2011 International Tourism Results and Prospects for 2012
Agenda Item 5b

24th Joint Meeting of the UNWTO Commission for East Asia and the Pacific and the Commission for South Asia

4 May 2012
Chiang Mai, Thailand
Inbound tourism: World 2011

International tourist arrivals, 1995-2011* (million)

International tourist arrivals (million)

International tourism receipts (US$ billion)

Source: World Tourism Organization (UNWTO)
International Tourist Arrivals, monthly evolution

World (% change)

Source: World Tourism Organization (UNWTO) ©

V-shape decline of 15 consecutive months of negative growth

+2.1% -3.8% +6.5% +4.6%

Source: World Tourism Organization (UNWTO) ©
International Tourist Arrivals, monthly evolution
World

Source: World Tourism Organization (UNWTO) ©
Emerging destinations suffered less in the crisis and recovered quicker.
International Tourism Arrivals and Receipts, World

growth in receipts follows growth in arrivals closely

Asian financial and economic crisis: receipts grew slower

11S, SARS, economic downturn: receipts more affected

‘Great recession’: receipts more affected and slower to recover

Source: World Tourism Organization (UNWTO)
Asia and the Pacific 2011
Inbound tourism: Asia and the Pacific 2011

International tourist arrivals, 1995-2011* (million)

US$ 289 bn

217 mn

Source: World Tourism Organization (UNWTO)
International Tourism Arrivals and Receipts, Europe

growth in receipts follows growth in arrivals closely

Source: World Tourism Organization (UNWTO)
International Tourist arrivals

- Asia and the Pacific: 217 mn, 22%
- Americas: 156 mn, 16%
- Africa: 50 mn, 5%
- Middle East: 55 mn, 6%
- Africa: 33 bn, 3%
- Middle East: 45 bn, 4%
- Americas: 200 bn, 19%
- Europe: 504 mn, 51%
- Europe: 463 bn, 45%

International Tourism Receipts

- Asia and the Pacific: 289 bn, 28%
- Americas: 156 mn, 16%
- Africa: 50 mn, 5%
- Middle East: 55 mn, 6%
- Africa: 33 bn, 3%
- Middle East: 45 bn, 4%
- Americas: 200 bn, 19%
- Europe: 504 mn, 51%
- Europe: 463 bn, 45%
International Tourist Arrivals, monthly evolution
Asia and the Pacific (% change)

Source: World Tourism Organization (UNWTO) ©
Inbound tourism: Asia and the Pacific 2011
Healthy growth in all sub regions

Source: World Tourism Organization (UNWTO)
International Tourist Arrivals, monthly evolution (million) Asia and the Pacific

Source: World Tourism Organization (UNWTO) ©

2011: 217 mn
2010: 204 mn => 2011: +13 mn
Inbound tourism: Asia and the Pacific 2011
Healthy growth in all sub regions

International tourism receipts, 1995-2011* (euro billion)

- North-East Asia
- South-East Asia
- Oceania
- South Asia

Source: World Tourism Organization (UNWTO)
2011 Gains and Losses
### International Tourist Arrivals (% change over same period of the previous year)

<table>
<thead>
<tr>
<th>Region</th>
<th>2010-2011</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>6.4</td>
<td>4.5</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>4.5</td>
<td>3.3</td>
</tr>
<tr>
<td>Western Europe</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Central/Eastern Europe</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Southern/Mediterranean Eu.</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>North-East Asia</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>South-East Asia</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>Oceania</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>South Asia</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>North America</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Caribbean</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Central America</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>South America</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>North Africa</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Subsaharan Africa</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Middle East</td>
<td>-10</td>
<td>-8</td>
</tr>
</tbody>
</table>

**Source:** World Tourism Organization (UNWTO) ©
increase 43 million arrivals in 2011: by region

Source: World Tourism Organization (UNWTO) ©
International Tourism Expenditure
(% change of same period year before, local currencies current prices)

Major outbound markets

- Germany
- United States
- China
- United Kingdom
- France
- Canada
- Russian Federation
- Italy
- Japan
- Australia
- Belgium
- Brazil
- Singapore
- Saudi Arabia
- Netherlands
- Korea, Republic of
- Hong Kong (China)
- Spain
- Norway
- Sweden
- India
Confidence weakening but still positive

UNWTO Panel of Tourism Experts

abs. number (n=347)

Source: World Tourism Organization (UNWTO) ©
Confidence weakening but still positive

UNWTO Panel of Tourism Experts: World

Prospects (before)
Evaluation (after)

Source: World Tourism Organization (UNWTO) ©
Confidence in emerging economies much stronger than in advanced economies

UNWTO Panel of Tourism Experts: Emerging economies

UNWTO Panel of Tourism Experts: Advanced economies
Confidence weakening but still positive

UNWTO Panel of Tourism Experts: World

Prospects (before) vs. Evaluation (after)

Source: World Tourism Organization (UNWTO) ©
Confidence in emerging economies much stronger than in advanced economies

UNWTO Panel of Tourism Experts: Emerging economies

Prospects (before)
Evaluation (after)

UNWTO Panel of Tourism Experts: Advanced economies

Prospects (before)
Evaluation (after)
Asia and the Pacific confidence somewhat lower than in previous years

Source: World Tourism Organization (UNWTO) ©
UNWTO Panel of Tourism Experts: Asia and the Pacific

Better

Equal

Worse

Source: World Tourism Organization (UNWTO) ©

…but on the rise again
Outlook: World

International tourist arrivals

Forecast
2012: 3% to 4%

Source: World Tourism Organization (UNWTO)
Outlook: Asia and the Pacific

International tourist arrivals

Forecast
2012: 4% to 6%

Source: World Tourism Organization (UNWTO)
Outlook 2012
by region
## International tourism: projection full year 2012

<table>
<thead>
<tr>
<th>Region</th>
<th>2011</th>
<th>Projection 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+4.4%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>+6.0%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+5.6%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Americas</td>
<td>+4.2%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Africa</td>
<td>+0.0%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-8.0%</td>
<td>+0% to +5%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Thank you!

World Tourism Organization (UNWTO)

www.unwto.org