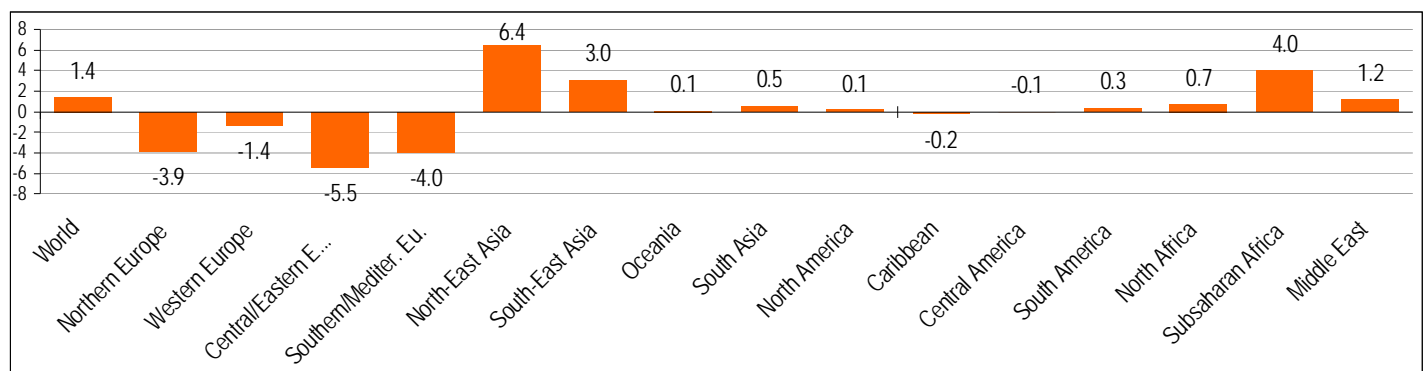
(% change January-August 2010 over same period of pre-crisis peak year 2008)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

(absolute change January-August 2010 over same period of pre-crisis peak year 2008, million)



Source: World Tourism Organization (UNWTO) ©

Risks, challenges and opportunities

The marked variation in trends from one region to another reflects the fact – as highlighted by the International Monetary Fund's (IMF's) most recent update – that the world has moved into a two-speed economy, and this is the world in which we can expect to live for the foreseeable future. According to the most recent forecasts, the IMF expects GDP growth of 2.7% this year for the advanced economies, while the emerging economies are projected to grow by 7.1%. The respective forecasts for annual growth in 2011-15 are 2% and 6% respectively.

There is little doubt that tourism growth, like economic growth generally, will in future be driven by the emerging economies, and especially the BRICs – Brazil, Russia, India and China. The advanced economies, which still account for two thirds of the world's production, cannot be bailed out by the emerging markets. And tourism demand from the advanced economies is bound to be influenced by factors such as unemployment, rising interest rates (which some expect around the corner) and the general economic uncertainties.

As previously stressed by UNWTO, there are risk factors which could affect the pace of the sector's recovery in many advanced economies, notably budget constraints to balance public deficits in main source markets and the central issue of unemployment. At a time when another shot of public sector support might be needed to stimulate economic growth and job creation, key economies are heading fast in the other direction – ie moving towards balanced budgets.

We are also likely to see a growing number of taxes on travel and tourism (it is an increasingly popular cash cow), and tougher visa restrictions (in the name of security) – both of which will contribute to dampening demand in the short and possibly longer term. In spite of tourism's proven contribution to the economy, there has been an increased temptation to introduce and increase taxation on travel, particularly on air transport. These impediments seriously affect tourism's capacity to generate jobs and stimulate economic growth, namely through export earnings that are crucial to a stable economic recovery.

Unemployment remains high in most of Europe and North America and civil unrest is growing, with strikes across Europe as unions and public sector workers try to resist budgetary policies that will be aimed at their benefits, but which are necessary if state budgets are to be more balanced. Just recently, the International Labour Organization (ILO) warned that the job crisis is set to continue through 2015. The latest figures highlight tourism as one of the most promising sectors to contribute to the unemployment challenge, considering that job creation in tourism tends to outgrow that of other sectors.

Apart from external economic and social conditions, the tourism sector faces many internal challenges in adjusting business models to the future. While advanced

economies still hold the larger share of arrivals, the different pace of recovery favours emerging destinations, which will quickly gain market share. An increasing part of new tourism demand is also being generated in emerging economies, which represent appealing markets, for long-haul as well as for short- and medium-haul travel. Innovation and diversification are the factors modifying the dynamics of the competitive environment. The first is required to catch the attention of visitors, and the latter to cope with geographically and culturally dispersed demand. In some economies, as for instance Germany, these factors seem to be able to reduce the longer-term impacts of crises such as the one just experienced.

Most importantly, for those stakeholders who have not yet done so, it is necessary to prepare for a new decade in which the demographics are changing, affecting not just tourism demand, but also behaviour patterns. Tourism products and experiences will change and new ways of communicating with customers will need to be found, adopting new technologies to make travel more accessible in the global marketplace. Consumers will also demand technologies that take the hassle out of travel – through paperless check-in, online visa applications, mobile maps, social networks, virtual 3D tours, blogs and podcasts. All of this, of course, does not mean that more conventional sources of expert information should be neglected, and the role of traditional travel agents in providing customer service remains important, but it does point to a need to be flexible as we move with the times.

Finally, industry will have to change the way it does business in a carbon-constrained world – an important driver of competitiveness in the future. Industry will be faced with consumers (and very likely shareholders) insisting on ecologically responsible behaviour. On the whole a much tighter regulatory framework on green economy issues can be expected.

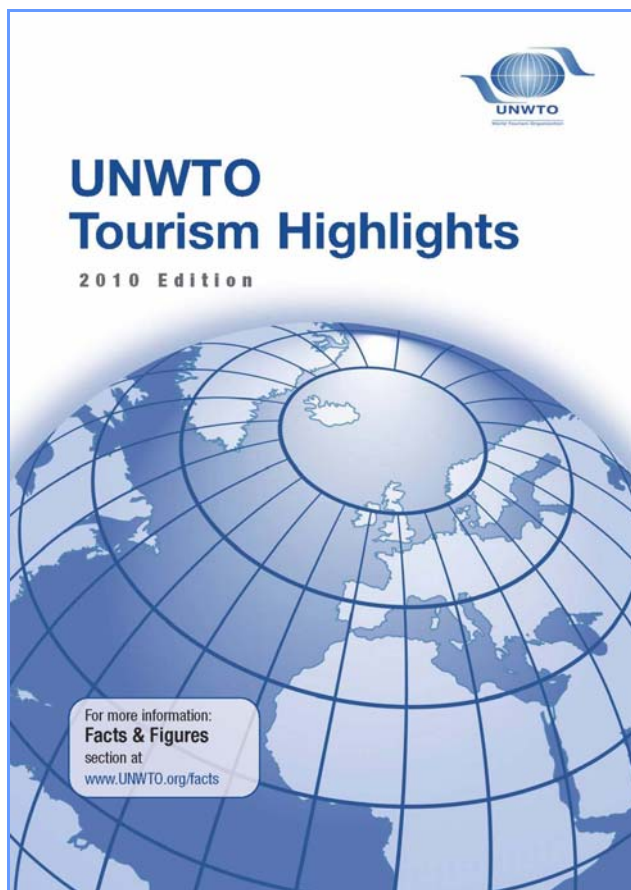
Tourism has been seriously affected by the global crisis, but less than other export sectors, and it is rebounding more quickly and more strongly. Current results reinforce the message that UNWTO has been underscoring since the outbreak of the global crisis at the end of 2008 – that tourism is one of the most dynamic economic sectors and a key driver in creating much needed growth and employment. UNWTO calls upon governments worldwide, as well as multilateral forums such as the G-20, to place tourism higher on their agendas as the sector can contribute to our common objectives of sustaining recovery, regaining jobs and promoting sustainable development.

Detailed results for arrivals and receipts by country are included in the 'Regions' section (pages 19-41).

UNWTO Tourism Highlights, 2010 Edition

On the occasion of World Tourism Day, held annually on 27 September, UNWTO released its updated overview of basic tourism facts and figures in its *UNWTO Tourism Highlights, 2010 Edition*.

In 2010, the 31st World Tourism Day is celebrated under the theme Tourism and Biodiversity in Guangzhou, Guangdong Province, China (see www.unwto.org/worldtourismday).



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 *2010 Edition* presents in 12 pages a snapshot of international tourism in the world for 2009 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>.

The detailed information in the continuation of the *UNWTO World Tourism Barometer*, is not included in the free extract 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.

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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 updated in January, June and October.

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



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, and sustainability, and identifies the major lines that will shape the sector.

Available in English and Spanish



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; Migration.

Available in English



The Indian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

India is one of the fastest-growing outbound travel markets in the world. Trips abroad have grown from 3.7 (1997) to 9.8 million (2007) and international tourism expenditure has increased from US\$ 1.3 (1997) to US\$ 8.2 billion (2008). With more than 1.1 billion inhabitants and GDP increasing by more than 8% every year, the country offers enormous potential for future growth in outbound travel. Recognizing the importance of this market, the ETC and the UNWTO have undertaken detailed research on the Indian outbound market. This publication covers 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. The report also sets out recommendations on how to best promote a destination in the Indian market.

Available in English



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



The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination

China is one of the fastest growing outbound markets in the world. Rising incomes and relaxation of restrictions on foreign travel led to a growth of 22% a year in trips abroad since 2000 (34.5 million in 2006). China ranks 5th worldwide in terms of spending on international tourism (US\$ 30 billion in 2007). In 1995, the World Tourism Organization (UNWTO) predicted that China would generate 100 million arrivals worldwide by 2020, making it the fourth largest market in the world (Tourism 2020 Vision). In view of recent trends, China may reach that target well before 2020. To better understand the structure and trends of this market is the aim of the new ETC/UNWTO report *The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination*.

Available in English



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.

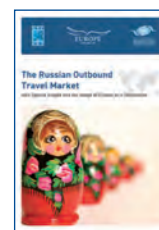
Available in English



The Russian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

Russia is the 9th biggest outbound travel market in the world, generating in 2007 US\$ 22 billion in spending abroad. To better understand the structure and trends of this growing market is the aim of this ETC/UNWTO report, which identifies key trends in the Russian outbound travel – among others, the market size and value, growth in trip volume and spending, purpose of trip, destination choice, the role of the travel trade and online distribution. In addition, the publication provides information on government policy affecting outbound travel, notably visa issues and traffic rights for foreign airlines operating to/from the country. All this information is critical to helping destinations and commercial operators plan ahead with greater foresight, providing guidance on the short term opportunities and the longer-term potential for investment in this market.

Available in English



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 154 countries, 7 territories, 2 permanent observers 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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