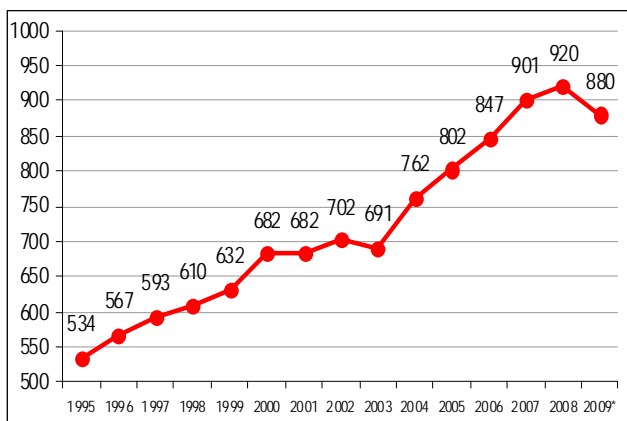


## On track for recovery after an exceptionally challenging 2009

International tourist arrivals are estimated to have declined worldwide by 4% in 2009 to 880 million. Growth returned in the last quarter of 2009, after 14 months of negative results, contributing to a better than expected full-year. The 2% upswing registered in the last quarter of 2009 contrasts with the declines of 10%, 7% and 2% felt in the first three quarters respectively. Asia and the Pacific and the Middle East led the recovery with growth already turning positive in both regions in the second half of 2009.

World: Inbound Tourism  
International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

Based on the trends through the first three quarters, international tourism receipts for 2009 are estimated to have decreased by around 6%. While this is unquestionably a disappointing result for an industry accustomed to continuous growth, it can also be interpreted as a sign of comparative resilience given the extremely difficult economic environment. This becomes even more evident when compared with the estimated 12% slump in overall exports as a consequence of the global crisis.

Against the backdrop of both the upturn in international tourism figures and overall economic indicators in recent months, UNWTO forecasts a growth in international tourist arrivals of between 3% and 4% in 2010. (Continued on page 5)

### Contents

Quick overview of key trends	3
Inbound Tourism: short-term tourism data 2009	5
World	5
Prospects for 2010	7
International Tourism Receipts and Expenditure 2009	9
UNWTO Forecasts for 2010	15
Evaluation by UNWTO's Panel of Tourism Experts	16
Regions	19
Europe	19
Asia and the Pacific	24
The Americas	29
Africa and the Middle East	34
In focus	39
UNWTO Affiliate Members	39
Transport	41
Hospitality	46
The economic environment	49

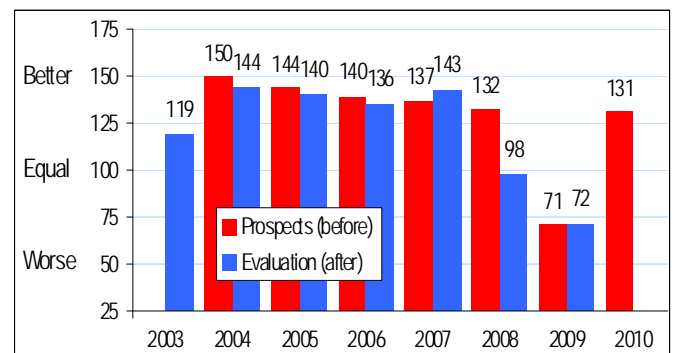
## UNWTO Panel of Tourism Experts

### Panel looks forward to 2010 with expectations

The improved prospects for 2010 are confirmed by the encouraging steep rise in the UNWTO Panel of Experts' Confidence Index for 2010. As expected, given the turbulence experienced over the past 12 months, the over 340 members of the UNWTO Panel of Tourism Experts from around the world who contributed to this issue of the *UNWTO World Tourism Barometer* have evaluated 2009 with a pretty poor score of just 72.

However, the average score given by these same experts for 2010's prospects is 131, well above the neutral 100 and close to the level of the boom years 2004-2007. (Continued on page 16)

### 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 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](http://www.unwto.org/facts/menu.html).

We welcome your comments and suggestions at [barom@unwto.org](mailto: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.



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.

Copyright © 2010 World Tourism Organization  
 Calle Capitán Haya, 42, 28020 Madrid, Spain

**UNWTO World Tourism Barometer**  
 ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2010 (version 28/01/10)  
 All rights reserved

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the Secretariat of the World Tourism Organization concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

All UNWTO publications are protected by copyright. Therefore and unless otherwise specified, no part of an UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications. For permission to photocopy UNWTO material, refer to the UNWTO website at [www.unwto.org/pub/rights.htm](http://www.unwto.org/pub/rights.htm).

The contents of this issue may be quoted provided the source is given accurately and clearly. Distribution or reproduction in full is permitted for own or internal use only. Please do not post electronic copies on publicly accessible websites, UNWTO encourages you to include a link to the Facts & Figures section of the UNWTO website instead at [www.unwto.org/facts/menu.html](http://www.unwto.org/facts/menu.html).

#### World Tourism Organization

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

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

Data collection for this issue was closed on 15 January 2010.

The next issue of the *UNWTO World Tourism Barometer* will be published at the end of June 2010.

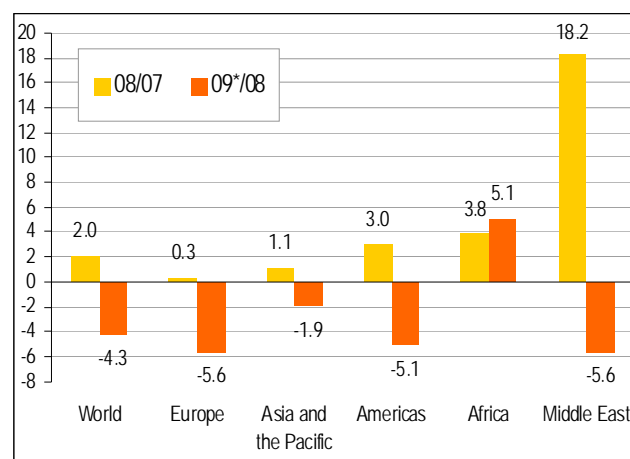
# UNWTO World Tourism Barometer, January 2010

## Quick overview of key trends

### International tourism 2009

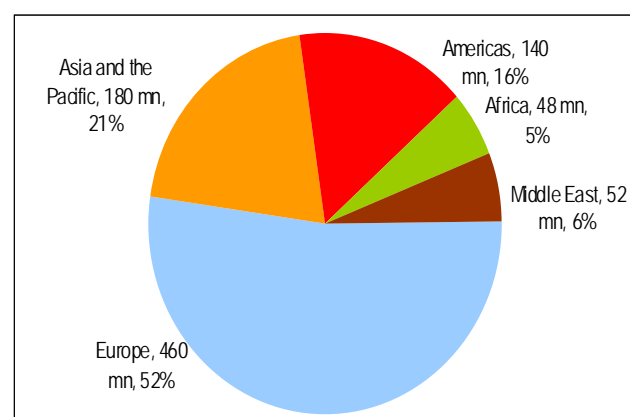
- Worldwide, international tourist arrivals fell by 4% in 2009.
- This represents a slight improvement on the previous estimate as a result of the 2% upswing in the last quarter of 2009. In contrast, international tourist arrivals shrank by 10%, 7% and 2% in the first three quarters of 2009 respectively.
- Asia and the Pacific and the Middle East led the recovery with growth already turning positive in both regions in the second half of the year.
- Full-year results show that growth was negative in all world regions except for Africa, which bucked the global trend.
  - Europe** ended 2009 down 6% after a very complicated first half (-10%). Destinations in Central, Eastern and Northern Europe were particularly badly hit, while results in Western, Southern and Mediterranean Europe were relatively better.
  - Asia and the Pacific** (-2%) showed an extraordinary rebound. While arrivals declined by 7% between January and June, the second half of 2009 saw 3% growth reflecting improved regional economic results and prospects.
  - In the **Americas** (-5%), the Caribbean returned to growth in the last four months of 2009. The performance was more sluggish in the other sub-regions, with the A(H1N1) influenza outbreak exacerbating the impact of the economic crisis.
  - The **Middle East** (-6%), though still far from the growth levels of previous years, had a positive second half in 2009.
  - Africa** (+5%) was a robust performer, with Sub-Saharan destinations doing particularly well.
- Despite the overall decline, several destinations worldwide reported positive results in 2009 in terms of international tourist arrivals. These include Morocco, Kenya, Rwanda, South Africa, Swaziland, Cuba, Curaçao, Dominican Republic, Jamaica, Guatemala, Nicaragua, Chile, Colombia, Guyana, Paraguay, Peru, Uruguay, the Republic of Korea, Taiwan (pr. of China), Cambodia, Indonesia, Malaysia, Myanmar, several Pacific Islands, Iran, Nepal, Sri Lanka, Iceland, Sweden, Hungary, FYR of Macedonia, Italy, Montenegro, Serbia, Turkey, Bahrain, Jordan, Lebanon and Syria.
- Based on the trends through the first three quarters of the year, receipts for 2009 are estimated to have decreased by around 6%. Still, there were seven destinations worldwide which achieved some growth in exports earnings from tourism in 2009. Among these, it is worth noting the double-digit growth of Taiwan (pr. of China), Sweden and Australia. Furthermore, Hong Kong (China), Malaysia, Poland and Hungary also managed to buck the overall negative trend.
- As in previous crises, consumers tended to travel closer to home during 2009. Several destinations have seen domestic tourism endure the crisis better and even grow significantly. This was the case among many other countries, of China, Brazil and Spain, where the domestic market, representing a large share of the total demand, contributed to partially offsetting the decline in international tourism.
- The upward trend of the last months of 2009 is also visible in the air transport data from IATA and various regional air transport associations. According to IATA, passenger traffic was positive since September 2009 after a year of declines. Overall, worldwide passenger traffic through November was 4% down, while capacity declined by 3%, leaving load factors at 75.4%, down from 75.9% for full year 2008.

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

World Inbound Tourism: International Tourist Arrivals, 2009\*



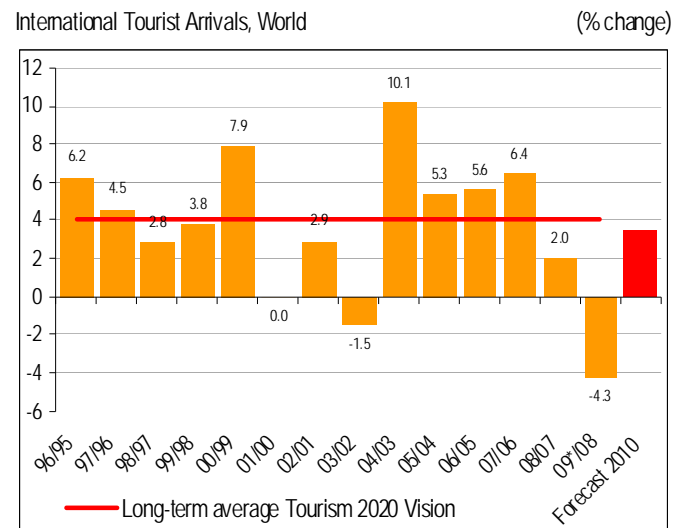
Source: World Tourism Organization (UNWTO) ©



- Meanwhile, global airline capacity measured in available seats shows positive growth for the fifth consecutive month in January 2010, according to OAG.
- Hotel performance data for the first eleven months, as analysed by Deloitte based on data reported by STR Global, also corroborates this upward trend – occupancy rates have started to post growth in some key destinations which is a sign that the recovery has begun.
- As expected, given the turbulence experienced over the past 12 months, the over 340 members of the UNWTO Panel of Tourism Experts from around the world who contributed to this issue of the *UNWTO World Tourism Barometer* have evaluated 2009 with a pretty poor score of 72 – surprisingly close to their rating for 2009's prospects at the beginning of the year. Nonetheless, the evaluation of the last four months of 2009 (up to 91 from 73 for the period May-August) confirms the improved confidence of the sector.

## Prospects for 2010

- The International Monetary Fund (IMF) has just recently stated that the global recovery is occurring “significantly” faster than expected, as compared with its October assessment, which already counted on a clear return of economic growth in 2010 (+3.1% worldwide, with stronger performance for emerging economies at +5.1%, alongside a more sluggish one for advanced economies at +1.3%).
- Given the recent upturn in both international tourism figures and the overall economic indicators, UNWTO forecasts a growth in international tourist arrivals of between 3% and 4% in 2010.
- By region, Asia is expected to continue showing the strongest rebound, while Europe and the Americas are likely to recover at a more moderate pace. Growth is expected to return to the Middle East while Africa will continue its positive trend benefiting from the extra boost provided by the 2010 FIFA World Cup in South Africa.
- These improved prospects are confirmed by the encouraging steep rise in the UNWTO Panel of Experts' Confidence Index for 2010. The experts who judge prospects for 2010 as 'better or 'much better than would reasonably be expected' (61%) clearly outnumber those rating it as 'the same as' (32%), or 'worse' (7%). The average score for 2010 (131), is well above the neutral 100 and close to the level of the boom years 2004-2007.
- 2010 provides several upside opportunities, while naturally not eliminating downside risks. On the positive side, the economy is recovering quicker than expected and business and consumer confidence have picked up. Interest rates and inflation are expected to rise only moderately in the short term. In the tourism sector, the pent-up demand that generally follows a slump creates several opportunities and there is scope for a revival among source markets which were hard hit in 2009 such as the UK or the Russian Federation. Another factor that will brighten up 2010 is that there will be plenty of events to attract potential visitors – from the Winter Olympics in Vancouver in February to the FIFA Football World Cup in June in South Africa and the Shanghai World Expo from May through October.
- On the downside, unemployment is the key challenge. The jobs crisis is not over yet, particularly in major advanced economies and many valuable human resources are still at risk. In the economic front, recovery in major tourism source markets, especially in Europe and the USA, is still fragile and household and company budgets may face extra pressure from the gradual withdrawal of stimulus measures and from potential increases in taxation as results of growing public deficits. Oil prices are expected to remain volatile through 2010 and security threats as well as the potential of increased related hassle and costs for travellers are still a challenge. Finally, although the overall impact of the influenza A(H1N1) virus was milder until now than anticipated, experience from previous pandemics shows that the situation could once again become challenging. 2010 will be characterised by a still quite rough business environment for the tourism sector as revenues and yields are expected to recover at a slower pace than travel volumes.



Source: World Tourism Organization (UNWTO) ©

## Inbound Tourism: short-term trends 2009

### World

(Continued from page 1)

Destinations in emerging economies, which currently receive 47% of worldwide international tourist arrivals, resisted last year's adverse environment relatively better than advanced economies (based on IMF classification, see [www.imf.org/external/pubs/ft/weo/2009/02/pdf/statapp.pdf](http://www.imf.org/external/pubs/ft/weo/2009/02/pdf/statapp.pdf)). As they count with less mature tourism sectors and more dynamic economies, they clearly have a potential to faster growth. In the past decades emerging economies tended to outgrow advanced economies on average by some 2 to 3 percentage points a year. In 2009 they maintained this differential, with arrivals decreasing by less than 3% compared to the over 5% decline of advanced economies.

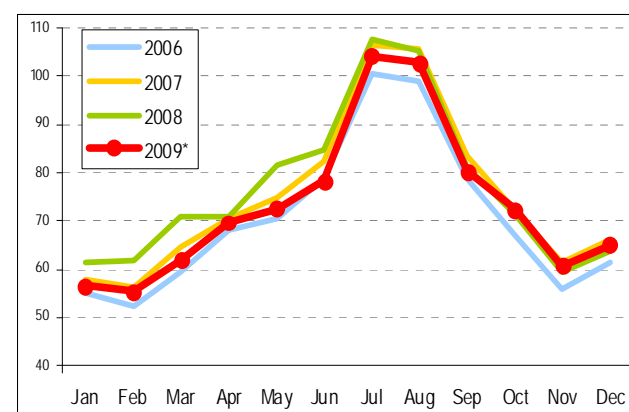
Full-year results for international tourist arrivals show that, except for Africa, which bucked the global trend, all world regions were negative in 2009. The Middle East, Europe and the Americas were the hardest hit regions. Preliminary estimates point to a 6% drop in arrivals for the Middle East last year with, in line with trends for Asia, a turnaround in the second half after a double-digit decline in the first six months of 2009. As in 2008, Europe (-6%)

turned in one of the worst performances. Central, Eastern and Northern Europe (-8%) were particularly affected, while in the Americas (-5%), all subregions ended 2009 down on the previous year, but North and Central America (both at -6%) recorded the largest decreases. The Caribbean by contrast managed to sustain the decline due to the recovery of the last four months of 2009. Asia and the Pacific achieved the most impressive upturn, from a

International Tourist Arrivals, monthly evolution

World

(million)



Source: World Tourism Organization (UNWTO) ©

#### International Tourist Arrivals by (Sub)region

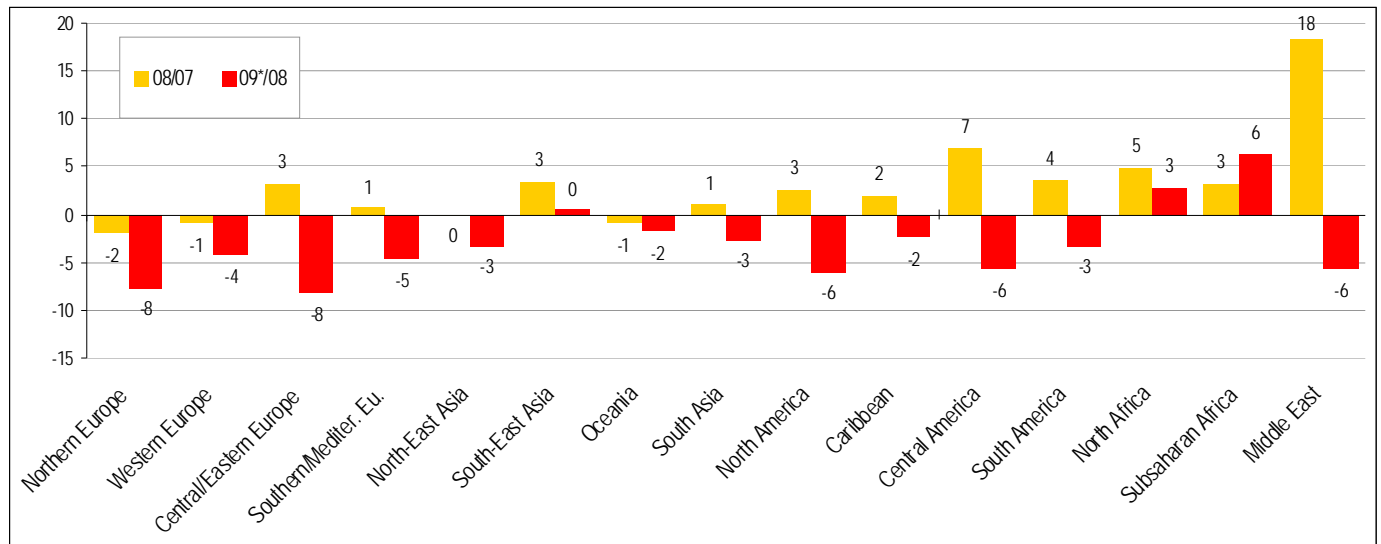
	Full year				Share	Change				Monthly or quarterly data series (% change over same period of the previous year)													
	2000	2005	2008	2009*		2009*	08/07		2008	09*/08	2009												
	(million)				(%)	J.-J.	J.-D.	(%)	J.-J.	J.-D.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
World	682	802	920	880	100	2.0	5.8	-1.4	-4.3	-8.5	-0.7	-7.7	-10.2	-12.8	-1.6	-10.7	-7.6	-3.2	-2.5	-1.0	1.4	2.1	2.0
Advanced economies	423	451	495	468	53.1	-0.3	3.8	-3.6	-5.4	-9.7	-2.0	-5.4	-12.9	-16.7	0.8	-12.6	-9.8	-4.6	-2.6	-2.8	-0.5	1.5	0.7
Emerging economies	260	351	425	413	46.9	4.9	8.3	1.4	-2.9	-7.4	0.8	-10.3	-7.8	-8.8	-4.6	-8.7	-4.9	-1.4	-2.3	1.4	3.7	2.4	3.0
<i>Europe</i>	392.2	441.0	487.1	459.7	52.2	0.3	3.7	-2.4	-5.6	-9.8	-2.4	-7.5	-13.1	-17.6	-1.5	-11.5	-8.4	-3.2	-2.8	-3.2	-1.6	-0.4	-1.1
Northern Europe	43.7	52.8	57.0	52.6	6.0	-2.0	3.2	-6.1	-7.7	-9.6	-6.0	-8.7	-17.1	-13.6	-1.7	-14.5	-3.7	-5.2	-7.8	-5.5	-7.5	-3.5	-5.6
Western Europe	139.7	141.7	152.4	145.8	16.6	-0.9	2.2	-3.3	-4.3	-9.8	-0.3	-1.8	-12.6	-22.7	1.6	-11.9	-8.6	-1.3	0.1	-2.6	0.6	2.8	1.2
Central/Eastern Eu.	69.3	87.5	99.7	91.6	10.4	3.2	5.4	0.9	-8.2	-11.6	-5.5	-12.7	-14.3	-14.2	-8.4	-11.2	-10.4	-5.8	-5.5	-5.8	-5.1	-5.5	-5.0
Southern/Mediterr. Eu.	139.5	159.1	178.0	169.6	19.3	0.6	4.4	-2.1	-4.7	-8.9	-1.4	-8.8	-11.3	-16.0	0.6	-10.5	-8.8	-3.1	-2.6	-1.6	0.3	2.2	1.8
<i>Asia and the Pacific</i>	110.1	153.6	184.1	180.5	20.5	1.1	5.7	-3.2	-1.9	-6.7	2.9	-4.8	-10.4	-6.7	-0.8	-10.1	-7.7	-5.5	3.3	4.4	3.4	6.6	5.7
North-East Asia	58.3	86.0	101.0	97.6	11.1	-0.1	5.6	-5.1	-3.3	-7.4	0.8	-4.7	-9.7	-8.2	-0.2	-11.6	-10.7	-6.9	5.8	-0.7	1.6	3.6	1.6
South-East Asia	36.1	48.5	61.7	62.0	7.0	3.5	7.2	-0.2	0.4	-5.9	7.1	-3.7	-12.3	-3.5	-2.9	-9.2	-3.8	-3.6	1.4	14.5	6.6	13.8	11.6
Oceania	9.6	11.0	11.1	10.9	1.2	-0.9	0.4	-2.2	-1.8	-4.7	1.0	-1.9	-8.6	-6.6	4.5	-5.1	-9.9	-7.9	-1.0	8.3	4.6	1.7	2.1
South Asia	6.1	8.1	10.3	10.0	1.1	1.1	4.2	-1.7	-2.8	-7.0	1.3	-15.0	-8.6	-11.7	1.0	-2.8	-1.0	-1.2	-5.7	-3.8	3.4	-0.2	12.9
<i>Americas</i>	128.2	133.3	147.1	139.6	15.9	3.0	6.4	-0.1	-5.1	-7.0	-3.2	-1.6	-5.2	-12.8	2.6	-12.3	-11.4	-6.8	-6.6	-2.2	0.2	-1.9	0.2
North America	91.5	89.9	97.8	91.9	10.4	2.6	6.4	-0.4	-6.0	-8.8	-3.6	-1.9	-4.9	-14.4	2.4	-15.8	-14.2	-7.1	-6.4	-2.2	0.4	-2.8	-0.3
Caribbean	17.1	18.8	20.2	19.7	2.2	2.1	5.9	-2.2	-2.4	-5.3	1.3	-3.4	-6.7	-11.8	-1.9	-2.9	-3.1	-1.0	4.0	7.2	4.1	1.7	3.1
Central America	4.3	6.3	8.3	7.8	0.9	7.0	11.4	2.8	-5.7	-7.4	-3.9	2.5	-8.3	-12.7	3.1	-15.6	-14.1	-9.1	4.7	-4.4	-6.2	0.5	0.4
South America	15.3	18.3	20.8	20.1	2.3	3.7	5.2	2.2	-3.3	-1.3	-5.5	-0.7	-3.7	-6.9	9.5	0.2	-2.6	-10.3	-11.3	-7.5	-1.4	-2.0	-1.2
<i>Africa</i>	27.0	36.4	45.7	48.0	5.5	3.8	3.8	1.5	5.1	4.4	5.7	6.5	4.4	-3.0	11.1	4.8	3.1	5.5	-0.1	6.4	5.6	9.9	8.5
North Africa	10.2	13.9	17.2	17.7	2.0	4.9	8.7	2.5	2.9	5.1	1.3	5.3	5.2	-2.5	16.6	4.6	2.3	4.7	-13.5	5.4	1.7	12.0	8.9
Subsaharan Africa	16.8	22.5	28.6	30.4	3.5	3.2	1.5	0.8	6.4	4.0	8.6	6.9	4.1	-3.2	8.1	4.9	3.8	6.5	13.5	6.9	7.7	9.0	8.3
<i>Middle East</i>	24.9	37.9	55.6	52.5	6.0	18.2	26.8	9.3	-5.6	-16.4	5.3	-37.0	-14.4	-8.4	-21.9	-12.8	5.6	5.6	-5.5	3.8	19.0	4.3	6.6

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2010)

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

7% decline between January and June to a 3% growth in the second half of the year. Not all subregions performed as well, but though the region's yearly count was down 2%, South-East Asia managed to end the year with a slight improvement over 2008's level. Africa was the clear winner in the regional stakes, attracting an estimated 5% growth and suffering only one month of decline (March due to the fact that the Easter was in April in 2009 while in the previous year it had been in March).

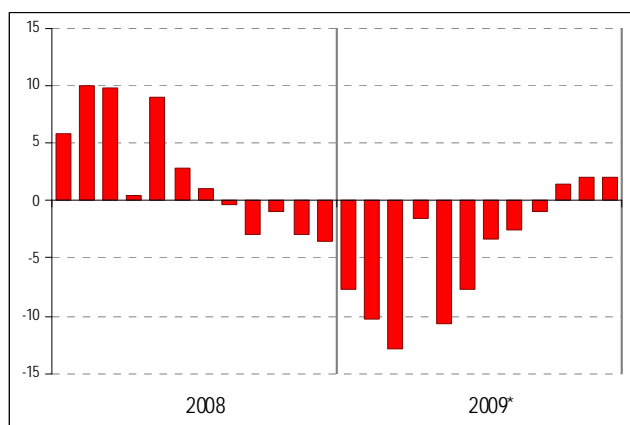
the year, and in particular in the case of Subsaharan Africa and Central and Eastern Europe, the subregional aggregate is based on data for only a limited number of countries. Countries with monthly data series available cover some 90% of worldwide arrivals. An assessment is made for missing data (both months and countries) based on trends for the (sub)region. In addition, data reported by countries at this stage is generally provisional and can still be revised. Experience, however, shows that the worldwide estimate will be accurate at this time of the year. So, although no major changes are expected to occur in terms of trends, individual numbers and growth rates may still vary.

Arguably, the last 12-18 months have been one of the most challenging periods in tourism's history. Both business and consumer confidence were bound to be affected, especially with the continuing uncertainties about unemployment and other factors such as exchange rates, the availability of credit, and uncertainty over the A (H1N1) influenza virus. However, data shows that, following 14 months of declines (some fairly modest, but with a deep through in the first half of last year), arrivals returned to positive growth in October 2009. This recovery, which is still fragile and uneven, is also reflected in the UNWTO's Panel of Experts Confidence Index.

Among the key trends that marked 2009, the most important was the poor performance of the business travel market, as this is driven by business development and thus directly related to the health of the world economy. The impact was felt most strongly by airlines due to the sharp fall in premium seat sales and in the high-end hotel market. Demand for segments like meetings and incentives plummeted in some countries, in part because companies were reluctant to be seen spending on such items in a recession and at a time when so many people were losing their jobs. 'Austerity chic' has become the new buzzword. Budget and mid-market travellers were the first to cut back on travel last year, but even more affluent consumers, used to taking several trips a year, sacrificed secondary trips,

International Tourist Arrivals, monthly evolution

World (% change)



Source: World Tourism Organization (UNWTO) ©

In absolute values, of the 40 million arrivals that disappeared from 2008's count, Europe accounted for close to 70%, or 27 million, as against 7 million for the Americas, 3 million each for Asia and the Pacific and for the Middle East. Africa on the other hand gained an estimated 2 million arrivals in 2009.

As always, it is important to stress that figures at this early moment in the year are preliminary estimates. Statistics for individual countries are, in a limited number of cases, based on full year data. In most cases, however, they are based on 10-11 months of full year results, with some based on a more limited part of the year. Also, not all countries report monthly or quarterly data series through



with the result that short-break travel suffered more than longer holidays. Not surprisingly, long-haul destinations were also more affected than short-haul points, and the strong euro (against most currencies) resulted in a continuing shift to destinations outside the eurozone.

Similar to previous crises, consumers tended to travel closer to home during 2009. Several destinations have seen domestic tourism endure the crisis better and even grow significantly, often with the support of specific government measures aimed at leveraging this trend. This was the case among many other countries, of China, Brazil and Spain, where the domestic market, representing a large share of the total demand, contributed to partially offsetting the decline in international tourism.

*Detailed results for arrivals and receipts by country are included in the 'Regions' section on page 19.*

## Prospects for 2010

The International Monetary Fund (IMF) has just recently stated that the global recovery is occurring "significantly" faster than expected, as compared with its October assessment which already counted on a clear return of economic growth in 2010 (+3.1% worldwide, with stronger performance for emerging economies at +5.1%, alongside a more sluggish one for advanced economies at +1.3%).

Against this backdrop and given the upturn in international tourism figures and in other economic indicators in recent months, UNWTO forecasts a growth in international tourist arrivals of between 3% and 4% in 2010. By region, Asia is expected to continue showing the strongest rebound, while Europe and the Americas are likely to recover at a more moderate pace. Growth is expected to return to the Middle East while Africa will continue its positive trend benefiting from the extra boost provided by the 2010 FIFA World Cup in South Africa.

2010 provides several upside opportunities, while naturally not eliminating downside risks.

### *Upside opportunities:*

- Business and consumer confidence has picked up;
- Interest rates and inflation remain at historically low levels and are expected to rise only moderately in the short term;
- A slump is generally followed by a rebound due to pent-up demand and destinations are expected to actively leverage this opportunity;
- There is scope for a revival among source markets which were hard hit in 2009, such as the UK or the Russian Federation;
- The momentum of the spirit of cooperation and partnership bred by the crisis is expected to be maintained by stakeholders;

- The flexibility shown by the tourism sector in dealing with rapid shifts in demand and volatile market conditions has made it stronger;
- Crises provide an opportunity to address underlying structural weaknesses and implement strategies fostering sustainable development and the transformation to the Green Economy.

### *Downside risks:*

- Unemployment is the key challenge. The jobs crisis is not over yet, particularly in major advanced economies and many valuable human resources are still at risk;
- Economic growth in major source markets, especially in Europe and the USA, is still fragile;
- Stimulus measures are likely to be phased out due to increasing public deficits while a number of advanced economies may see increases in taxation, putting extra pressure on household and company budgets;
- Oil prices remain volatile;
- Although the overall impact of the influenza A(H1N1) virus was milder until now than anticipated, experience from previous pandemics shows that the situation could once again become challenging;
- Security threats and the potential of increased related hassle and costs for travellers are still a challenge;
- Revenues and yields are expected to recover at a slower pace than travel volumes.

The UNWTO World Tourism Barometer is developed as a service for UNWTO Members and published three times a year in English, French and Spanish. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.

If you are interested in receiving the UNWTO World Tourism Barometer and you are not a UNWTO Member, you can subscribe to the next three issues for € 70 (pdf version delivered electronically) or € 100 (pdf plus hard copy).

To place your order, please consult the infoshop on UNWTO's website at [www.unwto.org/infoshop](http://www.unwto.org/infoshop) or contact us by telephone.



UNWTO • OMT • IOHBT

### 4 easy ways to order:

 [infoshop@unwto.org](mailto:infoshop@unwto.org)

 (+34) 91 567 81 06

 (+34) 91 571 37 33

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

# World Tourism Organization (UNWTO) Publications



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

## 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



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

## 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



Published: 2009  
Price: € 75

## 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



Published: 2009  
Price: € 75

## 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

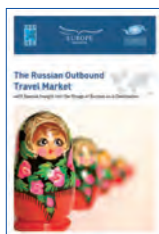


Published: 2008  
Price: € 75

## 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



Published: 2009  
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

## 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 advises 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



Published: 2008  
Price: € 75

## 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

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

The easy way to order UNWTO publications:

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

For further information, please contact:

**UNWTO Publications Department**

Tel. (34) 91 567 8100 - Fax: (34) 91 571 3733

e-mail: [pub@unwto.org](mailto:pub@unwto.org)