UNWTO World Tourism Barometer

Committed to Tourism, Travel and the Millennium Development Goals

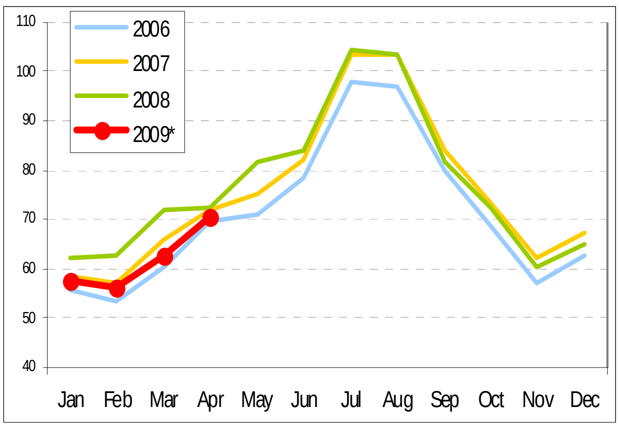
Volume 7 • No. 2 • June 2009

Testing times for international tourism

As expected, the negative trend in international tourism that emerged during the second half of 2008 intensified in 2009. International tourist arrivals have suffered a sharp drop since January – of -8% overall for the first four months of the year. Moreover, this decline is expected to have continued through to the end of June, due to the sector's strong first half-year performance in 2008.

International Tourist Arrivals, monthly evolution

World (million)



Source: World Tourism Organization (UNWTO) ©

In absolute terms, the number of international tourist arrivals is estimated to have reached 247 million between January and April, down from 269 million in 2008 and close to the 254 million of 2007. So far the number of international tourist arrivals is 22 million short of last year's volume. The first four months generally account for some 28% of the total annual number.

Results reflect the severe impact of the global economic crisis and all the associated causes and effects, exacerbated in some regions by concerns about the outbreak of the influenza A(H1N1) virus. But the effect on tourism demand has been different from one region to another until now. With the exception of Africa, which is estimated to have seen a 3% growth, all regions recorded declines in arrivals from January through April, with the worst hit being Europe (-10%) and the Middle East (-18%). Asia and the Pacific was down an estimated 6% and the Americas 5%. And outside Africa, only one subregion, South America, bucked the general downward trend, registering a flat +0.2%.

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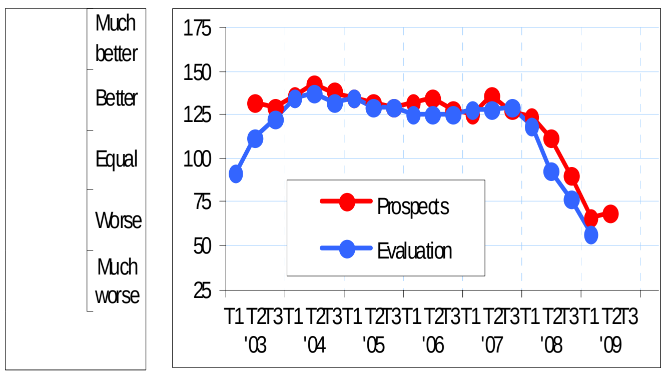
UNWTO Panel of Tourism Experts

Confidence hits rock bottom, but signs of a modest upturn

Reflecting the dramatic fall in both consumer and business confidence since the middle of 2008 – and the resulting negative trend in international tourism performance almost all over the world so far in 2009 – the more than 300 specialists from over 100 countries and territories who constitute UNWTO's Panel of Tourism Experts gave a rating of only 57 to their evaluation of world tourism during the first four months of this year.

(Continued on page 20)

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

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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 Market Trends, Competitiveness and Trade in Tourism Services Section, 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
mn: million (1,000,000)
bn: billion (1,000,000,000)

Q1: January, February, March
Q2: April, May, June
Q3: July, August, September
Q4: October, November, December

T1: January, February, March, April
T2: May, June, July, August
T3: September, October, November, 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.

WORLD TOURISM ORGANIZATION
ORGANISATION MONDIALE DU TOURISME
ORGANIZACIÓN MUNDIAL DEL TURISMO
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ
منظمة السياحة العالمية

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 160 countries and territories and more than 350 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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The next full issue of the *UNWTO World Tourism Barometer* will be published at the end of October 2009, and an Interim Update of tables is planned for mid September.

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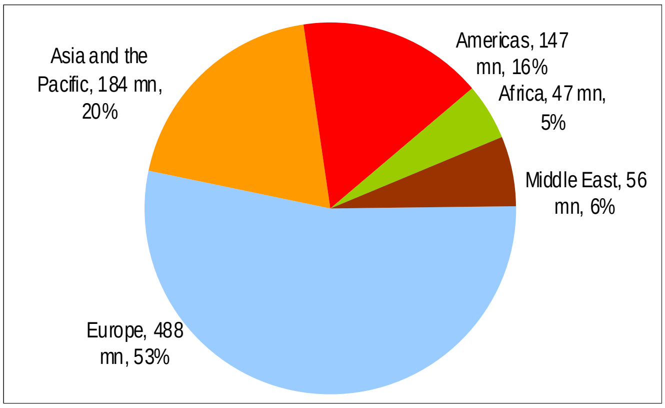
UNWTO World Tourism Barometer, June 2009

Quick overview of key trends

International tourism 2008

- International tourist arrivals reached 922 million in 2008, up 1.9% on 2007 (updated).
- International tourism receipts grew to US$ 944 billion (euro 642 billion) in 2008, corresponding to an increase in real terms of 1.8% on 2007, surprisingly close to the growth in arrivals.
- Receipts from international passenger transport are estimated at US$ 165 billion, bringing the total of international tourism receipts including international passenger transport (i.e. visitor exports) to US$ 1.1 trillion, or over US$ 3 billion a day.
- In 2008, there were only slight changes in the ranking of top tourism destinations by both international tourist arrivals and international tourism receipts. France continues to lead the ranking for arrivals, but ranks third in receipts. The USA ranks first in receipts and it regained its second position in arrivals from Spain that was lost after 11 September 2001. Spain now ranks third in arrivals but has firmly maintained its position as the second biggest earner worldwide and the first in Europe. China, fourth in arrivals, is fifth in terms of receipts, while the reverse is true for Italy.
- The top 10 ranking by international tourism spenders showed no major changes in 2008 apart from the fact that the Netherlands overtook the Republic of Korea, and now ranks 10th. The first nine places remain unchanged with Germany leading, followed by the USA, the UK, France and China.

World Inbound Tourism: International Tourist Arrivals, 2008*



Source: World Tourism Organization (UNWTO) ©

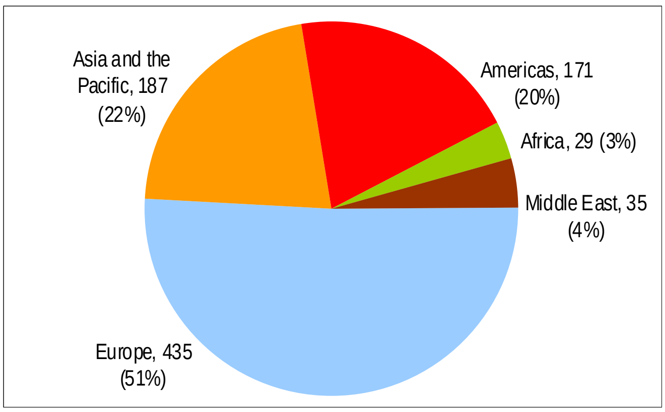
International tourist arrivals and receipts (local currencies, constant prices) (% change 2008/2007)

Source: World Tourism Organization (UNWTO) ©

International tourism January-April 2009

- Worldwide, international tourist arrivals declined by 8% between January and April, thus continuing the downward trend that emerged in the second half of 2008.
- Growth was negative in all world regions, except for Africa (+5%), which bucked the global trend. Europe (-10%) and the Middle East (-18%) were the hardest hit regions.
  - In **Europe** (-10%), Central and Eastern destinations were the most affected (-13%), but results for all other subregions were close to the average.
  - **Asia and the Pacific** (-6%) lagged well behind its previous growth levels. By subregions, only Oceania (-4%) declined at below average rate while South Asia (-12%) shows the sharpest drop.

World: Inbound Tourism
International Tourism Receipts, 2008 (US$ billion)



Source: World Tourism Organization (UNWTO) ©

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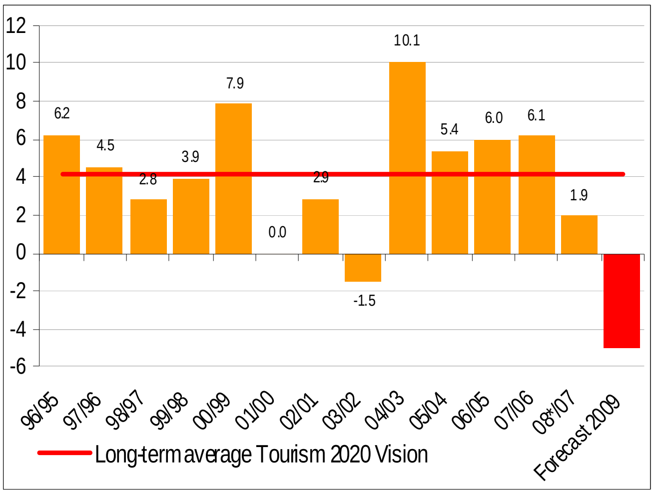
- Results for the **Americas** (-5%) were more mixed. Destinations in North America (-7%), the Caribbean (-6%) and Central America (-4%) have been more impacted by declining traffic from the USA and Europe, while South America (+0.2%) held up comparatively well, and was one of the few subregions, together with North and Subsaharan Africa, to show positive results.
- The **Middle East** (-18%) reports a sharp reversal of trends (data is still limited and very volatile though, and it is likely that this estimate will be revised) due in most part to the very strong decline for Saudi Arabia.
- **Africa**'s growth (+3%) was very positive compared with the world's performance overall. Results reflect the good performance of North African destinations as well as of some Sub-Saharan countries.

- Despite this overall decline, several destinations around the world still reported encouraging results for the first four months of 2009, notably Morocco, Tunisia, Kenya (which recovered the losses of previous years), Mexico, Cuba, Jamaica, several Central and South American destinations – Guatemala, Honduras, Nicaragua, Panama, Chile, Colombia, Paraguay and Uruguay – the Republic of Korea, Taiwan (Pr. of China), Malaysia, FYR of Macedonia, Serbia, Jordan, Lebanon and Syria.
- The slowdown in traffic through the first part of the year is confirmed by the air transport data reported by IATA and various regional air transport associations. According to IATA, there was an 8% decline in worldwide passenger traffic through May. Capacity was down by 4% while load factors declined to 72% from 76% for full year 2008.
- Hotel performance data for the first four months as reported by Deloitte also confirms these declining trends. Overall occupancy was down in all regions, and particularly in Asia Pacific (-10 percentage points). As consumers trade down, other indicators such as revenue per available room (revPAR) and average room rates show even more negative results. RevPAR (in US dollars) was down by double-digit rates in all world regions, and Asia destinations were again the most affected (-30%).
- The UNWTO Confidence Index is at the lowest level since its creation in 2003. The over 300 members of the UNWTO Panel of Experts gave the period January-April 2009 an overall 'Evaluation' of 57 – 20 points down from the previous period, September through December 2008.

International Tourist Arrivals, World

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

Prospects

- The volatile economic conditions, combined with additional uncertainties brought by the influenza A(H1N1), are expected to continue taking their toll on demand for tourism – at least in the short term.
- The UNWTO Panel of Experts is slightly less pessimistic for the current period May through August, at 69 – two points up on the rating given for 'prospects' for the first four months at the beginning of the year – well after the start of the economic recession, but before the influenza A(H1N1) outbreak.
- As the economic environment has rapidly deteriorated since the January issue of the *UNWTO World Tourism Barometer*, UNWTO has revised its forecast for the full year of 2009. Prospects have been adjusted downwards and UNWTO now expects international tourism to decline by between -6% and -4% during this year. Africa is the only bright spot on the horizon with arrivals forecast to grow by 1% to 5%. For all other regions, growth is projected to be negative: Asia and the Pacific (-4% to -1%), Americas (-6% and -3%), Europe (-8% to -5%) and the Middle East (-10% to -5%).
- As at the beginning of the year, the situation continues to be exceptionally volatile. There are possibilities of a moderate recovery, but much will depend on the evolving economic conditions and of the restoration of consumer and business confidence. Additional uncertainty has been added by the influenza A(H1N1) outbreak and its uncertain development. UNWTO will continue to closely monitor developments to provide the most accurate analysis possible.
- For comprehensive information on UNWTO Tourism Resilience Committee and related activities, see www.unwto.org/trc.

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Inbound Tourism: short-term data 2009

World

(Continued from page 1)

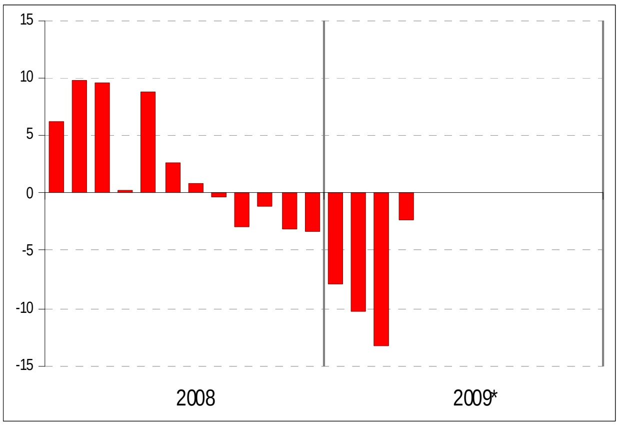
April was the best of the first four months of 2009 – boosted by the fact that the Easter holidays fell in April rather than March this year – but it was still negative in terms of growth (-2%). However, it is worth remembering that these declines are calculated on very strong base figures – the first part of 2008 represented the climax of the boom in world tourism. Care must of course be taken in interpreting the data available so far for 2009, since a number of countries have not yet filed results for April, and there are major gaps in coverage for the whole period in some regions and subregions. In addition, preliminary trends are often based on measures other than international tourist arrivals (e.g. hotel stays or bednights).

It is difficult to generalise with regard to global trends over the first four months of 2009. But cost clearly seems to have been the main driver of trends in all regions. Business travellers – the ones that have still been travelling – have generally been trading down and changing their habits. Instead of three trips, for example, they are combining everything into one extended trip, thereby spending more time away in one go – which means lower costs. A recently published report by the Economist Intelligence Unit, commissioned by Amadeus, points to a new age of austerity for business travellers, which says that executives will make fewer, shorter and cheaper business trips in 2009 and switch from luxury extras in favour of basic efficiency and good service. Some 20% of the 354 executives who responded to the survey in Europe, North America and Asia said they thought an internet connection was more critical than a quiet room. A big question now is: "Will changes like this drive fundamental changes in the corporate travel sector of tomorrow?"

As far as the leisure travel market is concerned, secondary short breaks appear to have been hit more than main vacations, and long-haul travel has fallen more than short-haul trips. But there are signs that this could be

International Tourist Arrivals, monthly evolution

World (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year				Share	Change		Monthly or quarterly data series (% change over same period of the previous year)														
	2000	2005	2007	2008*	2008*	07/06	08*/07	2009*						2008*						2007	
				(million)	(%)		(%)	YTD	Q1	Jan	Feb	Mar	Apr	May	J.-J.	J.-D.	Q1	Q2	Q3	Q4	J.-J.	J.-D.
World	684	804	904	922	100	6.1	1.9	-8.4	-10.6	-7.8	-10.3	-13.3	-2.3		6.0	-1.3	8.6	3.9	-0.6	-2.4	5.4	6.8
Europe	*392.5*	*441.6*	*487.3*	*487.9*	*52.9*	*4.2*	*0.1*	*-10.4*	*-13.4*	*-7.4*	*-13.2*	*-18.1*	*-3.3*		*3.4*	*-2.5*	*6.3*	*1.6*	*-1.4*	*-4.7*	*3.5*	*4.8*
Northern Europe	43.7	52.8	58.1	57.0	6.2	2.8	-1.9	-9.3	-12.5	-7.9	-16.5	-12.9	-0.9		3.3	-5.9	7.5	0.4	-4.1	-8.9	4.4	1.6
Western Europe	139.7	142.6	154.9	153.2	16.6	3.5	-1.1	-10.3	-14.0	-1.9	-12.6	-23.8	0.1		1.8	-3.6	7.3	-2.1	-3.6	-3.5	2.2	4.7
Central/Eastern Europe	69.4	87.5	96.5	98.9	10.7	5.5	2.5	-13.2	-14.4	-13.4	-15.0	-14.9	-10.3		4.6	0.3	4.6	4.6	3.6	-4.6	4.7	6.1
Southern/Mediter. Eu.	139.8	158.7	177.9	178.9	19.4	4.6	0.6	-9.2	-12.3	-8.5	-11.2	-15.6	-2.6		4.4	-2.1	5.8	3.6	-1.2	-4.3	3.8	5.1
Asia and the Pacific	*110.1*	*153.6*	*181.9*	*184.1*	*20.0*	*9.7*	*1.2*	*-6.1*	*-7.7*	*-5.2*	*-10.9*	*-7.1*	*-1.2*		*5.9*	*-3.1*	*8.4*	*3.4*	*-1.8*	*-4.3*	*9.8*	*9.5*
North-East Asia	58.3	85.9	100.9	101.0	11.0	9.8	0.1	-5.6	-7.5	-4.7	-9.7	-8.2	-0.2	-11.6	5.7	-5.0	9.8	1.8	-4.5	-5.4	9.1	10.4
South-East Asia	36.1	48.5	59.7	61.6	6.7	12.3	3.3	-6.3	-7.1	-4.3	-13.0	-4.3	-3.6		7.0	-0.3	7.2	6.6	2.6	-3.0	13.6	11.2
Oceania	9.6	11.0	11.2	11.1	1.2	1.7	-1.0	-3.7	-5.8	-2.0	-8.7	-6.5	4.0		0.4	-2.3	1.6	-1.2	-1.8	-2.7	2.7	0.8
South Asia	6.1	8.1	10.1	10.4	1.1	2.6	3.3	-11.8	-14.1	-17.3	-11.3	-13.5	-2.7	-5.4	7.8	-1.0	9.4	5.6	2.0	-3.3	2.5	2.7
Americas	*128.2*	*133.3*	*142.9*	*147.2*	*16.0*	*5.2*	*3.0*	*-5.4*	*-6.4*	*-1.0*	*-4.9*	*-12.4*	*-2.0*		*6.7*	*0.0*	*9.8*	*3.7*	*2.0*	*-2.2*	*3.3*	*6.9*
North America	91.5	89.9	95.3	97.8	10.6	5.2	2.6	-6.8	-7.7	-1.9	-4.8	-14.4	-4.1		6.4	-0.5	9.9	3.6	1.3	-2.8	3.7	6.4
Caribbean	17.1	18.8	19.8	20.3	2.2	1.6	2.4	-6.5	-7.5	-2.6	-7.9	-11.2	-3.5		6.1	-2.1	8.9	2.9	-0.5	-3.7	-1.4	5.1
Central America	4.3	6.3	7.8	8.3	0.9	12.0	7.2	-3.7	-4.5	4.5	-6.3	-11.6	-1.1		11.5	3.0	14.0	8.8	4.3	1.8	8.9	15.2
South America	15.3	18.3	20.0	20.8	2.3	6.5	3.9	0.2	-2.1	0.5	-2.1	-5.6	10.8		7.0	3.5	9.3	3.6	7.5	0.0	4.7	8.3
Africa	*27.9*	*37.3*	*45.1*	*47.0*	*5.1*	*8.9*	*4.1*	*3.1*	*1.1*	*5.9*	*2.3*	*-4.5*	*9.0*		*5.1*	*3.3*	*6.7*	*3.6*	*1.0*	*6.2*	*10.3*	*7.7*
North Africa	10.2	13.9	16.3	17.2	1.9	8.5	5.4	6.4	2.2	5.3	5.2	-2.5	16.6		8.8	3.1	10.6	7.5	1.0	7.3	6.6	9.7
Subsaharan Africa	17.6	23.4	28.8	29.7	3.2	9.1	3.4	1.7	0.7	6.1	1.2	-5.4	5.0		3.3	3.4	5.2	1.3	1.0	5.8	12.1	6.5
Middle East	*24.9*	*37.9*	*47.0*	*55.6*	*6.0*	*14.6*	*18.2*	*-18.1*	*-22.4*	*-39.5*	*-12.9*	*-10.0*	*-6.6*		*29.7*	*9.8*	*24.3*	*35.8*	*4.8*	*15.5*	*10.7*	*18.3*

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO June 2009)

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changing as potential travellers – particularly Europeans – realise that, despite higher airfares, long-haul destinations are often more attractive in terms of overall prices than destinations closer to home. Moreover, the advent of low-cost, long-haul airlines such as AirAsia X, is also helping to bring long-haul airfares down.

Detailed results for arrivals and receipts by country are included in the 'Regions' section (pages 23-40).

Trends and Prospects

The current four-month period includes the high season for leisure tourism in the northern hemisphere, which contains some of the world's leading outbound travel markets and destinations. But the advance booking situation, coupled with the reduction in airline capacity, shows that it is too much to hope for a recovery by the end of August. Indeed, few major players are expecting to see a recovery before the end of the year.

Trends suggest that the full-year results for 2009 will be worse than initially predicted (see revised forecast on page 18). Although some industry analysts say that, given some small signs of recovery in the global economy, the outlook for the remainder of the year has improved – especially since the second half of last year was in negative growth – many believe the worst is still to come. Unemployment is still increasing rapidly in key tourism source markets, exchange rates have been fluctuating, adding to the uncertainties, and business and consumer confidence is not yet really recovering.

An additional uncertainty has been added by the influenza A(H1N1) outbreak and its uncertain future progression. It is important to stress though that, despite of the move to the phase 6 or pandemic status on June 11, the World Health Organization (WHO) has explicitly stated that it does not recommend any restrictions on travel. The move to phase 6 is based on the geographic spread of the influenza A(H1N1) virus and is not related to its severity. The WHO has pointed out that limiting travel and imposing travel restrictions would have very little effect on stopping the disease, but would be highly disruptive to the global community.

As the economic environment has rapidly changed, prospects for the full year have been adjusted downwards. International tourism is now expected to decline by between -6% and -4% in 2009. But, as in January, the situation continues to be exceptionally volatile. There are possibilities of a moderate recovery, but much will depend on the evolving economic conditions and of the restoration of consumer and business confidence.

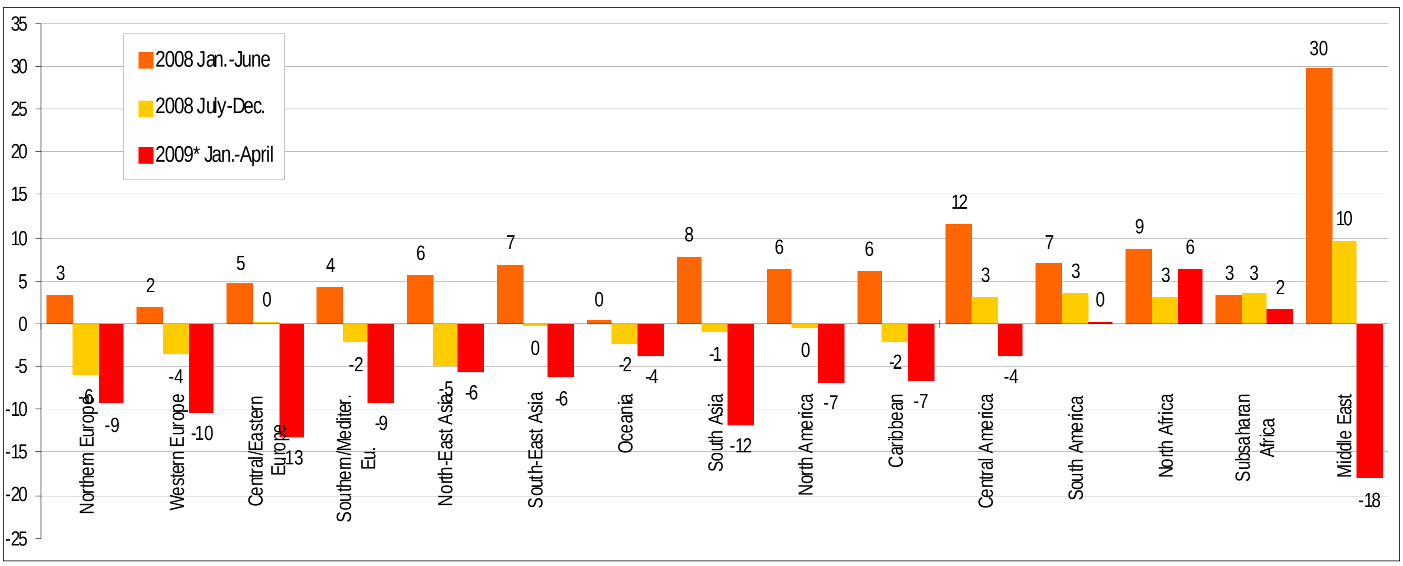
Nevertheless, some believe that there are good sides to the current crisis. The boom of the last few years resulted in excessive construction and huge speculation with regard to property prices. So, it was difficult to keep prime locations sustainable with developers often ignoring carrying capacity limits. This could now start to change. In addition, some stress that crisis brings opportunities, such as the possibility of diversifying products or moving into new markets, and extra time can be spent in rethinking longer-term strategies.

The crisis has also resulted in an increased focus on the important role of governments. As an example, global hotel investment has fallen to a fraction of what it was a year ago, with investment in the first quarter of this year down 80% on a year ago, according to Jones Lang LaSalle. As a result, tourism development is more reliant than ever on government funding and guarantees. Whether this continues beyond the short term is too difficult to predict at this stage.

Meanwhile, just under a year after oil prices peaked, the price of a barrel of oil is currently around US$ 70 – about half its July 2008 peak. Yet, air transport is still front-page news with the industry set to make around US$ 9 billion in losses this year.

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

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Global Economic Crisis: UNWTO's Response

Tourism & Travel is a primary vehicle for job creation and economic regeneration

Against a progressively more difficult environment, UNWTO has been increasing its efforts to provide the sector, and its Members in particular, with the necessary support to face these challenging times.

UNWTO has been focusing on three interrelated initiatives:

- **Resilience** – supporting the sector's immediate response through its Tourism Resilience Committee (TRC) to strengthen market intelligence and best practice sharing (see www.unwto.org/trc).
- **Stimulus** – advocating tourism's priority inclusion in general economic stimulus packages and its capacity to contribute significantly to the global objectives of job creation and economic recovery (see UNWTO G20 message at www.unwto.org/G20).
- **Green Economy** – advancing tourism in the new Green Economy as a sector that can deliver on smart growth, intelligent infrastructure and clean energy jobs.

As world leaders grapple with today's unprecedented global economic conditions, UNWTO stresses the potential for tourism and travel to support short-term stimulus actions, namely those aimed at creating and sustaining jobs, as well as the transformation to a green economy. Tourism is one of the largest employment sectors in most countries and a fast entry vehicle into the workforce for young people and women in urban and rural communities, directly, or through its strong multiplier effect on related services, manufacturing or agriculture.

Actions are needed to boost trade promotion, simplify regulation, build infrastructure and rationalise taxes, which in turn incite companies to invest, innovate and stimulate demand. This kind of public-private sector collaboration should be strongly advanced within and between all states – it will help build resilience and recovery across economies (for more information on Tourism and Economic Stimulus see UNWTO's initial assessment at www.unwto.org/trc/response/response.php?lang=E).

After the announcement of the *Roadmap for Recovery* (see www.unwto.org/pdf/brochure_TRC_roadmap.pdf) at ITB Berlin last March, an intensive work programme has been carried out by the Tourism Resilience Committee and its Core Group. UNWTO is formulating a unique position paper on tourism in face of the global crisis, the stimulus programmes and recovery, which presupposes collaborative multi-stakeholder engagement.

This will be officially presented at the UNWTO General Assembly in Kazakhstan (2-9 October2009) and will continue to be promoted within the G20 initiative.

Influenza A(H1N1): UNWTO's Response

As part of the preparedness efforts for a possible pandemic situation, UNWTO established some three years ago regular and active contacts within the United Nations system, in particular with the World Health Organization (WHO), the United Nations System Influenza Coordination (UNSIC), the International Civil Aviation Organization (ICAO) and the Department of Public Information of the UN (UNDPI). Internally, UNWTO reinforced its preparedness work with the establishment of a Risk and Crisis Management Section, which is the focal point for the coordination with the UN on pandemics.

Since the onset of the outbreak of the novel influenza A(H1N1) in April 2009 UNWTO has been actively involved in the coordination and communication efforts for the travel and tourism sector. The overall objectives of our activities were:

- Facilitating fast and targeted communications and providing relevant real-time information;
- Promoting consistent messages throughout the travel and tourism sector;
- Minimising the impacts of the pandemic on the sector through coordination and close cooperation with Member States, WHO, UNSIC and TERN; and
- Providing guidance and assistance to Member States.

To meet those objectives, UNWTO engaged at three levels:

- Inside the **UN-system**, UNWTO actively participated in the top-level coordination effort with WHO, ICAO and UNSIC to ensure that views and concerns of the travel and tourism sector were taken into account in the decision making process.
- At the **Member States**' level, UNWTO immediately activated the Influenza Focal Point structure, which had been put in place as part of the Avian Flu preparedness. UNWTO provided the Influenza Focal Points with regular information updates, guidelines and common messages, and shared lessons learned from previous pandemic simulation exercises.
- With respect to the **industry**, UNWTO was in close contact and coordinated frequent meetings with the Tourism Emergency Response Network (TERN) and WHO. TERN consists of key global travel and tourism network associations, both public and private, across all sectors. The active coordination and communication between UNWTO, TERN and WHO provided an insight into the needs, views and concerns of the travel and tourism sector.

At this particular stage, it is important to highlight that despite the declaration of the pandemic alert Phase 6 on 11 June 2009, travel restrictions are not recommended by WHO. The designation of this phase is based on the geographic spread of the virus and not its severity. Limiting travel and imposing travel restrictions would have

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very little effect on stopping the spread of the influenza A(H1N1) virus but would be highly disruptive to the global community.

The severity of the virus is currently considered moderate by WHO and measures recommended are prevention practices that apply in daily life, such as hand-washing and normal cough 'etiquette'. However, WHO has also pointed out that influenza viruses are well known for their instability. The further development of the influenza A(H1N1) virus remains uncertain and the severity of the pandemic can change considerably over time and differ by location and population. Staying informed is therefore important. Travellers should regularly check with www.SOS.travel or other reliable resources for the latest updates and information issued by health and travel authorities as the situation evolves.

It is important to keep in mind that the current influenza pandemic is the first one for which the global community has extensively prepared. These preparedness efforts were reflected in the global response to the challenges of the influenza outbreak over the last weeks. Although the development of the virus remains uncertain, we are confident that our joint work will help us avoid unnecessary repercussions on the travel and tourism sector. For more information see www.SOS.travel and www.unwto.org

The institutions currently collaborating to face and deal with the challenges of the influenza A(H1N1) are:
AAPA Association of Asia and Pacific Airlines, ACI Airport Council International, AEA Association of European Airlines, AHLA American Hotel and Lodging Association, ALTA Asociación Latinoamericana de Transporte Aéreo, ASTA American Society of Travel Agents, ATTA African Travel and Tourism Association, CHTA Caribbean Hotel and Tourism Association, CLIA Cruise lines International Association, CTC Canadian Tourism Commission, CTO Caribbean Tourism Organization, ETC European Travel Commission, FIA Federation Internationale de l'Automobile, IAAPA International Association of Amusement Parks and Attractions, IATA International Air Transport Association, ICAO International Civil Aviation Organization, IFTO International Federation of Tour Operators, IH&RA International Hotel and Restaurant Association, IH&RA International Hotel and Restaurant Association, ISF International Shipping Federation, MPI Meeting Professionals International, NTA National Tour Association, PATA Pacific Asia Travel Association, TOI Tour Operators Initiative, UFTAA United Federation of Travel Agents' Associations, UNWTO World Tourism Organization, UST US Travel, WHO World Health Organization, WTTC World Travel & Tourism Council, WYSETC World Youth Student and Educational Travel Confederation

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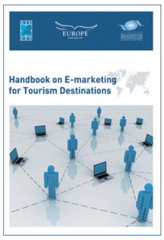
World Tourism Organization (UNWTO) Publications

WORLD TOURISM ORGANIZATION
ORGANISATION MONDIALE DU TOURISME
ORGANIZACIÓN MUNDIAL DEL TURISMO
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ
منظمة السياحة العالمية

Handbook on E-marketing for Tourism Destinations

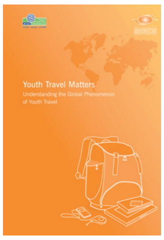


The ETC/UNWTO *Handbook on E-Marketing for Tourism Destinations* is the first comprehensive handbook of this kind for tourism destinations. The all-new publication is a practical 'how-to'-manual designed to help staff at national, regional and city tourism organisations, improve their e-marketing skills and manage new projects. The book covers all the basics, including website design, search engine optimisation, email marketing, social networking, and e-commerce. It has advice on how to build better content, get distribution of it, use CRM, succeed with online PR, support the travel trade on-territory, and get into mobile marketing. Web analytics, online research methods, and performance measurement get full treatment, and new areas such as digital television are covered, as well. It also includes over 30 examples of e-marketing in action.

Available in English

Published: 2008
Price: € 75

Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel



Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel offers a global overview of the youth and student travel industry, by revealing the latest trends in youth travel destinations, products and innovations.

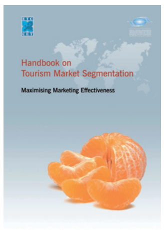
The report, developed by UNWTO and the World Youth Student & Educational Travel Confederation (WYSE Travel Confederation) shows that the motivations of young travellers make this market extremely important to the key objectives of the global tourism agenda. The value of youth, student and educational travel is being recognised by educational institutions, employers, official tourism organisations and governments worldwide.

This report explains the uniqueness of this segment, its wish to explore and engage with cultures. It focuses on the special mix of their travel ambitions with study, work, volunteer placements and adventure.

Available in English

Published: 2008
Price: € 40

Handbook on Tourism Market Segmentation – Maximising Market Effectiveness



Market segmentation is crucial for National Tourism Organizations (NTO) and Destination Marketing Organizations (DMO) in making sure that their resources are used in the most effective way. This new UNWTO/ETC manual, aimed ultimately at helping destinations improving their marketing effectiveness, is divided into four distinct sections. The first sets out the theory and rationale for segmentation. Other areas look at the current methods and practices, detailing some of the main methodologies; at practical steps to introducing or developing further segmentation-based marketing activities, and finally at best practices in the area of tourism market segmentation, including the analyses of a number of case studies.

Available in English

Published: 2007
Price: € 45

UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends, updated three times a year. 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 published in January, June and October.

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

Price: € 70, 3 issues (PDF version)
€ 100 (PDF and print version)

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

Published: 2008
Price: € 75

Handbook on Tourism Forecasting Methodologies

Tourism demand is a complex phenomenon which can be affected by an incredible number of different exogenous factors – economy, fuel prices, infrastructure, natural disasters, the image of a destination, etc. Therefore, tourism demand, in all of its different forms, is one of the most difficult variables to foresee. Nonetheless, it gets more and more important for destinations and private sector alike to anticipate demand trends and use such knowledge as a basis of management decisions and planning. This *Handbook on Tourism Forecasting Methodologies* aims to be a simple guide to the complex world of tourism forecasting. It presents the basic forecasting techniques, their advantages and disadvantages as well as some practical examples of such methodologies in action. It also includes a CD where the methodologies are further explained and exemplified in an excel file.

Available in English

Published: 2008
Price: € 45

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 Spanish, only

Published: 2008
Price: € 80

Tourism Market Trends, 2007 Edition

Tourism Market Trends is UNWTO's regular series of reports with a comprehensive and timely analysis of international tourism trends in the world and the various regions, subregions and countries. The series examines short- and medium-term tourism development and analyzes statistical information on a set of indicators including international tourist arrivals, international tourism receipts, arrivals by region of origin, purpose of visit and means of transport, volume of trips abroad, international tourism expenditure, etc. The full series consists of one volume providing an overview of the tourism trends in the world, *World Overview & Tourism Topics,* and five regional and subregional volumes presenting for each country a digest of statistical data as well as an evaluation of the past year.

Available in:
World Overview & Tourism Topics: English, French and Spanish
Africa: English and French
Americas: English and Spanish
Asia: English
Europe: English and French
Middle East: English

Published: 2008
Price: € 85 each

Set of five regional report + World Overview € 450

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 157 countries and territories and more than 300 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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