UNWTO World Tourism Barometer

Commited to Tourism, Travel and the Millennium Development Goals

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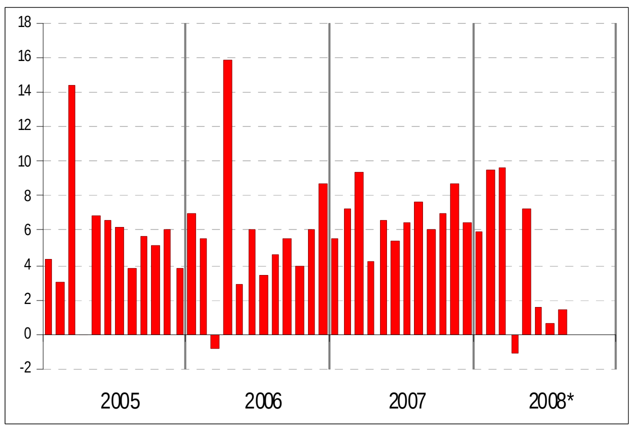
Rapid slowdown of international tourism growth

As anticipated in the June issue of the *UNWTO World Tourism Barometer*, international tourism demand cooled significantly over the period May-August 2008, severely constrained by the present economic uncertainties. After a sound start to the year with growth of international tourist arrivals worldwide averaging 5.7% in the first four months, demand was still strong in May (+7%). But in June, July and August growth fell below 2%. For the first eight months overall, world growth averaged 3.7% compared with the same period in 2007 and, for the year as a whole, it is now projected at 2-3%. Moreover, as the current troubled economic scenario is expected to continue into 2009, UNWTO's initial forecast for next year is a growth of between 0% and 2%.

International Tourist Arrivals, monthly evolution

World (% change)



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Asia and the Pacific was the region whose performance has deteriorated most rapidly. After having grown at a sustained rate of over 7% for 18 consecutive months up to March this year, growth declined to around 1.5% in June and July and was even negative in August. The high price of oil and rising inflation have taken their toll in the region, squeezing travel budgets. Growth in Europe also stagnated over the summer months. In the Americas, Africa and the Middle East growth weakened as well, but the slowdown was much less pronounced. (Continued on page 5)

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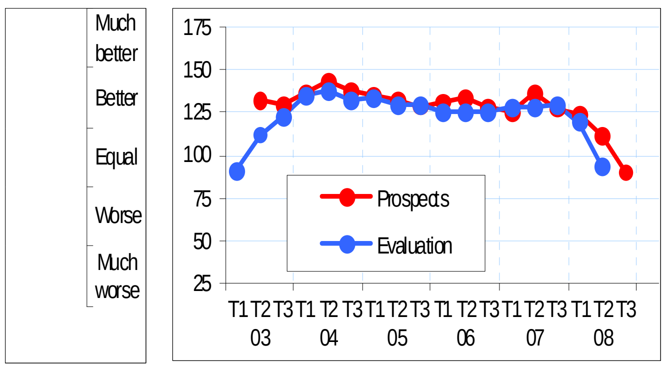
UNWTO Panel of Tourism Experts
Sharp decline in confidence

Confidence among the members of the UNWTO Panel of Experts has continued to slide – and even more steeply than in the previous period – according to the latest of the three-times-yearly UNWTO Tourism Confidence Index. Both in terms of the Panel's 'evaluation' of the period May-August (94) and regarding its 'prospects' for the period September-December (90), the index has fallen to its lowest level since it was first compiled just after the start of the SARS outbreak in 2003. The scores overall are negative, meaning that the number of experts rating actual and expected performance as "worse" or "much worse" exceed those who rate it as "better" or "much better", with a score of 100 indicating "no change", or the mid-point between positive and negative scores. (Continued on page 11)

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>.

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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

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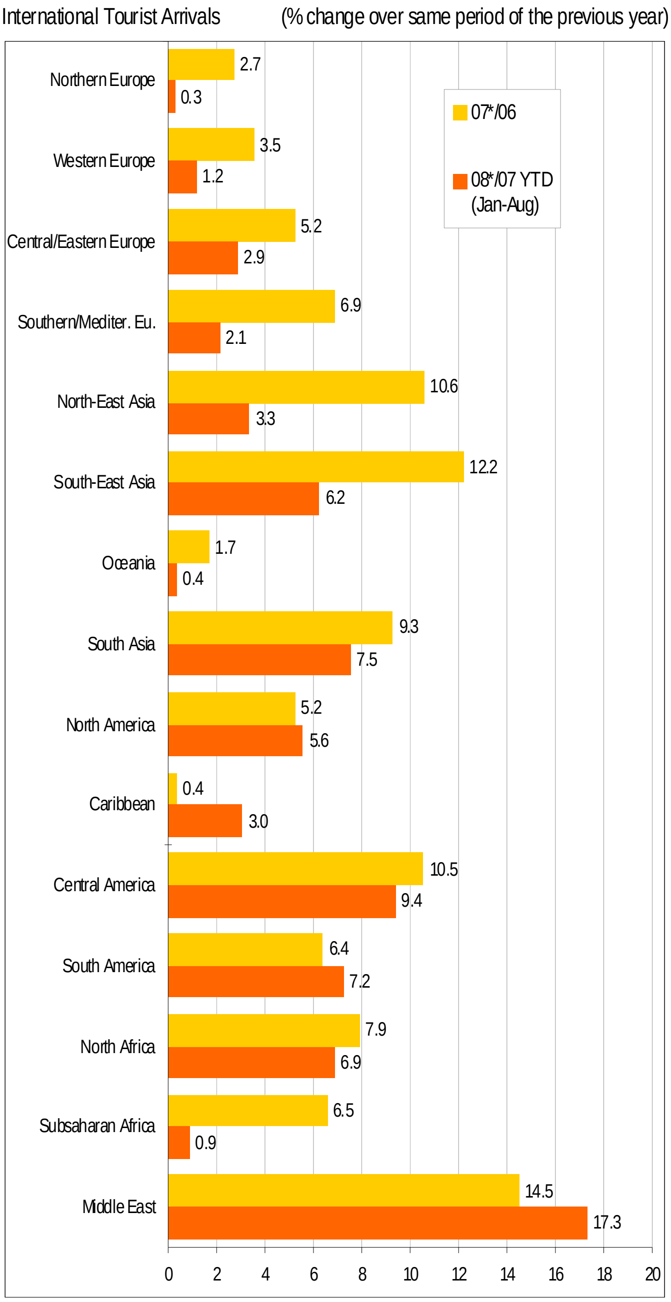
UNWTO World Tourism Barometer, October 2008

Quick overview of key trends

International tourism January-August 2008

- Worldwide, international tourist arrivals grew at around 4% between January and August 2008 compared to the same period of 2007.
- Results show a rapid deterioration of international tourism growth since mid-2008, reflecting the impact of rising oil prices at the beginning of the year and the deterioration of the economic situation, as well as consumer confidence, in recent months.
- On a month-by-month basis, global tourism up to May was still growing at a considerable pace, but in June, July and August growth fell below 2%.
- In absolute terms, the number of international tourist arrivals is estimated to have reached 641 million between January and August, up from 618 million in 2007, corresponding to an additional 23 million arrivals. In 2007 the first eight months represented some 68% of the total annual volume.
- All regions showed increases, but trends varied from region to region. Asia and the Pacific was the region whose performance has deteriorated most rapidly. Growth in Europe also stagnated over the summer months. In the Americas, Africa and the Middle East growth weakened as well, but the slowdown was much less pronounced. All subregions also reported positive results.
  - Europe currently stands at +2% for the first eight months of 2008 (well down from the 5% growth of the last two years), and the slowdown has not spared any of its four subregions.
  - Asia and the Pacific's growth (+4%) is also well behind its 2007 level, with Oceania and North-East Asia suffering the brunt of the downturn in demand.
  - The Americas has so far performed better than in 2007 with 6% growth through the first eight months. The region appears to have only experienced a mild slowdown in July and August.
  - The Middle East continued its rapid expansion, with growth for the period January through August estimated at 17%. Data is still limited, though, and it is likely that this estimate will be revised.
  - Africa's growth is currently running at less than half the level achieved in 2007, largely thanks to North Africa's strong performance, since the average growth in Subsaharan Africa has fallen significantly below its 2007 level.
- With respect to outbound tourism, the large majority of countries that have reported data on international tourism expenditure reported increases in the first half year of 2008. The strongest growth has come from emerging markets, as has been the case in recent years.



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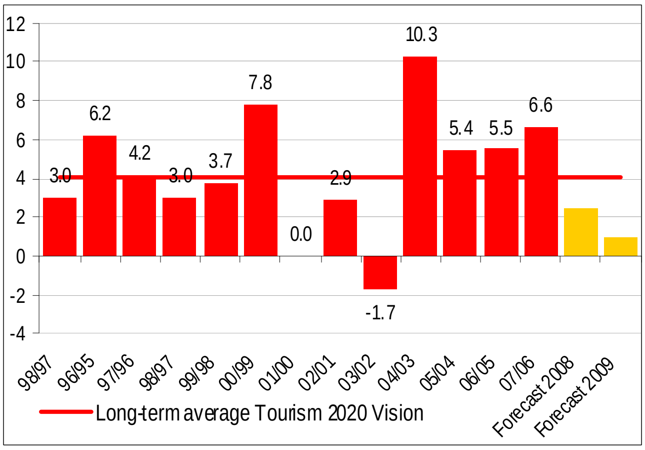
- The slowdown of traffic through the year, with negative growth in September, is confirmed by the air transport data as reported by IATA and various regional air transport associations. The worldwide trend through September was a 3.3% increase in passenger traffic as against a 4.8% rise in capacity, with the load factor for the period averaging 76.3%.
- Hotel performance data for the first eight months of the year as reported by STR Global also indicates a slowdown. The increases in revenue per available room (revPAR) and average room rates remain significant. However, the concern is about the occupancy rate which, except in the Middle East and Central and South America, continues to decline.
- Confidence among the almost 300 members of the UNWTO Panel of Experts has continued to slide – and even more steeply than in the previous period – according to the latest of the three-times-yearly UNWTO Tourism Confidence Index. Both in terms of the Panel's 'evaluation' of the period May-August and regarding its 'prospects' for the period September-December, the index has fallen to its lowest level since it was first compiled just after the start of the SARS outbreak in 2003.

Prospects

- The economic downturn, combined with the current uncertainties, extreme market volatility and a decline in both consumer and business confidence, are expected to continue taking their toll on demand for tourism – at least in the short to medium term.
- So far international tourism has resisted the downturn better than other economic sectors such as construction and real estate or car manufacturing and sales.
- Given the current adverse conditions, the growth of international tourism is expected to slow even more between September and December of this year, and will probably show negative growth in one or more months. Overall growth for 2008 is, however, still projected at 2-3%, building on the strong results of the first five months.

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



Source: World Tourism Organization (UNWTO) ©

- As the current troubled economic scenario is expected to continue into 2009, UNWTO's initial forecast for next year is a growth of between 0% and 2%. At least the first part of next year is expected to be complicated, while a gradual recovery is anticipated over the course of the year.
- Unlike major previous crises, such as 9/11 and SARS, the current downturn does not impact so much on the desire to travel. The major concern is about whether one can afford to travel, or wants to spend on travel, given the uncertain economic situation.
- As in previous crises:
  - Travel to destinations closer to home, including domestic travel, is expected to be favoured as compared to long-haul travel;
  - Segments such as visiting friends and relatives (VFR), repeat visitors, as well as special interest and independent travellers, are expected to be more resilient;
  - The decline in average length of stay, as well as expenditure, is projected to be more pronounced than in overall volume;
  - Destinations offering value for money and with favourable exchange rates have an advantage as price becomes a key issue;
  - Companies will and should concentrate on containment of costs in order to maintain their competitive edge;
  - It is more critical than ever before to work closely together in the tourism value chain – between the public and private sectors, and destinations and the travel trade.

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Inbound Tourism: short-term data 2008

World

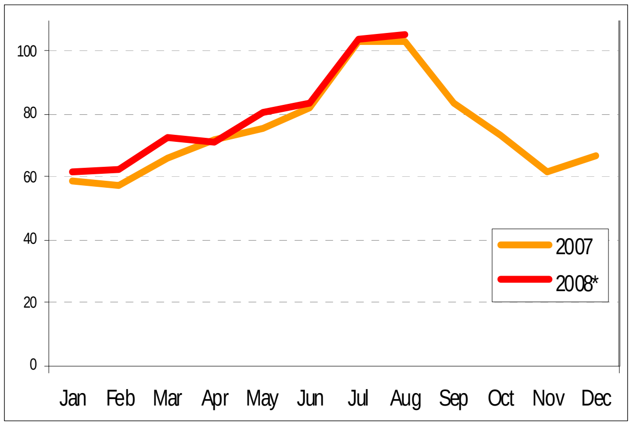
(Continued from page 1)
In absolute terms, from January to August, destinations worldwide received an estimated 641 million international tourist arrivals, up from 618 million in the same period of 2007 (when they represented some 68% of the total annual volume). This means that 23 million more arrivals have been counted for 2008 so far. As already happened in 2007, the Northern Hemisphere high season months of July and August again both exceeded 100 million arrivals.

However, international tourism results have rapidly deteriorated through the year, first under the influence of record high oil prices and rising inflation, and later through the fear of a sustained recession. As a result, on a month-by-month basis for the four-month period under review, May showed sustained growth of 7%, following an average increase of nearly 6% in the first four months, but the average fell to less than 2% in June, and 1% in the peak travel months of July and August.

In the first eight months of 2008, the global tourism industry was faced with the usual challenges – from natural disasters such as hurricanes, earthquakes and floods, to renewed terrorist incidents, political tensions and civil unrest. However, there was much worse brewing. The credit crunch, which had started in the United States in 2007, intensified in the first half of this year, resulting in the rescue of Bear Stearns in March and in the US Government's support package for Fannie Mae and Freddie Mac in July. But this only really started to have an impact on travel and tourism demand when the financial crisis sharply escalated in August and September, culminating in the collapse, or near-collapse, of many major financial institutions. This in turn led to a spate of sell-outs and nationalisations, a freezing of credit – not least in terms of inter-bank lending – rising unemployment, and a sharp fall in consumer and business confidence. And through the months of September and October, the situation deteriorated almost on a daily basis.

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	2006	2007	2007	06/05	07/06	2008*													2007			
			(million)	(%)		(%)	YTD	Q1	Q2	Q3	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Q1	Q2	Q3	Q4
World	683	847	903	100	5.5	6.6	3.7	8.3	2.6		5.6	9.5	9.6	-1.1	7.3	1.5	0.6	1.4		7.6	5.4	6.9	7.3
Europe	*393.3*	*462.1*	*484.9*	*53.7*	*5.0*	*4.9*	*1.7*	*5.5*	*1.0*		*2.1*	*7.3*	*6.6*	*-5.2*	*7.2*	*0.3*	*-0.9*	*1.0*		*7.0*	*3.4*	*5.1*	*5.1*
Northern Europe	43.7	56.5	58.1	6.4	7.1	2.7	0.3	7.0	-0.2		2.8	10.4	8.0	-5.4	6.4	-1.9	-4.5	-3.2		7.6	2.1	-0.6	5.2
Western Europe	139.7	149.6	154.9	17.1	4.9	3.5	1.2	7.4	-1.9		1.6	9.7	9.7	-11.7	8.0	-2.5	-1.4	0.8		2.5	1.9	4.1	5.7
Central/Eastern Europe	69.2	91.2	96.0	10.6	4.3	5.2	2.9	1.3	3.2		2.9	3.8	-2.4	2.8	4.6	2.2	3.8	3.7		9.9	4.8	4.1	3.5
Southern/Mediter. Eu.	140.8	164.8	176.1	19.5	4.7	6.9	2.1	5.6	2.7		1.6	5.8	8.3	-3.6	8.2	2.2	-1.4	1.2		10.0	4.4	8.1	5.6
Asia and the Pacific	*109.3*	*166.8*	*184.2*	*20.4*	*8.0*	*10.4*	*4.3*	*8.6*	*3.3*		*8.7*	*9.4*	*7.8*	*3.2*	*5.4*	*1.3*	*1.6*	*-2.0*		*10.4*	*10.5*	*10.6*	*10.5*
North-East Asia	58.3	94.3	104.2	11.5	7.7	10.6	3.3	10.1	2.2	-4.2	11.0	9.3	9.9	2.9	3.9	-0.2	-0.3	-7.1	-5.1	9.7	9.7	11.5	11.4
South-East Asia	35.6	53.1	59.6	6.6	9.4	12.2	6.2	7.1	5.5		6.5	10.3	4.8	4.5	8.0	3.9	4.3	7.6		12.8	14.0	11.1	11.1
Oceania	9.2	10.5	10.7	1.2	0.4	1.7	0.4	1.8	-1.1		0.7	4.8	-0.2	-3.3	3.9	-3.4	5.4	-5.8		3.1	2.0	2.6	-0.6
South Asia	6.1	8.9	9.7	1.1	12.0	9.3	7.5	11.0	6.6	1.8	8.8	10.3	14.2	6.0	7.6	6.4	1.6	3.2	0.4	12.2	7.7	7.7	11.6
Americas	*128.2*	*135.8*	*142.5*	*15.8*	*1.8*	*5.0*	*5.6*	*9.9*	*3.8*		*8.2*	*10.1*	*11.4*	*-0.5*	*8.7*	*3.4*	*2.4*	*3.8*		*2.6*	*3.5*	*6.1*	*7.4*
North America	91.5	90.6	95.3	10.6	0.8	5.2	5.6	10.7	4.0		7.7	10.1	13.6	-0.8	9.8	3.0	1.9	3.8		2.9	4.3	5.8	7.5
Caribbean	17.1	19.4	19.5	2.2	3.4	0.4	3.0	6.7	1.2		6.7	8.7	5.1	-2.1	5.3	1.1	-1.0	0.6		-0.8	-3.7	0.9	5.4
Central America	4.3	7.0	7.8	0.9	8.8	10.5	9.4	13.5	9.1		10.8	13.3	16.5	8.6	7.5	11.1	8.9	-1.1		7.1	8.1	13.1	14.0
South America	15.3	18.7	19.9	2.2	2.7	6.4	7.2	9.3	3.5		9.6	10.3	7.8	-0.8	6.1	5.7	6.9	9.3		3.6	6.2	10.4	6.5
Africa	*27.9*	*41.4*	*44.3*	*4.9*	*11.0*	*7.0*	*3.2*	*4.5*	*1.9*		*0.3*	*4.7*	*8.8*	*-7.0*	*5.7*	*7.4*	*2.9*	*3.6*		*10.0*	*5.3*	*7.8*	*5.4*
North Africa	10.2	15.1	16.3	1.8	8.4	7.9	6.9	10.6	7.5		6.2	11.6	13.3	-2.4	11.1	13.4	3.8	5.2		6.6	5.7	7.4	12.4
Subsaharan Africa	17.7	26.3	28.0	3.1	12.6	6.5	0.9	2.2	-1.5		-1.5	2.1	6.8	-9.6	2.7	3.1	1.9	2.0		11.4	5.1	8.2	2.5
Middle East	*24.4*	*41.4*	*47.4*	*5.2*	*9.3*	*14.5*	*17.3*	*25.4*	*15.7*		*12.1*	*30.1*	*39.9*	*26.5*	*12.3*	*7.8*	*9.5*	*8.9*		*14.1*	*16.3*	*20.5*	*14.6*

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO October 2008)

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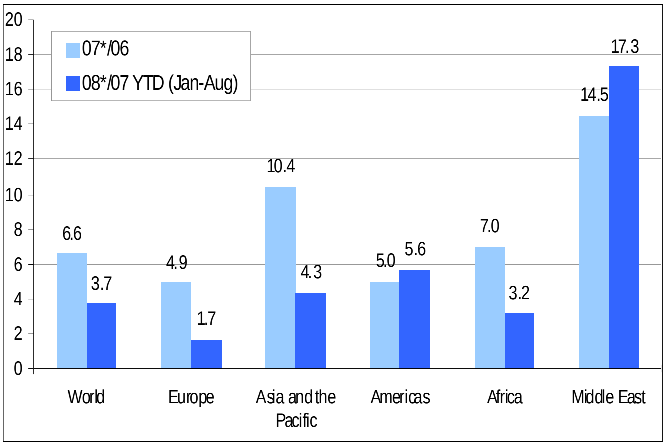
Meanwhile, US housing market troubles also continued to escalate, spreading to Europe – in particular to the UK, Spain and Ireland – and other parts of the world, notably Asia and the Pacific. Food, energy and commodity prices surged, pushing inflation higher globally and thereby eroding household real incomes. The price of oil, which peaked in July US$ 147 a barrel, has since fallen to less than half that level, but it has remained volatile, as have exchange rates, adding to the global environment of uncertainty. It was inevitable that demand, resilient until the middle of the year – or even longer in some markets – would falter under the strain.

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



Source: World Tourism Organization (UNWTO) ©

Although regional trends may vary as new data becomes available, growth for Europe currently stands at just 2% for the first eight months compared with the same period last year, and the slowdown has not spared any of its four subregions. Asia and the Pacific's growth (+4%) is also well behind its 2007 level, with Oceania and North-East Asia suffering the brunt of the downturn in demand. On the other hand, thanks both to a continued recovery in demand for travel to the USA, but also to continuing strong increases for Central and South America, the Americas has so far performed better than in 2007. Growth averaged 6% through the first eight months. Moreover, although a number of destinations have not yet released results for August, the region appears to have only experienced a modest slowdown in July and August. The Middle East is once again the star performer in 2008 until now, with growth for the period January through August estimated at 17%. Data, though, is still limited and this estimate is still likely to be revised. Africa's growth is currently running at around half the level achieved in 2007, and this is largely due to North Africa's strong performance. In Subsaharan Africa, whose average growth has been pulled down sharply by Kenya's 40% decline, the only two countries with data available showing growth above average are South Africa and Mauritius.

Detailed results for arrivals and receipts by country are included in the 'Regions' section (pages 14-32).

Prospects

The net result of all the financial stresses over the past few months has been a downgrading of economic growth forecasts, which will clearly be worse during the remainder of 2008 and is expected to extend into 2009. The economic downturn, combined with the current uncertainties, extreme market volatility and a decline in both consumer and business confidence, will clearly take their toll on demand for tourism – at least in the short to medium term.

Many businesses are expected to retrench, and any such retrenchment will be quickly felt in consumer markets. Air travel will almost certainly be more adversely affected than other sectors of the industry. Even if the price of oil remains at current levels (which are still well above the average for 2007), fuel surcharges may not be withdrawn completely as a stronger US dollar means continuing high prices of fuel for many non-US carriers. In addition, many airlines have been burnt by locking in fuel purchases as oil surged to record levels in mid-2008. As a result, more airline collapses are likely, aircraft will continue to be mothballed and airline routes and frequencies cut in an effort to reduce capacity and sustain profitable seat load factors. This in turn will of course impact negatively on overall performance.

The general consensus among UNWTO's Panel of Experts is that long-haul travel will suffer more than short-haul demand because of fuel's much higher share of costs in the overall price of a long-haul trip. The sharp fluctuations in exchange rates are also likely to result in a change in travel patterns, with a switch in demand from some traditional destinations to those perceived as more attractively priced. This trend is already evident in some markets and, even more worrying, some key markets have shown significant overall declines in outbound over the first eight to nine months of this year. Japan, the Republic of Korea and Taiwan (province of China) are prime examples. But Brazil and South Africa could be two additional markets to see their outbound travel affected in 2009.

Looking ahead to next year, the US Government will implement the full requirements of the land and sea phase of the Western Hemisphere Travel Initiative (WHTI) on 1 June. The proposed rules require most US citizens entering the USA at sea or land ports of entry (in addition to airports, as is now the case) to have a passport, passport card, or WHTI-compliant document. Together with the strengthening US dollar, this should in theory result in growing demand for foreign travel among Americans. However, the problems on Wall Street have had a huge impact on Main Street, resulting in rising unemployment and exceptionally low consumer confidence. So, until such time as the US housing market bottoms out, there seems to be little prospect of a real upswing in wider US economic activity, consumer sentiment, or demand for foreign travel.

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In Europe, as recession bites, inhabitants of the UK are in for a very tough 2009 and, in the eurozone, the three largest economies (Germany, France and Italy) also are likely to officially enter into recession (according to the traditional definition of recession: an economy shrinking over two successive quarters) in the second half of 2008, while both Spain and Ireland have witnessed a housing bubble burst and contraction in wider economic activity. In Asia, the big concern is that if the US economy does contract significantly there will be a sharp tailing-off in America's need to buy Asian exports, which for many countries in the region – notably China and the Republic of Korea – has been one of the main locomotives of economic growth in the past few years.

Business tourism, in particular that related to the financial and business services sector, is clearly at risk of slowing down, as companies search for ways of reducing their outgoings, including the amount spent on business travel and the number of events and conferences that are held. This weakness may manifest itself through an actual decline in the number of business trips and/or through companies opting for cheaper travel and accommodation options. As such, this may result in a further weakening of the aviation sector as it becomes harder for legacy airlines to fill the front end of their planes.

But, despite the less than optimistic forecasts for 2009, it is important to note that, in contrast to the situation after 9/11 or the outbreak of SARS, say, the current series of crises has not dampened people's desire for travel. This means that, as soon as the economic outlook improves, pent-up demand is likely to manifest itself, contributing to a rapid recovery in travel and tourism growth.

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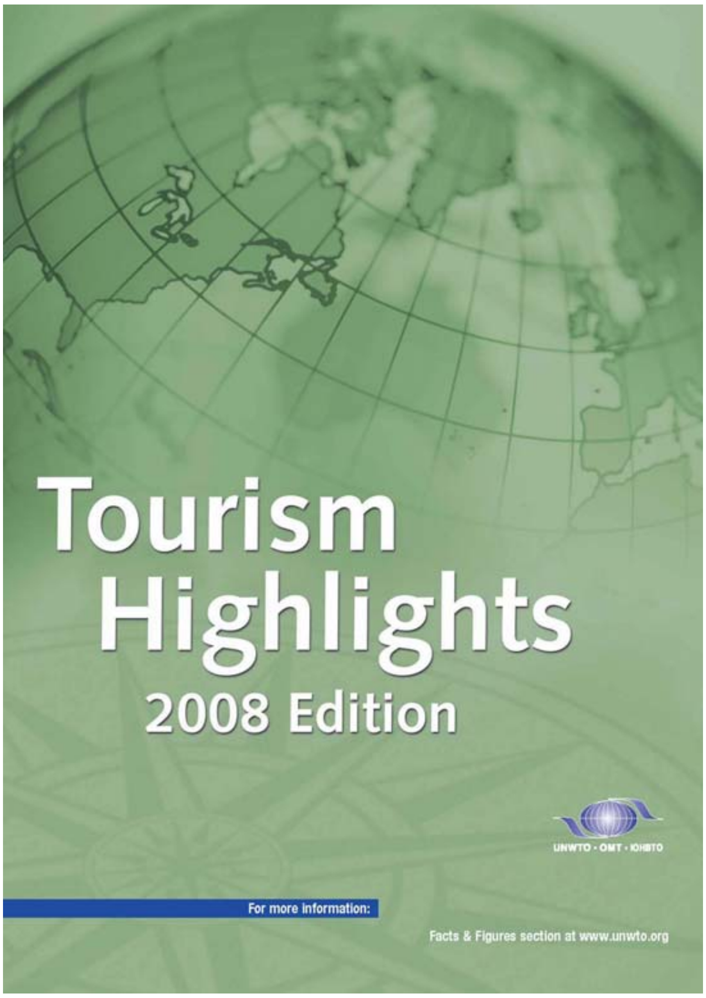
UNWTO Tourism Highlights, 2008 Edition

On the occasion of World Tourism Day on 27 September, UNWTO released its updated overview of basic tourism facts and figures in its *Tourism Highlights, 2008 Edition*. The 12-page brochure presents a snapshot of international tourism in the world for 2007 based on the latest available information collected from national sources.



Global and regional trends and results are analysed with a range of statistics included on international tourist arrivals and international tourism receipts, major regional destinations by arrivals and receipts, and outbound tourism generating regions, as well as the ranking of top tourism destinations by arrivals and receipts, and a list of top source markets in terms of spending.

Electronic copies can be downloaded free of charge from the Facts & Figures section of the UNWTO website <www.unwto.org/facts/menu.html>.

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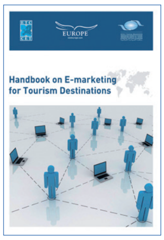
World Tourism Organization (UNWTO) Publications

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 for tourism destinations. The all-new publication is a practical 'how-to'-manual for tourism destination staff at national, regional and city tourism organisations, designed to help improve 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

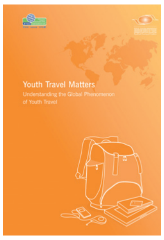
Handbook on Tourism Forecasting Methodologies

Tourism demand is a complex phenomenon which can be affected by an incredible number of different exogenous factors – economy, fuel prices, infrastructure, prices, natural disasters, the image of a destination, etc. Because of all of these and many other factors, tourism demand, in all of its different forms, is one of the most difficult variables to foresee. Nonetheless, it gets more important for destinations and private sector alike to anticipate demand trends and use such knowledge as a basis of management decisions and planning. The ETC/UNWTO *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

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

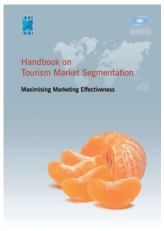
Cruise Tourism – Current Situation and Trends

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 on cruise tourism (2003). This new study discusses subjects like the current supply and demand for cruises as well as the characteristics, 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

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

Structures and Budgets of National Tourism Organizations, 2004 – 2005

Structures and Budgets of National Tourism Organizations (NTOs) is a benchmarking reference tool on inbound tourism promotion. The report compiles and analyses updated and comparable information on the budgets that NTOs allocate for the promotion of inbound tourism as well as their structure, functions and forms of operation in order to illustrate different forms of NTO organization and possible action in the area of inbound tourism promotion. The first part of the report is focused on the NTOs structure and functioning. The second part presents an overall view of NTO budgets for around 50 countries.

Available in English, French, Spanish and Russian

Published: *2006*
Price: € 50

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: € 65, 3 issues (PDF version)
€ 95 (PDF and print version)

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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