

# Tourism Highlights

## 2009 Edition



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### Key trends 2008:

- International tourist arrivals reached 922 million in 2008, up 18 million over 2007, representing a growth of 2%.
- International tourism receipts rose by 1.7% in real terms to US\$ 944 billion (642 billion euros).
- Following four years of consecutive strong growth, an abrupt shift in trend occurred in the middle of the year, with tourism demand falling significantly under the influence of an extremely volatile world economy (financial crisis, commodity and oil price rises and sharp exchange rate fluctuations).

### Current developments and short-term outlook:

- According to the June 2009 *UNWTO World Tourism Barometer*, the decline in tourism demand continued to intensify in the first four months of 2009, sliding to -8% when compared to the same period in the previous year.
- The 2009 outlook is much dependent on the global economic performance and the evolution of the influenza A(H1N1) outbreak. Taking into account the results for the first four months of 2009 and current market conditions, the pace of decline is expected to ease during the remainder of the year and international tourist arrivals are projected to decrease by between -6% and -4% in 2009.
- As part of its response activity, UNWTO has created a Tourism Resilience Committee and a web resource ([www.unwto.org/trc](http://www.unwto.org/trc)).

### Long-term trend:

- International tourist arrivals have continued to grow – from 25 million in 1950, to 277 million in 1980, to 438 million in 1990, to 684 million in 2000, and reaching 922 million in 2008.
- Over the past six decades, tourism has experienced continued growth and diversification to become one of the largest and fastest growing economic sectors in the world. Many new destinations have emerged alongside the traditional ones of Western Europe and North America. As growth has been particularly high in the world's emerging regions, the share in international tourist arrivals received by developing countries has steadily risen, from 31% in 1990 to 45% in 2008.
- By 2020 international arrivals are expected to reach 1.6 billion.

## Tourism – a key to development, prosperity and well-being

Over time, an increasing number of destinations have opened up and invested in tourism development, turning modern tourism into a key driver for socio-economic progress, through the creation of jobs and enterprises, infrastructure development, and the export income earned.

Tourism has become one of the major international trade categories. The overall export income generated by international tourism including passengers transport reached US\$ 1.1 trillion in 2008, or US\$ 3 billion a day. Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services. Globally, as an export category, tourism ranks fourth after fuels, chemicals and automotive products. For many developing countries it is one of the main income sources and the number one export category, creating much needed employment and opportunities for development.

The most comprehensive way to measure the economic importance of both international and domestic tourism in national economies is through the *Tourism Satellite Account (TSA) Recommended Methodological Framework*, approved by the UN Statistics Commission. Though many countries are in the process of implementing the *Framework*, relatively few have full, comparable results available. As data is currently still fragmented, it is not feasible to provide precise and detailed worldwide results. However, the knowledge and experience gained through the TSA exercise has certainly contributed to a much better understanding of the role of tourism in economies worldwide and allows for a tentative approximation of key indicators. Based on the information from countries with data available, the worldwide contribution of tourism to gross domestic product (GDP) is estimated at some 5%. Tourism's contribution to employment tends to be slightly higher and is estimated in the order of 6-7% of the overall number of jobs (direct and indirect). For advanced, diversified economies, the contribution of tourism to the GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries where tourism is an important pillar of the economy. For small islands and developing countries, or specific regional and local destinations where tourism is a key economic sector, the importance of tourism tends to be even higher.

*Tourism Highlights* is a publication of the World Tourism Organization (UNWTO), released on the occasion of World Tourism Day, celebrated annually on 27 September. In 2009, the 30<sup>th</sup> World Tourism Day will be commemorated in Ghana under the theme 'Tourism – Celebrating Diversity'.

*Tourism Highlights* aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. For information on current short-term tourism data and trends, please refer to the *UNWTO World Tourism Barometer* at [www.unwto.org/facts/eng/barometer.htm](http://www.unwto.org/facts/eng/barometer.htm).

The World Tourism Organization (UNWTO) 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 390 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

## 2008 – International tourism challenged by deteriorating world economy

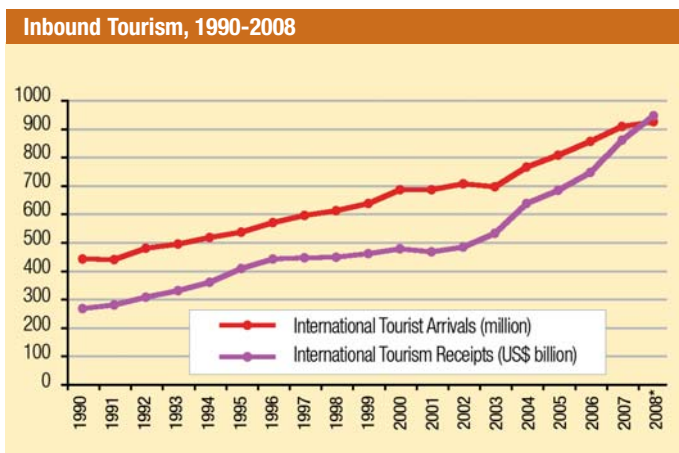
## Overview

# International Tourism, 2008

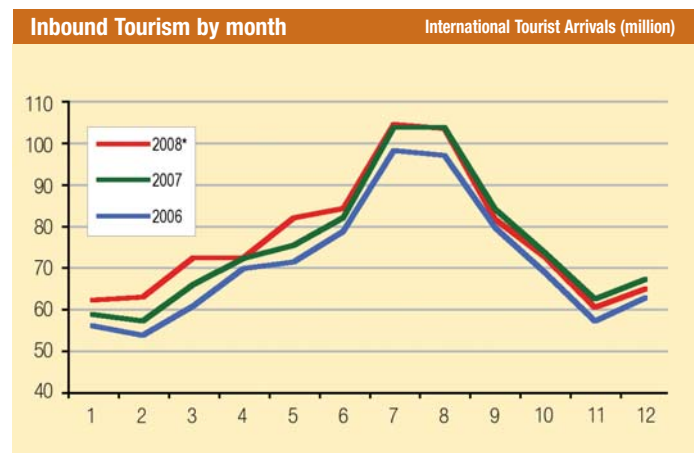
In 2008, international tourist arrivals reached 922 million, up from 904 million in 2007, representing a growth of 2%. This overall growth builds on the strong results of the first part of the year, before the collapse of the financial markets and the subsequent recession. The second half of the year showed an abrupt shift in trend, with international arrivals flat or showing negative growth in each of the last six months of 2008. Overall, the 5% growth between January and June gave way to a 1% decline in the second half of the year. Though not immune to the economic woes, tourism has so far resisted the economic downturn better than other sectors, such as construction, real estate and car manufacturing.

All regions had positive growth except Europe, which suffered stagnation in arrivals (+0.3%). The best performance was seen in the Middle East, where international arrivals reached 55 million, a rise of 18% over the previous year. Africa grew at half the rate of the previous year, but still registered an above-average growth of 4%. The Americas grew 3%, boosted by the strong performance of Central and South American destinations and the strength of traffic to the USA in the first half of the year. Asia and the Pacific saw a significant slowdown in arrivals as compared to its previous bumper years, growing just over 1% in 2008.

International tourism receipts rose by 1.7% in real terms in 2008 to US\$ 944 billion (642 billion euros). Receipts from international passenger transport are estimated at US\$ 183 billion, bringing the total international tourism receipts including international passenger transport (i.e. visitor exports) to over US\$ 1.1 trillion, corresponding to US\$ 3 billion a day. This represents around 30% of the worldwide volume of service exports and 6% of overall exports of goods and services.



Source: World Tourism Organization (UNWTO) ©



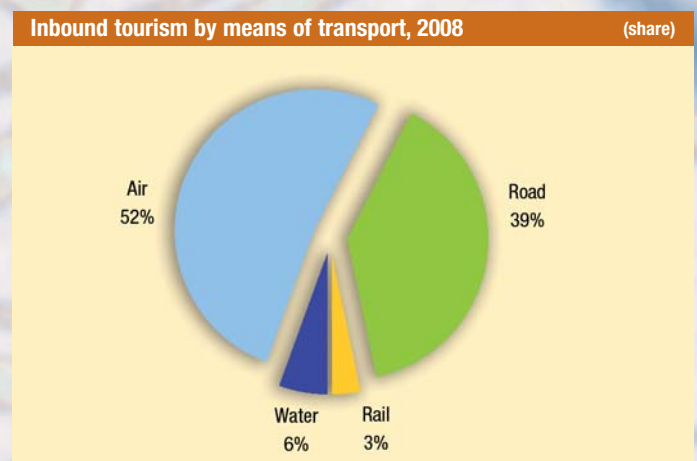
Source: World Tourism Organization (UNWTO) ©

## Purpose of visit and means of transport

In 2008, travel for leisure, recreation and holidays accounted for half of all international tourist arrivals (51% or a total of 467 million arrivals). Some 15% of international tourists reported travelling for business and professional purposes and another 27% travelled for other reasons, such as visiting friends and relatives (VFR), religious reasons/pilgrimages, health treatment, etc. The purpose of visit for the remaining 7% of arrivals was not specified. Slightly over half of travellers arrived at their destination by air transport (52%) in 2008, while the remainder travelled over the surface (48%) – whether by road (38%), rail (3%) or over water (6%). Over time, the trend has been for air transport to grow at a faster pace than surface transport, so the share of air transport is gradually increasing.



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

## International Tourist Arrivals by (Sub) region

	International Tourist Arrivals (million)							Market share (%) 2008*	Change (%)		Average annual growth (%) '00-'08*
	1990	1995	2000	2005	2006	2007	2008*		07/06	08*/07	
<b>World</b>	<b>438</b>	<b>534</b>	<b>684</b>	<b>804</b>	<b>853</b>	<b>904</b>	<b>922</b>	<b>100</b>	<b>6.1</b>	<b>2.0</b>	<b>3.8</b>
<b>Europe</b>	<b>265.0</b>	<b>309.5</b>	<b>392.6</b>	<b>441.8</b>	<b>468.4</b>	<b>487.9</b>	<b>489.4</b>	<b>53.1</b>	<b>4.1</b>	<b>0.3</b>	<b>2.8</b>
Northern Europe	28.6	35.8	43.7	52.8	56.5	58.1	57.0	6.2	2.8	-1.9	3.4
Western Europe	108.6	112.2	139.7	142.6	149.6	154.9	153.3	16.6	3.6	-1.1	1.2
Central/Eastern Europe	33.9	58.1	69.3	87.5	91.4	96.6	99.6	10.8	5.6	3.1	4.6
Southern/Mediterr. Eu.	93.9	103.4	139.9	158.9	170.9	178.2	179.6	19.5	4.3	0.8	3.2
<b>Asia and the Pacific</b>	<b>55.8</b>	<b>82.0</b>	<b>110.1</b>	<b>153.6</b>	<b>166.0</b>	<b>182.0</b>	<b>184.1</b>	<b>20.0</b>	<b>9.6</b>	<b>1.2</b>	<b>6.6</b>
North-East Asia	26.4	41.3	58.3	86.0	92.0	101.0	101.0	10.9	9.8	-0.1	7.1
South-East Asia	21.2	28.4	36.1	48.5	53.1	59.7	61.7	6.7	12.3	3.5	6.9
Oceania	5.2	8.1	9.6	11.0	11.0	11.2	11.1	1.2	1.7	-0.9	1.8
South Asia	3.2	4.2	6.1	8.1	9.8	10.1	10.3	1.1	2.6	2.1	6.8
<b>Americas</b>	<b>92.8</b>	<b>109.0</b>	<b>128.2</b>	<b>133.3</b>	<b>135.8</b>	<b>142.9</b>	<b>147.0</b>	<b>15.9</b>	<b>5.2</b>	<b>2.9</b>	<b>1.7</b>
North America	71.7	80.7	91.5	89.9	90.6	95.3	97.8	10.6	5.2	2.6	0.8
Caribbean	11.4	14.0	17.1	18.8	19.4	19.8	20.2	2.2	1.6	2.0	2.1
Central America	1.9	2.6	4.3	6.3	6.9	7.8	8.3	0.9	12.0	7.0	8.4
South America	7.7	11.7	15.3	18.3	18.8	20.1	20.8	2.3	6.5	3.6	3.9
<b>Africa</b>	<b>15.1</b>	<b>20.0</b>	<b>27.9</b>	<b>37.3</b>	<b>41.5</b>	<b>45.0</b>	<b>46.7</b>	<b>5.1</b>	<b>8.4</b>	<b>3.7</b>	<b>6.7</b>
North Africa	8.4	7.3	10.2	13.9	15.1	16.3	17.2	1.9	8.5	4.9	6.7
Subsaharan Africa	6.7	12.7	17.6	23.4	26.5	28.7	29.5	3.2	8.3	3.1	6.7
<b>Middle East</b>	<b>9.6</b>	<b>13.7</b>	<b>24.9</b>	<b>37.9</b>	<b>40.9</b>	<b>46.6</b>	<b>55.1</b>	<b>6.0</b>	<b>14.0</b>	<b>18.1</b>	<b>10.5</b>

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

## International Tourism Receipts by (Sub) region

### Growth in receipts mirrors that of arrivals

Visitor expenditure on accommodation, food and drink, local transport, entertainment, shopping, is an important pillar of the economies of many destinations, creating much needed employment and opportunities for development. More than 80 countries earned over US\$ 1 billion from international tourism in 2008.

UNWTO estimates that worldwide receipts from international tourism reached US\$ 944 billion (642 billion euros) in 2008. In absolute terms, international tourism receipts increased by US\$ 87 billion, but only by 16 billion euros due to the depreciation of the US dollar against several world currencies and, in particular, the euro (in 2008 the US dollar lost 7% against the euro).

In real terms, i.e. adjusted for exchange rate fluctuations and inflation, growth in international tourism receipts corresponded to 1.7%, only slightly lower than the growth in international tourist arrivals. After the substantial growth in 2006 and 2007 – of over 5% in both years – this represents a considerable slowdown.

All regions shared in the increase in tourism receipts in absolute values. In real terms growth was in all regions much weaker in 2008 than the year before with the exception of the Middle East, which registered a double-digit growth of 17%. Asia and the Pacific grew by 2.7% (compared to +9.8% in 2007) and the Americas increased by 5.0%, slightly less than 2007's 6.3%. Both Europe and Africa (-1% each), however, suffered negative growth in receipts in real terms.

By subregion, the strongest increases came from North America (+7%) and South Asia (+6%). In Northern, Western and Southern/Mediterranean Europe, North Africa, the Caribbean and Central America, receipts declined in real terms in 2008. In the case of North Africa and Central America, the decline followed two years of very strong growth.

	International Tourism Receipts (billion)							Change current prices (%)			Change constant prices (%)			
	1990	1995	2000	2005	2006	2007	2008*	06/05	07/06	08*/07	05/04	06/05	07/06	08*/07
Local currencies								8.8	8.9	6.8	3.1	5.3	5.4	1.7
US\$	264	405	475	680	745	857	944	9.5	15.1	10.1	3.9	6.0	11.9	6.1
Euro	207	310	515	547	593	626	642	8.5	5.5	2.6	5.1	6.1	3.3	-0.6

International Tourism Receipts	Change			Share	US\$			Euro		
	local currencies, constant prices (%)				(%)	Receipts		Receipts		
	06/05	07/06	08*/07	(billion)		per arrival	(billion)	per arrival		
				2008*	2007	2008*	2008*	2007	2008*	2008*
<b>World</b>	<b>5.3</b>	<b>5.4</b>	<b>1.7</b>	<b>100</b>	<b>858</b>	<b>944</b>	<b>1,020</b>	<b>626</b>	<b>642</b>	<b>700</b>
<b>Europe</b>	<b>4.2</b>	<b>2.7</b>	<b>-1.1</b>	<b>50.2</b>	<b>435.2</b>	<b>473.7</b>	<b>970</b>	<b>317.5</b>	<b>322.1</b>	<b>660</b>
Northern Europe	9.3	3.9	-2.4	7.4	70.7	69.8	1,220	51.6	47.5	830
Western Europe	4.0	2.3	-2.5	17.2	149.6	162.1	1,060	109.2	110.2	720
Central/Eastern Europe	8.4	9.0	2.7	6.2	48.5	58.1	580	35.4	39.5	400
Southern/Mediter, Eu,	1.6	1.0	-0.5	19.4	166.3	183.7	1,020	121.4	124.9	700
<b>Asia and the Pacific</b>	<b>11.1</b>	<b>9.8</b>	<b>2.7</b>	<b>21.8</b>	<b>186.8</b>	<b>206.0</b>	<b>1,120</b>	<b>136.3</b>	<b>140.1</b>	<b>760</b>
North-East Asia	12.1	8.5	3.1	10.2	85.8	95.9	950	62.6	65.2	650
South-East Asia	15.9	14.8	1.5	6.5	55.3	61.1	990	40.4	41.6	670
Oceania	1.2	7.0	2.4	3.6	31.9	33.9	3,050	23.3	23.0	2,080
South Asia	13.9	5.2	6.1	1.6	13.8	15.1	1,470	10.1	10.3	1,000
<b>Americas</b>	<b>2.1</b>	<b>6.3</b>	<b>5.0</b>	<b>19.9</b>	<b>171.3</b>	<b>188.4</b>	<b>1,280</b>	<b>125.0</b>	<b>128.1</b>	<b>870</b>
North America	0.8	7.2	7.0	14.7	124.9	138.5	1,420	91.1	94.2	960
Caribbean	4.2	0.6	-2.1	2.5	23.2	23.8	1,180	17.0	16.2	800
Central America	10.5	8.9	-0.5	0.7	6.2	6.8	820	4.5	4.6	560
South America	6.6	6.8	2.7	2.0	16.9	19.3	930	12.4	13.1	630
<b>Africa</b>	<b>11.5</b>	<b>9.1</b>	<b>-1.0</b>	<b>3.2</b>	<b>29.1</b>	<b>30.6</b>	<b>650</b>	<b>21.2</b>	<b>20.8</b>	<b>440</b>
North Africa	19.6	7.5	-4.4	1.1	10.2	10.7	630	7.5	7.3	430
Subsaharan Africa	7.7	9.9	0.7	2.1	18.9	19.9	670	13.8	13.5	460
<b>Middle East</b>	<b>3.0</b>	<b>9.0</b>	<b>17.3</b>	<b>4.8</b>	<b>35.0</b>	<b>45.6</b>	<b>830</b>	<b>25.5</b>	<b>31.0</b>	<b>560</b>

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

For destination countries, receipts from international tourism count as exports and cover transactions generated by same-day as well as overnight visitors. However, these do not include receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category, 'International Passenger Transport'. Although the availability of comparable international data is somewhat limited, the export value of international passenger transport has in recent years been estimated at around 16% of the combined receipts from international tourism and passenger transport, corresponding in 2008 to some US\$ 183 billion against US\$ 164 billion in 2007.

This takes total receipts from international tourism, including international passenger transport, to US\$ 1.1 trillion in 2008. In other words, international tourism contributes over US\$ 3 billion a day to the world economy.

## No major changes in the top ten

When ranked according to the two key tourism indicators – international arrivals and international receipts – it is interesting to note that eight of the ten top destinations appear in both lists, even though they show marked differences in terms of the types of tourists they attract, as well as their average length of stay and their spending per trip and per night.

There were only slight changes in the ranking of the 'World's Top Tourism Destinations' in 2008. The top three places – both by international tourist arrivals and international tourism receipts – were still occupied by the USA, Spain and France, albeit in a different order. France continued to lead the ranking of the world's major tourism destinations in terms of arrivals, but ranked third in receipts. The USA ranked first in receipts, earning US\$ 110 billion and regained its second position in arrivals, which it lost to Spain after 11 September 2001. Spain dropped to third place in terms of arrivals but maintained its position as the second biggest earner worldwide, and the first in Europe.

China and Italy both held on to their 2007 positions in terms of arrivals and receipts, with China ranking fourth in arrivals and fifth in receipts, while the reverse was true for Italy. The UK ranked sixth in arrivals and dropped to seventh place in receipts, after being overtaken by Germany (which ranked ninth in arrivals). Turkey moved up one rank in both categories, occupying the eighth position in arrivals and ninth in receipts. Completing the top ten ranking in arrivals were Ukraine (7) and Mexico (10) and in receipts, Australia (8) and Austria (10).

The top ten tourism earners last year accounted for 49% of the total estimated US\$ 944 billion in international tourism receipts. Their respective share of international tourist arrivals was slightly lower at 45%.

## World's Top

### Tourism

### Destinations

International Tourist Arrivals						International Tourism Receipts								
Rank	Series <sup>1</sup>	Million		Change (%)		Rank	US\$				Local currencies			
		2007	2008*	07/06	08*/07		Billion		Change (%)		change (%)			
							2007	2008*	07/06	08*/07	07/06	08*/07		
1	France	TF	81.9	79.3	3.9	-3.2	1	United States	96.7	110.1	12.8	13.8	12.8	13.8
2	United States	TF	56.0	58.0	9.8	3.6	2	Spain	57.6	61.6	12.8	6.9	3.3	-0.4
3	Spain	TF	58.7	57.3	1.1	-2.3	3	France	54.3	55.6	17.1	2.4	7.3	-4.6
4	China	TF	54.7	53.0	9.6	-3.1	4	Italy	42.7	45.7	11.9	7.2	2.5	-0.1
5	Italy	TF	43.7	42.7	6.3	-2.1	5	China	37.2	40.8	9.7	9.7	9.7	9.7
6	United Kingdom	TF	30.9	30.2	0.7	-2.2	6	Germany	36.0	40.0	9.9	11.0	0.7	3.5
7	Ukraine	TF	23.1	25.4	22.1	9.8	7	United Kingdom	38.6	36.0	11.6	-6.7	2.6	1.6
8	Turkey	TF	22.2	25.0	17.6	12.3	8	Australia	22.3	24.7	25.0	10.6	12.5	10.3
9	Germany	TCE	24.4	24.9	3.6	1.9	9	Turkey	18.5	22.0	9.7	18.7	9.7	18.7
10	Mexico	TF	21.4	22.6	0.1	5.9	10	Austria	18.9	21.8	13.5	15.4	4.0	7.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

## Regional

### Results

#### Europe – noting the effects of the global economic crisis

Out of all regions in the world, Europe's tourism sector, the world's largest and most mature, was the most severely affected by the global economic crisis that emerged in mid-2008. The region, which accounted for over 53% of the world's international tourist arrivals and 50% of international tourism receipts in 2008, achieved the weakest growth in international tourist arrivals (+0.3% to 489 million arrivals). The impact was even more severe in terms of tourism earnings – while international tourism receipts increased by 5 billion euros (US\$ 39 billion), to 322 billion euros (US\$ 474 billion), this represented a negative growth of 1% in real terms.

Both Northern and Western Europe posted weaker arrivals figures for 2008. The world economic crisis and associated fluctuations in exchange rates heavily affected arrivals in both subregions, with many of their main tourism destinations recording negative results: the Netherlands (-8%), France (-3%), and the United Kingdom (-2%). A few countries, such as Germany, Switzerland and Austria, the latter two co-hosting the

Major destinations	Series <sup>1</sup>	International Tourist Arrivals						International Tourism Receipts			
		(1000)			Change (%)		Share (%)	(US\$ million)			Share (%)
		2006	2007	2008*	07/06	08*/07	2008*	2006	2007	2008*	2008*
<b>Europe</b>		<b>468,446</b>	<b>487,851</b>	<b>489,436</b>	<b>4.1</b>	<b>0.3</b>	<b>100</b>	<b>378,290</b>	<b>435,177</b>	<b>473,680</b>	<b>100</b>
Austria	TCE	20,269	20,773	21,935	2.5	5.6	4.5	16,643	18,885	21,791	4.6
Belgium	TCE	6,995	7,045	7,165	0.7	1.7	1.5	10,295	10,898	12,396	2.6
Bulgaria	TF	5,158	5,151	5,780	-0.1	12.2	1.2	2,612	3,130	3,804	0.8
Croatia	TCE	8,659	9,307	9,415	7.5	1.2	1.9	7,902	9,254	10,971	2.3
Czech Rep	TCE	6,435	6,680	6,649	3.8	-0.5	1.4	5,541	6,632	7,722	1.6
France	TF	78,853	81,940	79,300	3.9	-3.2	16.2	46,345	54,273	55,595	11.7
Germany	TCE	23,571	24,420	24,886	3.6	1.9	5.1	32,801	36,038	40,018	8.4
Greece	TF	16,039	17,518	..	9.2	..	..	14,259	15,513	17,114	3.6
Hungary	TF	9,260	8,638	8,814	-6.7	2.0	1.8	4,233	4,728	6,032	1.3
Ireland	TF	8,001	8,332	8,026	4.1	-3.7	1.6	5,346	6,066	6,294	1.3
Italy	TF	41,058	43,654	42,734	6.3	-2.1	8.7	38,130	42,651	45,727	9.7
Kazakhstan	TF	3,468	3,876	3,447	11.8	-11.1	0.8	838	1,013	1,012	0.2
Netherlands	TCE	10,739	11,008	10,104	2.5	-8.2	2.1	11,348	13,305	13,375	2.8
Poland	TF	15,670	14,975	12,960	-4.4	-13.5	2.6	7,239	10,599	11,771	2.5
Portugal	TF	11,282	12,321	..	9.2	..	..	8,377	10,145	10,943	2.3
Russian Federation	TF	20,149	20,605	..	2.3	..	..	7,628	9,607	11,943	2.5
Spain	TF	58,004	58,666	57,316	1.1	-2.3	11.7	51,122	57,645	61,628	13.0
Sweden	CE	4,729	5,224	..	10.5	..	1.1	9,084	12,001	12,490	2.8
Switzerland	TH	7,863	8,448	8,608	7.4	1.9	1.8	10,802	12,180	14,408	3.0
Turkey	TF	18,916	22,248	24,994	17.6	12.3	5.1	16,853	18,487	21,951	4.6
Ukraine	TF	18,936	23,122	25,392	22.1	9.8	5.2	3,485	4,597	5,768	1.2
United Kingdom	TF	30,654	30,871	30,182	0.7	-2.2	6.2	34,597	38,602	36,028	7.6

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

\* = provisional figure or data; .. = figure or data not (yet) available; I = change of series.

<sup>1</sup> Series of 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.

UEFA Football Championship, were able to maintain positive growth, with the first two increasing by 2%, while Austria experienced a 6% boost in arrivals.

Central and Eastern Europe bucked the trend with an increase of 3% in arrivals in 2008. Still, there was wide variation from one destination to another, with various destinations, including Bulgaria, Ukraine, Kyrgyzstan, Georgia and Armenia, recording double-digit increases. Southern and Mediterranean Europe recorded only slight increases in arrivals (+0.8%) with destinations such as Italy and Spain registering declines in arrivals. One bright spot in the region was Turkey which, with its attractive exchange rate and relaxed visa regime, achieved an increase of 12% in arrivals over 2007.

## Regional

### Results

#### Asia and the Pacific – rising cost of travel dampens growth

Asia and the Pacific experienced a significant slowdown in the growth pace of international tourist arrivals in 2008. The deceleration from +9.6% in 2007 to +1.2% in 2008 can be attributed principally to a rise in the price of tourism caused by increases in aviation fuel prices during the first half of the year. Growth in receipts in Asia outpaced that of arrivals. Year-on-year growth in receipts for the region was 2.7%, to US\$ 206 billion, with South Asia (+6%) reporting the highest growth rate in real terms.

North-East Asia experienced a significant drop in arrivals growth, from 10% in 2007 to -0.1% in 2008. The dynamo for tourism in the region, China, experienced a 3% decrease in arrivals, which may be attributed to visitors' fear of congestion, higher prices and security concerns brought on by the 2008 Summer Olympics. Playing host to the Olympics did, however, have a positive effect on China's tourism receipts, which grew by almost 10% (in US dollar terms). Arrivals in Japan stagnated in 2008, which can be explained in part by the Japanese yen's appreciation over the course of 2008. Destinations such as the Republic of Korea (+7%) and Taiwan (pr. of China) (+3%) bucked the trend and recorded above-average growth.

South-East Asia and South Asia were the strongest performing subregions of Asia and the Pacific, growing at 3% and 2% in 2008. In South-East Asia, countries like Indonesia (+13%), Cambodia (+7%) and Malaysia (+5%) grew at above-average rates. Arrivals in India, the dominant destination in South Asia, grew 6%.

Oceania reported the weakest arrivals figures in the region (-1%). The high costs of air travel – especially significant for distant destinations – coupled with the global economic environment and high exchange rates have negatively impacted international travel to Australia (-1%) and New Zealand (-0.3%). However, some of the Pacific Islands, such as Fiji (+8%), reported encouraging results in 2008.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals					International Tourism Receipts				
		(1000)			Change (%)		(US\$ million)			Share (%)	
		2006	2007	2008*	07/06	08*/07	2008*	2006	2007	2008*	2008*
<b>Asia and the Pacific</b>		<b>165,989</b>	<b>181,984</b>	<b>184,104</b>	<b>9.6</b>	<b>1.2</b>	<b>100</b>	<b>157,067</b>	<b>186,789</b>	<b>206,022</b>	<b>100</b>
Australia	VF	5,532	5,644	5,586	2.0	-1.0	3.0	17,840	22,298	24,660	12.0
Cambodia	TF	1,591	1,873	2,001	17.7	6.8	1.1	963	1,135	1,221	0.6
China	TF	49,913	54,720	53,049	9.6	-3.1	28.8	33,949	37,233	40,843	19.8
Fiji	TF	549	540	585	-1.6	8.4	0.3	480	497	568	0.3
Guam	TF	1,212	1,225	1,142	1.1	-6.8	0.6	..	..	..	..
Hong Kong (China)	TF	15,822	17,154	17,320	8.4	1.0	9.4	11,638	13,754	15,300	7.4
India	TF	4,447	5,082	5,367	14.3	5.6	2.9	8,634	10,729	11,832	5.7
Indonesia	TF	4,871	5,506	6,234	13.0	13.2	3.4	4,448	5,346	7,375	3.6
Iran	TF	2,735	2,172	..	-20.6	..	..	1,452	1,486	..	..
Japan	VF	7,334	8,347	8,351	13.8	0.0	4.5	8,469	9,334	10,821	5.3
Korea, Republic of	VF	6,155	6,448	6,891	4.8	6.9	3.7	5,788	6,138	9,078	4.4
Lao P.D.R.	TF	842	1,142	1,295	35.6	13.4	0.7	173	233	276	0.1
Macao (China)	TF	10,683	12,942	10,605	21.2	..	5.8	9,829	13,612	13,382	6.5
Malaysia	TF	17,547	20,973	22,052	19.5	5.1	12.0	10,424	14,047	15,277	7.4
Maldives	TF	602	676	683	12.3	1.1	0.4	512	602	636	0.3
New Zealand	VF	2,422	2,466	2,459	1.8	-0.3	1.3	4,738	5,400	4,912	2.4
Nepal	TF	384	527	500	37.2	-5.0	0.3	128	198	336	0.1
Pakistan	TF	898	840	823	-6.6	-2.0	0.5	255	276	245	0.1
Philippines	TF	2,843	3,092	3,139	8.7	1.5	1.7	3,501	4,931	4,388	2.1
Singapore	TF	7,588	7,957	7,778	4.9	-2.2	4.2	7,535	9,162	10,575	5.1
Sri Lanka	TF	560	494	438	-11.7	-11.2	0.3	410	385	342	0.2
Taiwan (pr. of China)	VF	3,520	3,716	3,845	5.6	3.5	2.1	5,136	5,213	5,937	2.9
Thailand	TF	13,822	14,464	14,584	4.6	0.8	7.9	13,401	16,669	17,651	8.6
Vietnam	VF	3,584	4,229	4,236	18.0	0.2	2.3	3,200	3,477	3,926	1.9

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

<sup>1</sup> See note on page 6.

## Regional

### Results

#### Americas – still considerable growth in Central and South America

International tourist arrivals in the Americas grew by 3% in 2008, to 147 million, where Central and South America led the way with above-average increases of 7% and 4% respectively. Growth in receipts in the region (+5%) tripled that of the world (+1.7%), with the strongest performance coming from North America (+7%). International tourism receipts for the Americas totalled US\$ 188 billion in 2008, representing 20% of the world total.

Arrivals in South America were up 4%, following 2007's increase of 7%. Strongest performers in the subregion were Uruguay (+10%), Chile (+8%), Peru (+7%) and Ecuador (+7%). International arrivals in Argentina and Brazil, on the other hand, grew at more modest rates of 2% and 0.5%, respectively. In Central America, Panama had an excellent year, showing double-digit growth of 17%, and other countries, like Honduras (+8%), Nicaragua (+7%), Costa Rica (+6%) and Guatemala (+5%), also enjoyed above average growth in 2008.

The results for North America were mixed. Mexico was up 6%, as against a flat 2007. The USA's performance was very strong in the first eight months but the looming recession in major source markets brought growth to a halt, ending the year at 4%. By contrast, arrivals in Canada continued to slide (-4%), due to factors which include a poor exchange rate, stricter travel restrictions to/from the USA, and reduced airline capacity from important source markets in Europe and Japan. The Caribbean saw arrivals grow by 2%. Cuba (+9%) and Aruba (+7%) posted excellent results and destinations such as Jamaica (+4%) and Puerto Rico (+6%) also did better than the subregion overall. Weaker results in the rest of the subregion can be attributed in large part on high fares and decreased airline capacity, as well as economic difficulties in the USA and Europe.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals					International Tourism Receipts				
		(1000)			Change (%)		(US\$ million)			Share (%)	
		2006	2007	2008*	07/06	08*/07	2006	2007	2008*	2008*	
<b>Americas</b>		<b>135,791</b>	<b>142,866</b>	<b>147,037</b>	<b>5.2</b>	<b>2.9</b>	<b>100</b>	<b>154,503</b>	<b>171,295</b>	<b>188,355</b>	<b>100</b>
Argentina	TF	4,173	4,562	4,665	9.3	2.3	3.2	3,344	4,314	4,633	2.5
Aruba	TF	694	772	827	11.2	7.1	0.6	1,080	1,255	1,412	0.7
Bahamas	TF	1,601	1,528	1,463	-4.6	-4.2	1.0	2,056	2,187	2,153	1.1
Barbados	TF	563	575	568	2.1	-1.2	0.4	1,057	1,199	1,192	0.6
Bolivia	TF	521	573	594	9.9	3.7	0.4	244	292	275	0.1
Brazil	TF	5,017	5,026	5,050	0.2	0.5	3.4	4,316	4,953	5,785	3.1
Canada	TF	18,265	17,931	17,128	-1.8	-4.5	11.6	14,642	15,333	15,106	8.0
Chile	TF	2,253	2,507	2,699	11.3	7.7	1.8	1,213	1,478	1,757	0.9
Colombia	VF	1,053	1,195	1,222	13.5	2.2	0.8	1,554	1,669	1,844	1.0
Costa Rica	TF	1,725	1,980	2,089	14.8	5.5	1.4	1,732	2,029	2,250	1.2
Cuba	TF	2,150	2,119	2,316	-1.4	9.3	1.6	2,127	2,141	2,267	1.2
Dominican Rep.	TF	3,965	3,980	3,980	0.4	0.0	2.7	3,917	4,064	4,176	2.2
Ecuador	VF	841	937	1,005	11.5	7.2	0.7	490	623	763	0.4
El Salvador	TF	1,279	1,339	1,385	4.7	3.5	0.9	793	847	894	0.5
Guatemala	TF	..	1,448	1,527	..	5.4	1.0	919	1,055	1,068	0.6
Honduras	TF	739	831	899	12.6	8.2	0.6	488	557	621	0.3
Jamaica	TF	1,679	1,701	1,767	1.3	3.9	1.2	1,870	1,910	1,984	1.1
Mexico	TF	21,353	21,370	22,637	0.1	5.9	15.4	12,177	12,852	13,289	7.1
Nicaragua	TF	749	800	858	6.8	7.2	0.6	231	255	276	0.1
Panama	TF	843	1,103	1,293	30.8	17.2	0.9	960	1,185	1,408	0.7
Peru	TF	1,721	1,916	2,058	11.4	7.4	1.4	1,570	1,723	1,991	1.1
Puerto Rico	TF	3,722	3,687	3,894	-0.9	5.6	2.6	3,369	3,414	3,644	1.9
United States	TF	50,977	55,986	58,030	9.8	3.6	39.5	85,720	96,712	110,090	58.4
Uruguay	TF	1,749	1,752	1,921	0.2	9.7	1.3	598	809	1,042	0.6
Venezuela	TF	748	771	745	3.0	-3.4	0.5	768	817	895	0.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

<sup>1</sup> See note on page 6.

#### Africa – above average growth in arrivals

Africa's growth of 4% to 47 million international tourist arrivals, though at half the level achieved in 2007, was still very positive when compared to the world's performance overall. International tourism receipts amounted to US\$ 31 billion, signifying a decrease of 1% in real terms. It is important to note that this decline followed a series of previous strong growth years.

North African countries Morocco (+6%) and Tunisia (+4%) posted good results, which can be attributed to strong government support coupled with easy access and attractive prices compared to 'euro' destinations



on the northern shores of the Mediterranean. A number of Sub-Saharan African destinations reported positive growth, with Angola, Ghana, Mali and Uganda turning in double-digit results. Boosted by increased funding for tourism and targeted marketing promotions, South Africa, the leading destination in the region, increased international arrivals by 6%, boosted by the build-up to the hosting of the FIFA 2010 Football World Cup.

## Regional

### Results

Major destinations	Series <sup>1</sup>	International Tourist Arrivals						International Tourism Receipts			
		(1000)			Change (%)		Share (%)	(US\$ million)			Share (%)
		2006	2007	2008*	07/06	08*/07	2008*	2006	2007	2008*	2008*
<b>Africa</b>		<b>41,534</b>	<b>45,016</b>	<b>46,700</b>	<b>8.4</b>	<b>3.7</b>	<b>100</b>	<b>24,896</b>	<b>29,089</b>	<b>30,612</b>	<b>100</b>
Algeria	VF	1,638	1,743	1,771	6.4	1.6	3.8	215	219	..	..
Angola	TF	121	195	294	60.4	51.0	0.6	75	225	..	..
Botswana	TF	1,843	1,990	2,131	8.0	7.1	4.6	537	546	553	1.8
Cape Verde	TF	242	267	285	10.4	6.7	0.6	228	303	350	1.1
Ethiopia	TF	290	312	330	7.4	5.8	0.7	162	176	374	1.2
Gambia	TF	125	143	147	14.3	2.9	0.3	75	84	..	..
Ghana	TF	497	587	698	18.0	19.0	1.5	861	908	919	3.0
Kenya	TF	1,644	..	..	..	..	..	687	917	752	2.5
Lesotho	TF	346	292	285	-15.7	-2.5	0.6	36	43	33	0.1
Madagascar	TF	312	344	375	10.4	9.0	0.8	232	269	333	1.1
Malawi	TF	638	735	742	15.2	1.0	1.6	24	27	..	..
Mali	TF	153	164	190	7.4	15.9	0.4	175	221	..	..
Mauritius	TF	788	907	930	15.1	2.6	2.0	1,007	1,299	1,449	4.7
Morocco	TF	6,558	7,408	7,879	12.9	6.4	16.9	5,984	7,181	7,202	23.6
Namibia	TF	833	929	..	11.5	..	..	384	434	378	1.2
Reunion	TF	279	381	396	36.5	4.2	0.8	335	447	505	1.7
Senegal	TF	866	875	..	1.0	..	..	250	531	..	..
Seychelles	TF	141	161	159	14.7	-1.4	0.3	228	285	258	0.8
South Africa	TF	8,396	9,091	9,592	8.3	5.5	20.5	7,875	8,418	7,609	24.9
Sudan	TF	328	436	..	32.9	..	..	252	262	331	1.1
Swaziland	THS	873	870	754	-0.4	-13.3	1.6	75	32	..	..
Tanzania	TF	628	692	750	10.2	8.4	1.6	950	1,199	1,354	4.4
Tunisia	TF	6,550	6,762	7,049	3.2	4.2	15.1	2,275	2,575	2,932	9.6
Uganda	TF	539	642	844	19.2	31.5	1.8	346	398	498	1.6
Zambia	TF	757	897	812	18.5	-9.5	1.7	110	138	..	..
Zimbabwe	VF	2,287	2,508	..	9.7	..	..	338	365	..	..

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

<sup>1</sup> See note on page 6.

## Middle East – sustained growth amid turbulent times

The Middle East has succeeded in sustaining the high growth rate of the past few years. International arrivals in the region as a whole grew an estimated 18% to 55 million, and receipts increased 17% in real terms, reaching US\$ 46 billion. Lebanon, Syria (both +31%) and Saudi Arabia (+28%) led the way in arrivals growth, followed by Egypt (+16%), Oman (+13%) and Jordan (+9%).

Major destinations	Series <sup>1</sup>	International Tourist Arrivals						International Tourism Receipts			
		(1000)			Change (%)		Share (%)	(US\$ million)			Share (%)
		2006	2007	2008*	07/06	08*/07	2008*	2006	2007	2008*	2008*
<b>Middle East</b>		<b>40,900</b>	<b>46,646</b>	<b>55,106</b>	<b>14.0</b>	<b>18.1</b>	<b>100</b>	<b>29,863</b>	<b>34,983</b>	<b>45,640</b>	<b>100</b>
Bahrain	TF	4,519	4,935	..	9.2	..	..	1,048	1,105	1,166	2.6
Egypt	TF	8,646	10,610	12,296	22.7	15.9	22.3	7,591	9,303	10,985	24.1
Jordan	TF	3,225	3,430	3,729	6.4	8.7	6.8	2,060	2,311	2,943	6.4
Lebanon	TF	1,063	1,017	1,333	-4.3	31.0	2.4	4,981	5,466	7,192	15.8
Oman	TF	1,336	1,124	1,273	-15.9	13.3	2.3	544	648	804	1.8
Qatar	TF	946	964	..	1.9	..	..	874	..	..	..
Saudi Arabia	TF	8,620	11,531	14,757	33.8	28.0	26.8	4,961	5,228	9,720	21.3
Syrian Arab Republic	TF	4,231	4,158	5,430	-1.7	30.6	9.9	2,025	2,883	..	..
Untd Arab Emirates	THS	..	..	..	..	..	..	4,972	6,072	7,162	15.7
Yemen	THS	382	379	404	-0.8	6.6	0.7	181	425	..	..

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

<sup>1</sup> See note on page 6.

## Middle East outbound market continues dynamic growth trend

Majority of international travel takes place within the traveller's own region, with about four out of five worldwide arrivals originating from the same region. However, travel between different regions tends to grow at a somewhat faster rate than intraregional travel. In 2008, interregional travel increased by 3.1% as against a growth of 1.7% for intraregional traffic.

Source markets for international tourism are still largely concentrated in the industrialized countries of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth over recent years, especially markets in North-East and South-East Asia, Central and Eastern Europe, the Middle East, Southern Africa and South America. Europe is currently the most important source market, generating 55% of international arrivals worldwide in 2008, followed by Asia and the Pacific (20%) and the Americas (16%). All three regions grew at below average rates as the global economic crisis dampened growth in most source markets in the second part of the year. The Middle East, however, continued its dynamic growth, recording an annual increase of 16%. Outbound tourism from Africa also maintained growth at a rate of 5%.

	International Tourist Arrivals (million)						Share (%) 2008*	Change (%)		Average annual growth (%) '00-08*	
	1990	1995	2000	2005	2006	2007		2008*	07/06		08*/07
<b>World</b>	<b>438</b>	<b>534</b>	<b>684</b>	<b>804</b>	<b>853</b>	<b>904</b>	<b>922</b>	<b>100</b>	<b>6.1</b>	<b>2.0</b>	<b>3.8</b>
From:											
Europe	254.2	308.1	395.6	451.5	475.2	502.6	508.7	55.2	5.8	1.2	3.2
Asia and the Pacific	58.8	86.6	114.2	153.2	164.0	178.3	181.6	19.7	8.7	1.8	6.0
Americas	99.3	108.6	131.1	136.3	142.8	149.5	151.8	16.5	4.7	1.5	1.9
Middle East	8.2	9.3	14.1	22.6	24.6	27.0	31.5	3.4	9.7	16.4	10.6
Africa	10.0	12.7	16.3	22.1	24.9	27.2	28.6	3.1	9.1	5.0	7.3
Origin not specified <sup>1</sup>	7.9	8.9	12.5	18.3	21.0	19.7	20.2	2.2			
Same region	352.8	429.4	540.2	635.3	670.3	710.5	722.5	78.3	6.0	1.7	3.7
Other regions	77.7	96.0	131.0	150.3	161.3	174.2	179.6	19.5	7.9	3.1	4.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2009)

<sup>1</sup> Countries that could not be allocated to a specific region of origin. As information is derived from inbound tourism data this occurs when data on the country of origin is missing or when a category such as 'other countries of the world' is used grouping countries together that are not separately specified.

## International tourism's top spenders – virtually equal to last year's line-up

The ranking of international tourism spenders shows no major changes in 2008 apart from the fact that the Netherlands re-entered after a few years of absence, taking the number ten spot. Among the world's top ten spenders, apart from China (+21% in US\$ terms), the Russian Federation (+12% in US\$ terms) did particularly well in 2008, as did France (+10%) and Canada (+8%). Just one market, Japan, recorded negative growth (-8%), while world's top spender Germany increased spending only by a modest 2% for the year.

In spite of an overall cooling of tourism growth in the second half of 2008, emerging source markets again turned in some of the best performances, with many registering growth rates of over 15% – Brazil, Hungary, South Africa, India, Bulgaria, Ukraine, China, Saudi Arabia, United Arab Emirates, Egypt, Malaysia and Argentina.

Rank		International Tourism Expenditure (US\$ billion)		Local currencies change (%)		Market share (%) 2008*	Population 2008 (million)	Expenditure per capita (US\$)
		2007	2008*	2007/2006	2008*/2007			
	<b>World</b>	<b>857</b>	<b>943</b>			<b>100</b>	<b>6,724</b>	<b>140</b>
1	Germany	83.1	91.0	2.9	2.0	9.7	82	1,108
2	United States	76.4	79.7	5.9	4.4	8.5	304	262
3	United Kingdom	71.4	68.5	4.1	4.4	7.3	61	1,121
4	France	36.7	43.1	7.9	9.6	4.6	62	693
5	China	29.8	36.2	22.5	21.4 (\$)	3.8	1,328	27
6	Italy	27.3	30.8	8.4	4.9	3.3	59	519
7	Japan	26.5	27.9	-0.2	-7.6	3.0	128	218
8	Canada	24.7	26.9	13.3	8.4	2.9	33	810
9	Russian Federation	22.3	24.9	22.1	11.8 (\$)	2.6	142	175
10	Netherlands	19.1	21.7	2.6	6.2	2.3	17	1,301

Source: World Tourism Organization (UNWTO) ©

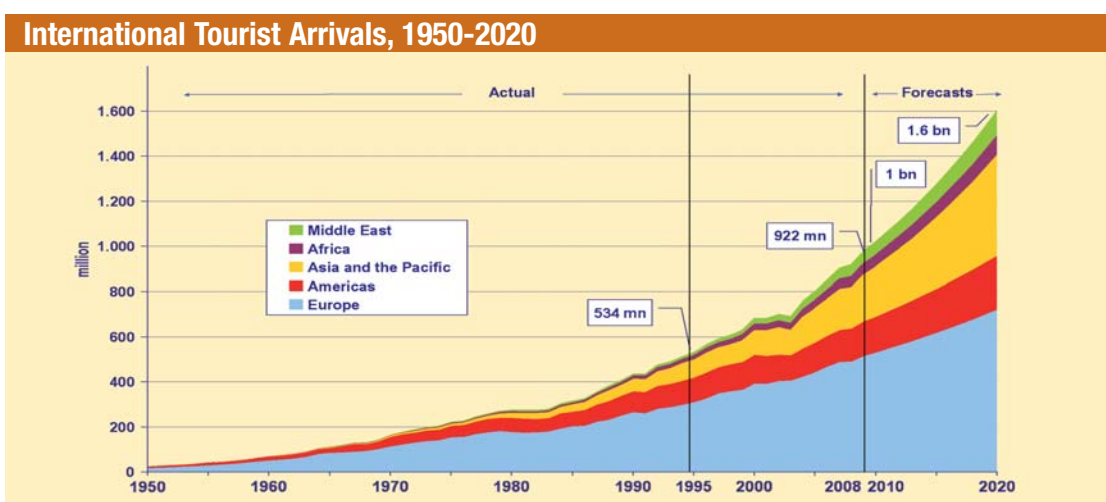
(Data as collected by UNWTO, 2009)

(\$) = percentage derived from series in US\$ instead of local currency

## Long-term prospects

*Tourism 2020 Vision* is the World Tourism Organization's long-term outlook and assessment of the development of tourism up to the first 20 years of the new millennium. An essential outcome of the *Tourism 2020 Vision* are quantitative forecasts covering a 25-year period, with 1995 as the base year and forecasts for 2010 and 2020.

Although the evolution of tourism over recent years has been somewhat irregular, for the moment UNWTO has maintained its long-term forecast. The underlying structural trends of the forecast are believed not to have changed significantly. Experience shows that in the short term, periods of faster growth (1995, 1996, 2000, and 2004 to 2007) alternate with periods of slow growth (2001 to 2003, 2008). In fact, the actual pace of growth has actually been slightly faster than the *Tourism 2020 Vision* forecast as international tourist arrivals showed an average annual growth of 4.3% between 1995 and 2008, compared with the projected 4.1%. As part of its program of work, UNWTO is currently undertaking a major update of its long-term outlook with the project *Tourism Towards 2030*.



Source: World Tourism Organization (UNWTO) ©

UNWTO's *Tourism 2020 Vision* projects that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 0.4 billion will be long-haul travellers. East Asia and the Pacific, South Asia, the Middle East and Africa are forecast to grow at over 5% per year, compared to the world average of 4.1%. More mature regions Europe and the Americas are anticipated to show lower-than-average growth rates. Europe will maintain the highest share of world arrivals, although this share will decline from 60% in 1995 to 46% in 2020.

The total tourist arrivals by region shows that, by 2020, the top three receiving regions will be Europe (717 million tourists), East Asia (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia.

### International Tourist Arrivals by Region (million)

	Base Year	Forecasts		Average annual growth rate (%)	Share (%)	
	1995	2010	2020	1995-2020	1995	2020
<b>Total</b>	<b>565</b>	<b>1,006</b>	<b>1,561</b>	<b>4.1</b>	<b>100</b>	<b>100</b>
Africa	20	47	77	5.5	3.6	5.0
Americas	109	190	282	3.9	19.3	18.1
East Asia/Pacific	81	195	397	6.5	14.4	25.4
Europe	338	527	717	3.0	59.8	45.9
Middle East	12	36	69	7.1	2.2	4.4
South Asia	4	11	19	6.2	0.7	1.2
Intraregional (a)	464	791	1,183	3.8	82.1	75.8
Long-haul (b)	101	216	378	5.4	17.9	24.2

Source: World Tourism Organization (UNWTO) ©

Notes: (a) Intraregional includes arrivals where country of origin is not specified.

(b) Long-haul is defined as everything except intraregional travel.

## 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.

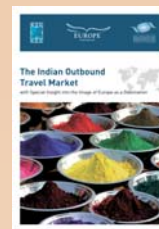
Available in English, French and Spanish



## 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



## 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



## 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



## 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



## 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



## 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



## Compendium of Tourism Statistics, 2009 Edition

The Compendium of Tourism Statistics is designed to provide a condensed and quick-reference guide on the major tourism statistical indicators in each country. The 2009 edition provides statistical information on tourism in 208 countries and territories around the world for the period 2003 – 2007. This publication is edited in English and includes text in Arabic, French, German, Russian and Spanish printed in a separate pasteboard.

## Yearbook of Tourism Statistics, 2009 Edition

The Yearbook of Tourism Statistics provides data on total arrivals and overnight stays associated with inbound tourism, with a breakdown by country of origin for 204 countries and territories for the period 2003 – 2007. It is available in English, with notes given in English, French and Spanish.



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

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