



# **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

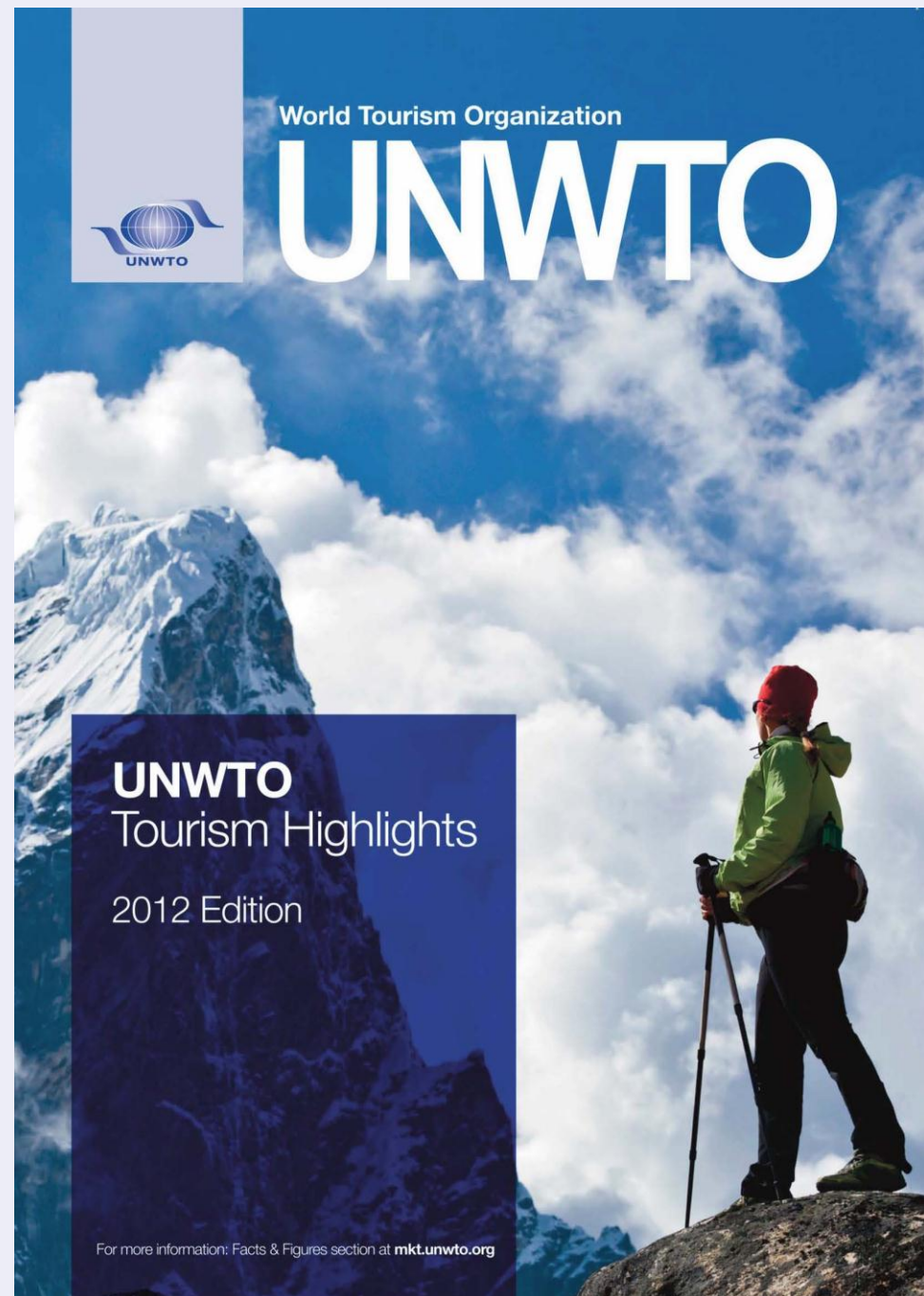
+4.6%

## International Tourism Receipts

US\$ 1,030 billion (euro 740 bn)

+3.9% (real terms)

[www.unwto.org/facts](http://www.unwto.org/facts)



# Inbound tourism: World

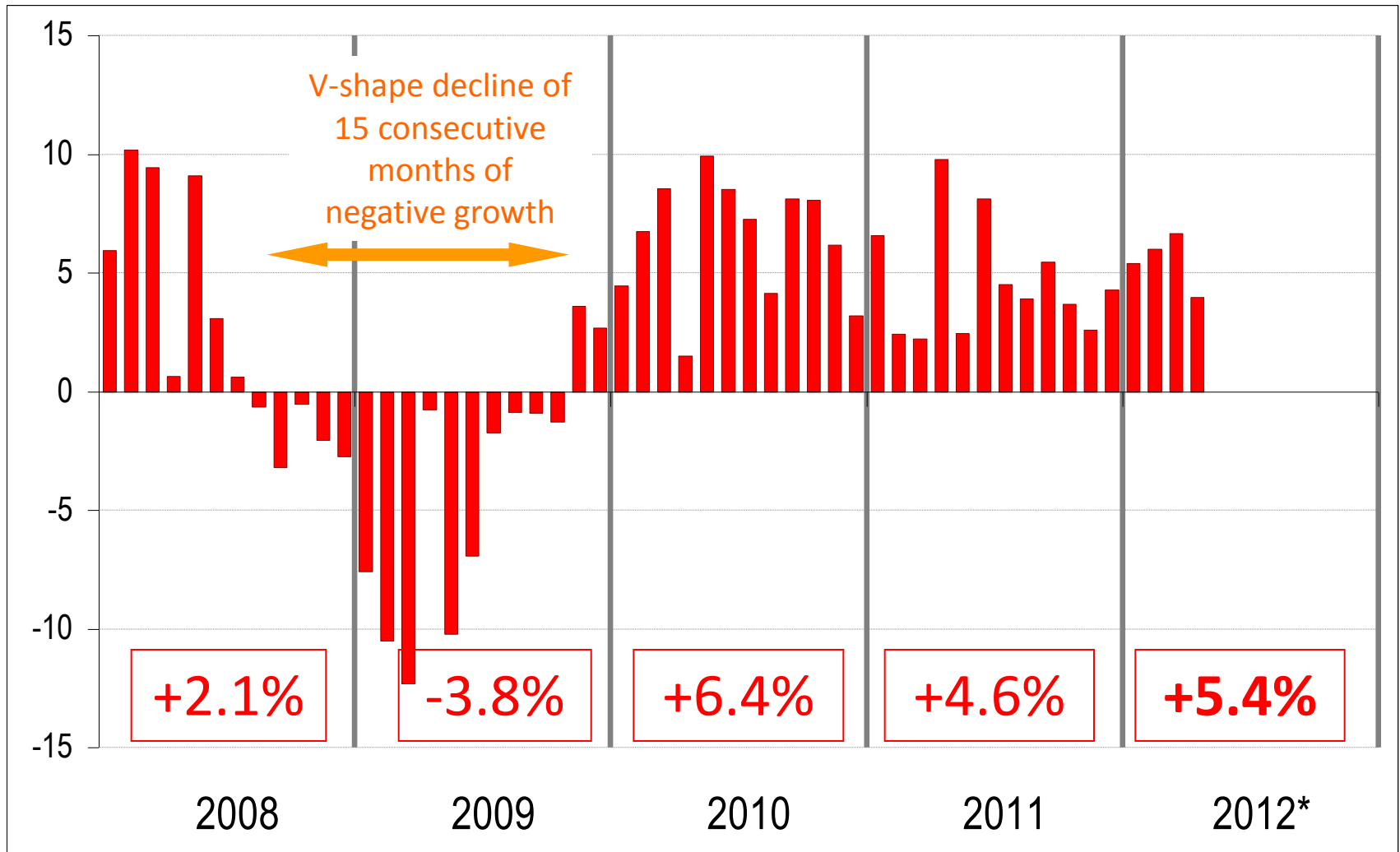
International tourist arrivals, 1995-2011\* (million)



# International Tourist Arrivals, monthly evolution

World

(% change)



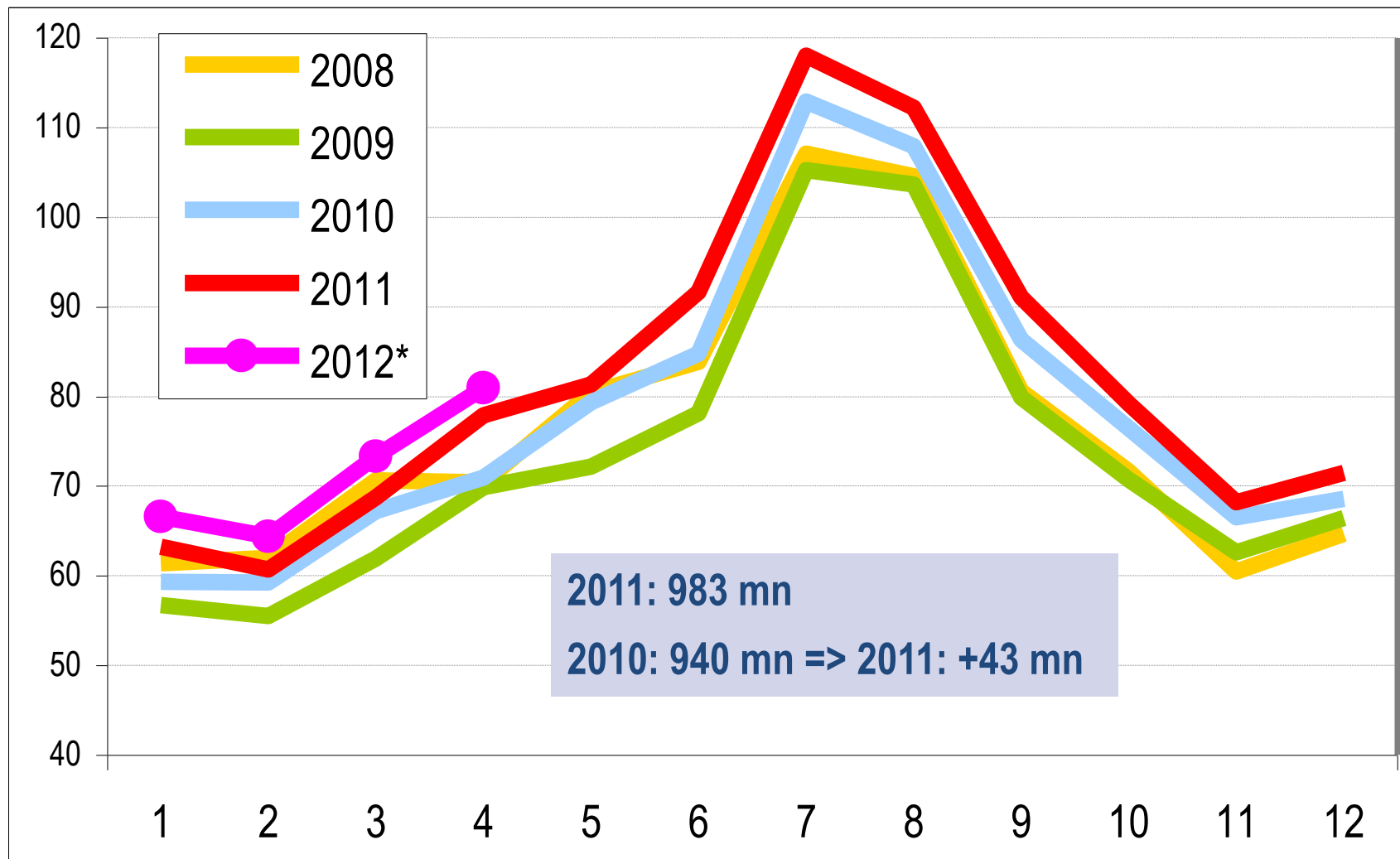
Source: World Tourism Organization (UNWTO) ©



# International Tourist Arrivals, monthly evolution

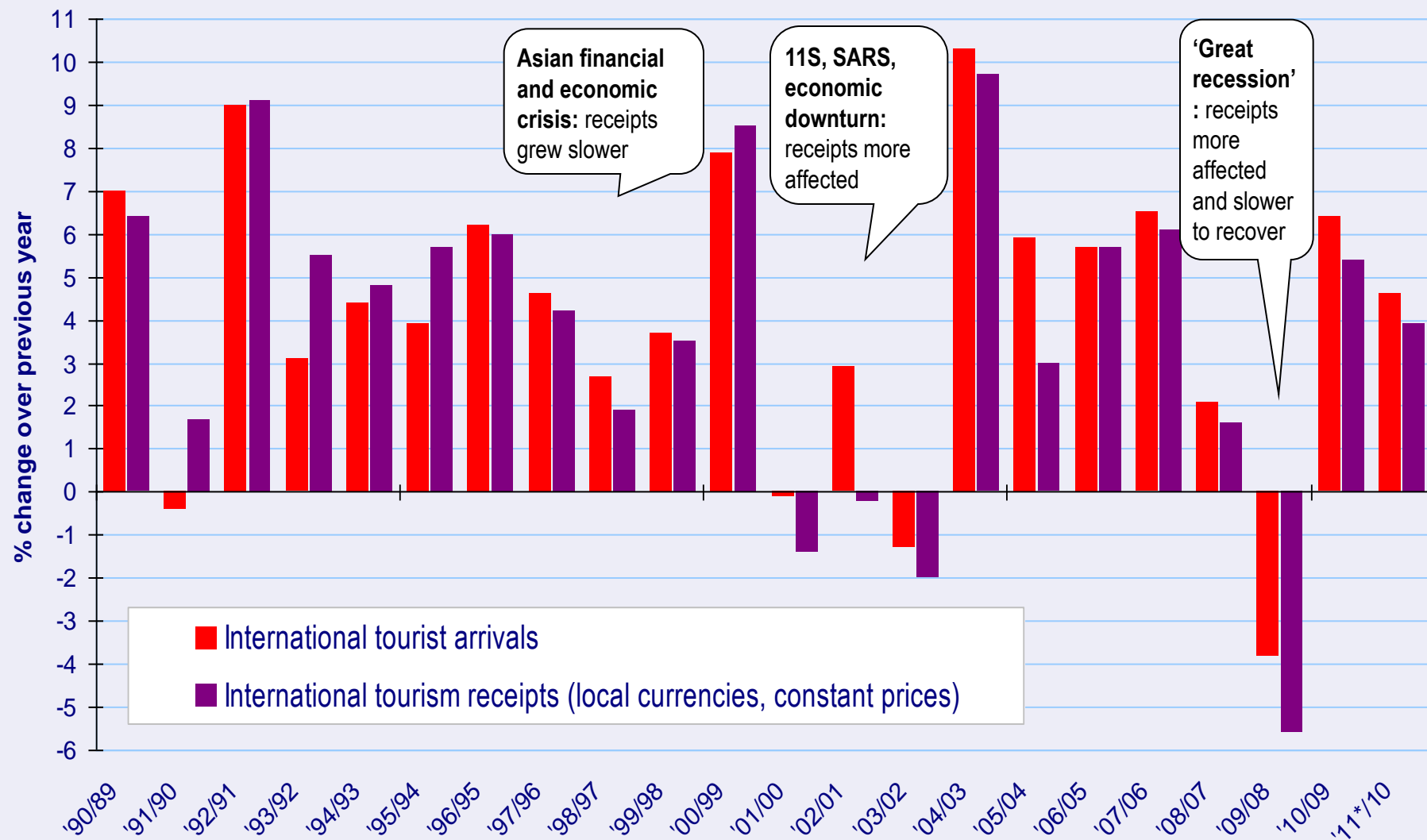
World

(million)



# International Tourism Arrivals and Receipts, World

## growth in receipts follows growth in arrivals closely



**Africa 2011**

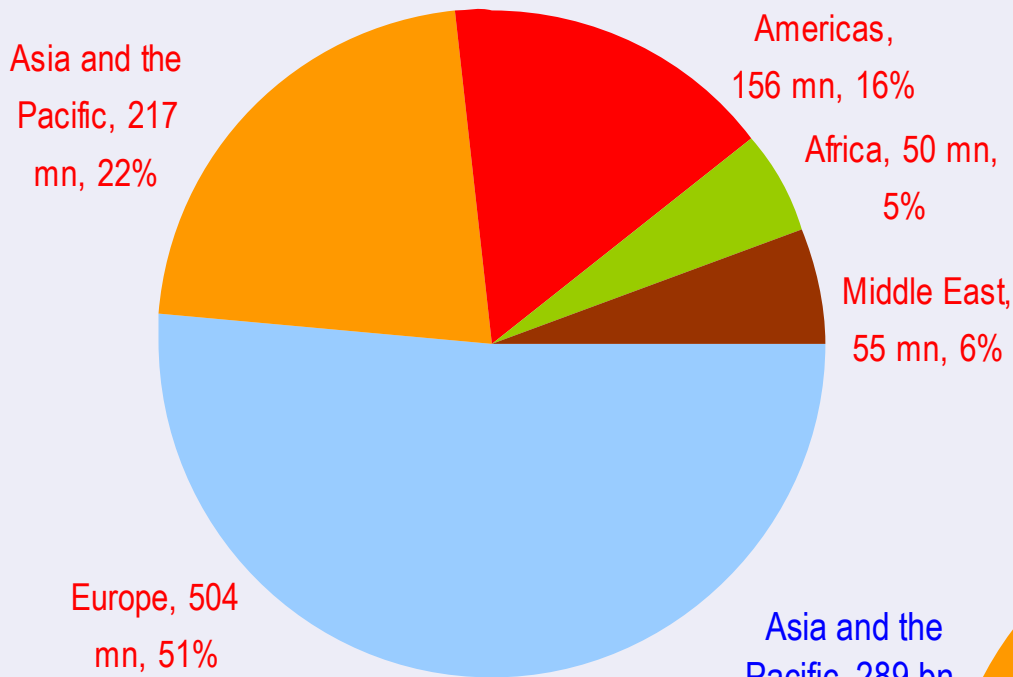


# Inbound tourism: Africa 2011

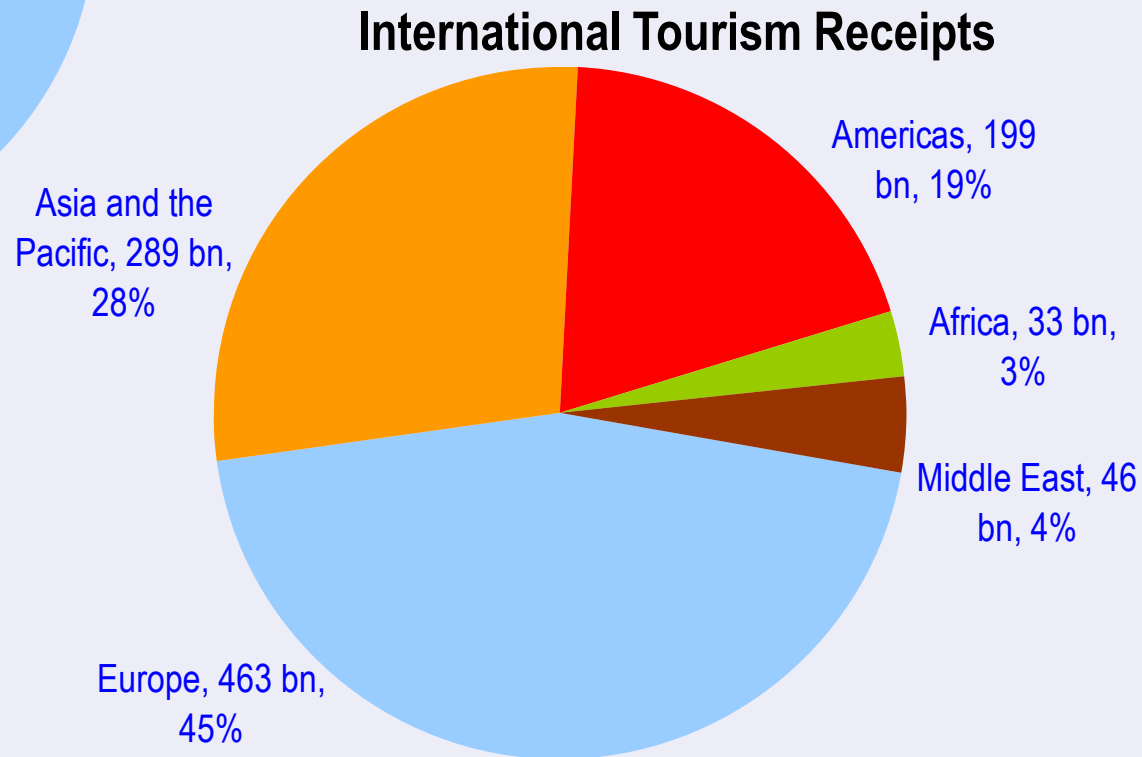
International tourist arrivals, 1995-2011\* (million)



# Share 2011 by region



**International Tourist arrivals**

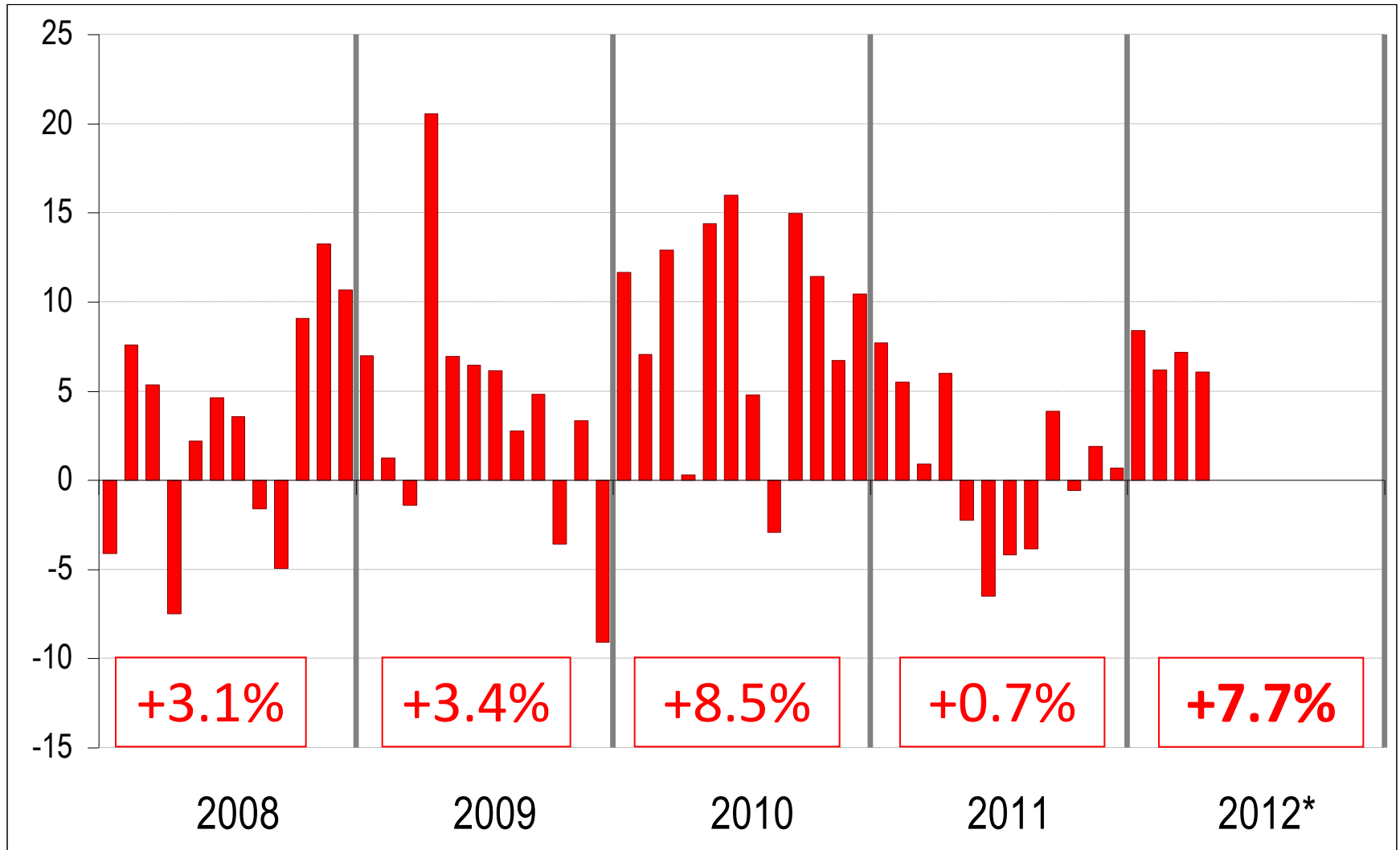


**International Tourism Receipts**

# International Tourist Arrivals, monthly evolution

Africa

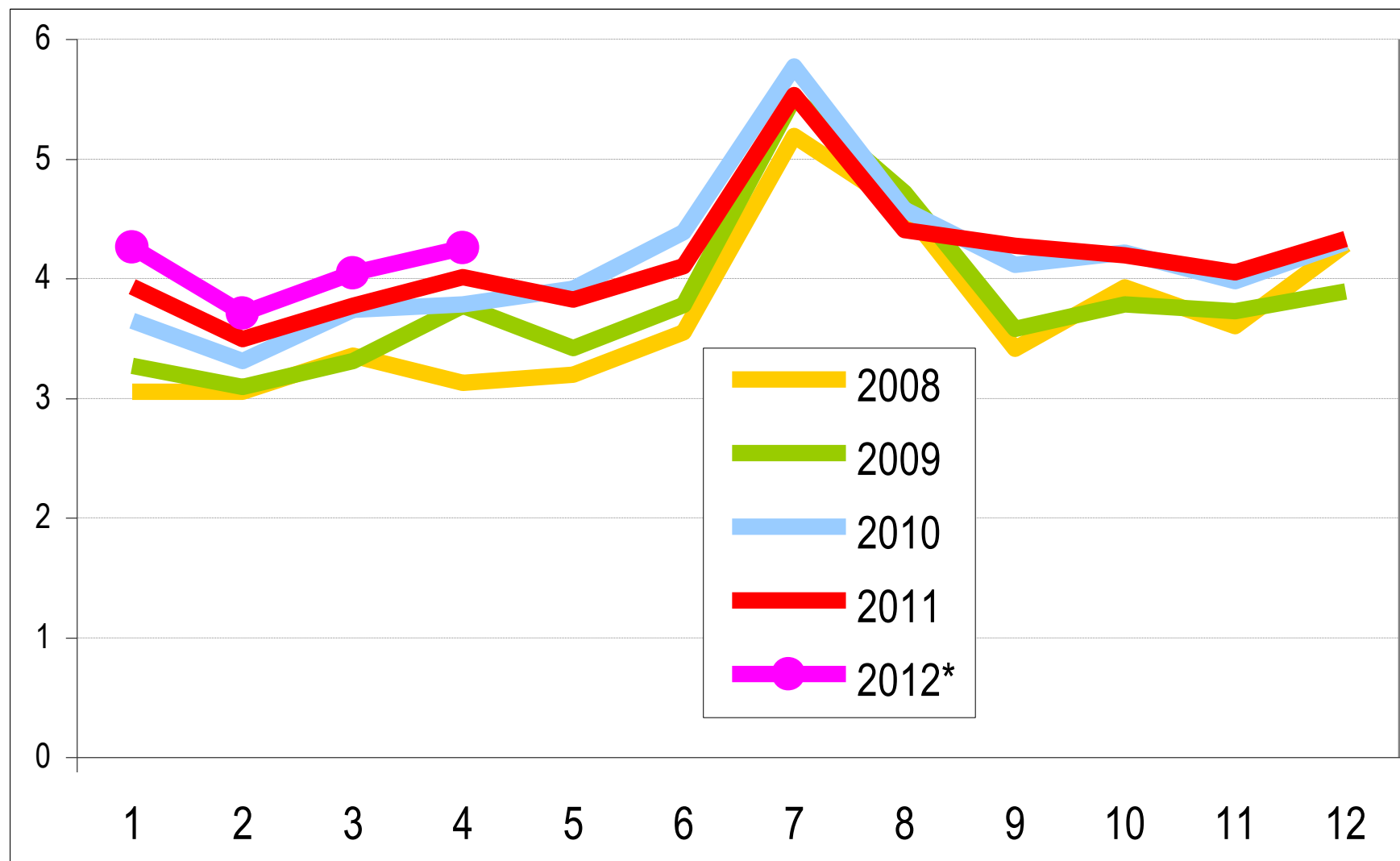
(% change)



# International Tourist Arrivals, monthly evolution

Africa

(million)

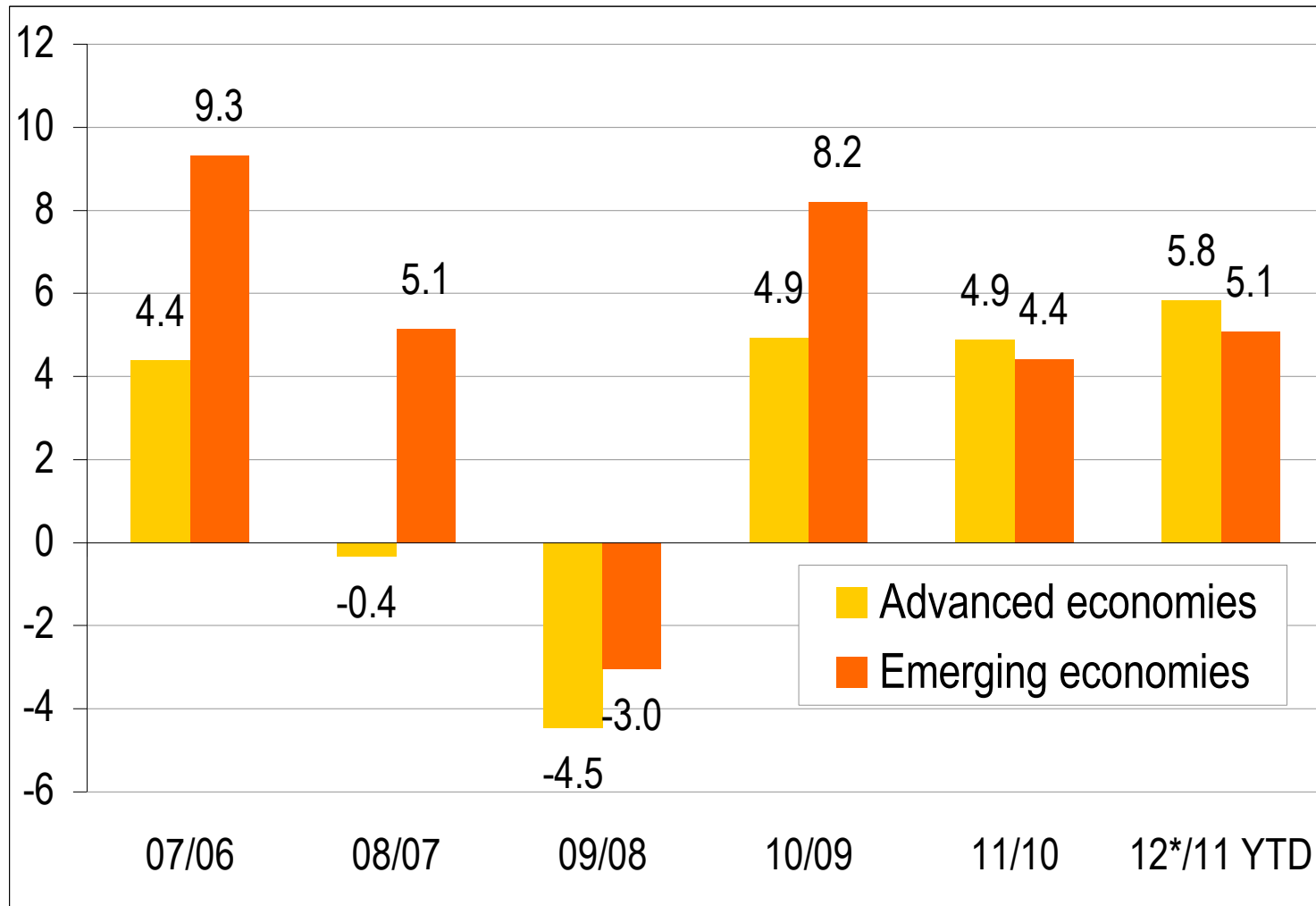


Source: World Tourism Organization (UNWTO) ©

# Emerging destinations suffered less in the crisis and recovered quicker

International Tourist Arrivals

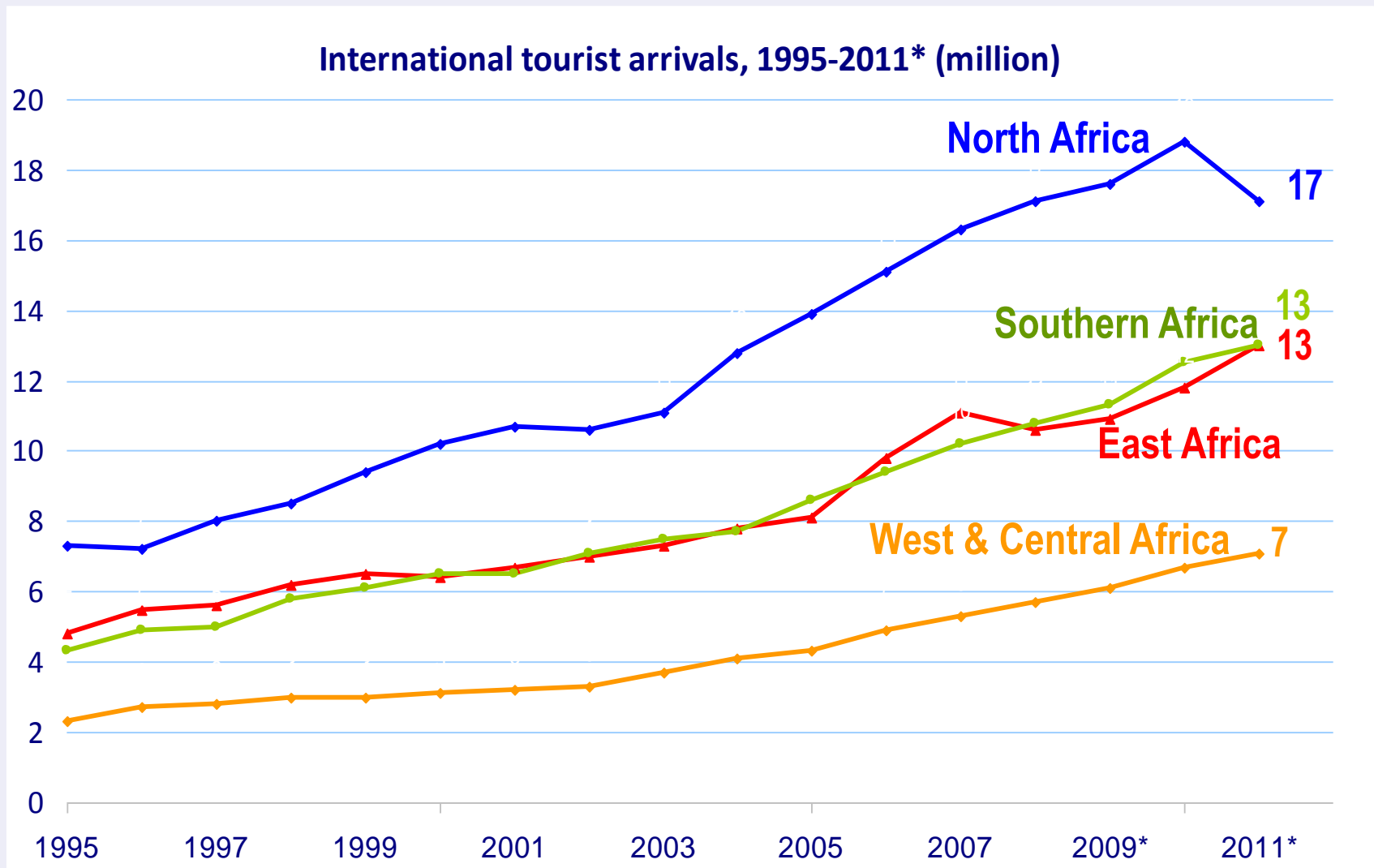
(% change)



Source: World Tourism Organization (UNWTO) ©

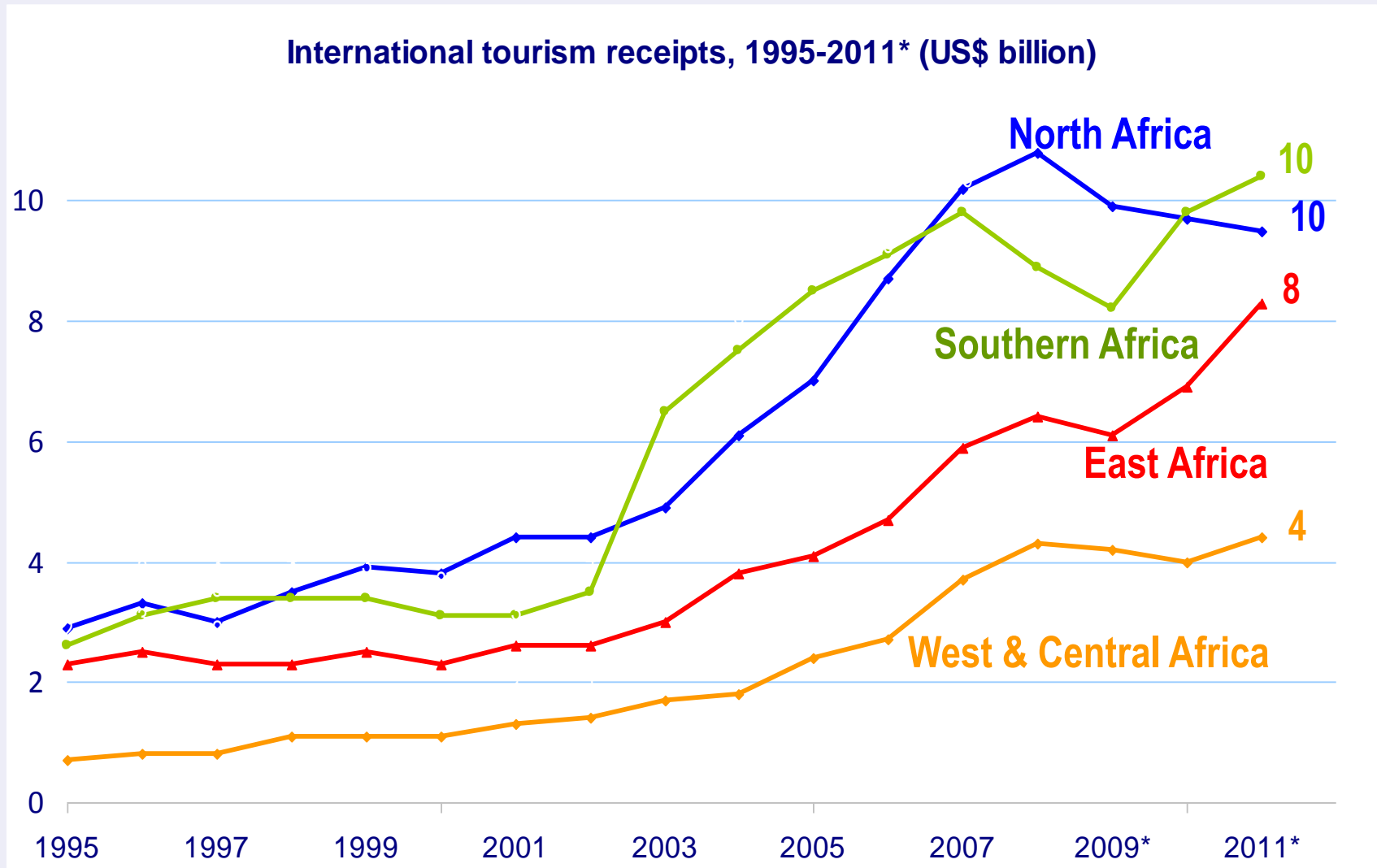
# Africa 2011 Inbound tourism

## Growth in South offset by North



# Africa 2011 Inbound tourism

## Growth in South offset by North





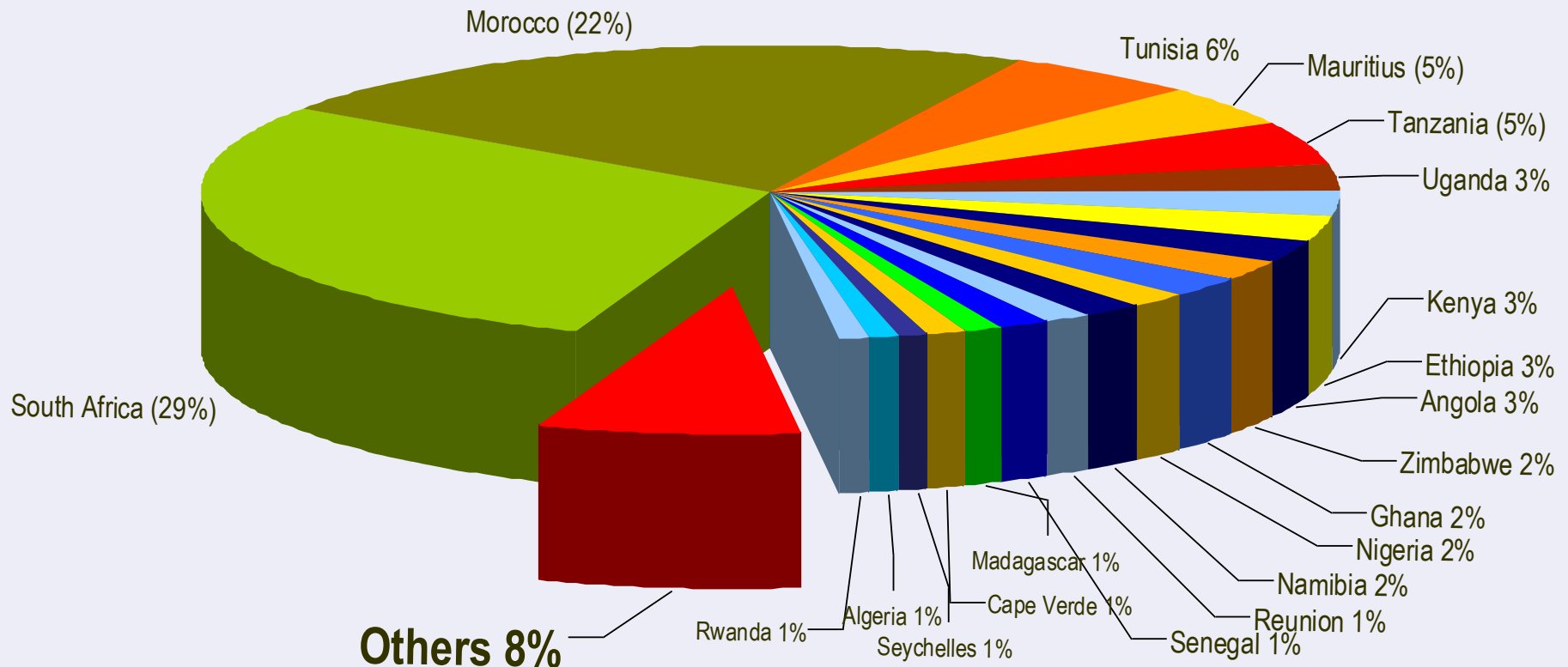
# Receipts by destination

2011: US\$ 33 billion

**Africa**

Top 20: 92%

Other 32 destinations: 8%

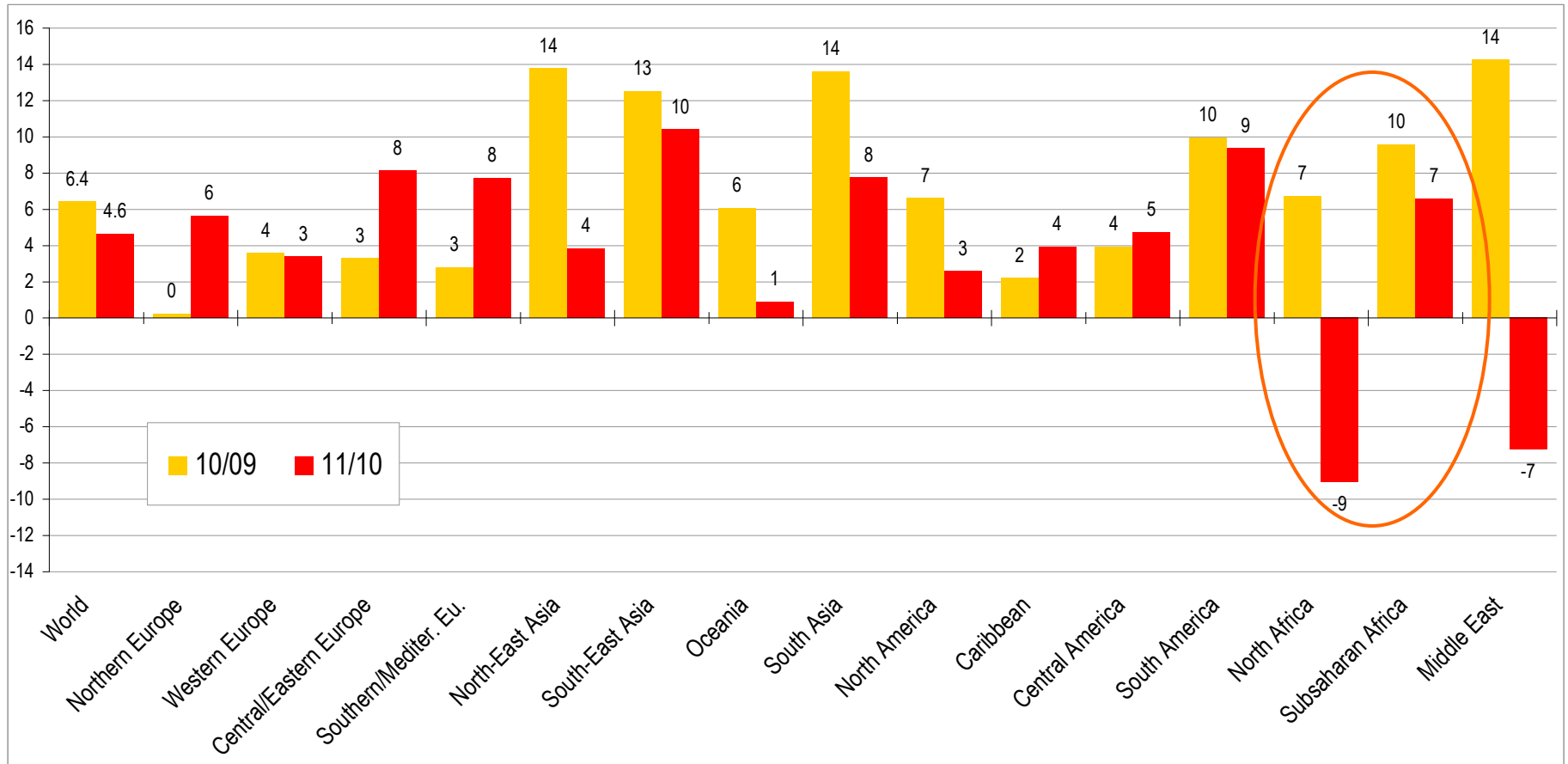


**2011 gains  
and losses**

# 2010 and 2011 by subregion

## International Tourist Arrivals

(% change over same period of the previous year)

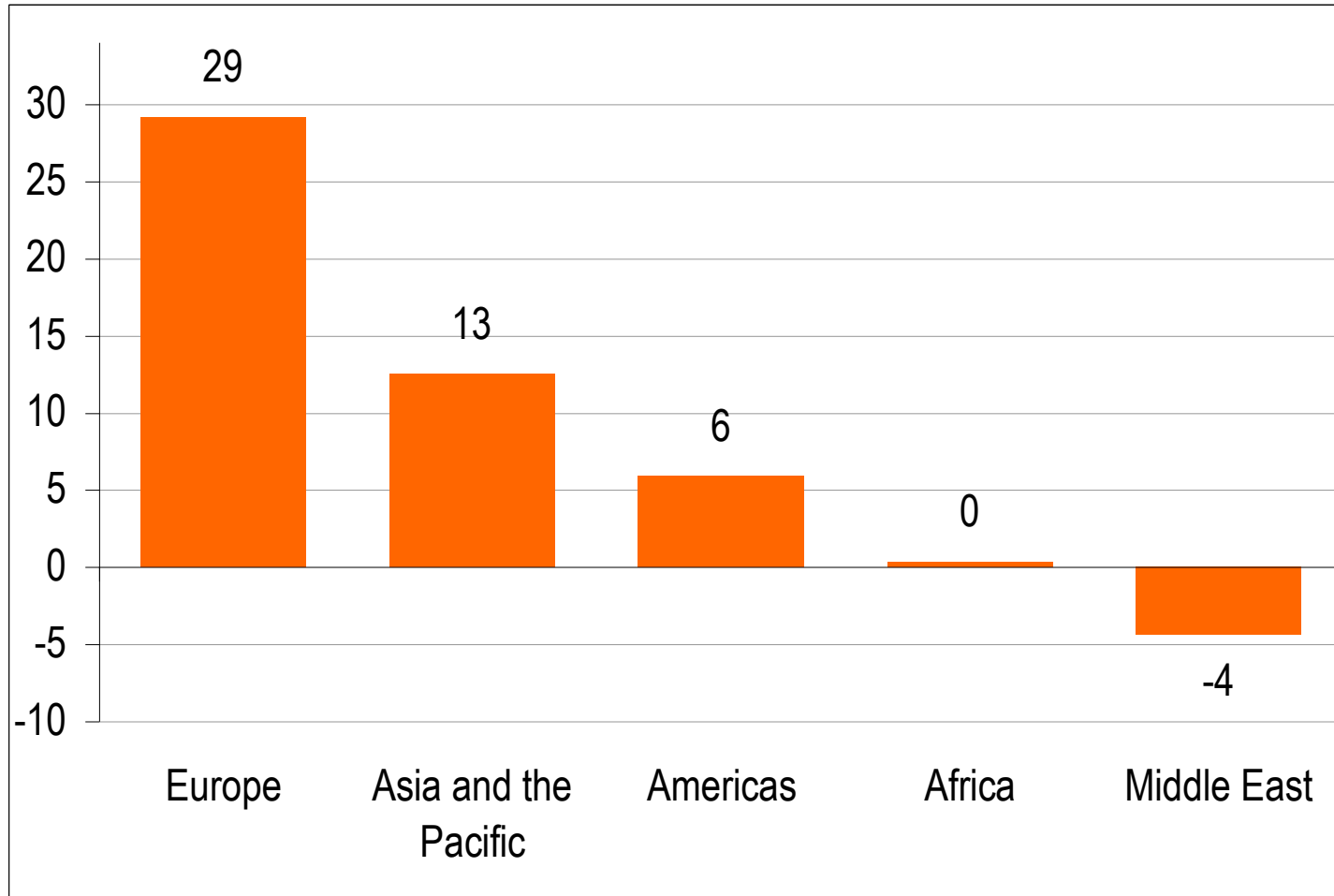


Source: World Tourism Organization (UNWTO) ©

# increase 43 million arrivals in 2011: by region

## International Tourist Arrivals

(absolute change 2011, million)



Source: World Tourism Organization (UNWTO) ©

# Major outbound markets

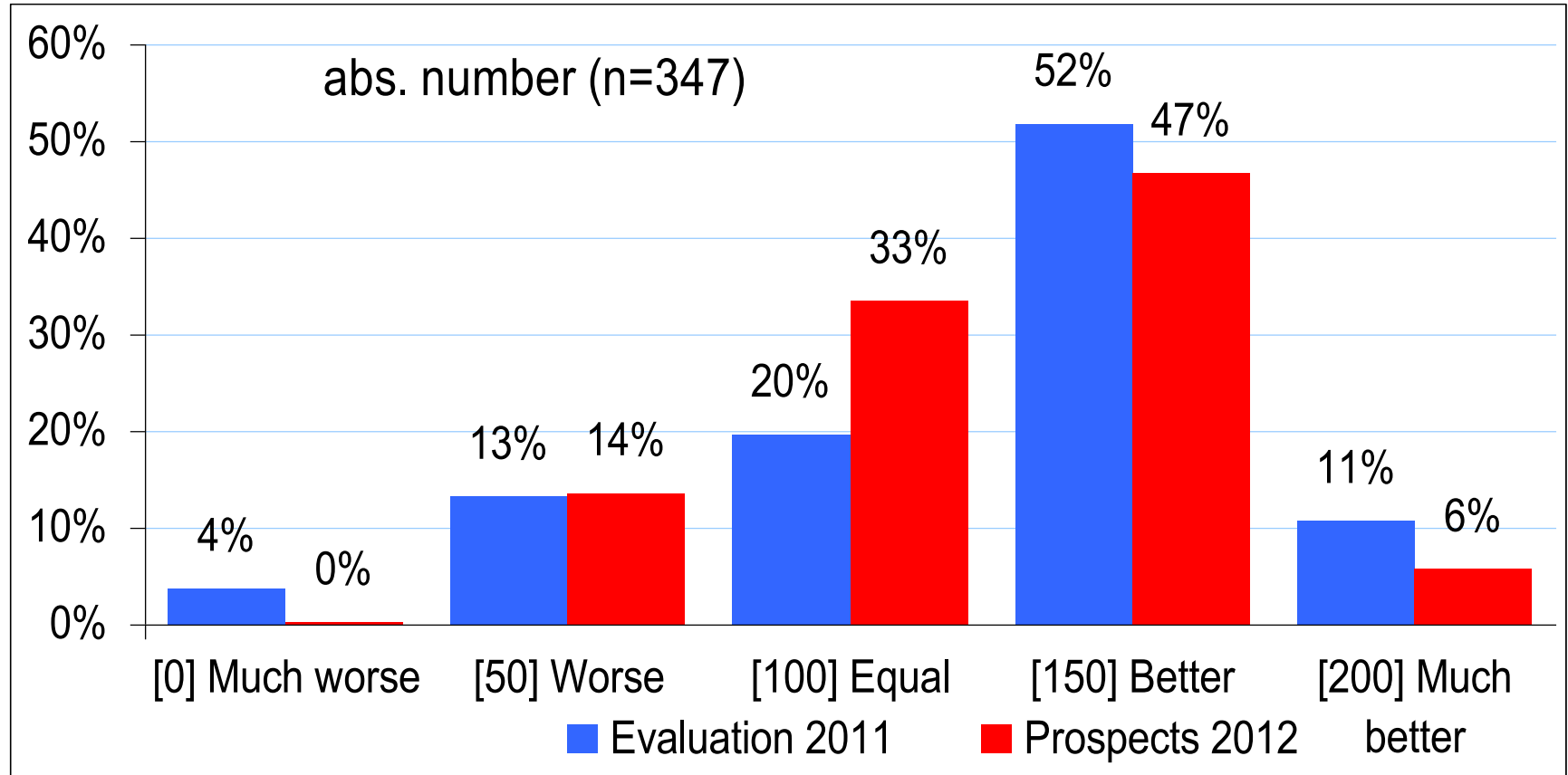
## BRICs are hot



# **UNWTO Tourism Confidence Index**

# Confidence weakening but still positive

## UNWTO Panel of Tourism Experts

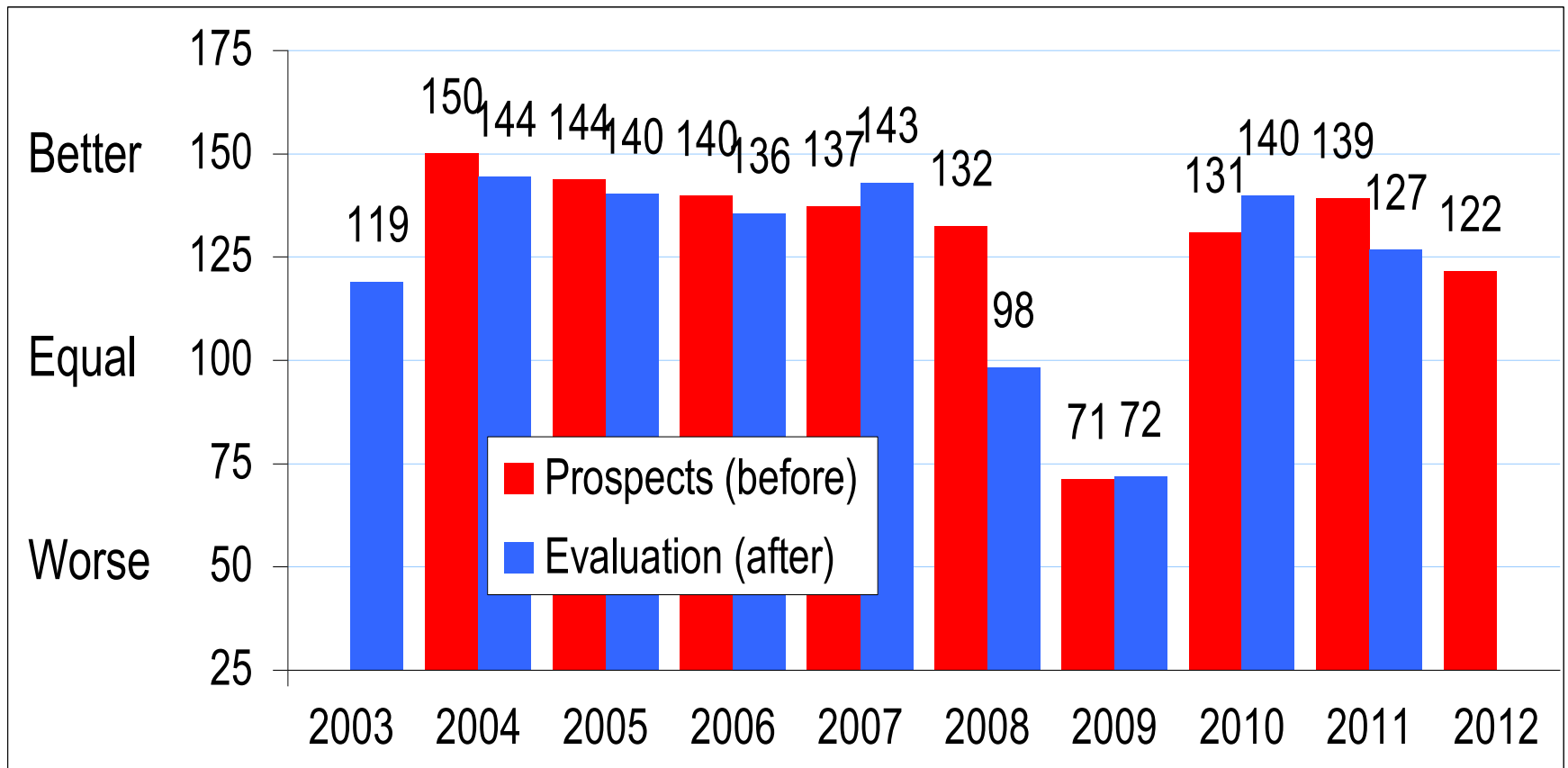


Source: World Tourism Organization (UNWTO) ©



# Confidence weakening but still positive

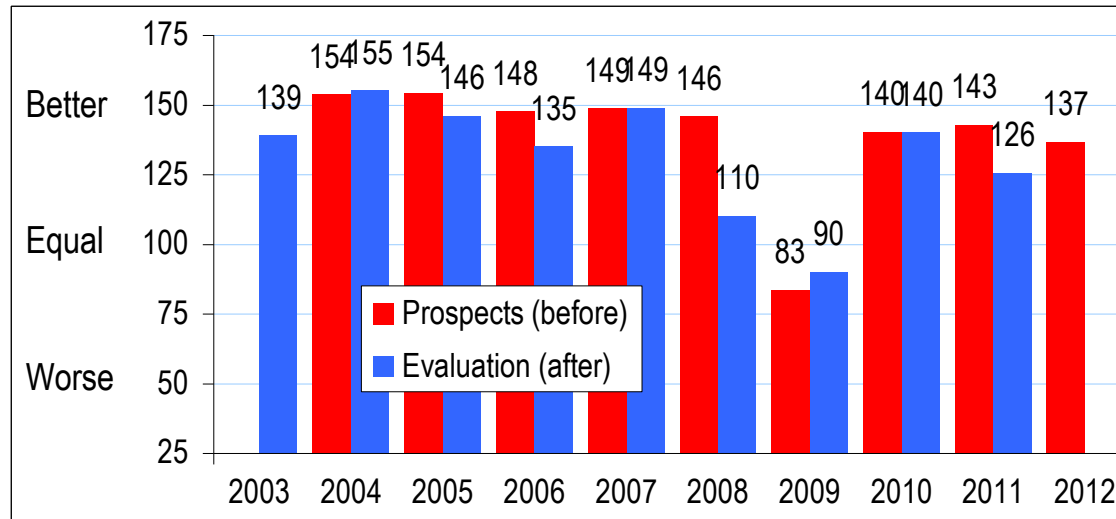
## UNWTO Panel of Tourism Experts: World



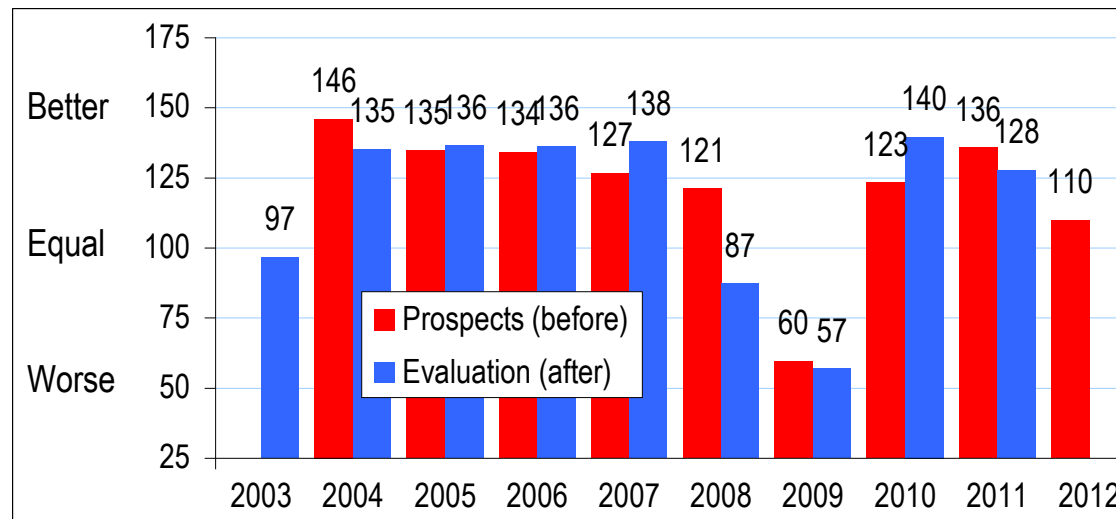
Source: World Tourism Organization (UNWTO) ©

# Confidence in emerging economies much stronger than in advanced economies

UNWTO Panel of Tourism Experts: Emerging economies

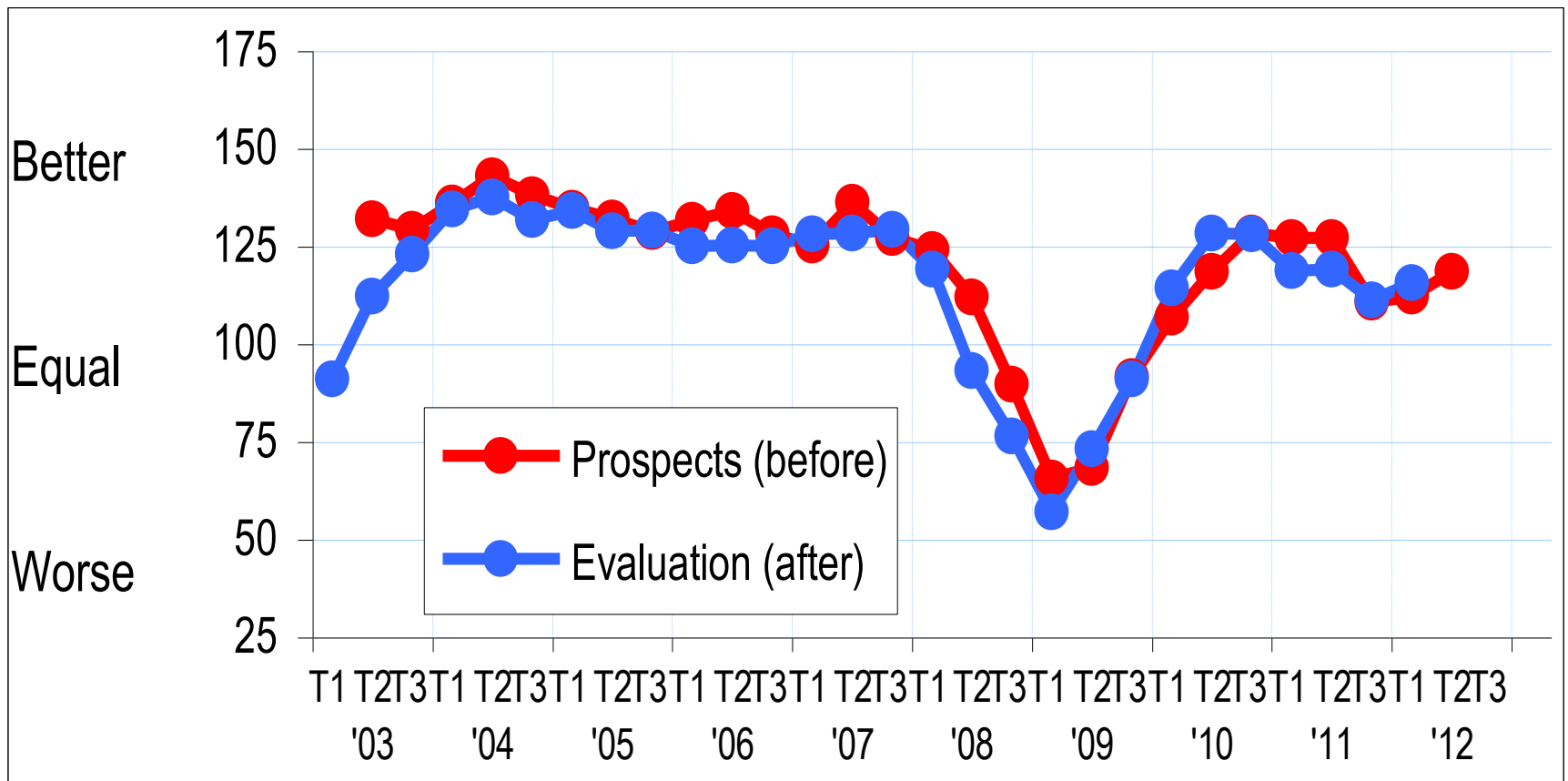


UNWTO Panel of Tourism Experts: Advanced economies



# Confidence weakening but still positive

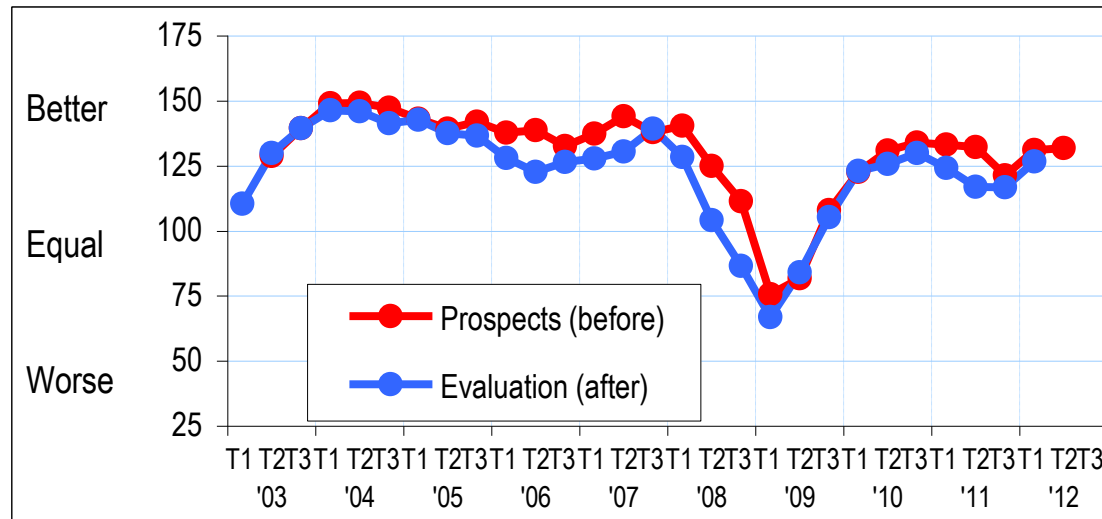
## UNWTO Panel of Tourism Experts



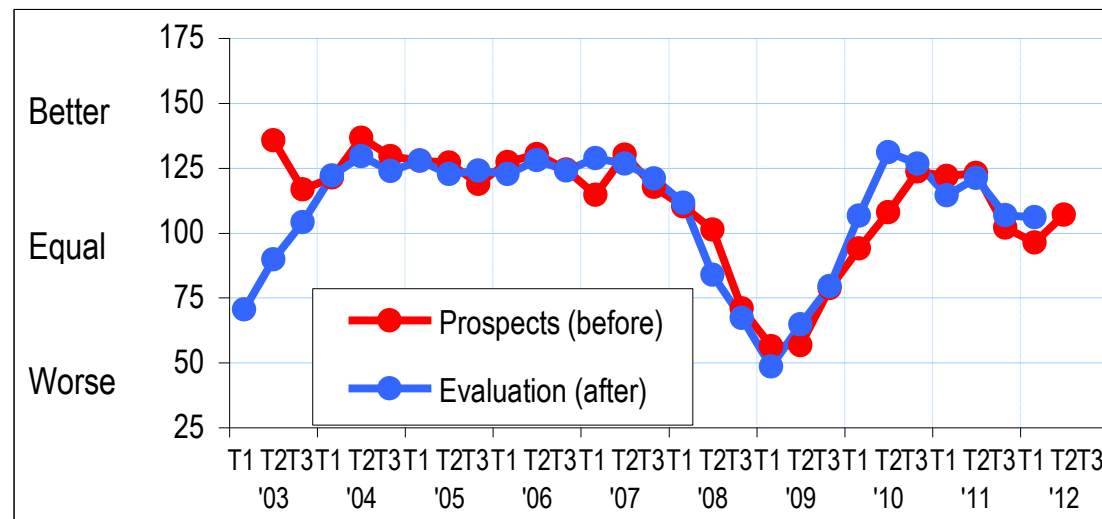
Source: World Tourism Organization (UNWTO) ©

# Confidence in emerging economies much stronger than in advanced economies

UNWTO Panel of Tourism Experts: Emerging economies

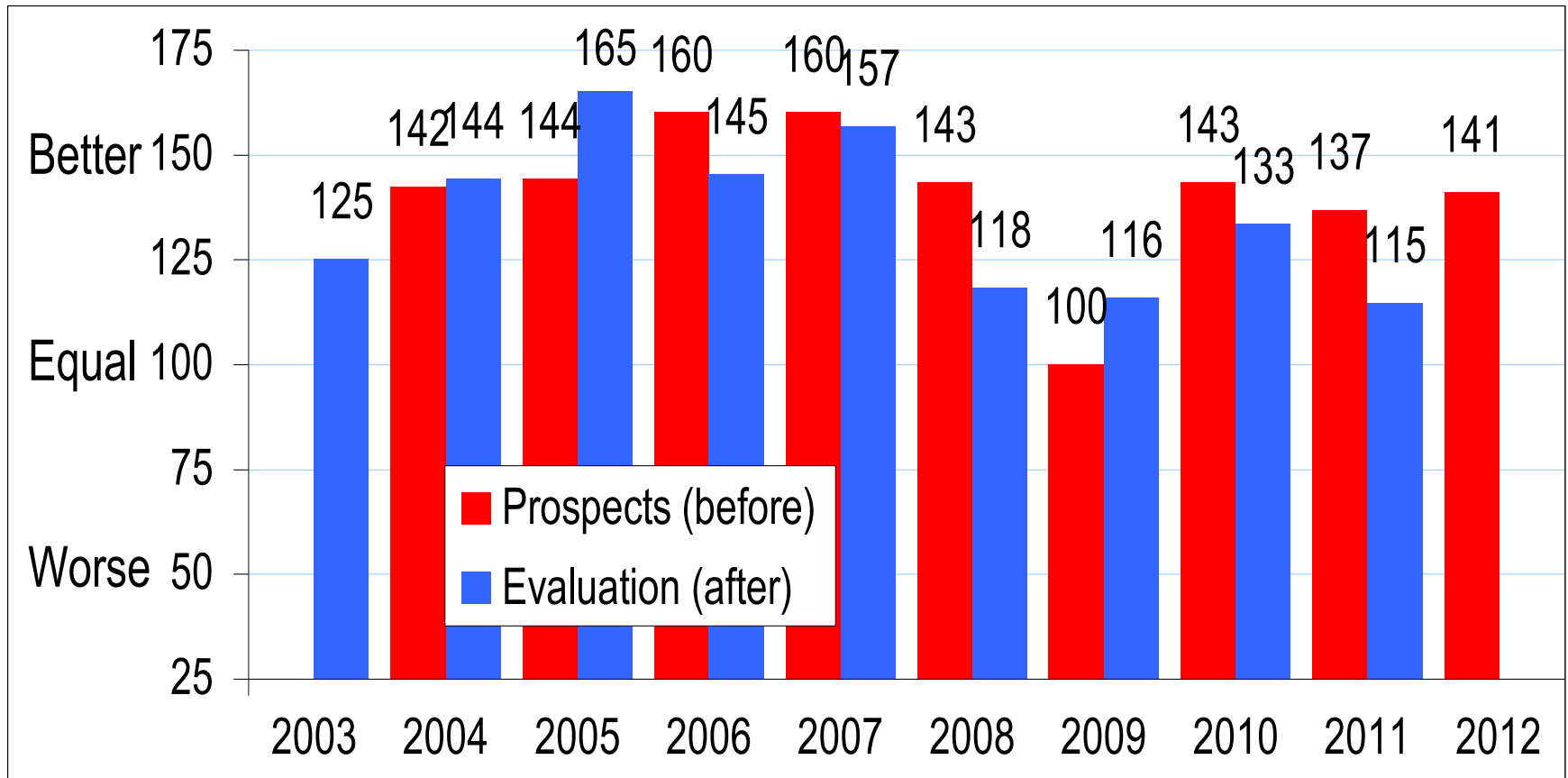


UNWTO Panel of Tourism Experts: Advanced economies



# Africa confidence on high level

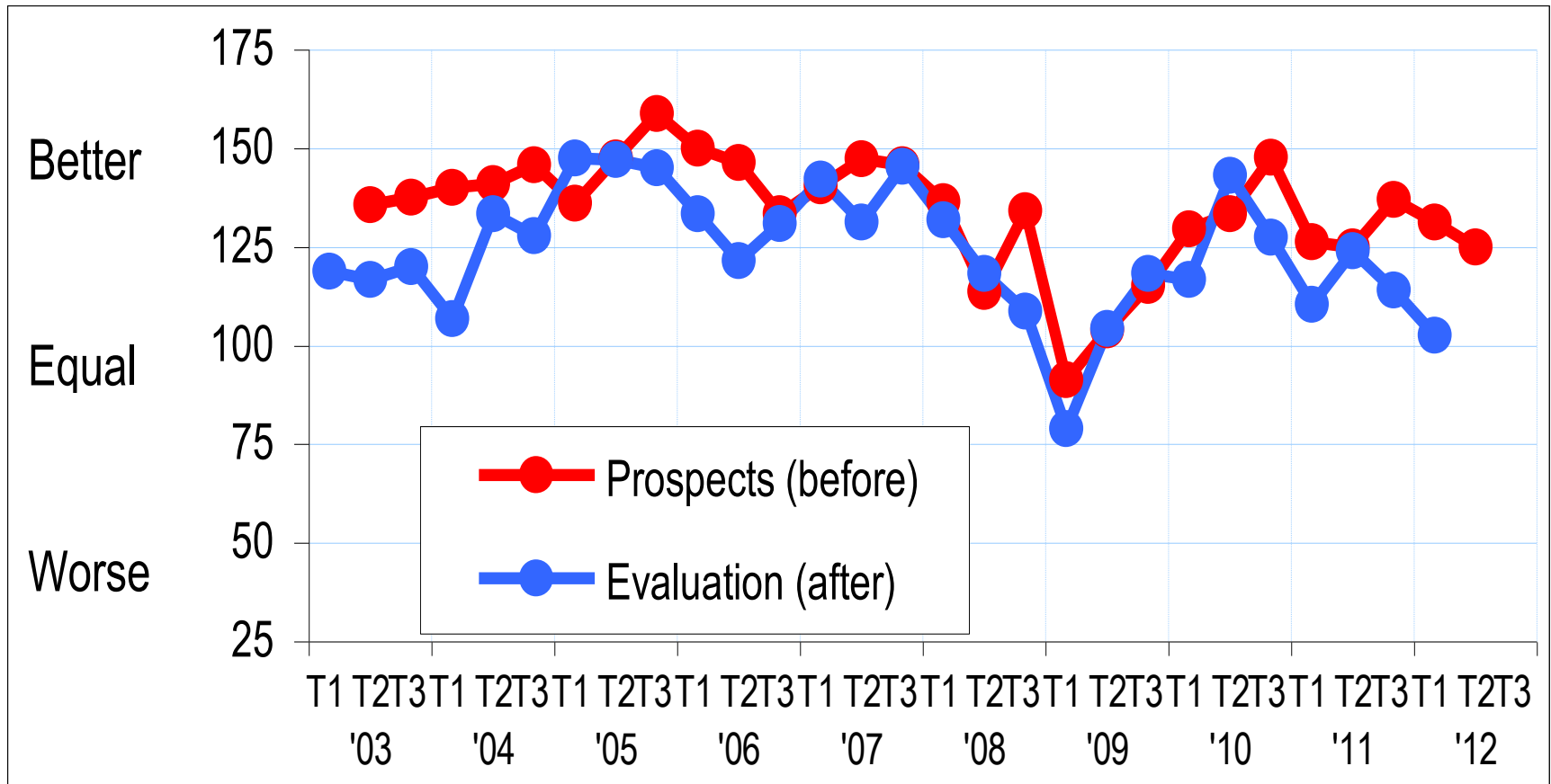
## UNWTO Panel of Tourism Experts: Africa



Source: World Tourism Organization (UNWTO) ©

# Africa: confidence on high level

## UNWTO Panel of Tourism Experts: Africa



Source: World Tourism Organization (UNWTO) ©

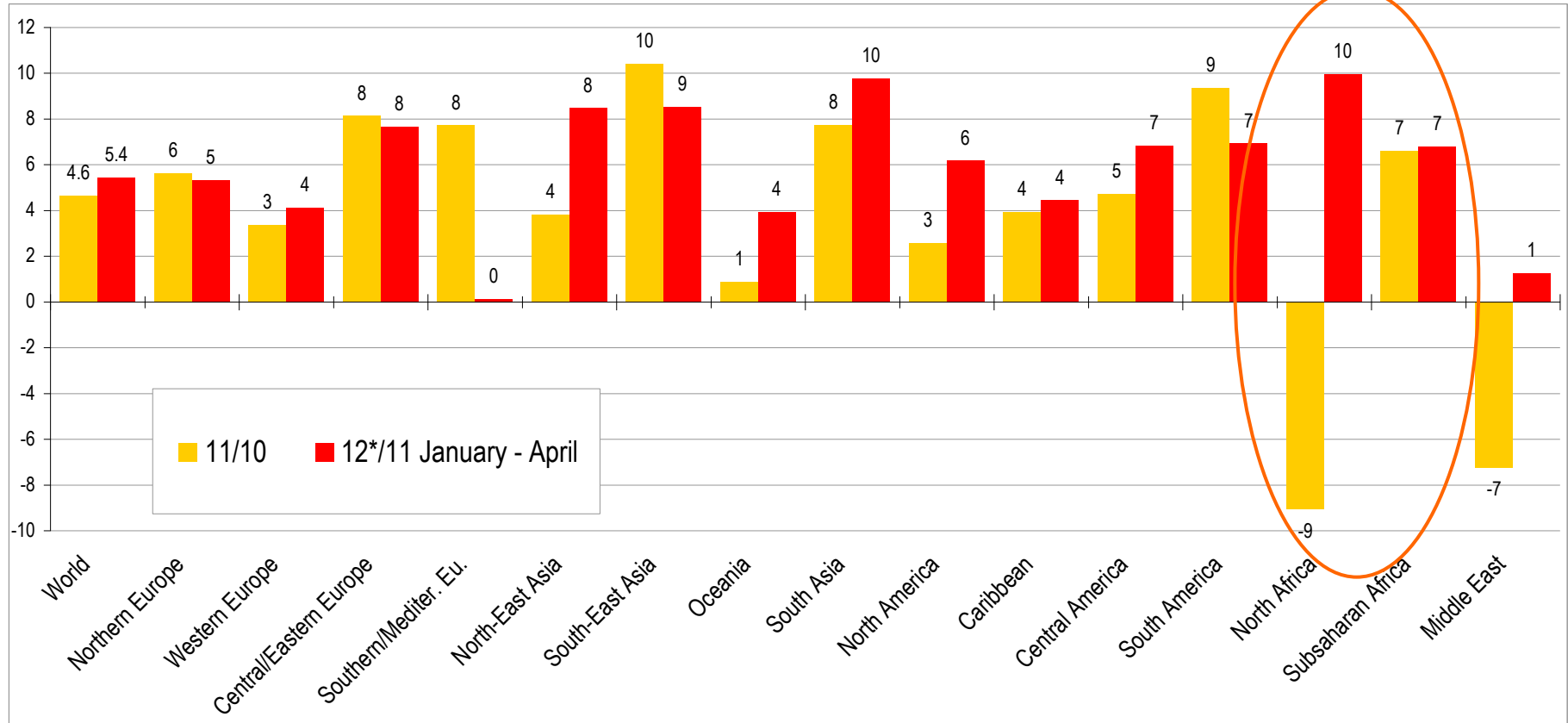
**Outlook 2012**



# 2011 and 2012 year to date by subregion

## International Tourist Arrivals

(% change over same period of the previous year)

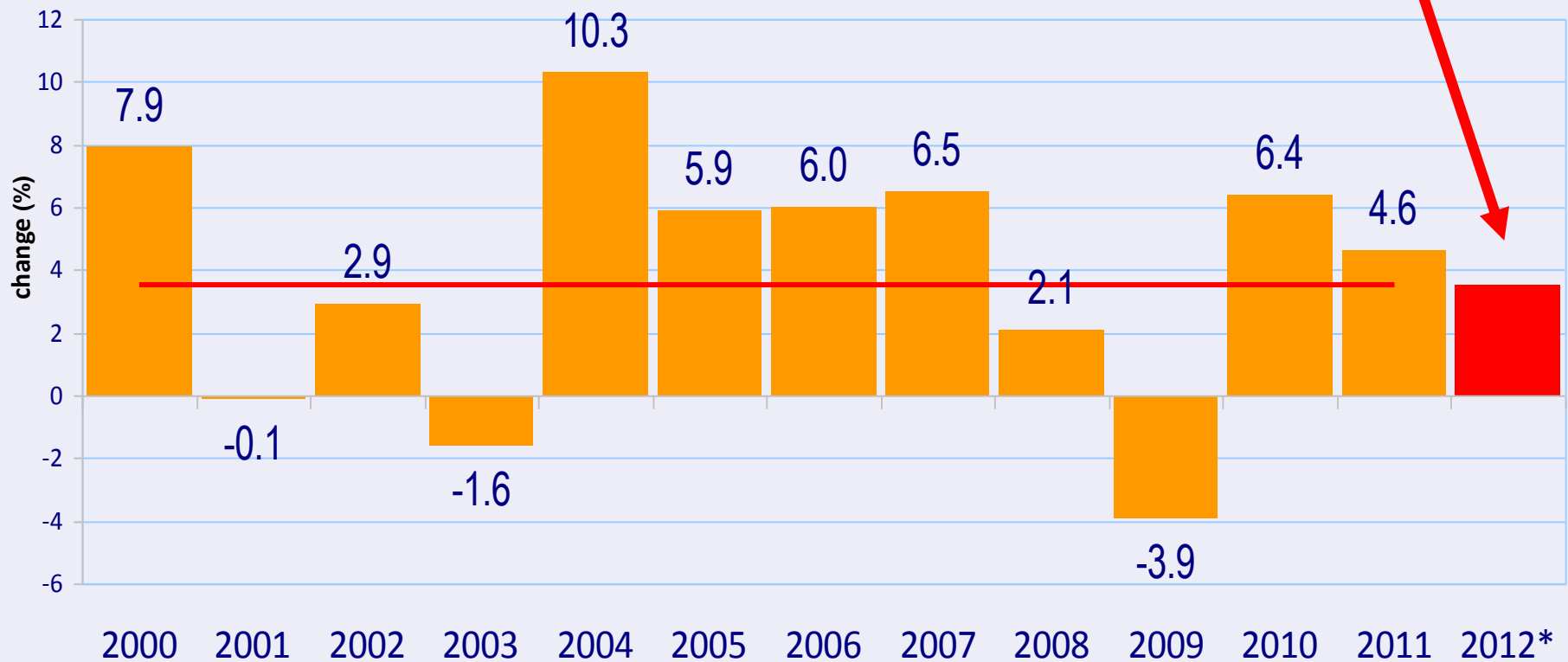


Source: World Tourism Organization (UNWTO) ©

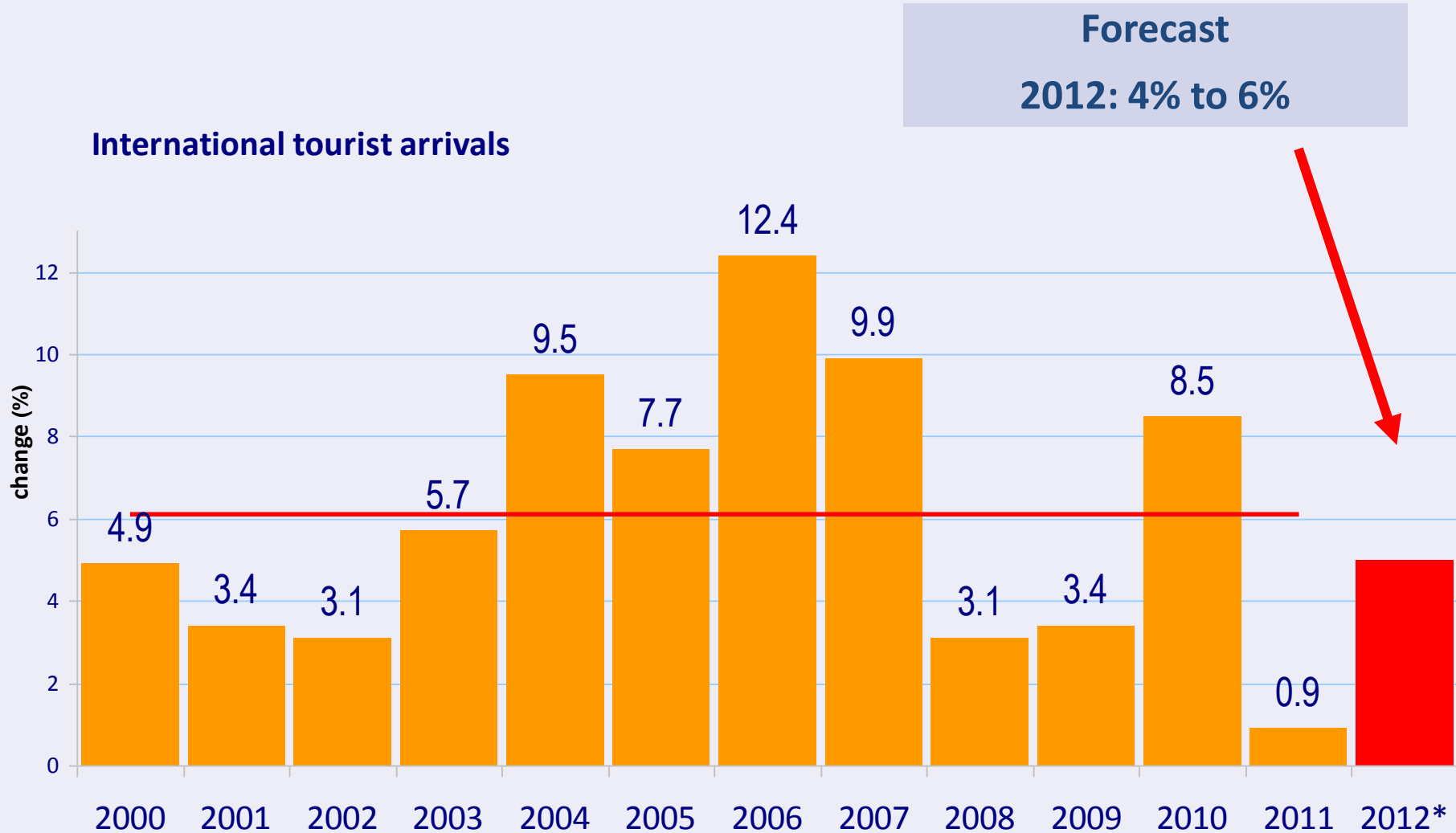
# Outlook: World

**Forecast**  
**2012: 3% to 4%**

## International tourist arrivals



# Outlook: Africa



# **Outlook 2012 by region**

# International tourism: projection full year 2012

	2011	Projection 2012
<b>World</b>	<b>+4.6%</b>	<b>+3% to +4%</b>
Europe	+6.1%	+2% to +4%
Asia and the Pacific	+6.1%	+4% to +6%
Americas	+4.2%	+2% to +4%
Africa	+0.8%	+4% to +6%
Middle East	-8.4%	+0% to +5%



**Thank you very much  
for your attention!**

**World Tourism Organization  
(UNWTO)**

**[www.unwto.org](http://www.unwto.org)**









# Tourism Towards 2030

Advance release

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

UNWTO

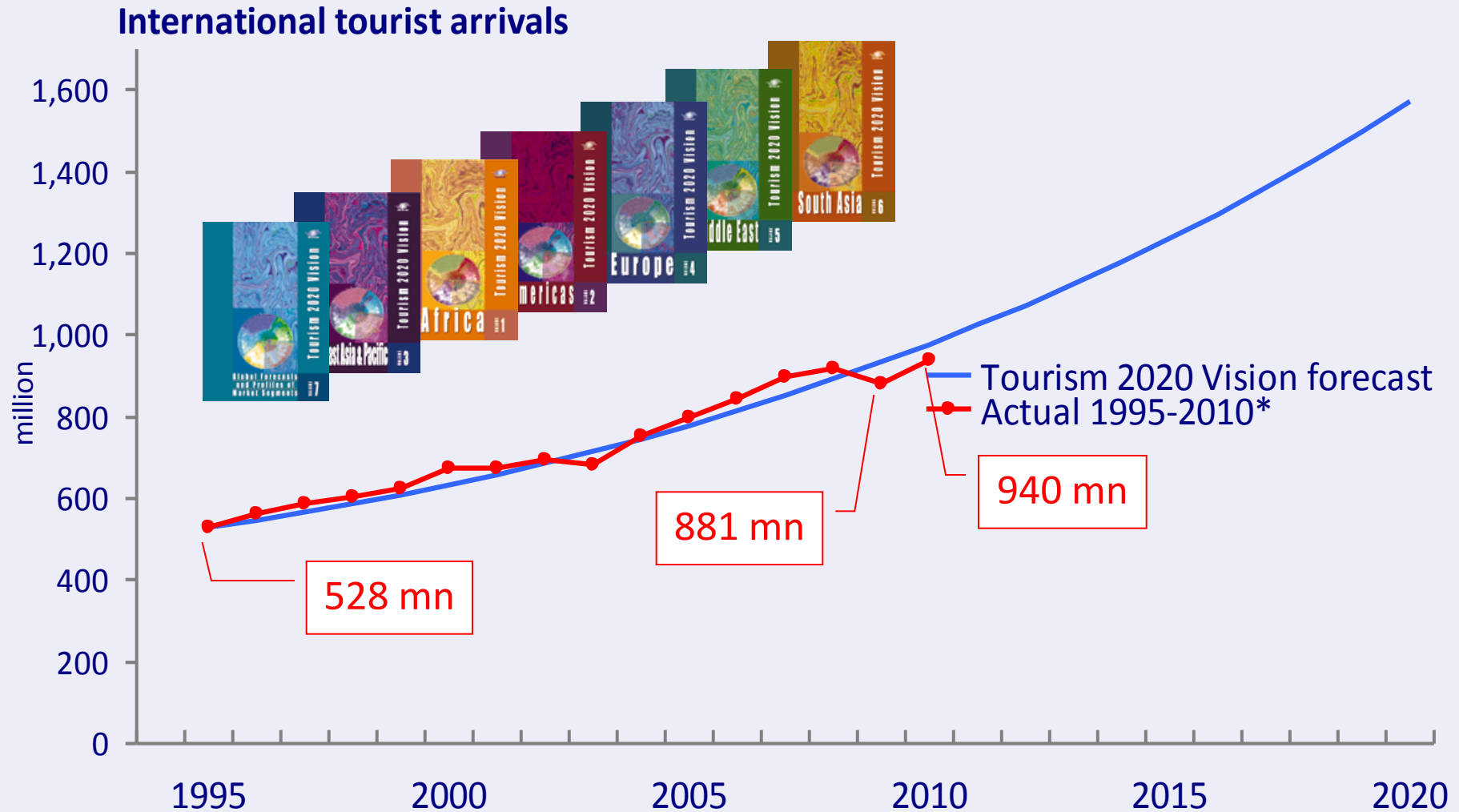


World Tourism Organization

# UNWTO

**Tourism towards 2030**  
Global overview

# Tourism 2020 Vision vs. actual trend World



# Tourism Towards 2030

- A broad research project of long-term forecasting, following up on work initiated by UNWTO in the 1990s
- Objectives:
  - **Assist** UNWTO Members in formulating policies and long-term strategic plans
  - **Provide** a global reference on future tourism development
  - **Reinforce** UNWTO's role in agenda setting for tourism-related subjects
  - **Constitute** a reference for UNWTO strategic documents, programme of work and activities
- Central to the study are the projections for international tourism flows in the two decades 2010-2030
  - Data series on international tourist arrivals as reported by destination countries are used as the key indicator, taking into account subregion of destination, region of origin, mode of transport and purpose of visit for the period 1980-2010
  - The quantitative forecast is based on a causal econometric model with international tourist arrivals as the dependent variable. Two independent variables are used: 1) growth of Gross Domestic Product (GDP), a proxy for traveller affluence and business travel potential; 2) cost of transport.



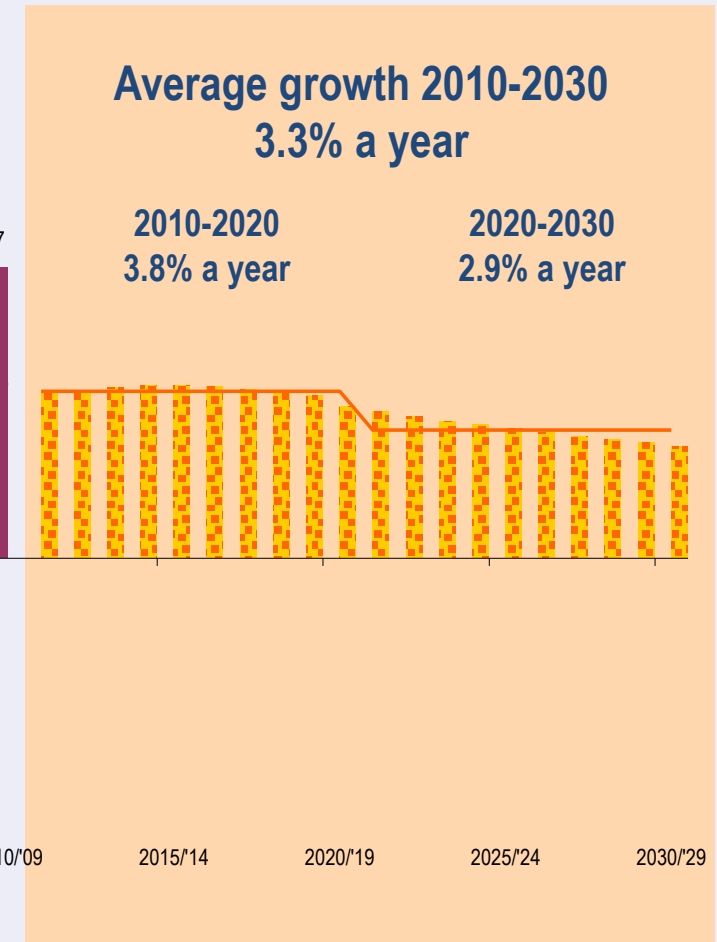
**World**

# Growth in international tourism will continue, but at a more moderate pace

International tourism, World

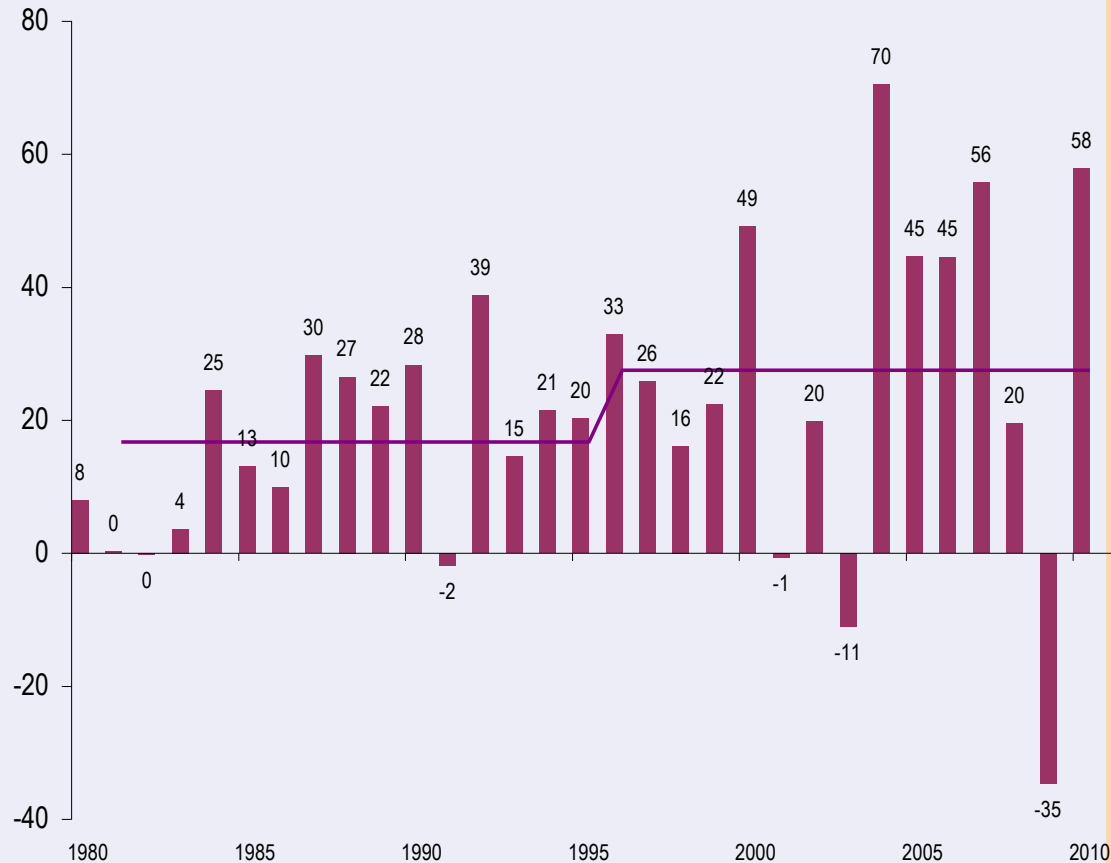


International Tourist Arrivals, % change over previous year



# International tourist arrivals to increase by 43 million a year on average

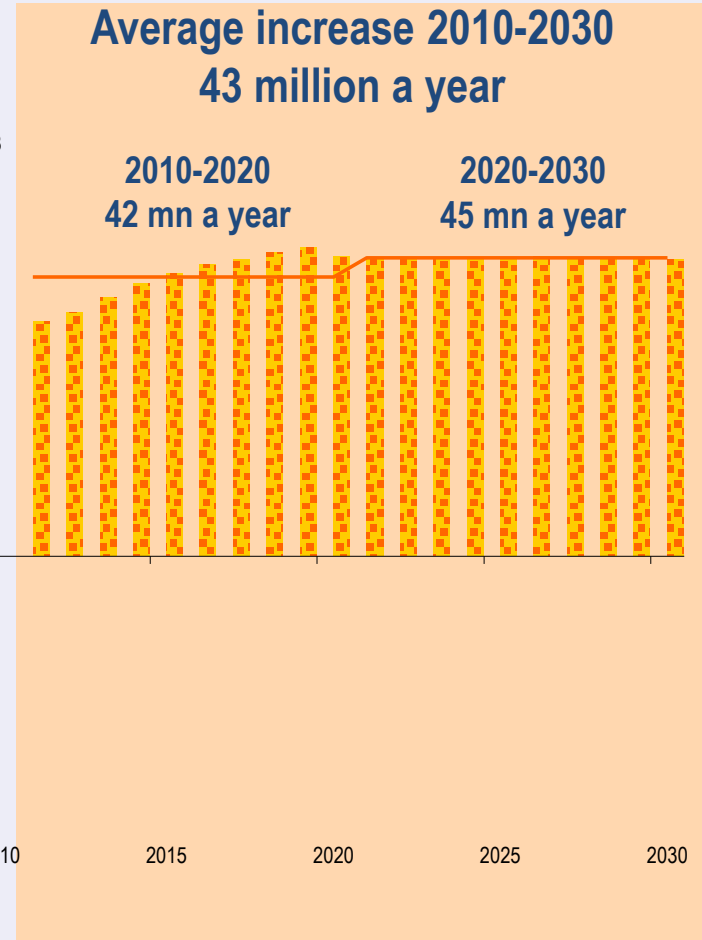
International tourism, World



**Average increase 2010-2030  
43 million a year**

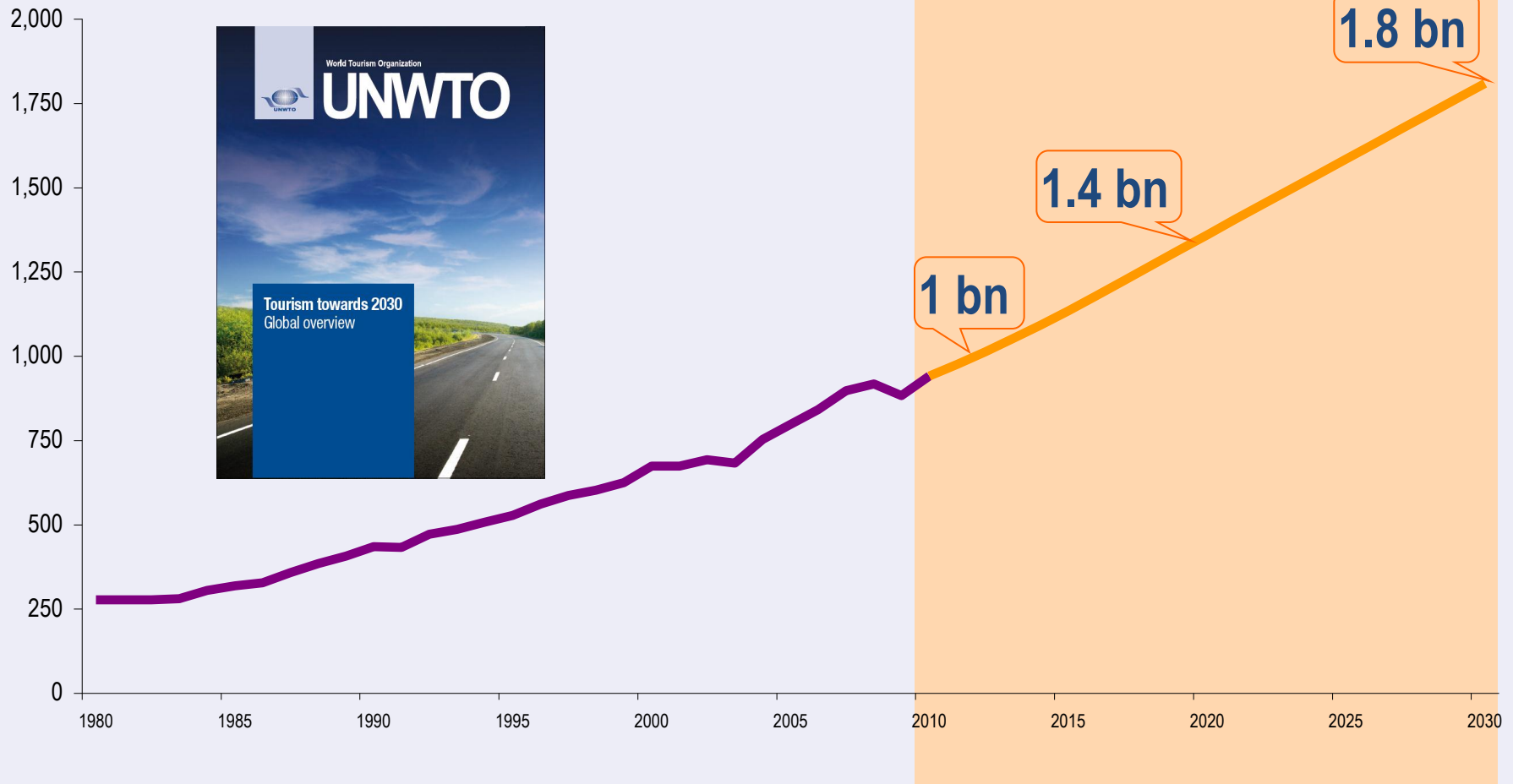
**2010-2020  
42 mn a year**

**2020-2030  
45 mn a year**



# International tourist arrivals to reach 1.8 billion by 2030

International tourism, World

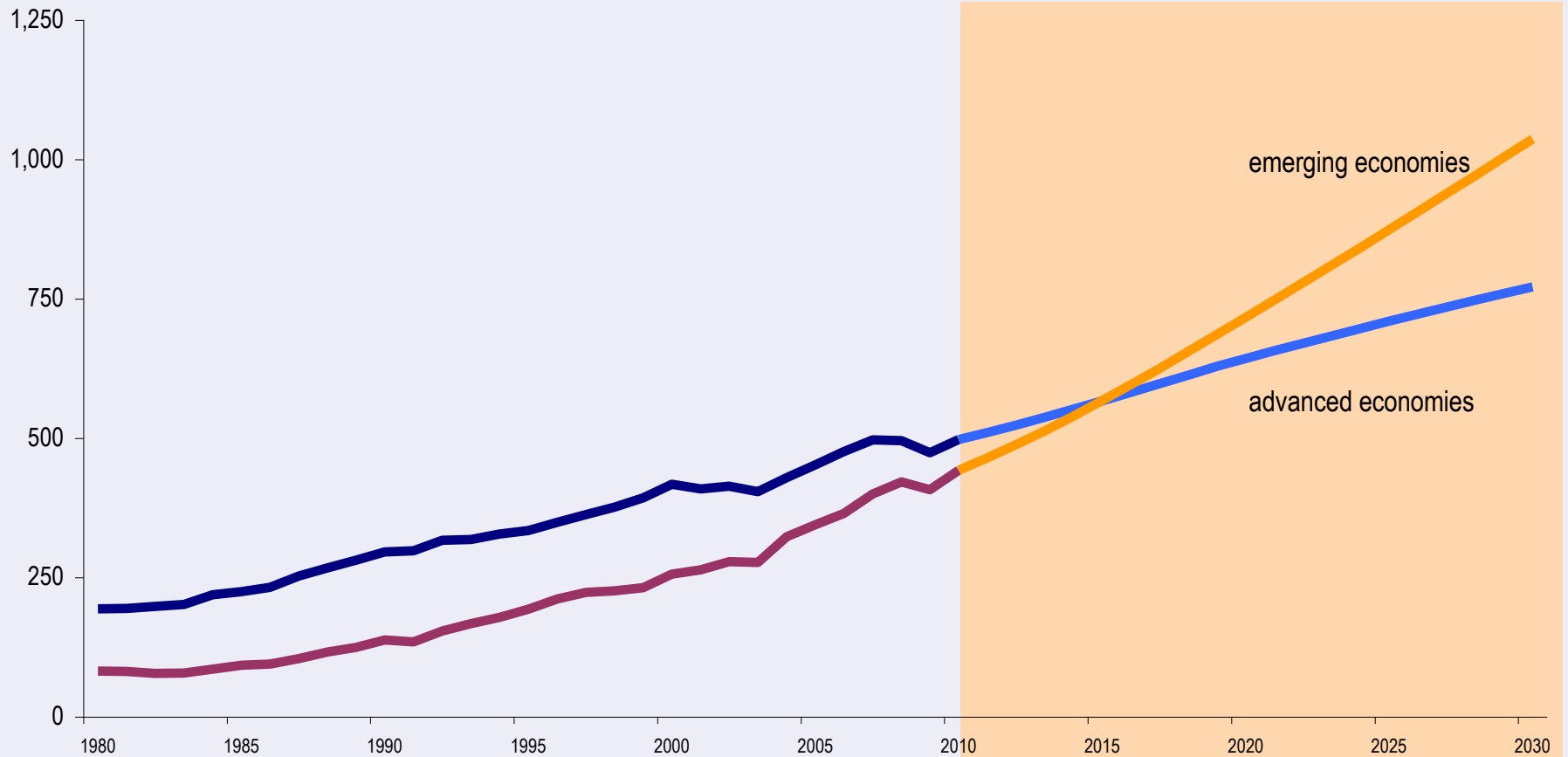


source: World Tourism Organization (UNWTO) ©

# Emerging economy destinations to surpass advanced destinations in 2015

Inbound tourism, advanced and emerging economies

International Tourist Arrivals, million

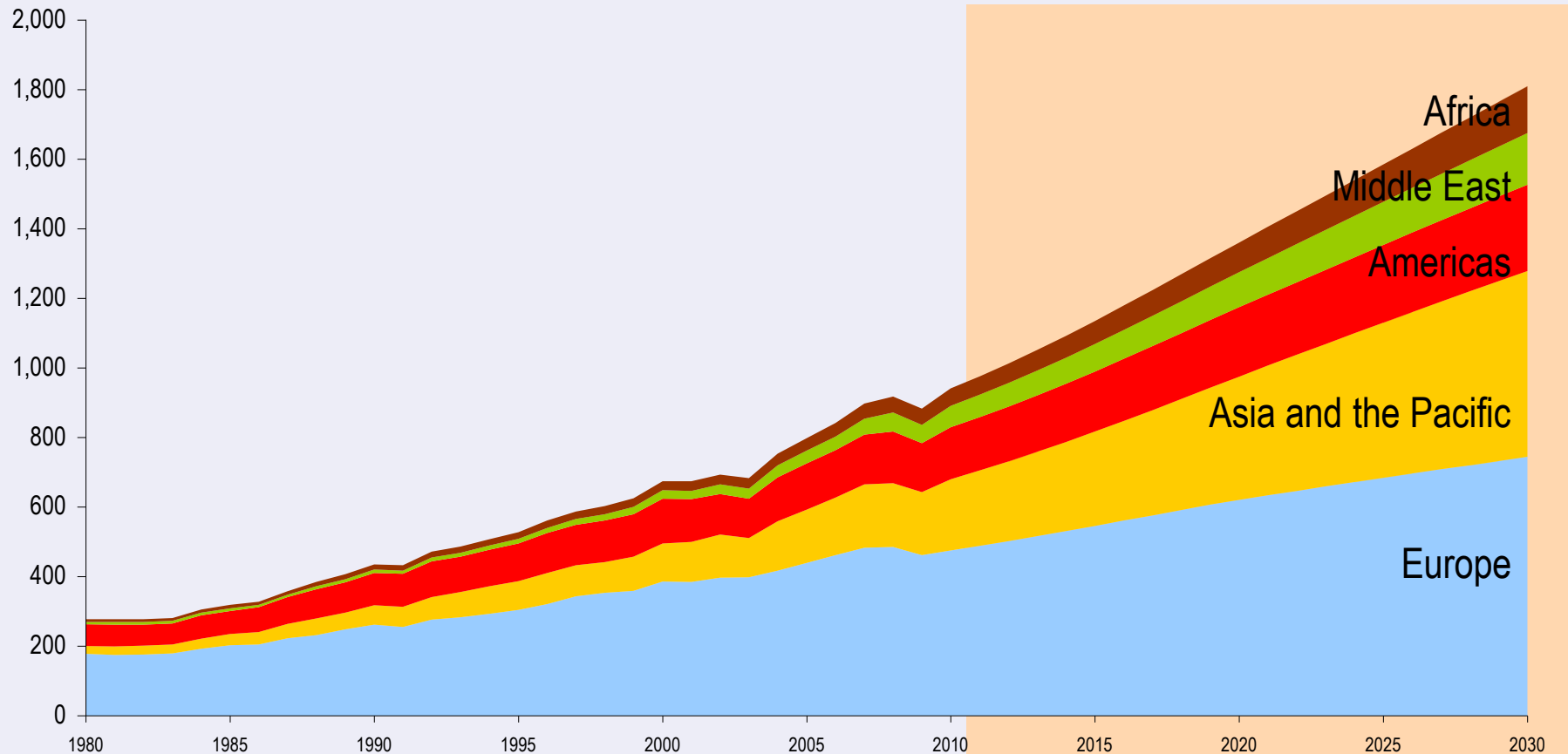


source: World Tourism Organization (UNWTO) ©



# Asia and the Pacific will gain most of the new arrivals

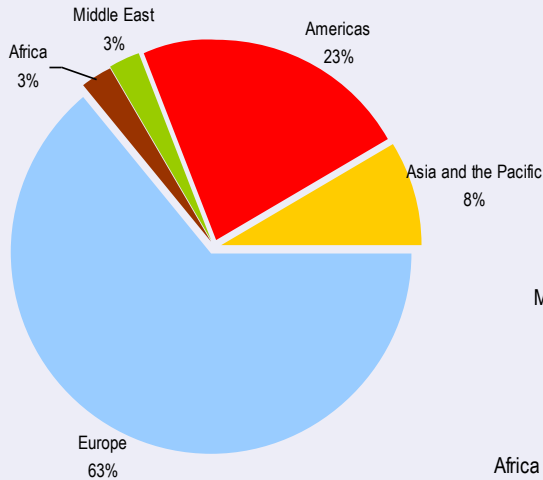
Inbound tourism by region of destination



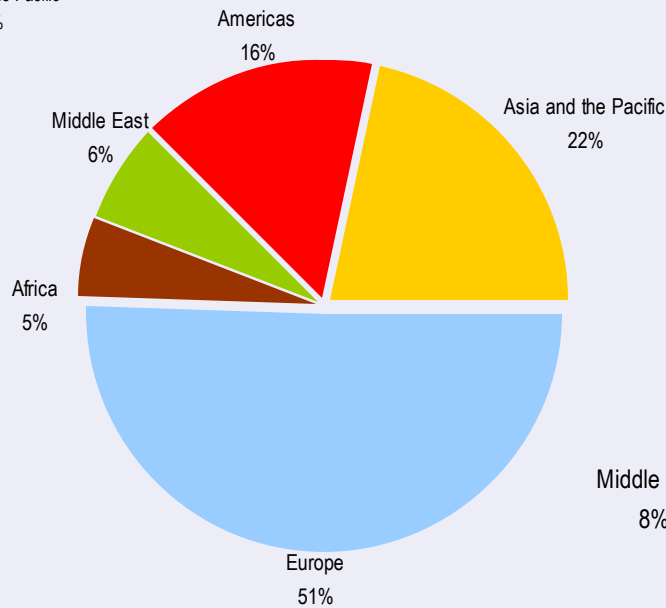
source: World Tourism Organization (UNWTO) ©

# Asia and the Pacific, the Middle East and Africa to increase their shares

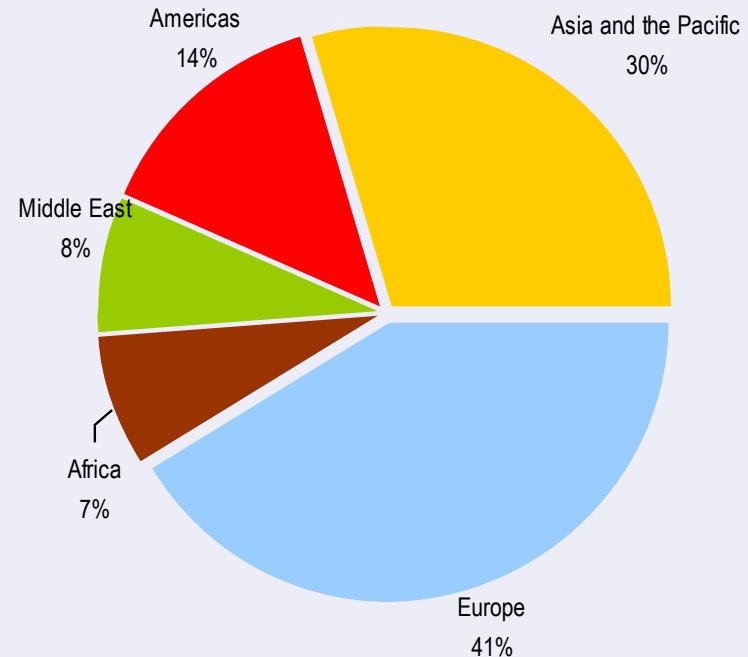
1980 (277 mn)



2010 (940 mn)

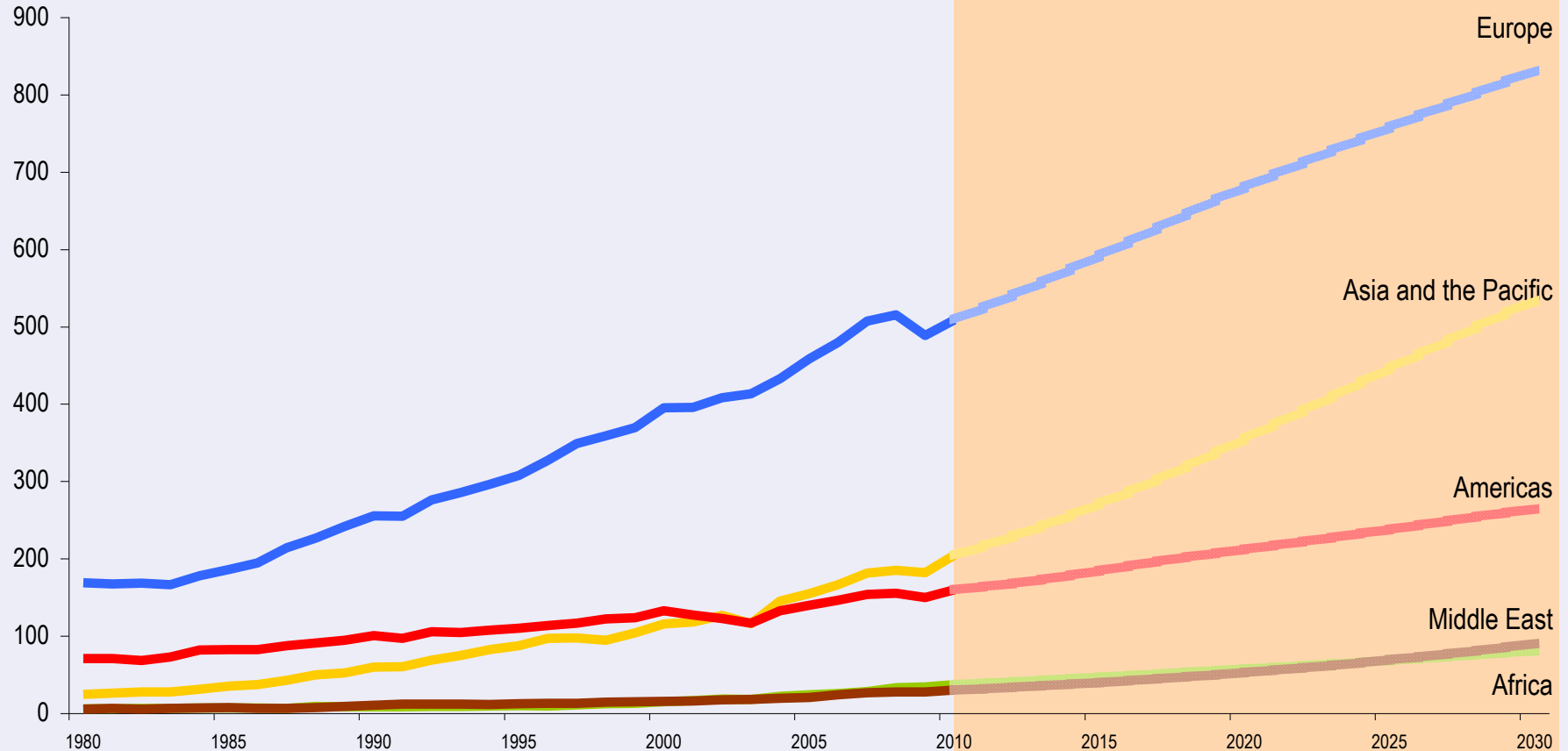


2030 (1.8 bn)



# Asia and the Pacific will also be the outbound region that grows most

Outbound tourism by region of origin

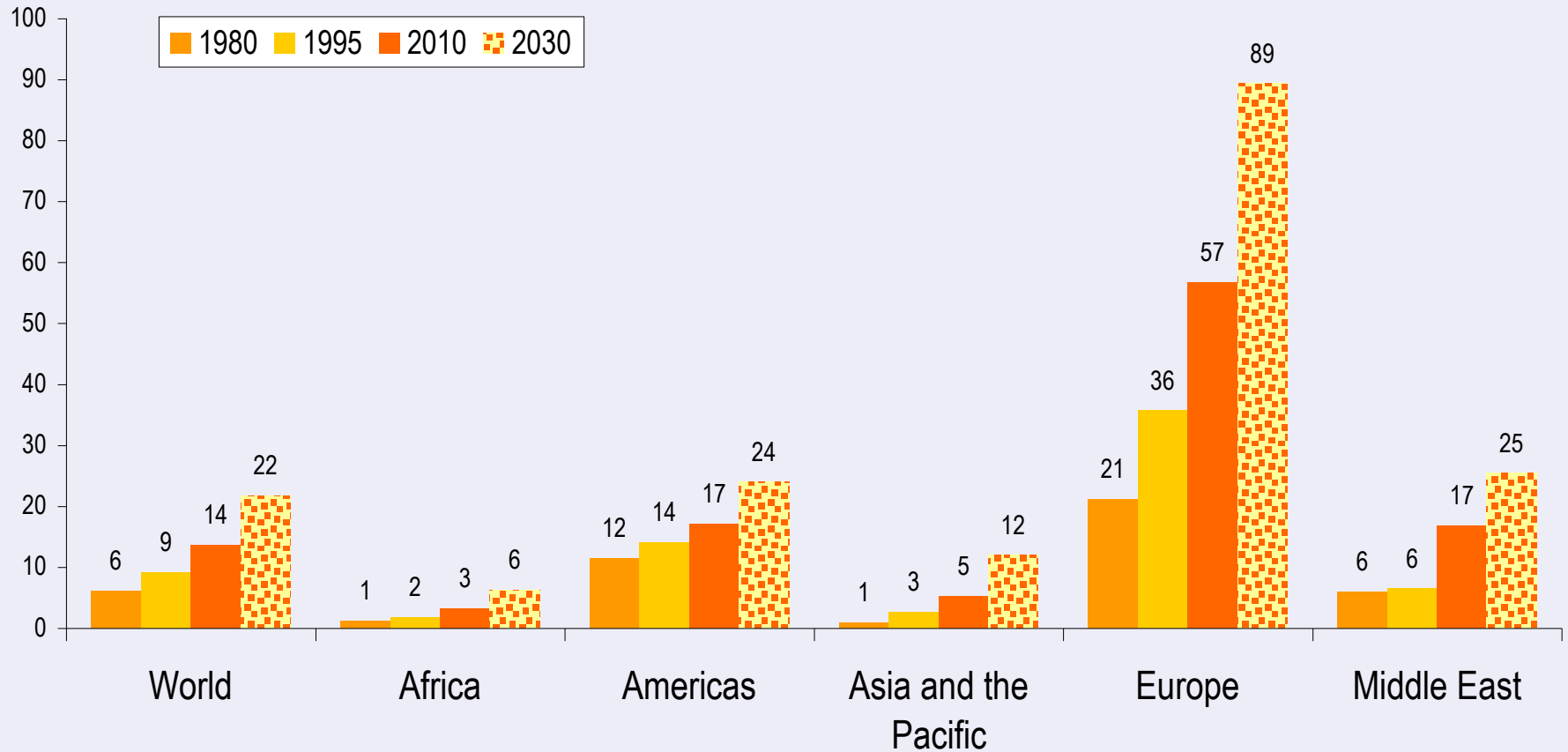


source: World Tourism Organization (UNWTO) ©

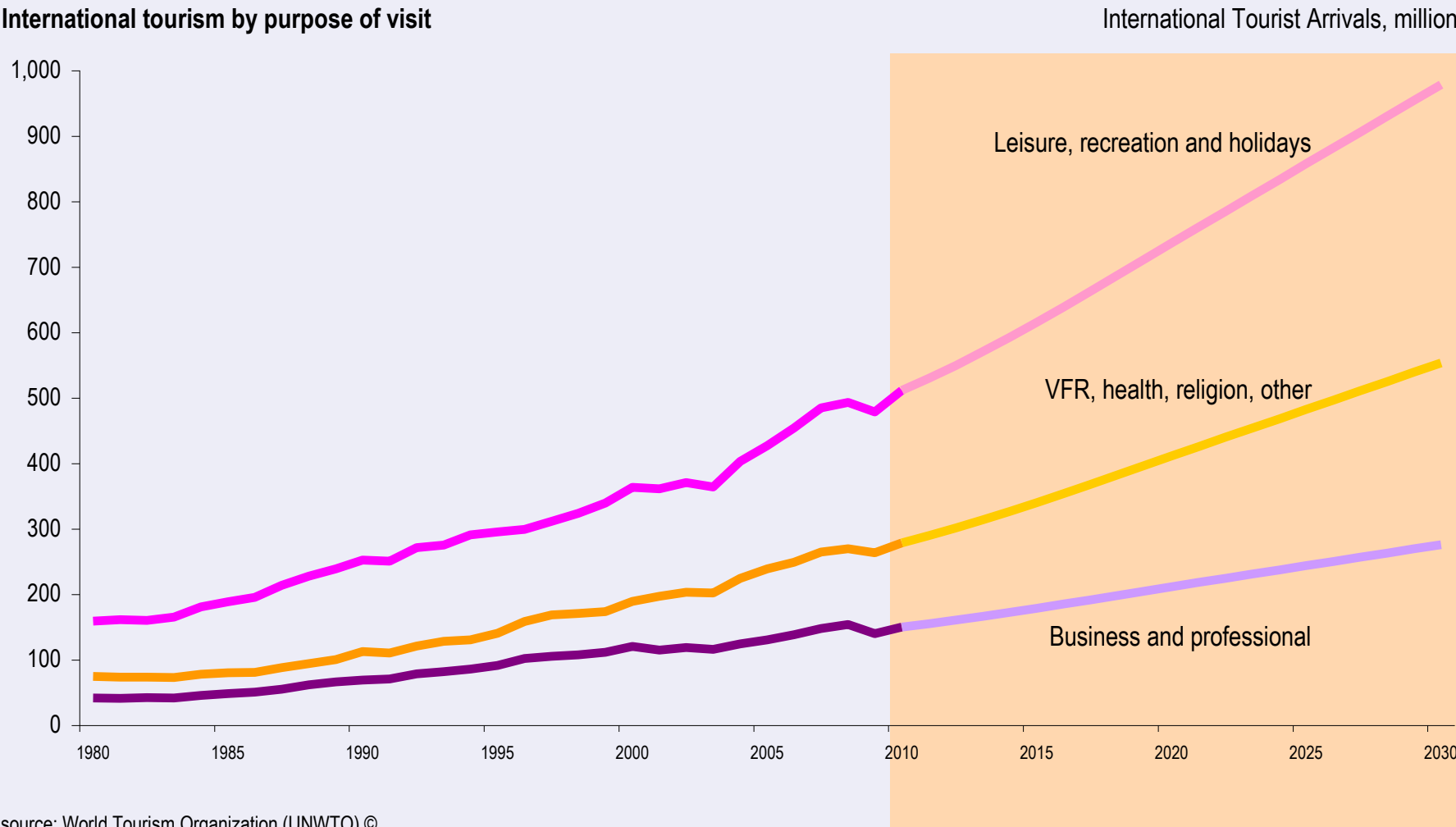
# Europe generates most arrivals relative to population, while Africa is still low

Outbound tourism by region of origin

International Tourist Arrivals generated per 100 population



# No major change in share by purpose of visit

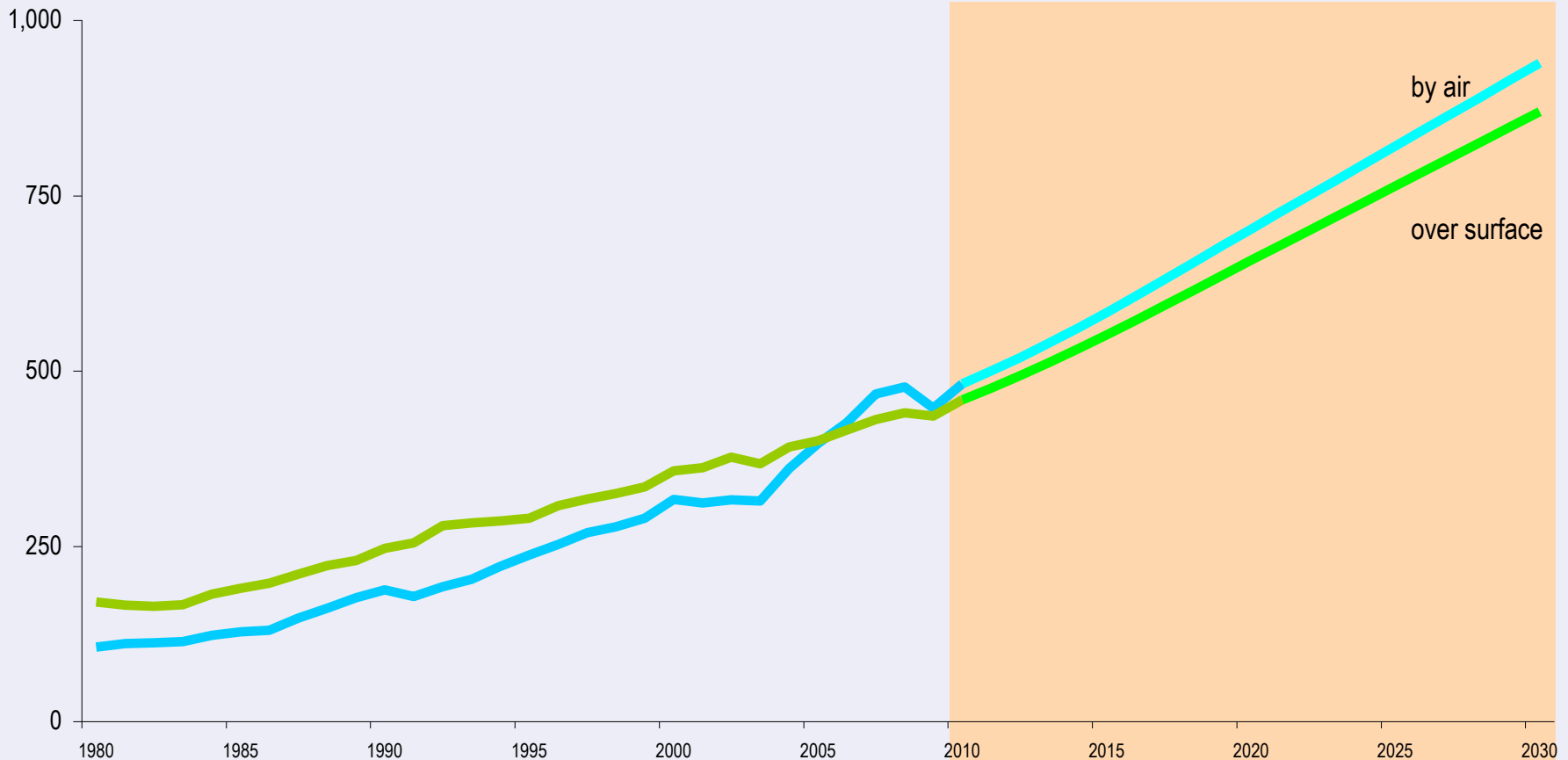


source: World Tourism Organization (UNWTO) ©

# Air transport will continue to increase market share, but at a slower pace

International tourism by means of transport

International Tourist Arrivals, million



source: World Tourism Organization (UNWTO) ©



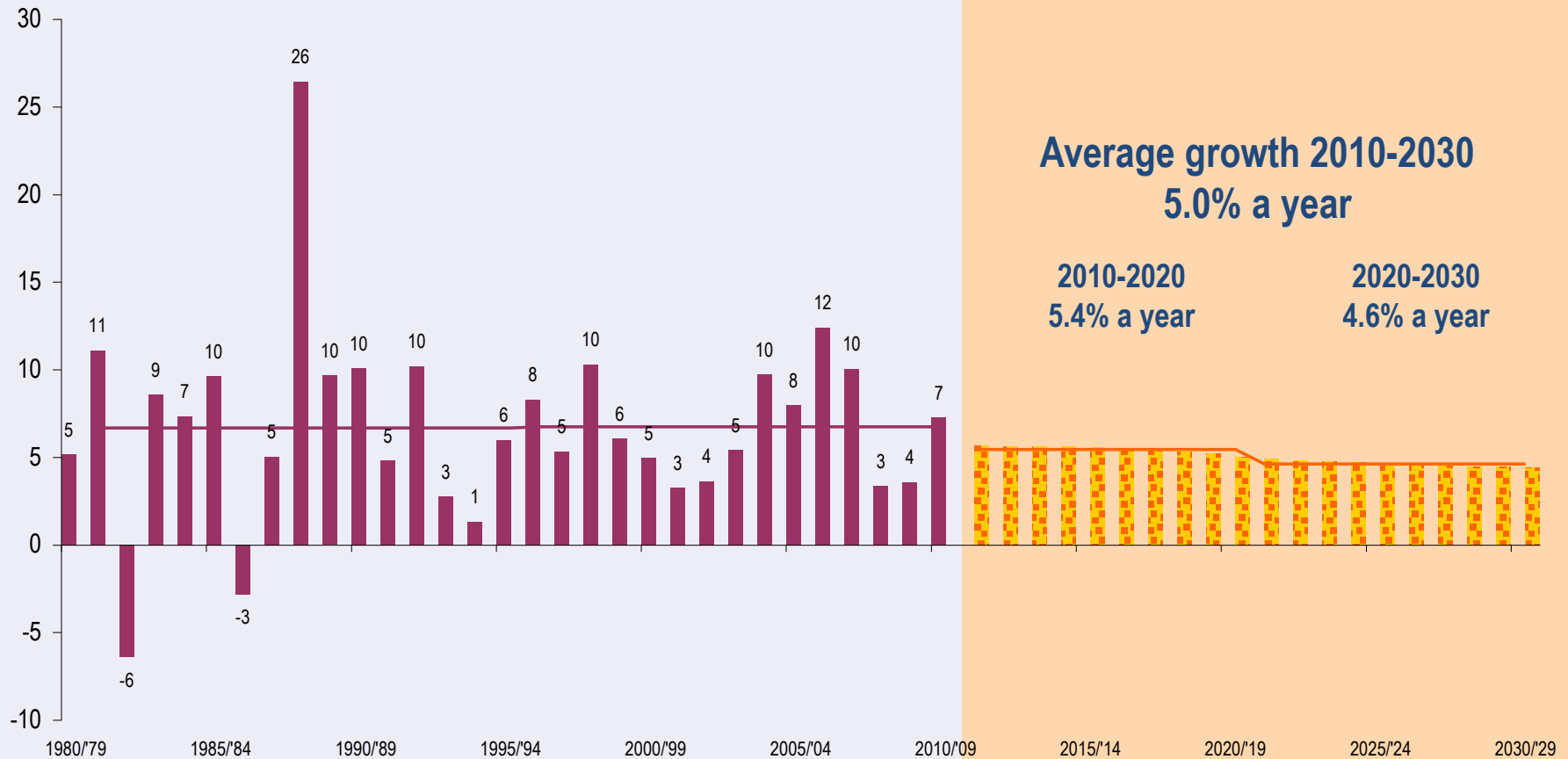


Africa

# Africa: growth in international tourism to continue at 5% a year on average

## International Tourism, Africa

International tourist arrivals, % change over previous year



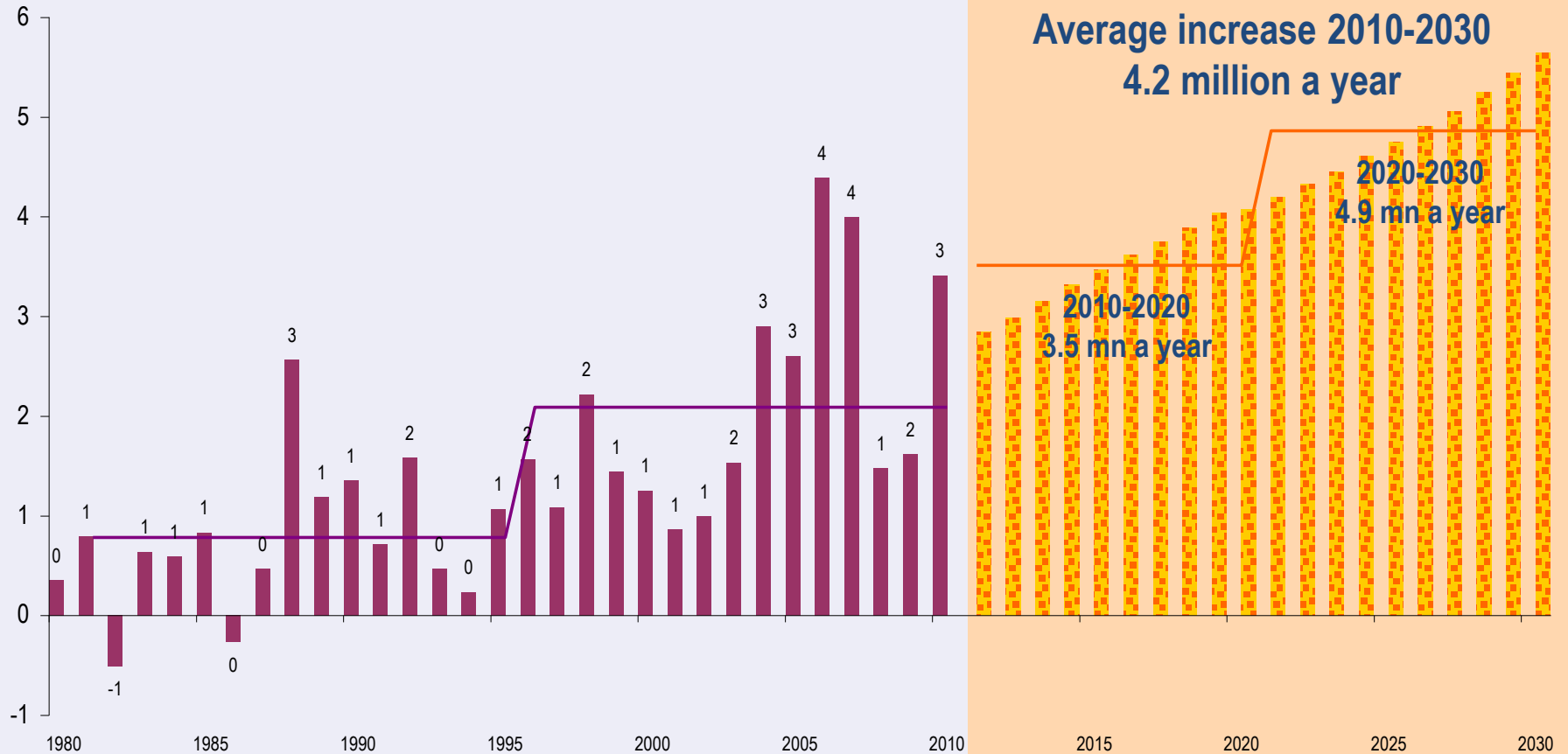
Source: World Tourism Organization (UNWTO) ©



# Africa: International tourist arrivals to increase by 4 million a year on average

## International Tourism, Africa

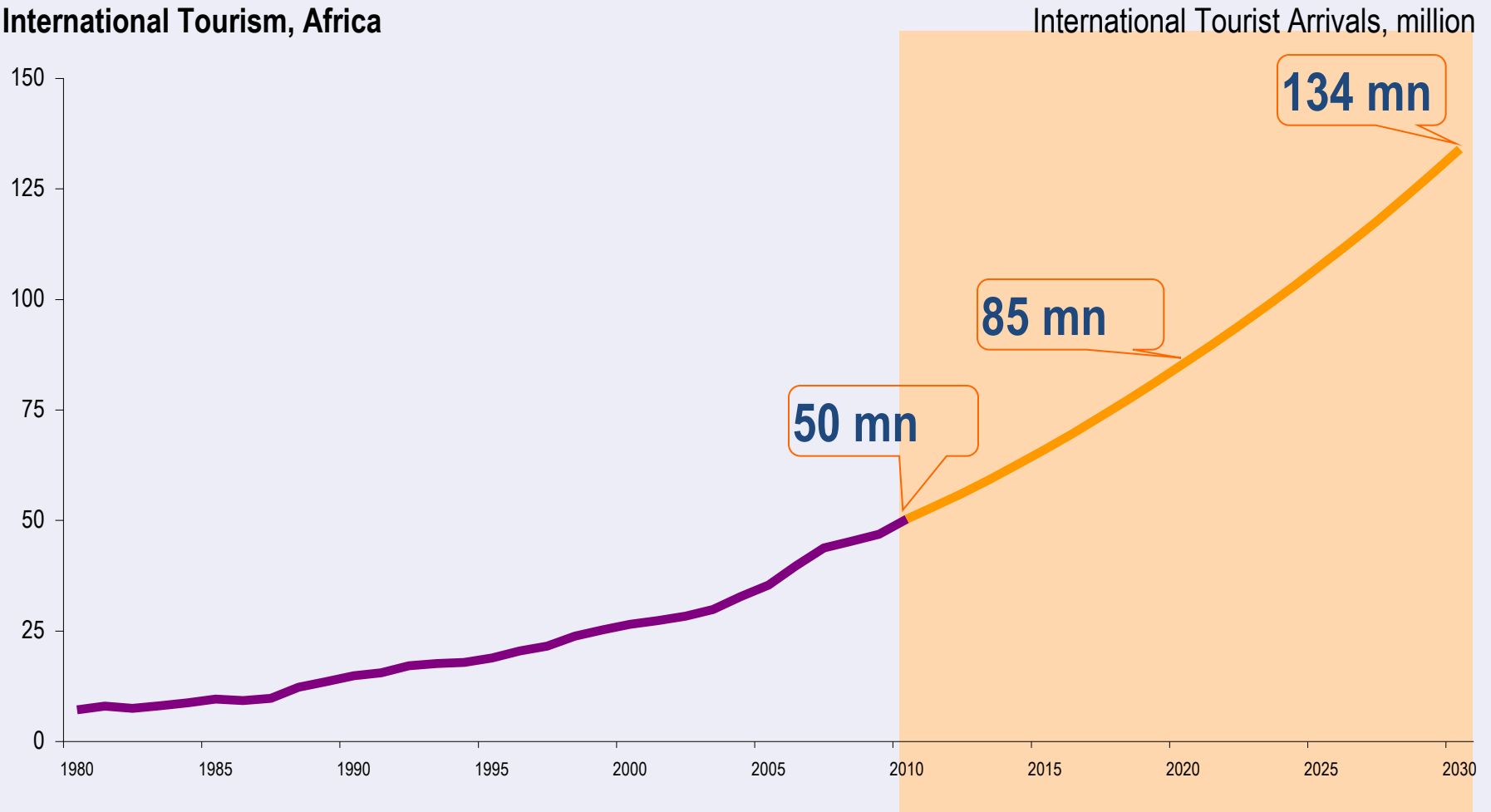
International tourist arrivals, absolute change over previous year, million



Source: World Tourism Organization (UNWTO) ©

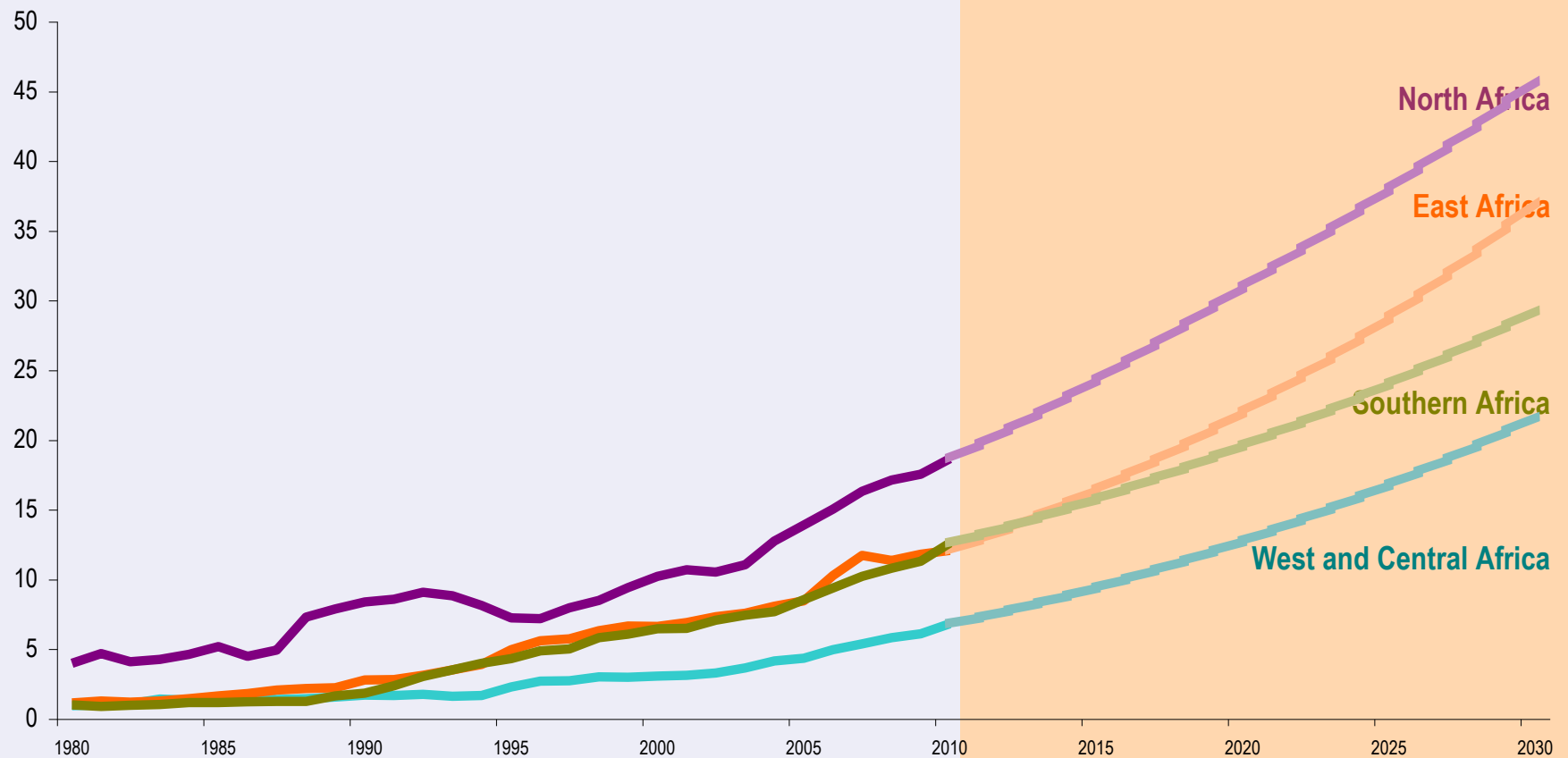
# Africa: International tourist arrivals to grow from 50 mn to 134 mn

International Tourism, Africa



# Africa by subregion

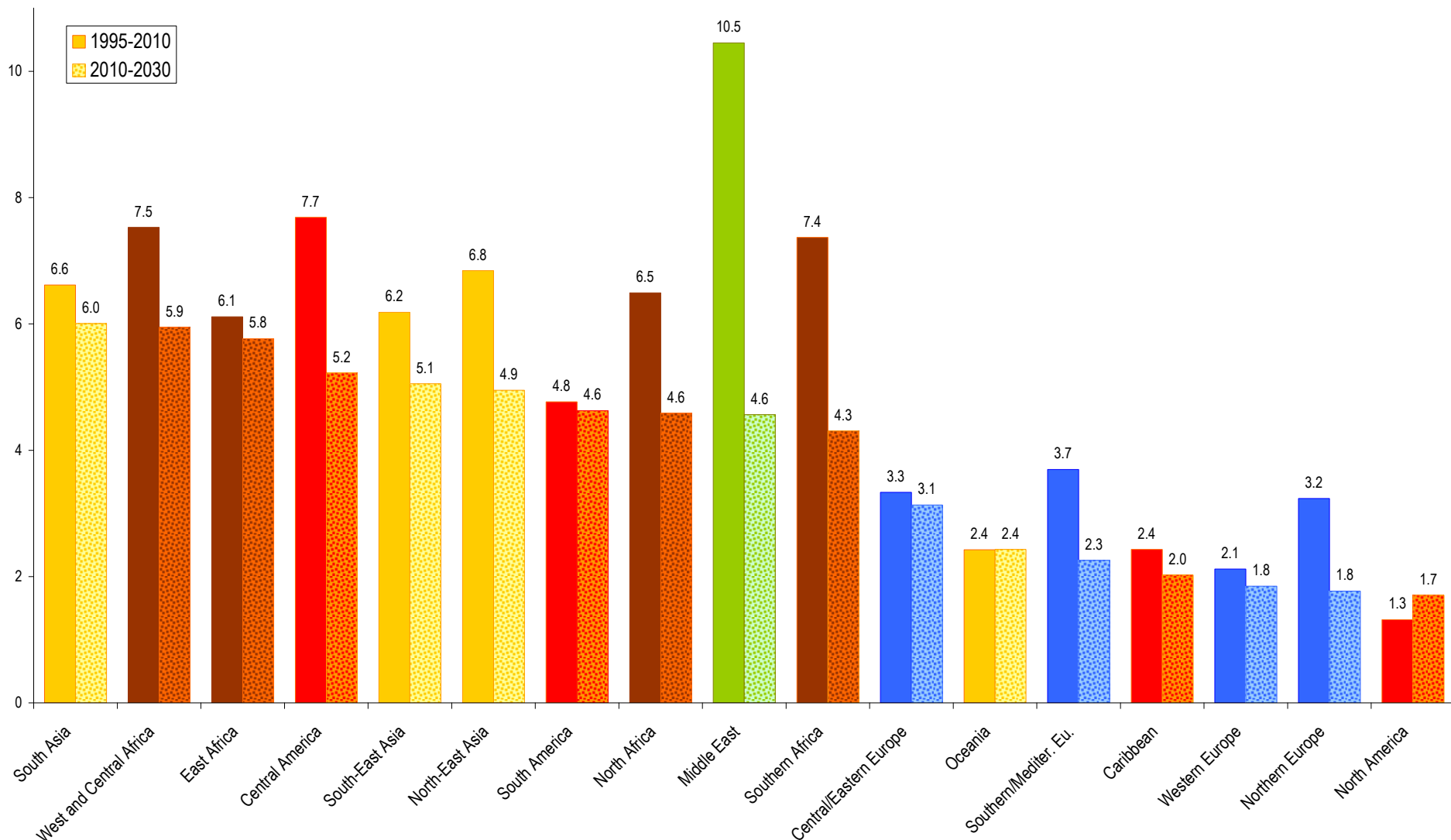
Africa: Inbound tourism by subregion of destination



# South Asia subregion with fastest growth (%), followed by West and Central, and East Africa

International tourism by (sub)region of destination

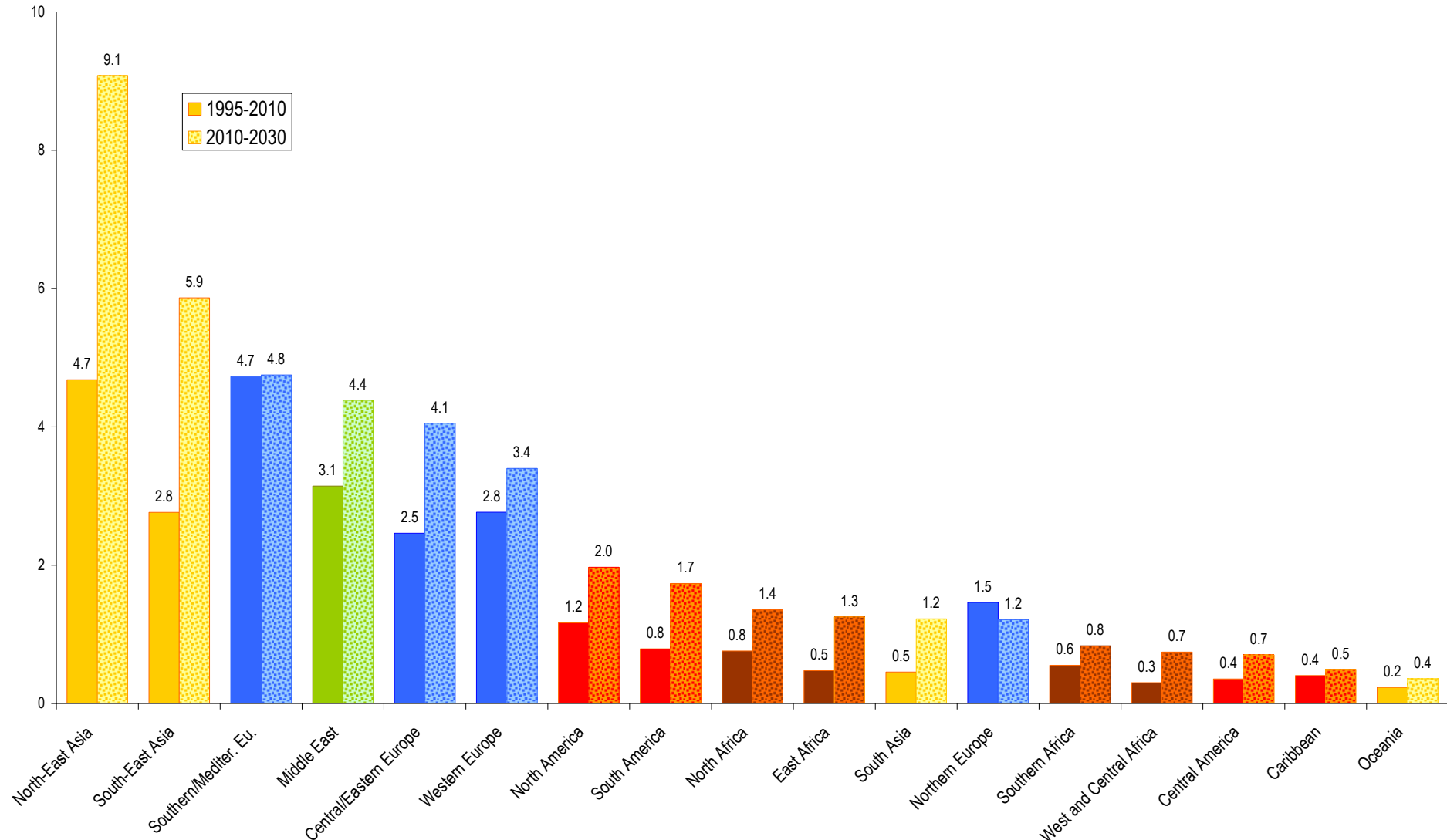
International tourist arrivals, average annual growth %



# NE Asia subregion with fastest growth (abs.)

International tourism by (sub)region of destination

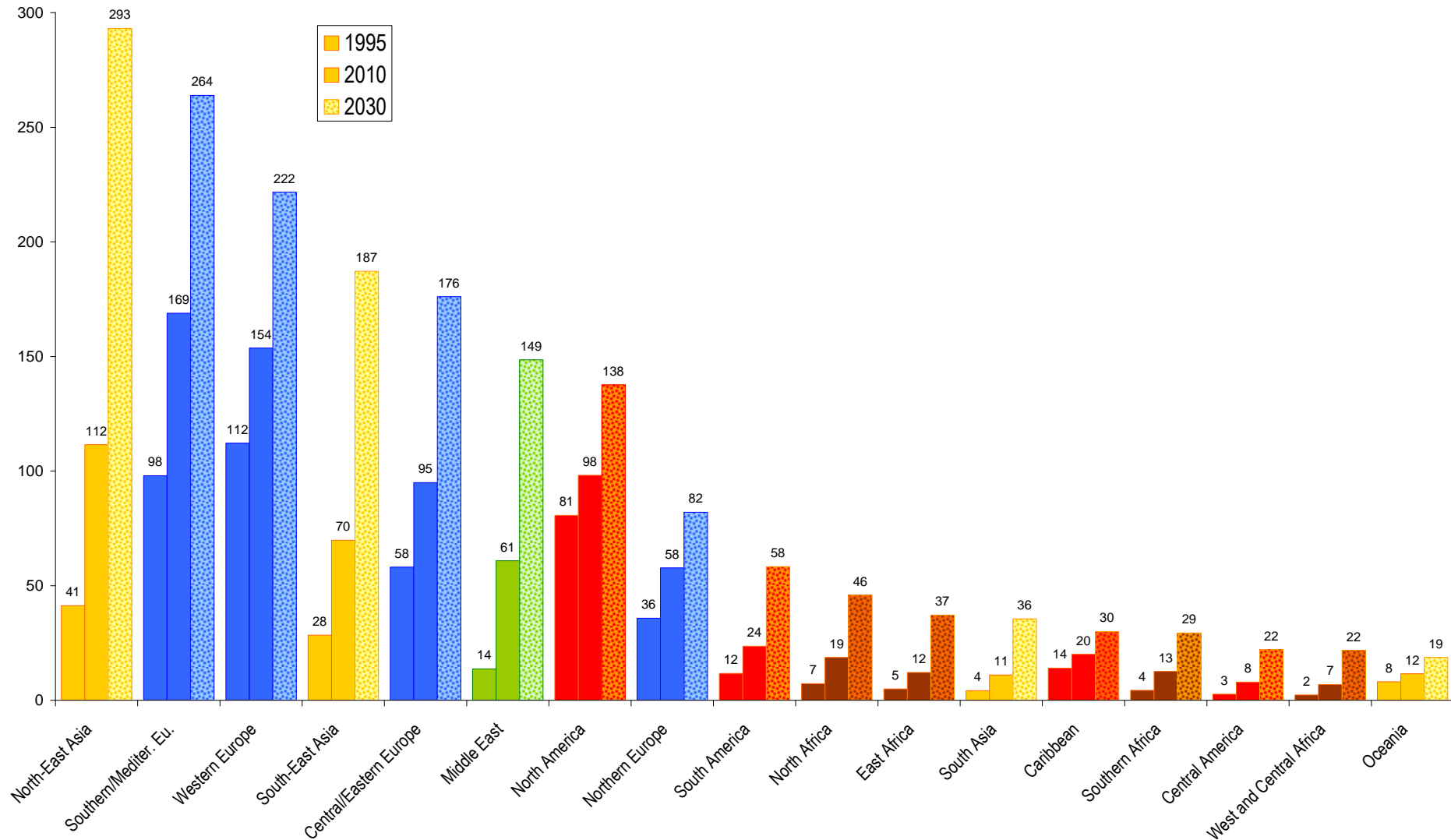
International tourist arrivals, average absolute change over previous year, million



# North-East Asia will be the most visited subregion in 2030

International tourism by (sub)region of destination

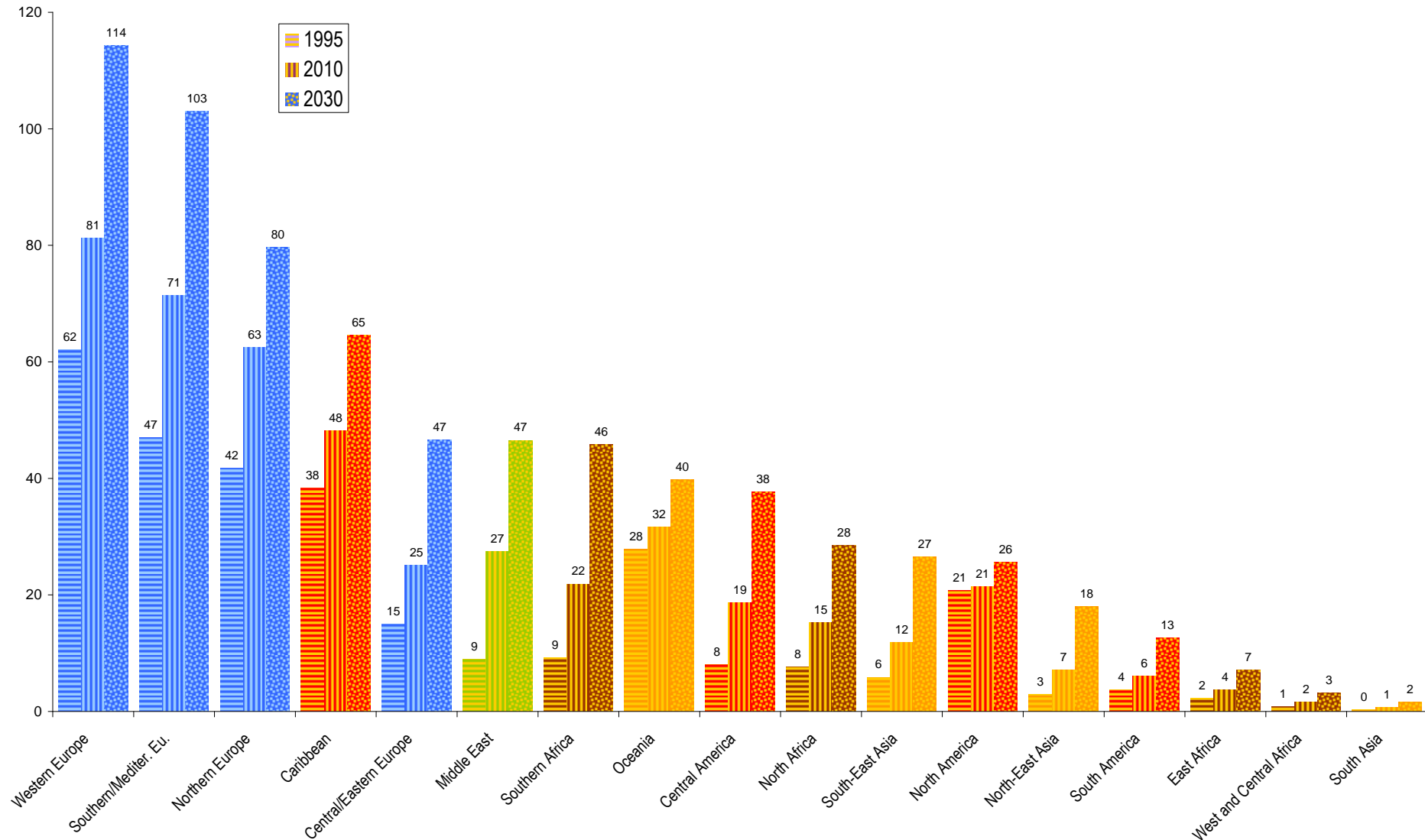
International tourist arrivals, million



# Europe continues to lead in international arrivals received per 100 of population

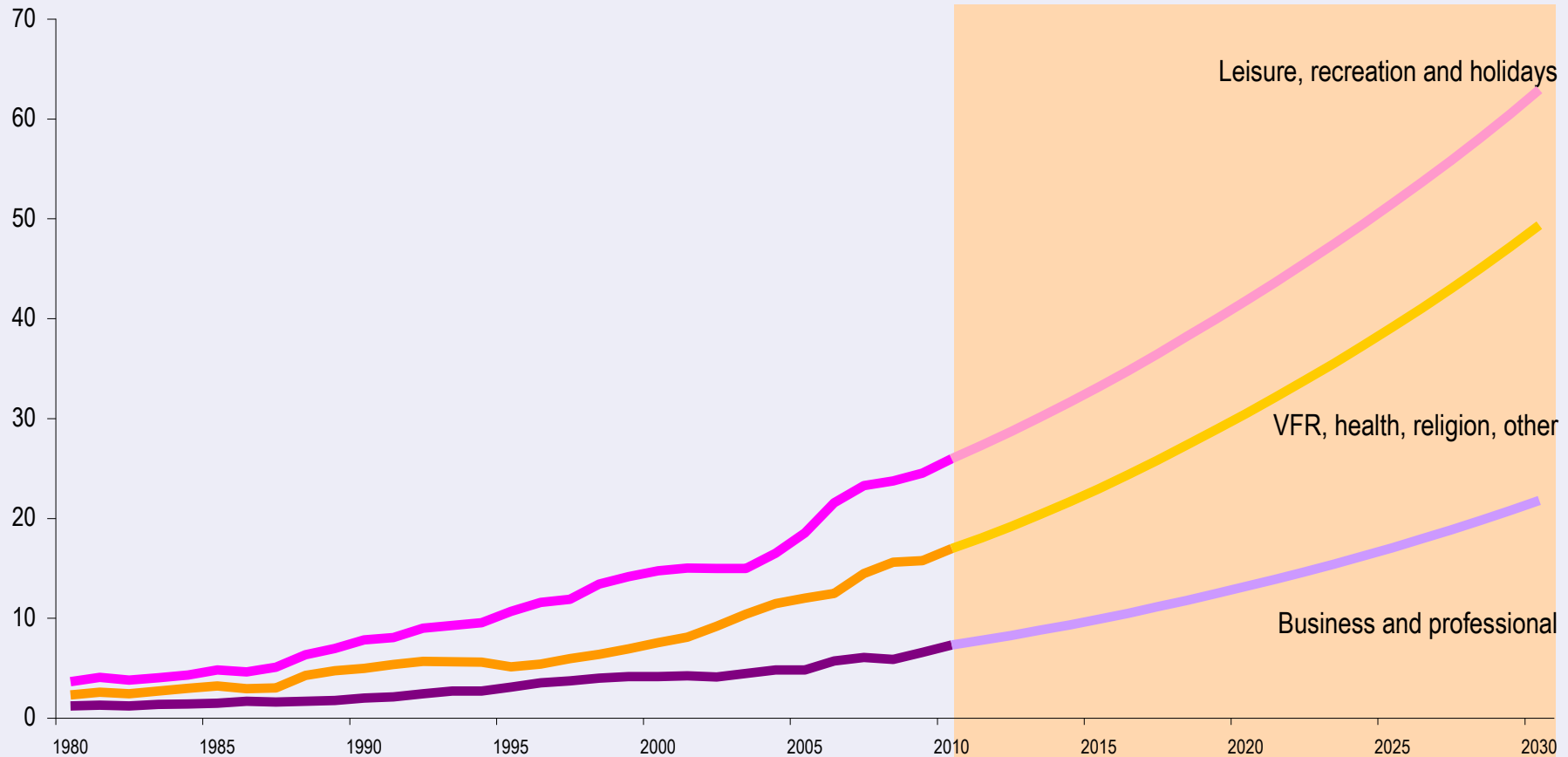
International tourism by (sub)region of destination

International tourist arrivals received per 100 of population



# Africa: business and VFR to grow slightly faster

Africa, International tourism by purpose of visit

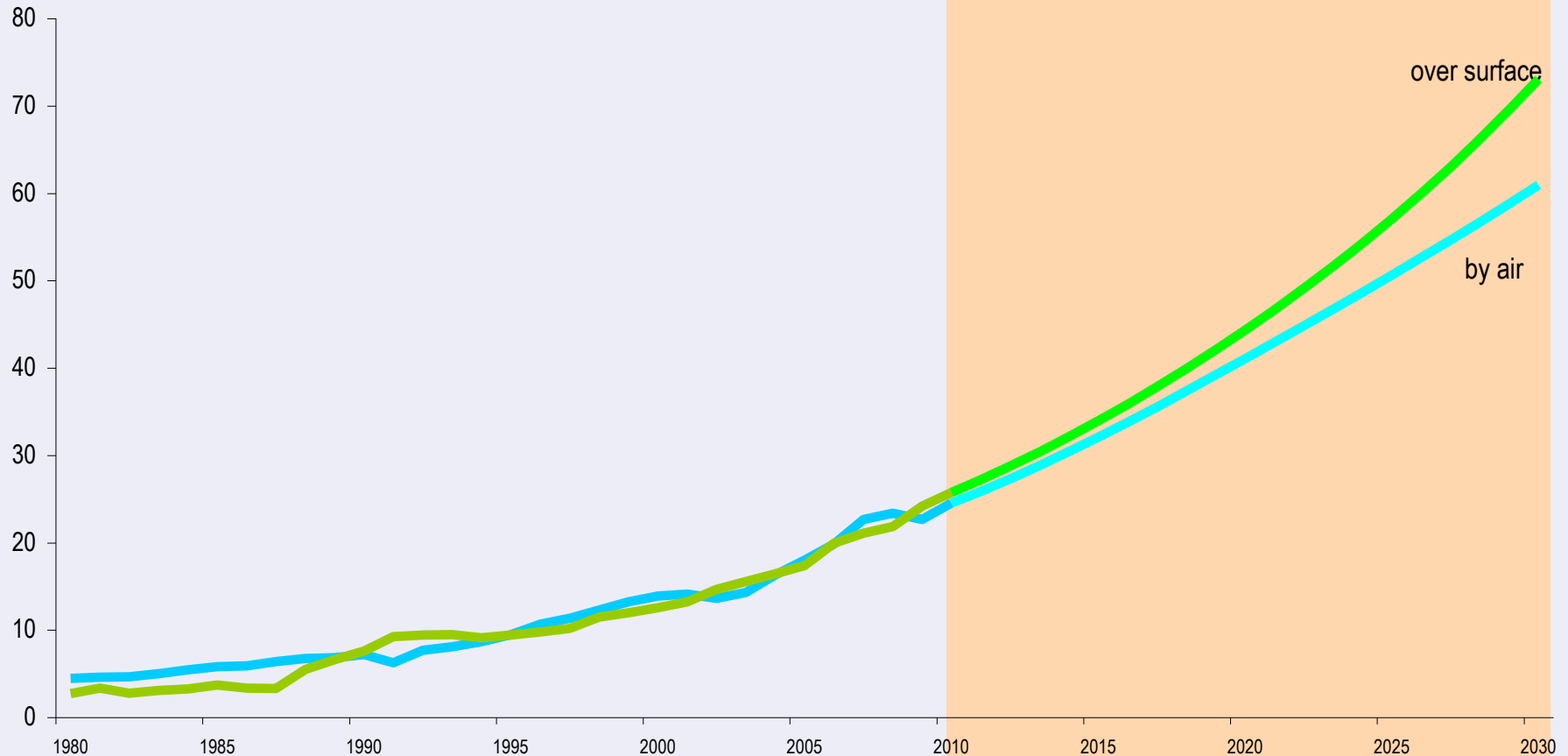


Source: World Tourism Organization (UNWTO) ©



# Africa: transport over surface to grow somewhat faster than by air

Africa, International tourism by means of transport



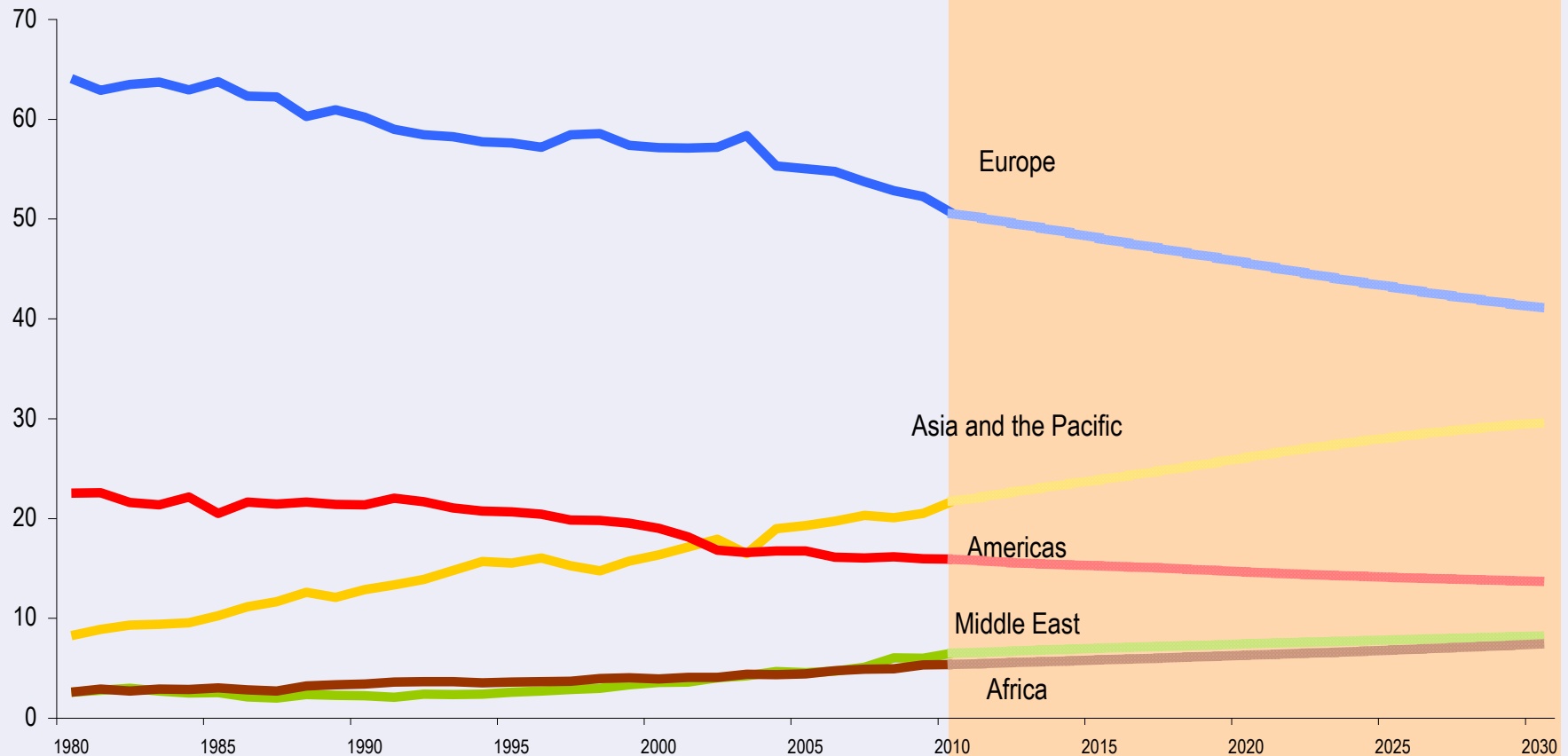
Source: World Tourism Organization (UNWTO) ©

A photograph of a herd of African elephants in a savanna environment. Several elephants of various ages are gathered on a sandy bank next to a small, calm body of water. The background is filled with dense, green trees and bushes under a clear sky. The ground is dry and sandy, with some small plants and rocks scattered about. The elephants are mostly facing towards the water or looking in different directions.

**Share in  
the world**

# Africa inbound tourism market share going up due to faster growth

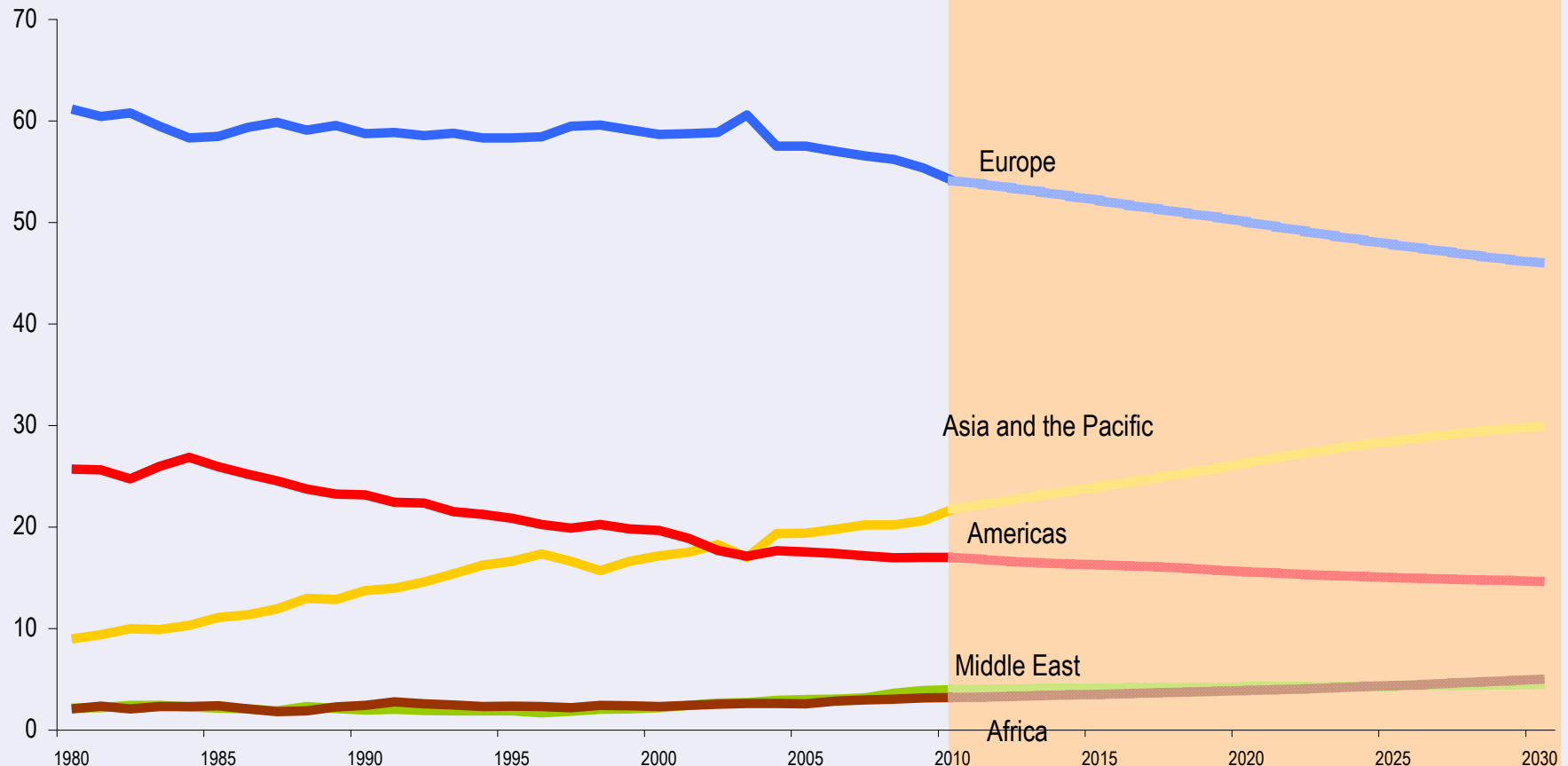
Inbound tourism by region of destination



source: World Tourism Organization (UNWTO) ©

# African outbound tourism also growing at a faster pace

Outbound tourism by region of origin

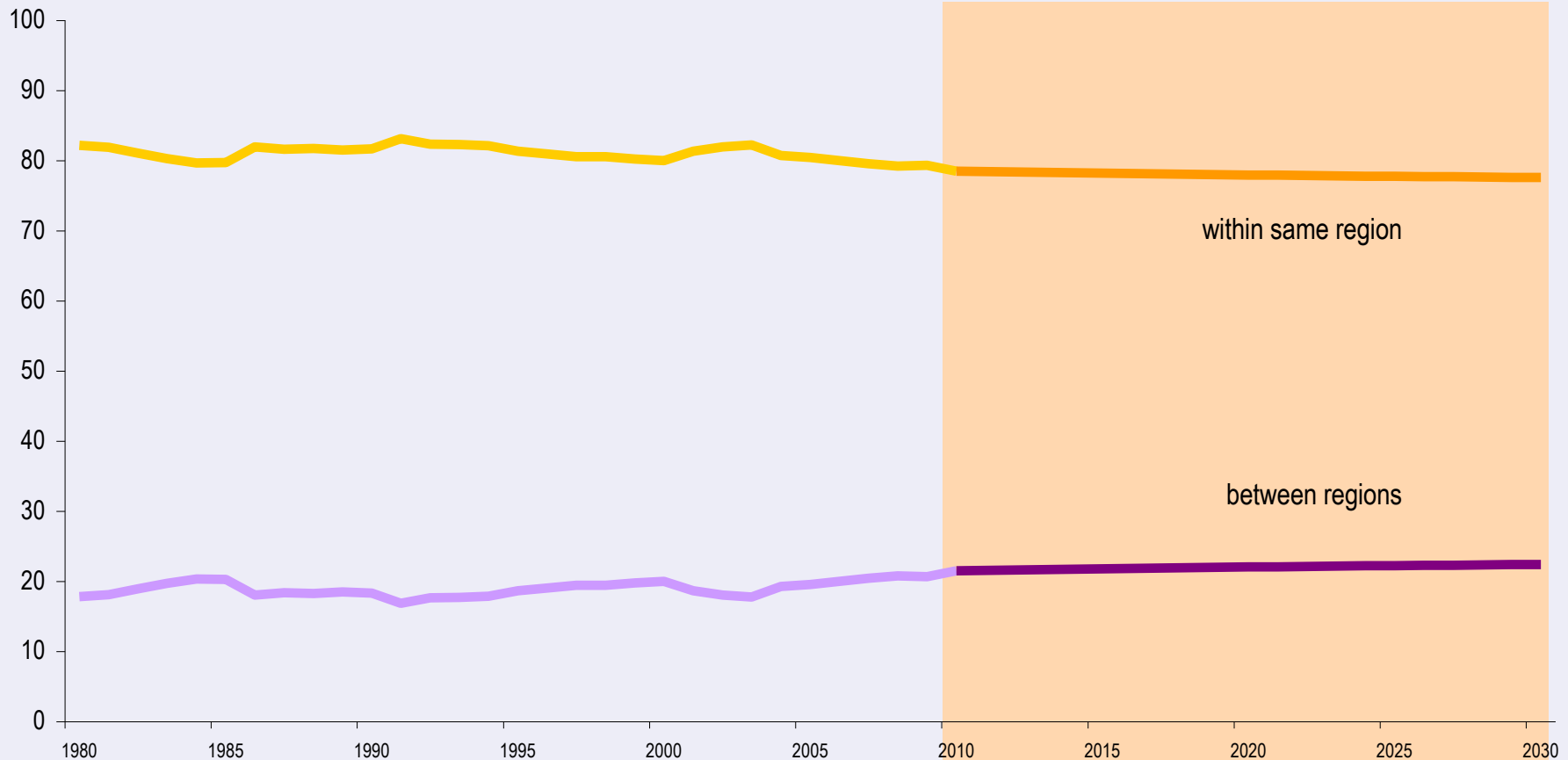


source: World Tourism Organization (UNWTO) ©



# Travel between regions continues to grow slightly faster than within the same region

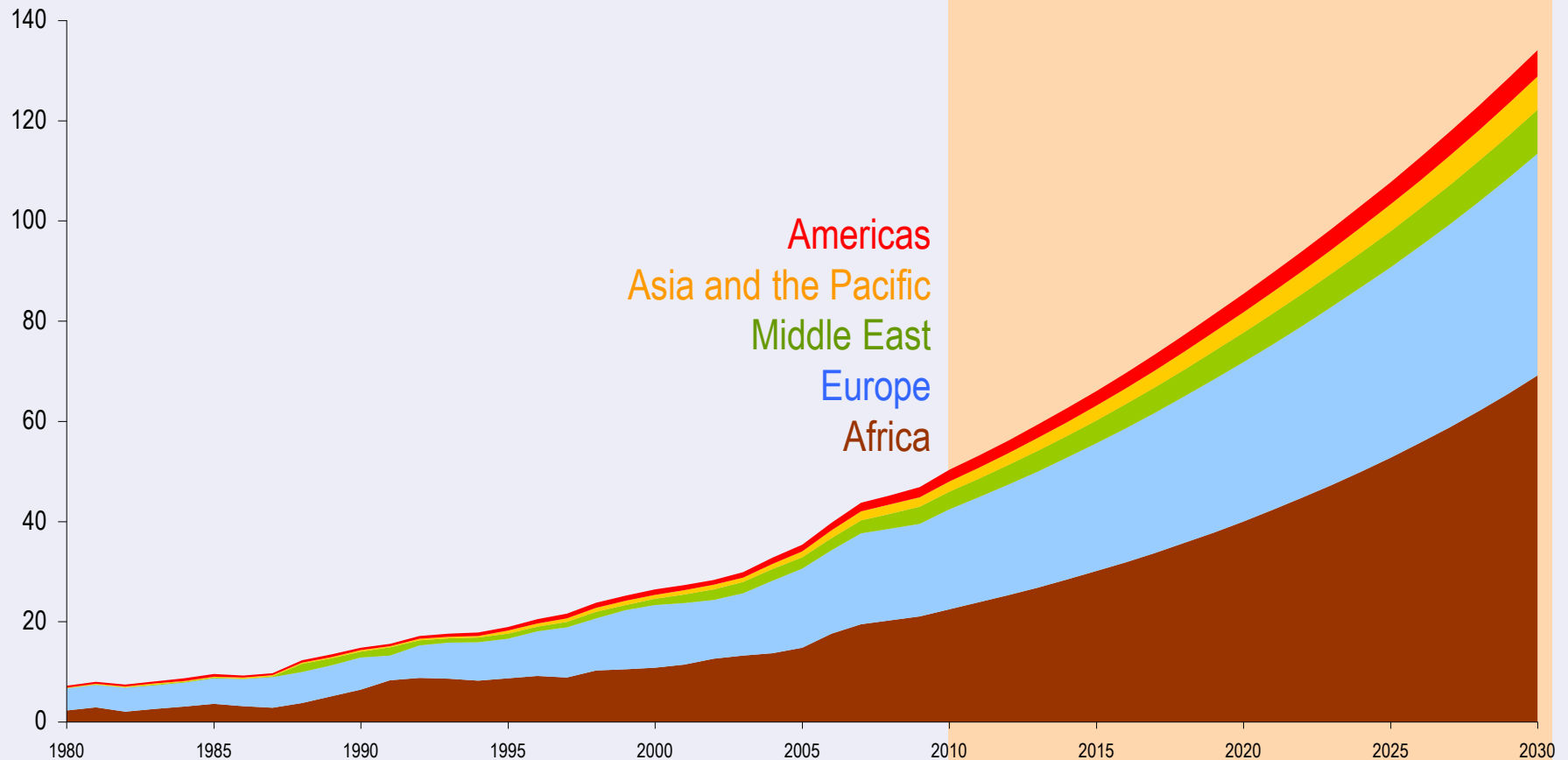
International tourism by region of destination and origin



source: World Tourism Organization (UNWTO) ©

# Africa: intraregional arrivals grow faster, so share from other regions decreasing

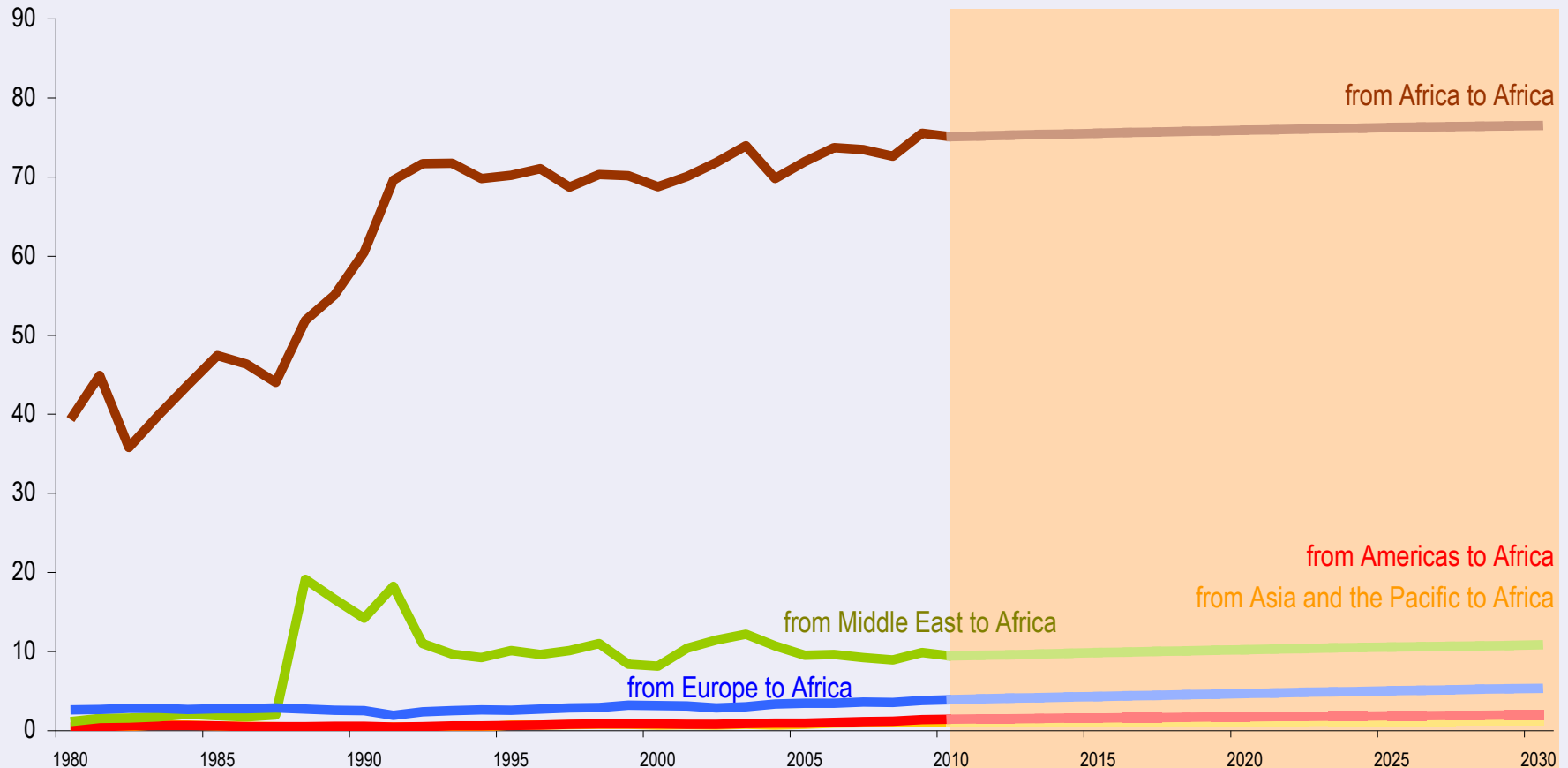
Africa: Inbound tourism by region of origin



Source: World Tourism Organization (UNWTO) ©

# ... but Africa is gaining share in outbound travel from all regions

Market share of Africa in regional outbound markets

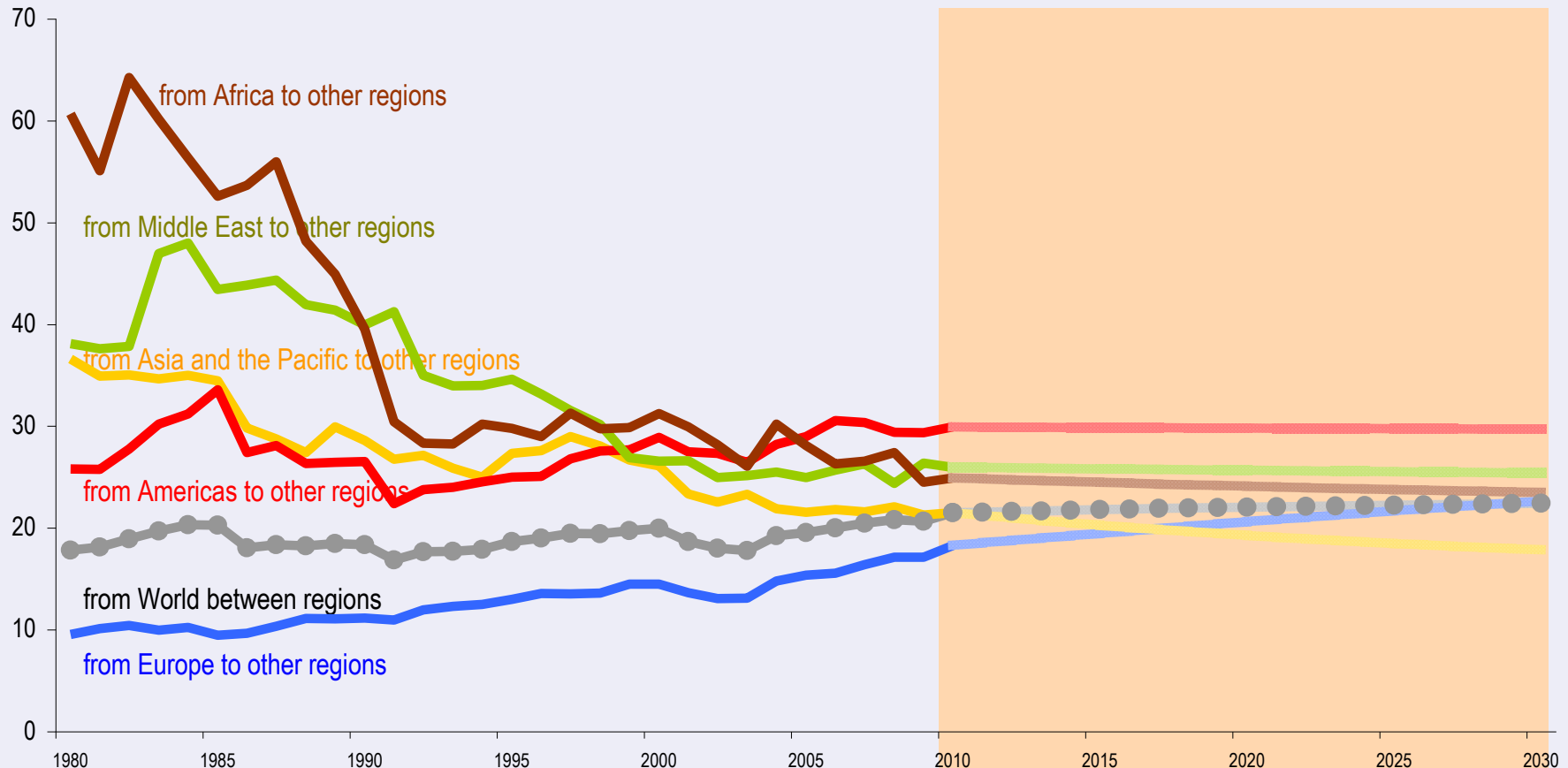


Source: World Tourism Organization (UNWTO) ©

# Travel from emerging markets more often to same region, Europe more often outside

International tourism by region of destination and origin

International Tourist Arrivals, share, %



source: World Tourism Organization (UNWTO) ©



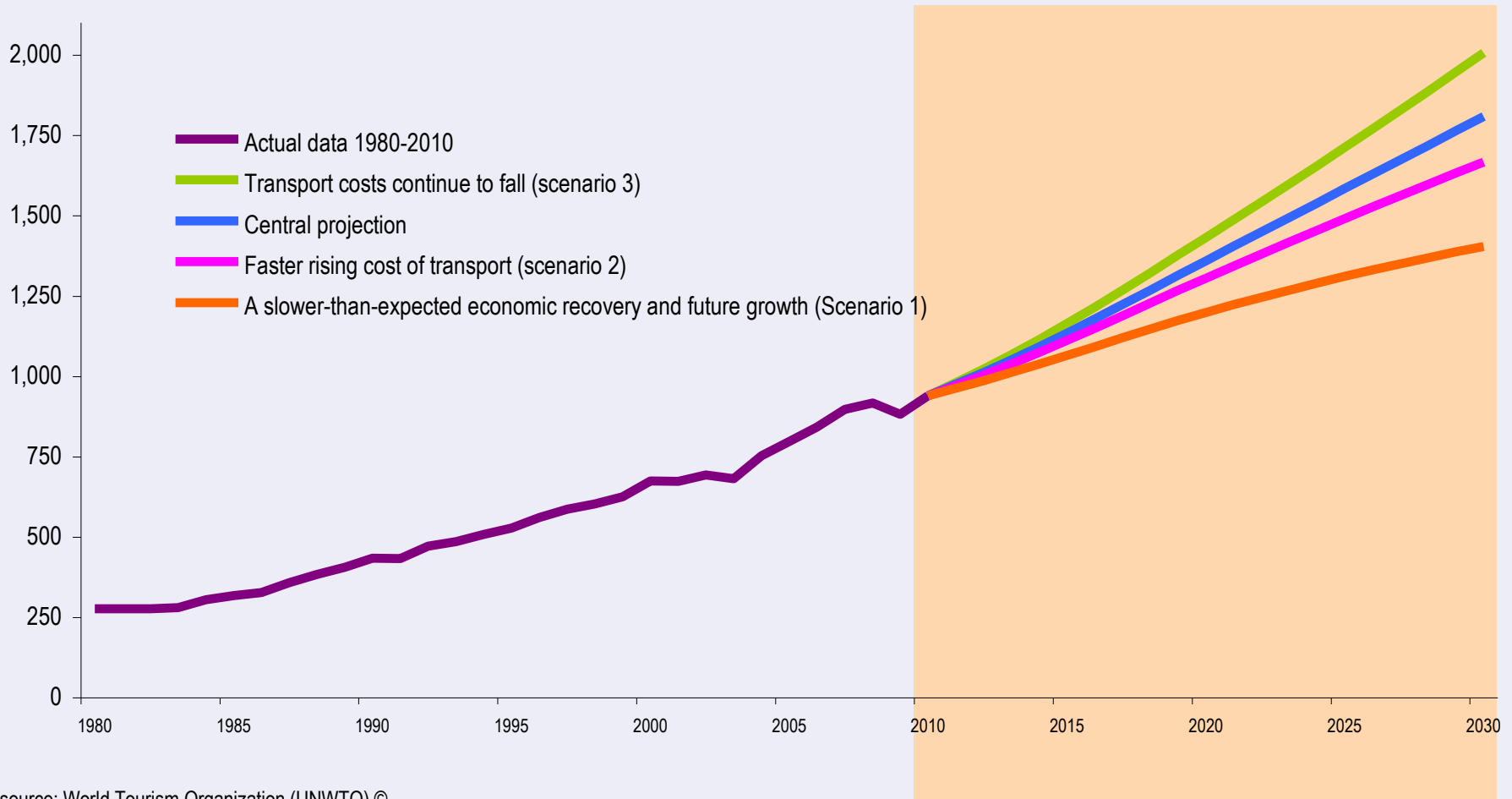
A cyclist wearing a yellow helmet, a blue and white jersey, and black shorts is riding a mountain bike on a dirt trail. The trail is surrounded by green brush and trees, and the sky is blue. The cyclist is wearing a backpack and has a race number on their bike. The image is slightly blurred, suggesting motion.

**Round-up**

# What if assumptions change?

Tourism Towards 2030: global projection and sensitivity analysis

International Tourist Arrivals, million



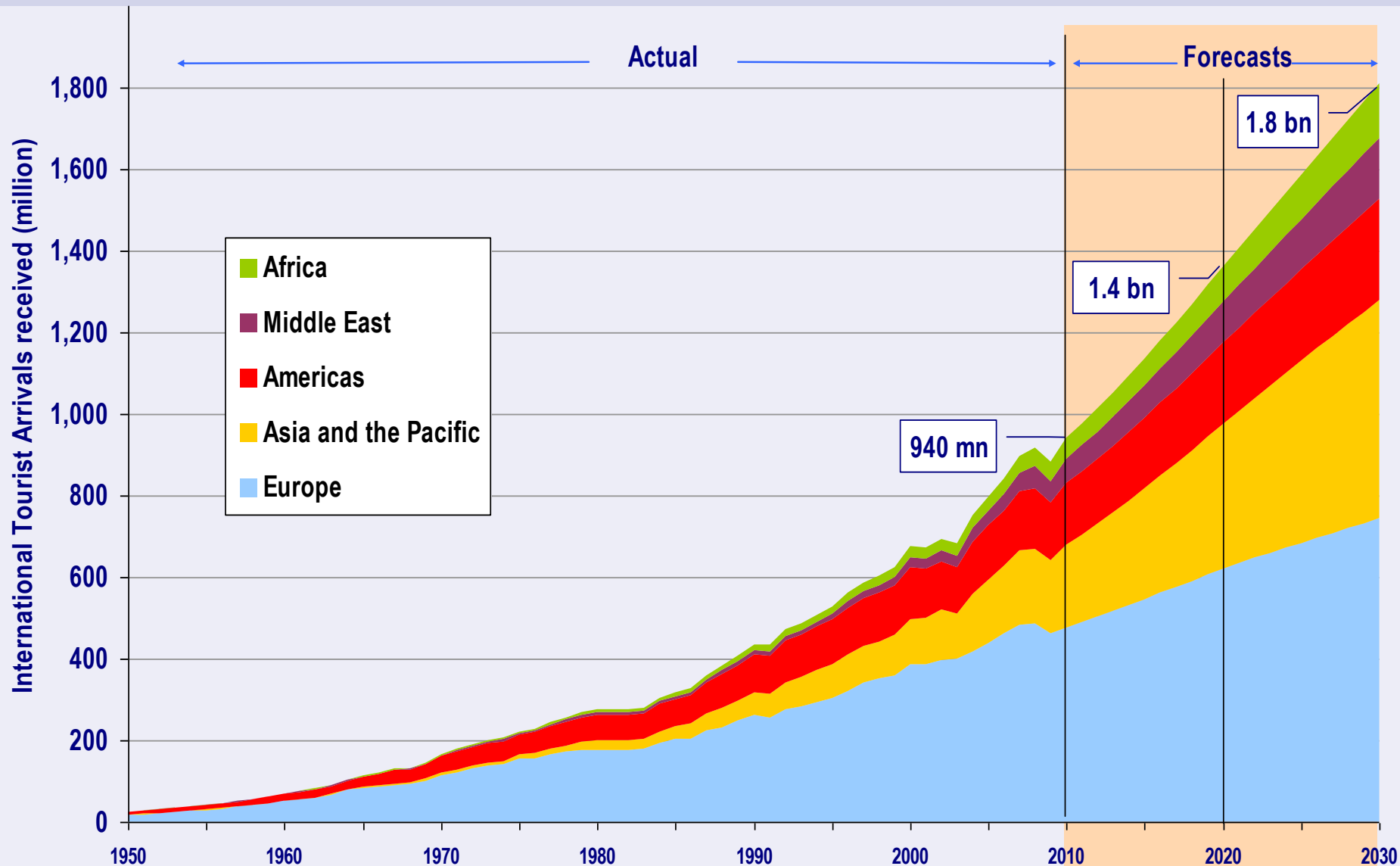
source: World Tourism Organization (UNWTO) ©

# ***Tourism Towards 2030 in one page***

- Global growth in international tourist arrivals to continue, but at a more moderate pace, from 4.2% per year (1980–2020) to 3.3% (2010–2030), as a result of four factors:
  - The base volumes are higher, so smaller % increases still add substantial numbers
  - Lower GDP growth, as economies mature
  - A lower elasticity of travel to GDP
  - A shift from falling transport costs to increasing ones
- *Tourism Towards 2030* shows that there is still a great potential for further expansion in coming decades; emerging as well as established destinations can benefit from this trend and opportunity, provided they shape the adequate conditions and policies with regard to business environment, infrastructure, facilitation, marketing and human resources
- Along with opportunities, challenges also arise in maximising social and economic benefits and minimising negative impacts

**Long-term tourism growth pattern: more moderate, sustainable and inclusive**

# UNWTO Tourism Towards 2030: Actual trend and forecasts 1950-2030



# Opportunities and challenges: how to make it possible

## Five key areas that mark the future:

- For many countries **tourism** represents a **powerful tool for social and economic development and the reduction of poverty** through the creation of job and enterprises, infrastructure development and the export revenues earned
- In order to tap into this potential, it is essential to continue creating and raising **awareness** and to **mainstream tourism** in the political agenda
- **Sustainability** (social, economic and environment) is more important than ever, addressing issues such as energy dependency, climate change adaptation and mitigation, green economy, congestion management and risk management
- Keep track of the **changing consumer**: more experienced and demanding customers, demographic change (ageing, migration and diversification of family structure), changing values and lifestyles, from service economy to experience economy, etc.
- Enhance **competitiveness** by shaping an adequate business environment: innovation, diversification of products, markets and segments, product development, ICT and technology in general, marketing and promotion, research, evaluation, human resources development, quality, etc.

# Africa: how to make it possible

## Opportunities

- natural resources
- cultural resources
- human resources
- authenticity and newness
- price competitiveness
- dynamism

## Challenges

- infrastructure development
- planning & product dev'ment
- attracting investment
- travel facilitation
- safety and security
- health and hygiene
- quality
- marketing and promotion
- e-marketing
- image building and branding

# Africa towards 2030

**42** **million**  
additional  
international  
tourist arrivals  
on average a  
year of the  
43 million  
worldwide



World Tourism Organization

# UNWTO

**Tourism towards 2030**  
Global overview



**Thank you very much  
for your attention!**

**World Tourism Organization (UNWTO)**

[www.unwto.org](http://www.unwto.org)