2011 International Tourism Results and Prospects for 2012

53rd Meeting of the UNWTO Commission for Africa
25 June 2012
Calabar, Nigeria
World 2011
Results 2011

International Tourist Arrivals
983 million
+4.6%

International Tourism Receipts
US$ 1,030 billion (euro 740 bn)
+3.9% (real terms)

www.unwto.org/facts
Inbound tourism: World

International tourist arrivals, 1995-2011* (million)

International tourist arrivals (million)

International tourism receipts (US$ billion)

Source: World Tourism Organization (UNWTO)
V-shape decline of 15 consecutive months of negative growth

Still to be updated with 4 month data 2012

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

World (million)

2011: 982 mn => 2011: +43 mn

Still to be updated with 4 month data 2012

Source: World Tourism Organization (UNWTO) ©
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)
Inbound tourism: Africa 2011

International tourist arrivals, 1995-2011* (million)

- International tourist arrivals (million)
- International tourism receipts (US$ billion)

Source: World Tourism Organization (UNWTO)
Share 2011 by region

International Tourist arrivals

Asia and the Pacific, 217 mn, 22%
Europe, 504 mn, 51%
Americas, 156 mn, 16%
Africa, 50 mn, 5%
Middle East, 55 mn, 6%

International Tourism Receipts

Europe, 463 bn, 45%
Asia and the Pacific, 289 bn, 28%
Americas, 199 bn, 19%
Africa, 33 bn, 3%
Middle East, 46 bn, 4%
Still to be updated with 4 month data 2012

2008 2009 2010 2011 2012*

+0.5% +5.1% +8.5% +0.9% +7.4%
International Tourist Arrivals, monthly evolution

Africa (million)

Source: World Tourism Organization (UNWTO) ©

Still to be updated with 4 month data 2012
Emerging destinations suffered less in the crisis and recovered quicker.

Still to be updated with 4 month data 2012

Source: World Tourism Organization (UNWTO) ©
Africa 2011 Inbound tourism
Growth in South offset by North

International tourist arrivals, 1995-2011* (million)

Source: World Tourism Organization (UNWTO)
Africa 2011 Inbound tourism Growth in South offset by North

Source: World Tourism Organization (UNWTO)
Receipts by destination

Africa

2011: US$ 33 billion
Top 20: 92%
Other 32 destinations: 8%

Source: UNWTO
2011 gains and losses
2010 and 2011 by subregion

International Tourist Arrivals (% change over same period of the previous year)

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

Source: World Tourism Organization (UNWTO) ©
Major outbound markets
BRICs are hot

International Tourism Expenditure
(% change of same period year before, local currencies current prices)
UNWTO Tourism Confidence Index
Confidence weakening but still positive

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

Better

Equal

Worse

Still to be updated with 4 month data 2012

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

Still to be updated with 4 month data 2012
Africa confidence on high level

UNWTO Panel of Tourism Experts: Africa

Better

Equal

Worse

Source: World Tourism Organization (UNWTO) ©
Africa confidence on high level

UNWTO Panel of Tourism Experts: Africa

Still to be updated with 4 month data 2012

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

**Source:** World Tourism Organization (UNWTO) ©

<table>
<thead>
<tr>
<th>Subregion</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>-8</td>
<td>-9</td>
</tr>
<tr>
<td>Northern Europe</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Western Europe</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Central/Eastern Europe</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Southern/Mediterranean Eu.</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>North-East Asia</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>South-East Asia</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Oceania</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
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<td>8</td>
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<tr>
<td>North America</td>
<td>10</td>
<td>10</td>
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<tr>
<td>Caribbean</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Central America</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>South America</td>
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<td>8</td>
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<td>North Africa</td>
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<tr>
<td>Subsaharan Africa</td>
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<td>7</td>
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<tr>
<td>Middle East</td>
<td>5</td>
<td>0</td>
</tr>
</tbody>
</table>

**Still to be updated with 4 month data 2012**
International tourist arrivals

2000 7.9
2001 2.9
2002 -0.1
2003 -1.6
2004 10.3
2005 5.9
2006 6.0
2007 6.5
2008 2.1
2009 -3.9
2010 6.4
2011 4.6
2012* 3% to 4%

Forecast

Source: World Tourism Organization (UNWTO)
Outlook: Africa

International tourist arrivals

<table>
<thead>
<tr>
<th>Year</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>4.9</td>
</tr>
<tr>
<td>2001</td>
<td>3.4</td>
</tr>
<tr>
<td>2002</td>
<td>3.1</td>
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<tr>
<td>2003</td>
<td>5.7</td>
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<td>2004</td>
<td>9.5</td>
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<tr>
<td>2005</td>
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<td>2007</td>
<td>9.9</td>
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<td>2008</td>
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<td>2009</td>
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<td>2010</td>
<td>8.5</td>
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<tr>
<td>2011</td>
<td>0.9</td>
</tr>
<tr>
<td>2012*</td>
<td>0.9</td>
</tr>
</tbody>
</table>

Forecast
2012: 4% to 6%

Source: World Tourism Organization (UNWTO)
Outlook 2012 by region
<table>
<thead>
<tr>
<th>Region</th>
<th>2011</th>
<th>Projection 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+4.6%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>+6.1%</td>
<td>+2% to +4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+6.1%</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>+0.8%</td>
<td>+4% to +6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-8.4%</td>
<td>+0% to +5%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Thank you very much for your attention!

World Tourism Organization (UNWTO)

www.unwto.org