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Interim Update, April 2009

This is the first issue of the *Interim Update* of the *UNWTO World Tourism Barometer*, intended to bridge the gap between the full editions of the Barometer published every four months. It will be made available to members through the UNWTO library in electronic format only.

This update forms part of UNWTO's activity in terms of support to its members in the face of the economic crisis and aims at providing a closer market monitoring through an update of the monthly data included in the tables on International Tourist Arrivals. A comprehensive analysis of international tourism trends will be included in the next full version of the *UNWTO World Tourism Barometer* scheduled for the end of June.

Inbound Tourism: short-term data 2009

World

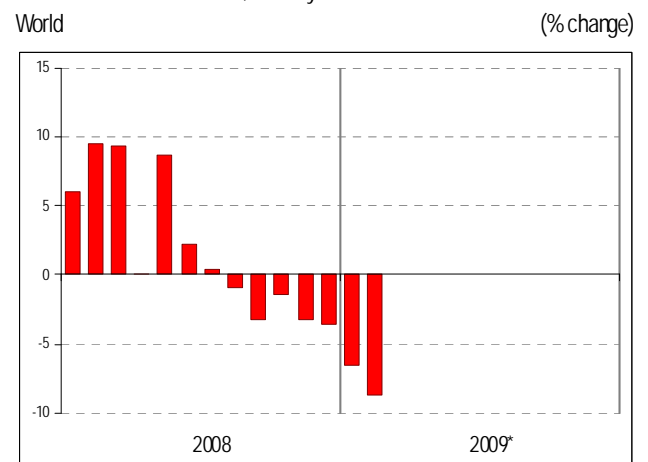
- The world economy faces an unprecedented crisis, which has triggered one of the most severe recessions in generations. The world's GDP is forecast to decline by some 1.3% in 2009, according to the International Monetary Fund (IMF, World Economic Outlook (WEO) April 2009), exports have been dramatically reduced and all advanced economies are in recession. Even emerging economies, which at the beginning seemed to resist better, are rapidly facing the impact of the economic crisis.
- Although tourism has been more resilient than some other economic sectors, it has not been immune, and international tourism demand has deteriorated further under the impact of such global economic recession. Preliminary figures compiled by UNWTO for the first

months of 2009 indicate a continuation of the negative growth trend already experienced in the second half of 2008, when international tourist arrivals declined by 2%, following a strong 6% increase in the first half year.

- Based on initial results reported by a large number of destination countries, international tourist arrivals world-wide are estimated at 59 million for January 2009 and 58 million for February. This represents a decline of about 8% in this period, compared with the very strong first two months of 2008. The overall volume is now at about the same level as recorded in 2007 for this same period.

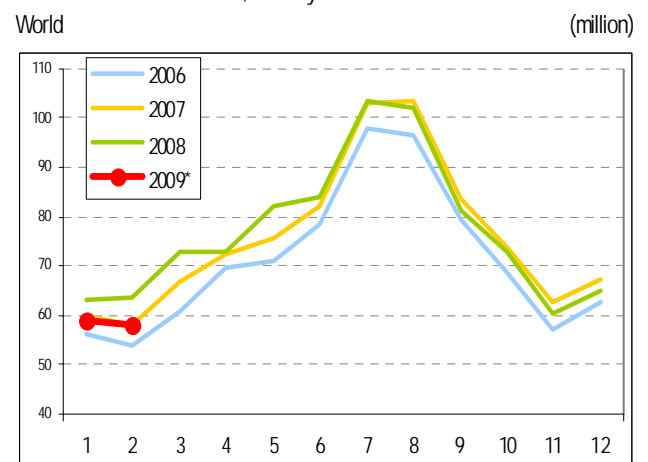
(Continued on page 3)

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



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.

We welcome your comments and suggestions at barom@unwto.org, tel +34 915678206 / fax +34 915678217.

Explanation of abbreviations and signs used

* = provisional figure or data
 .. = figure or data not (yet) available
 | : change of series
 mn: million (1,000,000)
 bn: billion (1,000,000,000)

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

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

YTD: Year to date, variation of months with data available compared with the same period of the previous year. The (sub)regional totals are approximations for the whole (sub)region based on trends for the countries with data available.

Series International Tourist Arrivals

TF: International tourist arrivals at frontiers (excluding same-day visitors);
 VF: International visitor arrivals at frontiers (tourists and same-day visitors);
 THS: International tourist arrivals at hotels and similar establishments;
 TCE: International tourist arrivals at collective tourism establishments;
 NHS: Nights of international tourists in hotels and similar establishments;
 NCE: Nights of international tourists in collective tourism establishments.

Series International Tourism Receipts and Expenditure

All percentages are derived from non-seasonally adjusted series in local currencies, unless otherwise indicated: \$: US\$; €: euro; sa: seasonally adjusted series.



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

The World Tourism Organization is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 160 countries and territories and more than 350 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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 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: 2009 (version 11/05/09)

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World Tourism Organization

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Data collection for this issue was closed end of April.

The next full issue of the *UNWTO World Tourism Barometer* will be published at the end of June 2009.

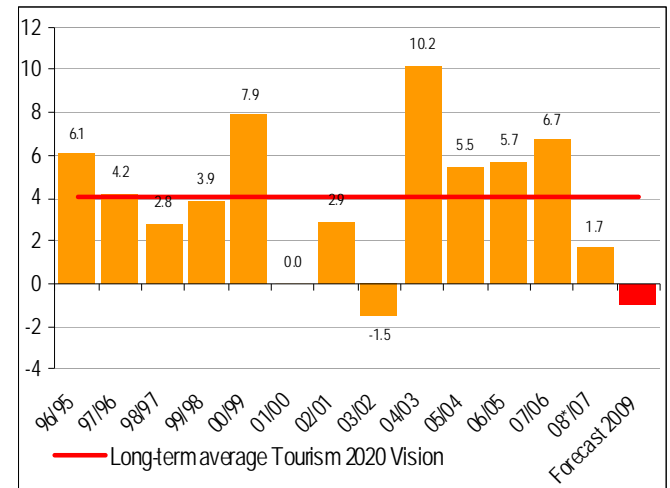
- Destinations all around the world have suffered from weakened demand in major source markets. Growth has been negative for all subregions, with the exception of North Africa, Sub-Saharan Africa, Central America and Southern America, which recorded increases in the range of 3-5%.
- So far, Northern Europe, Southern and Mediterranean Europe, South Asia and the Middle East are among the most affected subregions.
- Various countries bucked the overall negative trend posting positive growth. Among these Lebanon (+54% Jan.-Mar.), Morocco (+8% Jan.-Feb.), South Africa (+6% Jan.), the Republic of Korea (+24% Jan.-Mar.), Mexico (+13% Jan.-Feb.), Panama (+7% Jan.-Feb.), Colombia (+7% Jan.-Mar.) or Chile (+6% Jan.-Feb.).
- With regard to the data for February it should be taken into account that the same month last year counted an extra day, as 2008 was a leap year. This in itself can already account for a difference of some 3 percentage points.
- Countries that have already reported figures for March tend to show a more pronounced decline in this month, particularly in the case of Europe and the Americas, but not so in Asia and the Pacific. However, this is essentially due to the calendar effect of the Easter holiday, which was celebrated in April in 2009 instead of March as was the case last year.
- These results reflect international tourist arrivals only, an indicator for which comprehensive data is currently available. Results for international tourism receipts will be presented in the *UNWTO World Tourism Barometer* scheduled for the end of June. Experience of past years suggests that the growth of receipts follow fairly closely that of arrivals. However, in times of crises revenues tend to be somewhat more affected than arrivals.
- The slowdown of traffic in the first months of the year is confirmed by the air transport data as reported by IATA and various regional air transport associations. IATA reports a decrease in passenger traffic of 9% (including an 11% decline in March which should be taken cautiously as this also reflects the Easter effect, as this holiday took place in March in 2008, and not in April, as in 2009). Capacity, meanwhile, has decreased in the same period by 4%.
- Hotel performance data for the first three months of the year as reported by Deloitte also corroborate these trends. Overall occupancy rates were down in all regions by double-digit rates, except in Europe, the Middle East and South America, where the decline was just below the 10% mark (-9%).

Prospects

- For the moment, UNWTO maintains its forecast for tourism growth included in the January issue of the *UNWTO World Tourism Barometer*, which projects international tourism to stagnate (0%) or decline as much as -2% during the current year.

International Tourist Arrivals, World

(% change over same period of the previous year)

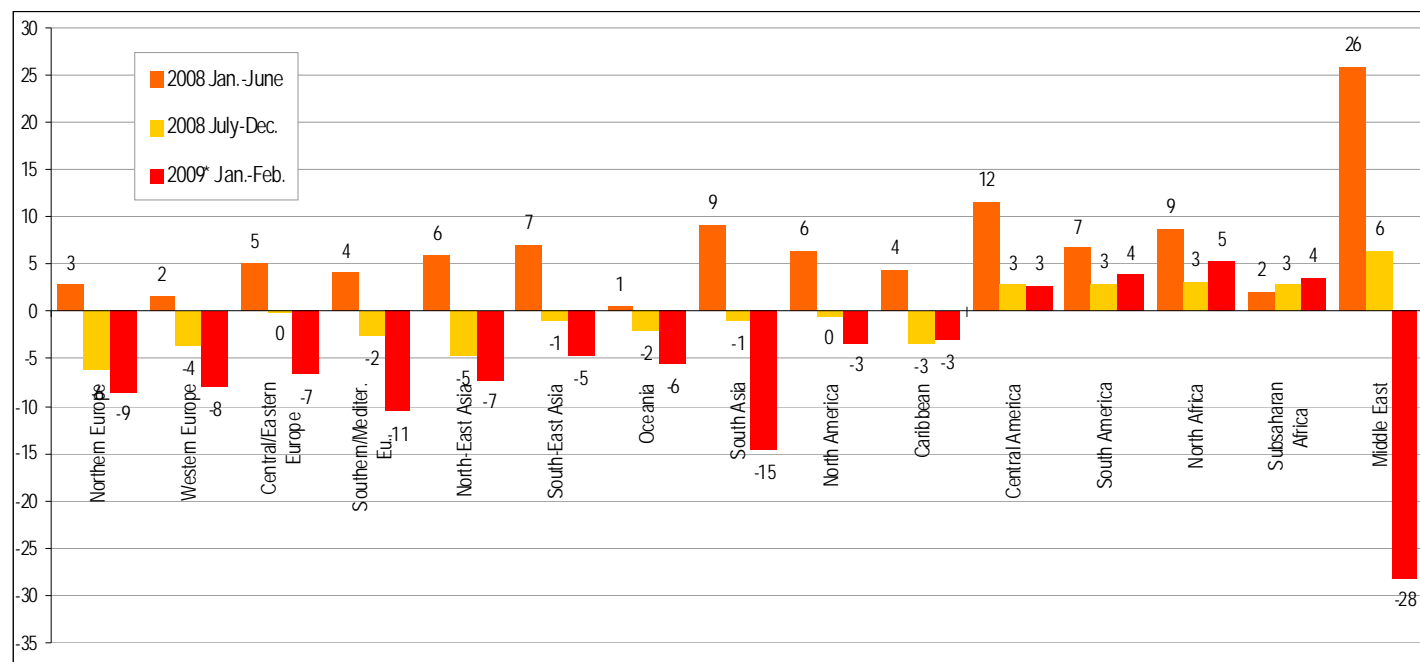


Source: World Tourism Organization (UNWTO) ©

- In the past months economic growth projections have been adjusted downwards repeatedly. At the moment the International Monetary Fund (IMF) forecast is for world GDP to decline by as much as 1.3%, the first contraction since World War II. As a consequence unemployment is rising rapidly and will continue to increase as long as growth is below potential. With disposable income constraint and uncertainty about the future, this means that prospects for tourism are bleaker than they were at the beginning of the year.
- A comprehensive revision of the 2009 forecast for the world and regions will be included in the forthcoming full issue of the *UNWTO World Tourism Barometer*.

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year		Share		Change		Monthly or quarterly data series (% change over same period of the previous year)																
	2000	2005	2007	2008*	2008*	07/06	08*07	2009*	2008*												2007		
	(million)		(%)		(%)		ytd	Q1	Jan	Feb	Mar	J.-J.	J.-D.	Q1	Q2	Q3	Q4	Oct	Nov	Dec	J.-J.	J.-D.	
World	683	806	908	924	100	6.7	1.7	-7.7	-6.6	-8.8	5.7	-1.7	8.3	3.7	-1.0	-2.7	-1.3	-3.2	-3.7	6.5	6.8		
Europe	392.4	441.6	487.2	487.5	52.8	5.0	0.0	-8.4	-5.4	-11.2	3.4	-2.8	6.2	1.5	-1.7	-4.8	-2.0	-7.7	-5.6	5.4	4.7		
Northern Europe	43.7	52.8	58.0	56.7	6.1	2.7	-2.3	-8.6	-6.1	-11.0	2.8	-6.2	7.1	-0.2	-4.8	-8.6	-2.5	-12.8	-11.5	4.3	1.5		
Western Europe	139.7	142.6	154.9	153.2	16.6	3.5	-1.1	-7.9	-1.6	-13.2	1.7	-3.6	7.2	-2.2	-3.6	-3.7	-1.7	-7.6	-2.7	2.2	4.7		
Central/Eastern Europe	69.2	87.5	96.5	98.7	10.7	5.5	2.3	-6.7	-6.3	-7.0	5.1	-0.1	5.1	5.0	3.0	-4.5	-4.2	-4.5	-4.8	9.9	1.9		
Southern/Mediterr. Eu.	139.8	158.7	177.9	178.9	19.4	6.9	0.6	-10.5	-12.3	-8.5	-12.4	-14.7	4.1	-2.5	5.5	3.4	-1.5	-4.6	-1.1	-8.1	-7.2	6.4	7.3
Asia and the Pacific	109.7	154.7	184.7	187.0	20.2	10.1	1.2	-6.7	-6.6	-4.1	-9.4	-6.2	6.2	-3.2	8.7	3.7	-2.1	-4.2	-1.5	-5.8	-5.3	10.2	10.1
North-East Asia	58.3	87.5	104.3	104.6	11.3	10.6	0.4	-7.2	-7.6	-4.5	-10.0	-8.2	6.0	-4.7	10.1	2.2	-4.2	-5.2	-3.6	-6.0	-6.1	10.0	11.2
South-East Asia	36.1	48.5	59.7	61.4	6.6	12.3	3.0	-4.7	-3.5	-1.1	-8.3	-1.3	7.0	-1.0	7.3	6.7	0.9	-2.8	1.7	-6.1	-3.5	13.4	11.3
Oceania	9.2	10.5	10.7	10.6	1.2	1.7	-0.9	-5.6	-6.1	-2.2	-8.7	-7.1	0.5	-2.2	1.8	-1.1	-1.7	-2.6	-1.4	-5.4	-1.2	2.6	0.8
South Asia	6.1	8.1	10.1	10.4	1.1	2.6	2.6	-14.6	-14.1	-17.5	-11.6	-13.1	9.2	-1.0	11.0	6.6	3.3	-4.2	2.6	-2.0	-11.6	2.5	2.7
Americas	128.2	133.3	142.8	147.1	15.9	5.2	3.0	-1.4	0.4	-3.3	6.4	-0.2	9.5	3.5	1.8	-2.6	-1.8	-3.1	-2.8	3.3	6.9		
North America	91.5	89.9	95.3	97.8	10.6	5.2	2.6	-3.4	-1.8	-4.9	6.4	-0.5	9.9	3.6	1.4	-2.8	-2.1	-2.6	-3.6	3.7	6.4		
Caribbean	17.1	18.8	19.8	19.9	2.2	1.5	0.8	-3.0	-1.2	-4.6	4.4	-3.5	7.2	1.3	-1.9	-5.0	-5.9	-6.3	-3.5	-1.4	5.0		
Central America	4.3	6.3	7.8	8.3	0.9	12.0	7.1	2.8	6.5	-1.2	11.5	2.8	14.0	8.8	4.3	1.4	3.9	-0.3	1.0	8.9	15.2		
South America	15.3	18.3	20.0	21.1	2.3	6.5	5.1	3.9	5.4	2.1	6.7	2.9	9.0	3.3	7.1	-0.8	1.1	-3.2	-0.3	4.7	8.3		
Africa	27.9	37.3	44.9	46.5	5.0	8.4	3.5	4.1	4.3	3.8	4.3	2.9	5.8	2.8	0.7	5.7	4.0	6.0	7.1	10.0	7.3		
North Africa	10.2	13.9	16.3	17.2	1.9	8.5	5.4	5.3	5.3	5.4	8.8	3.1	10.6	7.5	1.0	7.3	5.2	14.7	3.7	6.6	9.7		
Subsaharan Africa	17.6	23.4	28.6	29.3	3.2	8.4	2.5	3.6	3.9	3.2	2.1	2.8	4.0	0.1	0.4	5.1	3.4	2.7	8.4	11.6	5.9		
Middle East	24.9	38.8	48.7	55.8	6.0	14.5	14.4	-28.2	-39.7	-13.1	25.9	6.4	21.0	31.3	1.4	12.1	3.3	32.3	2.3	10.7	18.0		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO April 2009)

UNWTO Response

Tourism means Jobs, Infrastructure, Trade and Development.

In order to cope with the current adverse market conditions, UNWTO is providing the sector and its Members with the necessary support to endure these challenging times. Historically, tourism has demonstrated a remarkable resilience and has, on the whole, come out stronger and healthier. This juncture, however, might be different. This crisis is truly global and its parameters are still in many ways unclear.

UNWTO response is focused on three interrelated pillars:

- *Resilience*: a Tourism Resilience Committee (TRC) has been set up to support the sector's immediate response by providing a framework for better market analysis, collaboration on response and medium-term policymaking. The Committee, which met twice this year (in January and March), is open to all UNWTO members and key industry partners and aims to be a focal point for crisis response for the tourism sector around the world. The Committee will hold a pivotal meeting at UNWTO General Assembly in Kazakhstan in October 2009 where a detailed *Roadmap for Recovery* will be presented and discussed (more information and related documents at www.unwto.org/trc).

- *Stimulus*: UNWTO urges governments to put tourism at the core of their stimulus packages because the jobs and trade flows from a strong tourism sector, as well as business and consumer confidence in travel, can play a big part in the economic recovery. UNWTO stresses that spending on tourism can pay massive returns across entire economies due to the contribution of the sector to exports and employment. This message has been promoted by UNWTO during the G20 Summit in London last April and will continue to be so within the G20 paradigm (see www.unwto.org/G20.php?lang=E).

- *Green Economy*: tourism must be at the forefront of the transformation to the Green Economy contributing with carbon-clean operations, jobs in environment management and energy-efficient building.

UNWTO is developing a *Roadmap for Recovery*. This aims to be a unique positioning of the sector with respect to the economic crisis, its role in the stimulus programmes and in the economic recovery and in the future sustainability and competitiveness of tourism (www.unwto.org/pdf/brochure_TRC_roadmap.pdf).

UNWTO urges all governments and the private sector to stand behind its *Roadmap for Recovery* as tourism has a significant potential to support short term stimulus actions as well as longer term transformation to a green economy, coherent with development and climate imperatives.

Tourism and the Economic Stimulus

Many countries are already developing stimulus measures within their fiscal and monetary packages to mitigate the effects of the crisis on tourism realizing that the sector can be a key driver of economic recovery. Some destinations are reducing taxes and improving travel facilitation, recognizing that it is now crucial to remove all obstacles to tourism, especially taxation and over regulation. Others have developed financial systems to support tourism enterprises, maintain/increase employment in the sector and develop infrastructure. More should follow suit.

As part of its response activity, UNWTO has created a web resource with information on the work of its Tourism Resilience Committee, including a first assessment on tourism and economic stimulus with information on the measures implemented by over 50 countries worldwide (see www.unwto.org/trc and www.unwto.org/G20.php?lang=E).

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).

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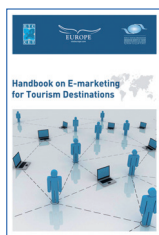
World Tourism Organization (UNWTO) Publications



Handbook on E-marketing for Tourism Destinations

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

Available in English



Published: 2008
Price: € 75

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

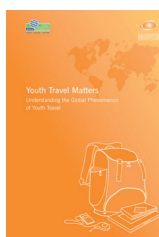
Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel

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

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

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

Available in English



Published: 2008
Price: € 40

Handbook on Tourism 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

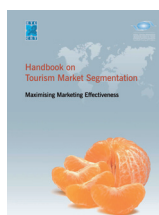


Published: 2008
Price: € 45

Handbook on 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 improve 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

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

UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends, updated three times a year. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on major routes; a retrospective and prospective evaluation of current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The *UNWTO World Tourism Barometer* is published in January, June and October.

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



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

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

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