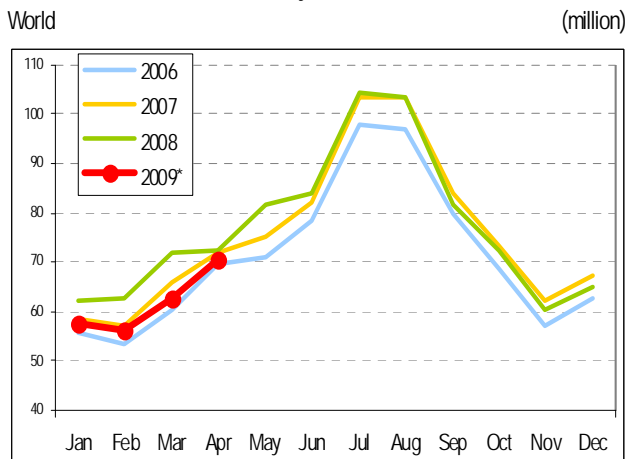




Testing times for international tourism

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

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

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

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

(Continued on page 5)

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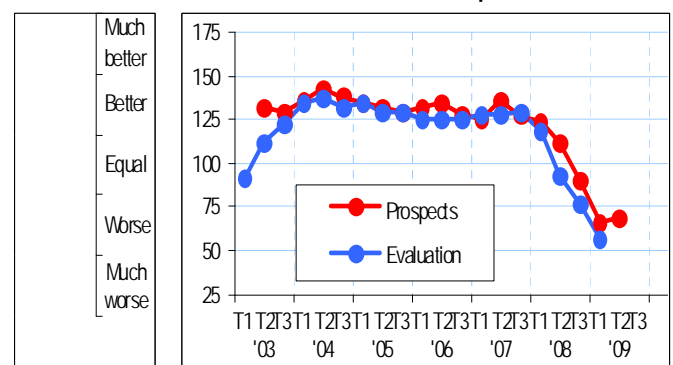
UNWTO Panel of Tourism Experts

Confidence hits rock bottom, but signs of a modest upturn

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

(Continued on page 20)

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

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.



The World Tourism Organization is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 161 countries and territories and more than 350 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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World Tourism Organization

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

www.unwto.org

Data collection for this issue was closed on 30 June.

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

UNWTO World Tourism Barometer, June 2009

Quick overview of key trends

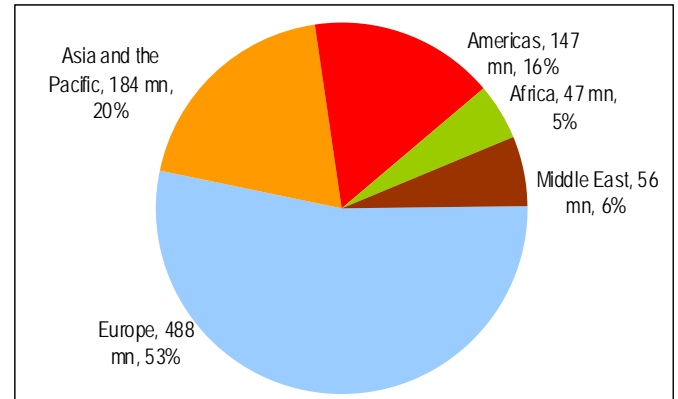
International tourism 2008

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

International tourism January-April 2009

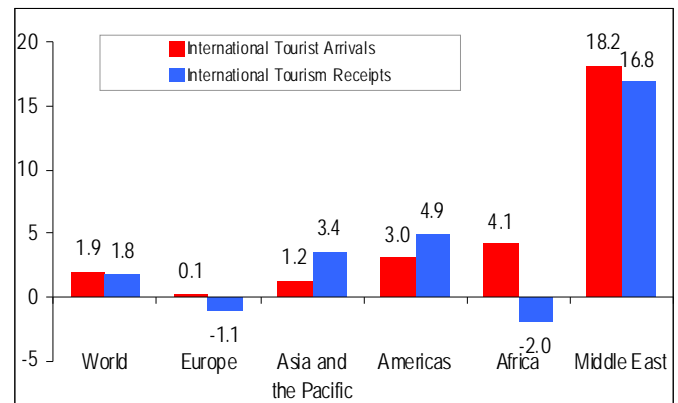
- Worldwide, international tourist arrivals declined by 8% between January and April, thus continuing the downward trend that emerged in the second half of 2008.
- Growth was negative in all world regions, except for Africa (+5%), which bucked the global trend. Europe (-10%) and the Middle East (-18%)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

World Inbound Tourism: International Tourist Arrivals, 2008*



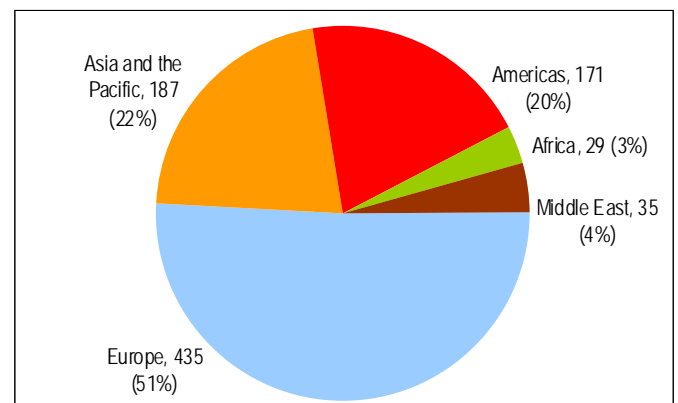
Source: World Tourism Organization (UNWTO) ©

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



Source: World Tourism Organization (UNWTO) ©

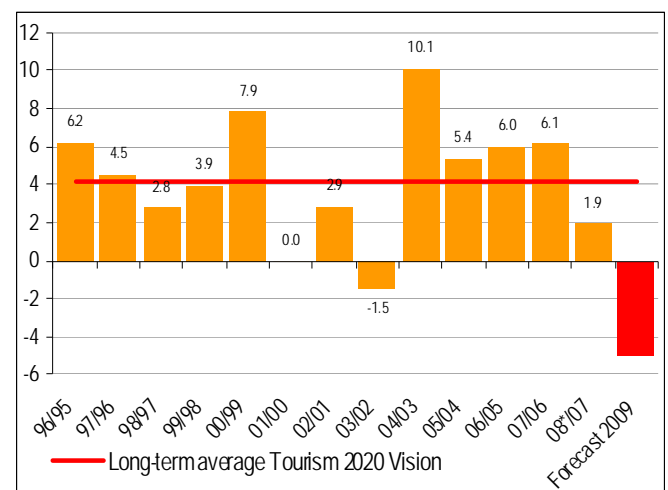
World: Inbound Tourism
International Tourism Receipts, 2008 (US\$ billion)



Source: World Tourism Organization (UNWTO) ©

- Results for the **Americas** (-5%) were more mixed. Destinations in North America (-7%), the Caribbean (-6%) and Central America (-4%) have been more impacted by declining traffic from the USA and Europe, while South America (+0.2%) held up comparatively well, and was one of the few subregions, together with North and Sub-Saharan Africa, to show positive results.
- The **Middle East** (-18%) reports a sharp reversal of trends (data is still limited and very volatile though, and it is likely that this estimate will be revised) due in most part to the very strong decline for Saudi Arabia.
- Africa's** growth (+3%) was very positive compared with the world's performance overall. Results reflect the good performance of North African destinations as well as of some Sub-Saharan countries.
- Despite this overall decline, several destinations around the world still reported encouraging results for the first four months of 2009, notably Morocco, Tunisia, Kenya (which recovered the losses of previous years), Mexico, Cuba, Jamaica, several Central and South American destinations – Guatemala, Honduras, Nicaragua, Panama, Chile, Colombia, Paraguay and Uruguay – the Republic of Korea, Taiwan (Pr. of China), Malaysia, FYR of Macedonia, Serbia, Jordan, Lebanon and Syria.
- The slowdown in traffic through the first part of the year is confirmed by the air transport data reported by IATA and various regional air transport associations. According to IATA, there was an 8% decline in worldwide passenger traffic through May. Capacity was down by 4% while load factors declined to 72% from 76% for full year 2008.
- Hotel performance data for the first four months as reported by Deloitte also confirms these declining trends. Overall occupancy was down in all regions, and particularly in Asia Pacific (-10 percentage points). As consumers trade down, other indicators such as revenue per available room (revPAR) and average room rates show even more negative results. RevPAR (in US dollars) was down by double-digit rates in all world regions, and Asia destinations were again the most affected (-30%).
- The UNWTO Confidence Index is at the lowest level since its creation in 2003. The over 300 members of the UNWTO Panel of Experts gave the period January-April 2009 an overall 'Evaluation' of 57 – 20 points down from the previous period, September through December 2008.

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



Source: World Tourism Organization (UNWTO) ©

Prospects

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

International Tourism Receipts 2008

International Tourism Receipts rose by 1.8% in 2008, virtually equalling the growth in arrivals

With the large majority of destination countries having reported full year receipts data for 2008, UNWTO estimates that worldwide receipts from international tourism reached US\$ 944 billion last year, up from US\$ 857 billion in 2007. Last year's substantial increase in absolute terms is, of course, to some degree a reflection of the further weakening of the US dollar which boosted receipts expressed in dollar terms (in 2008 the US dollar lost 7% against the euro, see further box and table below). Expressed in euro, receipts increased to 642 billion, up from 625 billion in 2007.

In real terms, i.e. adjusted for exchange rate fluctuations and inflation, growth in international tourism receipts reached 1.8%. After the substantial growth in 2006 and 2007 – of over 5% in both years – this represents a considerable slowdown.

Growth of receipts versus arrivals

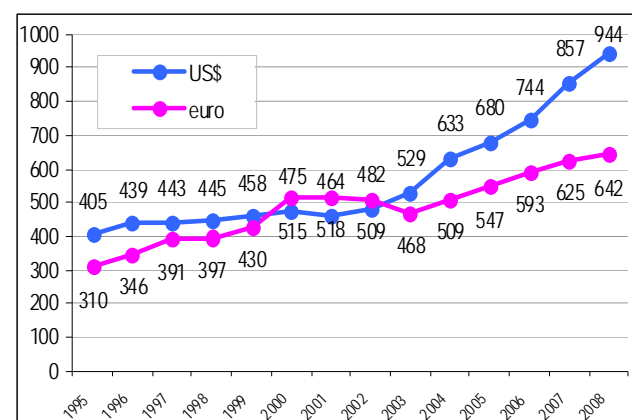
As in previous years, the growth in International Tourism Receipts followed closely the growth in International Tourist Arrivals. After including revised and additional data, as well as a few revisions of series, the latest data is only marginally different from the preliminary results for arrivals reported in the January issue of the *UNWTO World Tourism Barometer*. According to the data currently available, international tourist arrivals rose by 1.9% in 2008 to 922 million.

At 1.8%, the growth in international tourism receipts in 2008 measured in real terms was just one decimal percentage point below that of arrivals compared with a difference of one full percentage point the previous year. Over a longer period, there is a fairly close correlation between the growth in international arrivals and that of receipts. Receipts tend to follow the growth in international arrivals, but at only a slightly lesser pace of on average about one percentage point lower (see graph on next page).

World: Inbound Tourism

International Tourism Receipts

(billion)



Source: World Tourism Organization (UNWTO) ©

International passenger transport receipts

What is reported by UNWTO as international tourism receipts refers to the earnings in destination countries from expenditure by international visitors on accommodation, food and drink, local transport, entertainment, shopping, etc. It does not include, however, earnings from international passenger transport, which are reported separately. In simple terms, the latter category refers to receipts from international passenger transport services by companies registered in the reporting country rendered to residents of another country. It should be realised that it does not relate to all receipts from international passenger transport, but only to their export value, as many people travel with transport companies registered in their own country of residence (which is not included). (See box on page 7)

Although the availability of comparable international data broken down at this level has its limitations, the export value of international passenger transport has in recent years been estimated at some 16% of the sum of international tourism and international passenger transport receipts. For 2008, this corresponds to some US\$ 184 billion, as against US\$ 164 billion in 2007. This takes total receipts from international tourism, including international passenger transport, to over US\$ 1.1 trillion in 2008. In other words, over US\$ 3 billion a day is earned by international tourism.

International Tourism Receipts, World

	International Tourism Receipts											Change				Change			
												current prices				constant prices			
	(billion)											(%)				(%)			
	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007	2008*	05/04	06/05	07/06	08*/07	05/04	06/05	07/06	08*/07
Local currencies												6.3	8.8	8.9	6.9	3.1	5.3	5.4	1.8
US\$	264	405	475	464	482	529	633	680	744	857	944	7.4	9.5	15.1	10.2	3.9	6.1	11.9	6.2
Euro	207	310	515	518	509	468	509	547	593	625	642	7.4	8.5	5.5	2.7	5.1	6.1	3.2	-0.6

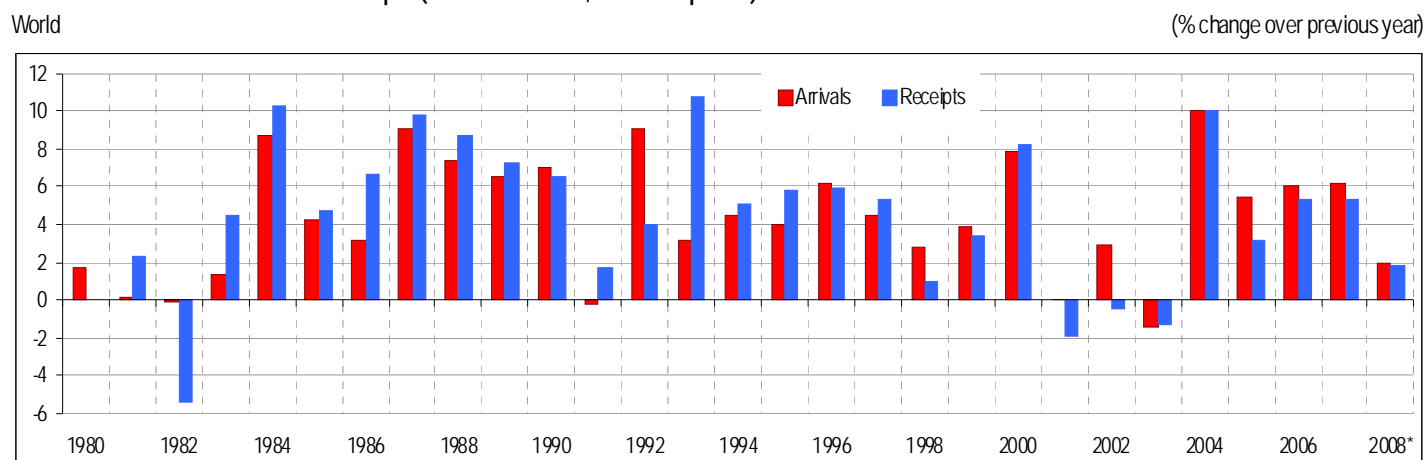
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

In economic terms, both receipts from international tourism and from international passenger transport count as services exports and for many destinations they are a very important pillar of their economy, creating much needed

employment and opportunities for development. World-wide, as an export category, tourism ranks fourth after fuels, chemicals and automotive products, while for many developing countries it is the number one export category.

International tourist arrivals and receipts (local currencies, constant prices)



Source: World Tourism Organization (UNWTO) ©

International Tourism by (Sub)region

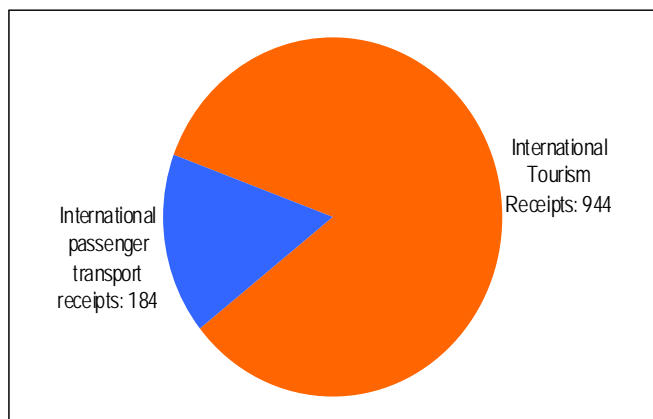
	International Tourism Receipts									International Tourist Arrivals						
	Change			US\$		euro		Share		abs.		Change		Share		
	Local currencies, constant prices (%)			Receipts (billion)		Receipts (billion)		Receipts per arrival		Receipts per arrival		Receipts per arrival		Receipts per arrival		
	06/05	07/06	08*/07	2007	2008*	2008	2007	2008*	2008	2008*	2007	2008*	06/05	07/06	08*/07	2008*
World	5.3	5.4	1.8	857	944	1,020	625	642	700	100	904	922	6.0	6.1	1.9	100
Europe	4.2	2.7	-1.1	435.1	473.5	970	317.5	322.0	660	50.1	487.3	487.9	5.9	4.2	0.1	52.9
Northern Europe	9.3	3.9	-2.4	70.7	69.9	1,230	51.6	47.5	830	7.4	58.1	57.0	6.9	2.8	-1.9	6.2
Western Europe	4.0	2.3	-2.5	149.6	162.0	1,060	109.2	110.2	720	17.2	154.9	153.2	4.9	3.5	-1.1	16.6
Central/Eastern Europe	8.3	8.8	2.7	48.4	58.0	590	35.4	39.4	400	6.1	96.5	98.9	4.6	5.5	2.5	10.7
Southern/Mediterr. Eu.	1.6	1.0	-0.5	166.3	183.7	1,030	121.4	124.9	700	19.4	177.9	178.9	7.2	4.6	0.6	19.4
Asia and the Pacific	11.1	9.9	3.4	187.0	207.6	1,130	136.4	141.1	770	22.0	181.9	184.1	8.0	9.7	1.2	20.0
North-East Asia	12.1	8.5	5.0	85.8	97.5	970	62.6	66.3	660	10.3	100.9	101.0	7.0	9.8	0.1	11.0
South-East Asia	15.9	14.9	0.9	55.4	60.8	990	40.4	41.4	670	6.4	59.7	61.6	9.4	12.3	3.3	6.7
Oceania	1.3	8.1	2.5	32.0	34.1	3,070	23.4	23.2	2,090	3.6	11.2	11.1	0.2	1.7	-1.0	1.2
South Asia	13.9	5.2	6.1	13.8	15.1	1,450	10.1	10.3	990	1.6	10.1	10.4	20.8	2.6	3.3	1.1
Americas	2.1	6.3	4.9	171.3	188.1	1,280	125.0	127.9	870	19.9	142.9	147.2	1.9	5.2	3.0	16.0
North America	0.8	7.2	7.0	124.9	138.5	1,420	91.1	94.2	960	14.7	95.3	97.8	0.8	5.2	2.6	10.6
Caribbean	4.3	0.5	-3.2	23.2	23.5	1,160	16.9	16.0	790	2.5	19.8	20.3	3.4	1.6	2.4	2.2
Central America	10.5	8.9	-0.6	6.2	6.8	820	4.5	4.6	560	0.7	7.8	8.3	9.8	12.0	7.2	0.9
South America	6.6	6.8	2.6	16.9	19.3	920	12.4	13.1	630	2.0	20.0	20.8	2.7	6.5	3.9	2.3
Africa	11.3	9.0	-2.0	29.0	30.2	640	21.2	20.5	440	3.2	45.1	47.0	11.1	8.9	4.1	5.1
North Africa	19.1	7.6	-5.1	10.2	10.6	620	7.5	7.2	420	1.1	16.3	17.2	8.4	8.5	5.4	1.9
Subsaharan Africa	7.6	9.8	-0.3	18.8	19.6	660	13.7	13.3	450	2.1	28.8	29.7	12.8	9.1	3.4	3.2
Middle East	3.3	7.8	16.8	34.7	45.0	870	25.3	30.6	550	4.8	47.0	55.6	8.4	14.6	18.2	6.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

World: Inbound Tourism, 2008

Receipts from international tourism and passenger transport (US\$ billion)



Source: World Tourism Organization (UNWTO) ©

Regional results

In absolute terms, international tourism receipts increased by US\$ 87 billion in 2008 (only 17 billion euro, though). In dollar terms, this amount is equal to the sum of the world's fourth and fifth biggest tourism earners, Italy and China.

All regions shared in this increase in absolute terms, though in some cases growth was negative in real terms (i.e. computed in local currencies at constant prices). Asia and the Pacific improved results by US\$ 21 billion, to US\$ 208 billion (a 22% market share), and the Americas added US\$ 17 billion to US\$ 188 billion, taking its share of global receipts to 20%. Europe increased receipts by US\$ 38 billion to US\$ 473 billion (in euro only by 4 billion to 322 billion) (50% of the world total), but suffered a negative growth of 1% in real terms. The Middle East increased receipts by US\$ 10 billion, to US\$ 45 billion (5% share), corresponding to a double-digit growth of 17% in real terms. Africa's growth in receipts was US\$ 1 billion to US\$ 30 billion (a 3% share), but they declined by 2% in real terms.

Except for the Middle East, the relative growth in real terms in all regions was weaker in 2008 than the year before. In terms of subregions, the strongest increases came from North America (+7%), South Asia (+6%) and North-East Asia (+5%). In Northern and Western Europe, North and Sub-Saharan Africa, the Caribbean and Central America, receipts declined in real terms in 2008. In the case of North Africa, Sub-Saharan Africa, and Central America, the decline followed previous strong growth years.

Also among subregions, there is a reasonable correlation between growth in international arrivals and in receipts. Growth in receipts surpassed that of arrivals in Central and Eastern Europe, North-East Asia, Oceania, South Asia and North America, however. In North-East Asia, the case of China is interesting, as arrivals suffered a decline of 3%, while receipts grew by 10%. This might be attributable to the Olympics, as large events often boost

receipts rather more than arrivals. In North America, an attractive US dollar vis-a-vis strong currencies such as the euro could have led to an increase of expenditure, as international tourism receipts grew by 14% with only a 3% increase in arrivals. Central America, North Africa and Sub-Saharan Africa are exceptions at the other end of the spectrum, as receipts growth in real terms lagged somewhat behind arrivals growth.

About receipts and expenditure data

For destination countries, receipts from international tourism count as exports and cover all transactions related to the consumption by international visitors of, for example, accommodation, food and drink, fuel, domestic transport, entertainment, shopping, etc. They include transactions generated by same-day as well as overnight visitors. Receipts from same-day visitors can be substantial, especially in the case of neighbouring countries where a lot of shopping for goods and services is carried out by cross-border, same-day visitors. However, the values reported as international tourism receipts do not include receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category.

With financial data measured in different currencies it is fairly complicated to accurately determine variations in relative terms, as receipts have to be expressed in a common currency like the US dollar or the euro and generally are also reported at current prices, thus not taking account of exchange rate fluctuations and inflation. In 2008 the dollar depreciated 7% against the euro and in 2007 8%, while over the two years 2005 and 2006, the US dollar and the euro maintained a fairly steady exchange rate, although both currencies did fluctuate against a range of other currencies. On average for the year, in 2008 one euro exchanged at US\$ 1.4708, in 2007 at 1.3705 in 2006 at 1.2556 and in 2005 at 1.2441 (or 1 US\$ to 0.6799 euro on average for 2008, 0.7297 euro in 2007, 0.7964 euro in 2006 and 0.8038 euro in 2005).

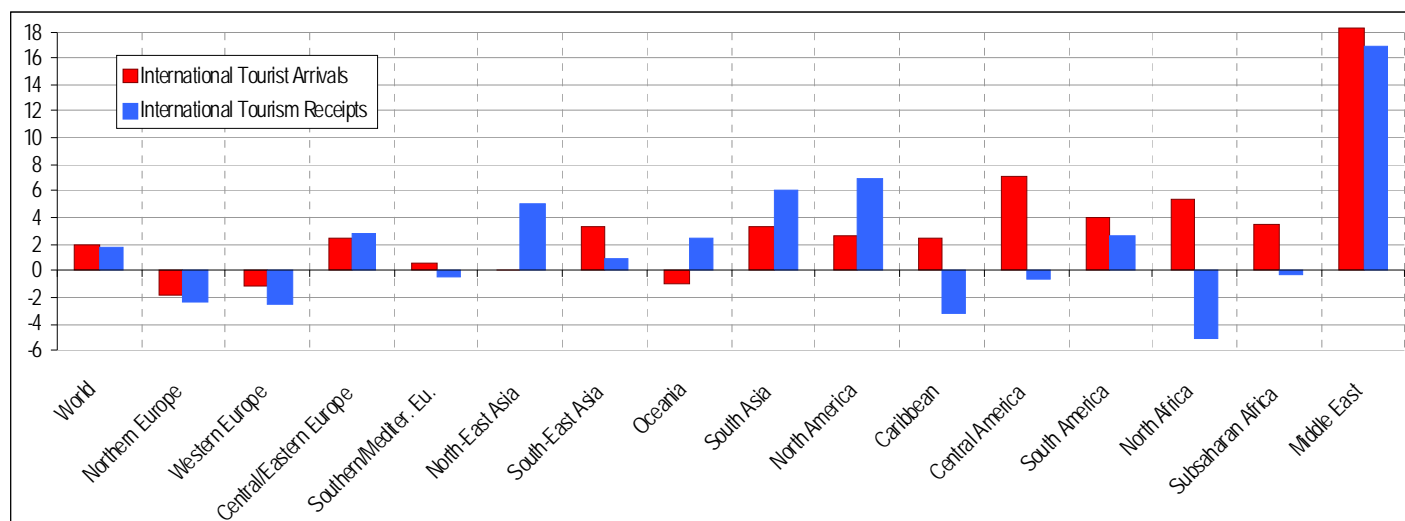
In order to account for exchange rate changes and inflation, international tourism receipts in US dollar values were computed back to the local currencies of each destination, weighted by the share in the total, and deflated by the corresponding rate of inflation.

Although in this way data are made comparable, care should nevertheless be taken in interpreting the trends, as statistics, in most cases, are still provisional and subject to revision. For the totals, an assessment is made by UNWTO for countries that have not yet reported results, based on the previous year's value and the trend for the (sub)region. Unlike arrivals, where revisions generally more or less balance out, receipts data tends to be revised upwards.

International tourist arrivals and receipts (local currencies, constant prices)

World and subregions

(% change 2008/2007)



Source: World Tourism Organization (UNWTO) ©

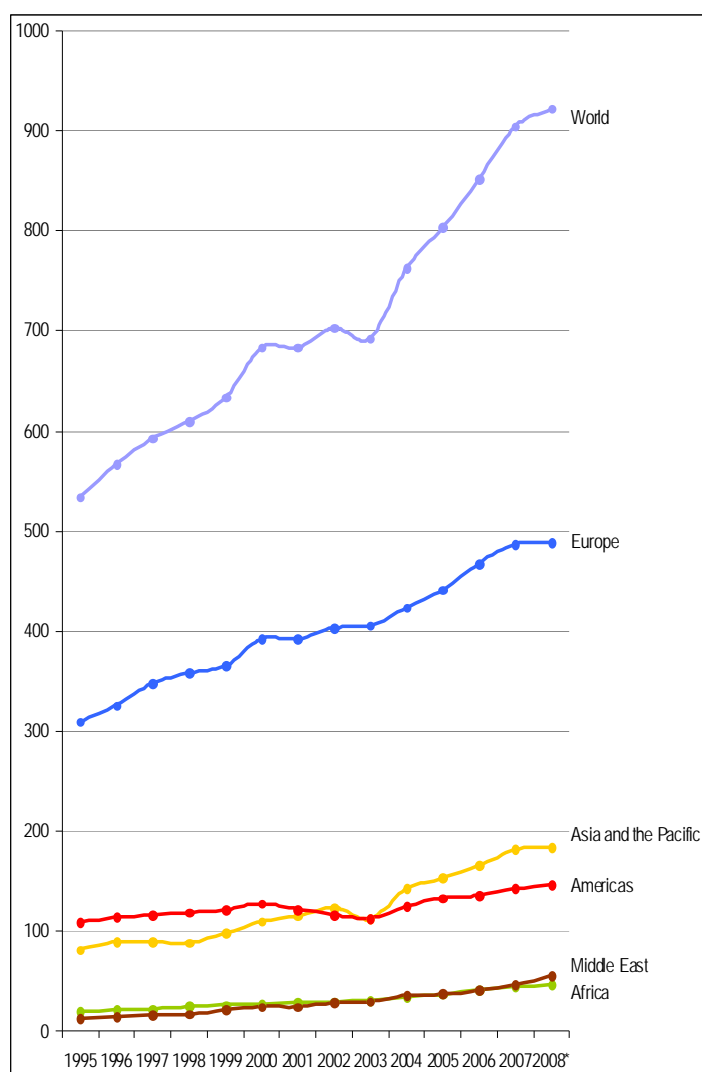
World and regions: Inbound tourism

International Tourist Arrivals

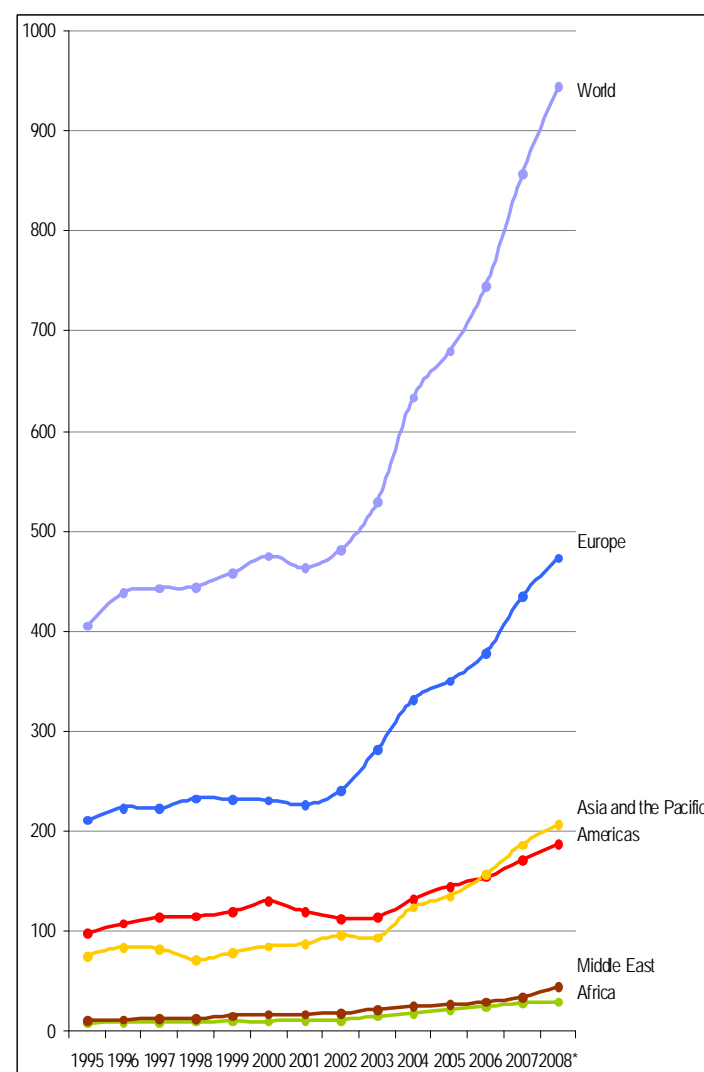
(million)

International Tourism Receipts

(US\$ billion)



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

World's Top Tourism Destinations 2008

When ranking destinations for international tourism, it is always preferable to take more than just one indicator into account. Ranked according to the two key tourism indicators – international tourist arrivals and international tourism receipts – it is interesting to note that eight of the top ten destinations appear in both lists, even though they show marked differences in terms of the type of tourists they attract, as well as their average length of stay and their spending per trip and per night.

In 2008, there have been only slight changes in the ranking by both international tourist arrivals and international tourism receipts. The first three places are still occupied by the USA, Spain and France, albeit in a different order. France continues to lead the ranking of the world's major tourism destinations for arrivals (79 million tourists), but ranks third in receipts. The USA ranks first in receipts with US\$ 110 billion and it regained the second position in arrivals from Spain that was lost after 11 September 2001. Spain now ranks third in arrivals but has

firmly maintained its position as the second biggest earner worldwide and the first in Europe.

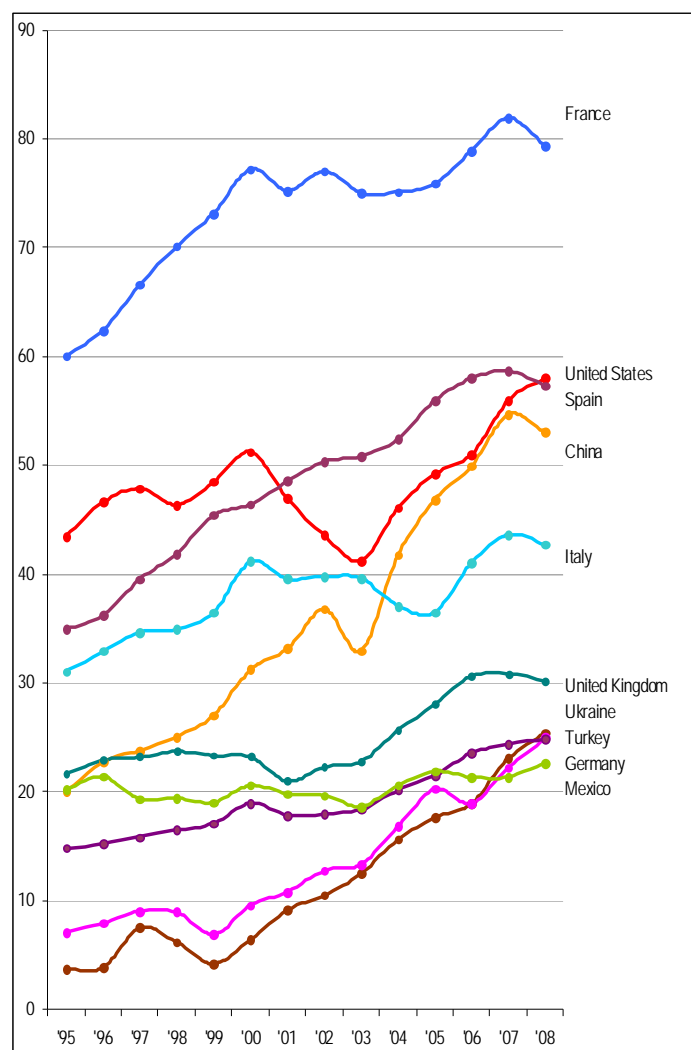
China, fourth in arrivals, is still fifth in terms of receipts, while the reverse is true for Italy. The UK ranks sixth in arrivals and seventh in receipts, in which it was surpassed by Germany, which now ranks sixth (ninth in arrivals). Turkey has moved up one rank in both arrivals, to eight, and receipts, to ninth. In arrivals, the top ten ranking is completed by Ukraine (7) and Mexico (10) and in receipts by Australia (8) and Austria (10).

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

The tables in this section list the first 50 destinations in terms of arrivals and receipts. For values of other countries with data available, see the tables on the regions on pages 23-40.

International Tourist Arrivals

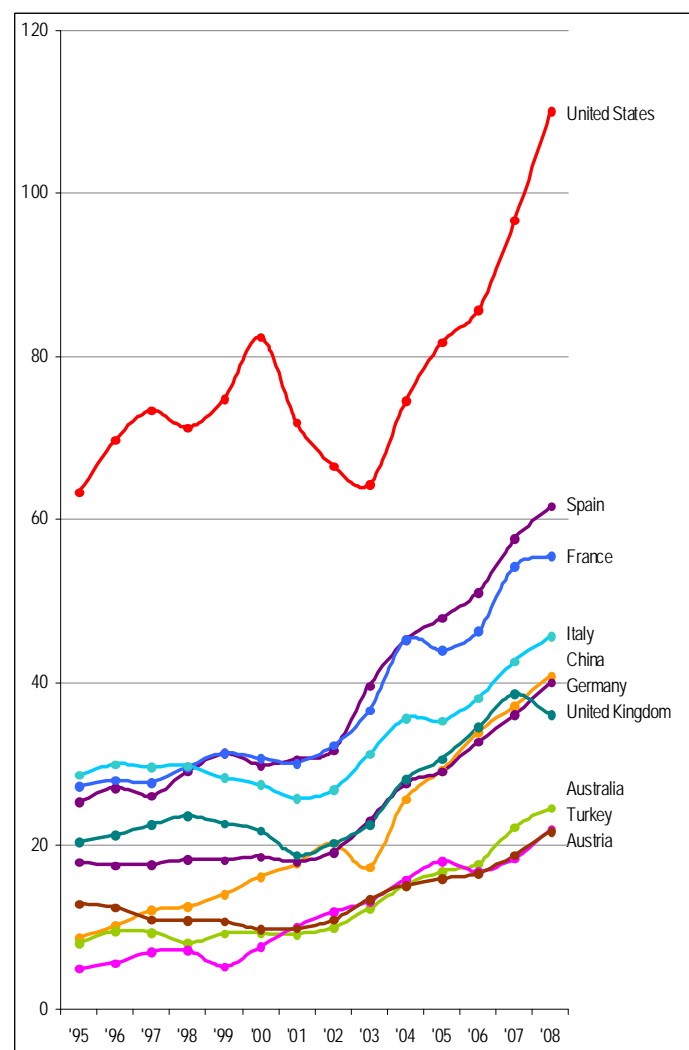
(million)



Source: World Tourism Organization (UNWTO) ©

International Tourism Receipts

(US\$ billion)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by Country of Destination

Full year											Monthly or quarterly data series													
											(% change over same period of the previous year)													
Series	1995	2000	2005	2006	2007	2008*	06/05	07/06	08*/07	Series	2009*							2008*						
						(million)			(%)		YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4			
World		534	684	804	852	904	922	6.0	6.1	1.9		-8.4	-10.6	-7.8	-10.3	-13.3	-2.3		8.6	3.9	-0.6	-2.4		
1 France	TF	60.0	77.2	75.9	78.9	81.9	79.3	3.9	3.8	-3.2	THS	-12.6		-5.9	-18.1				6.1	-3.7	-6.3	-5.2		
2 United States	TF	43.5	51.2	49.2	51.0	56.0	58.0	3.6	9.8	3.6	TF(1)	-14.3	-14.3	-9.1	-11.5	-19.9			15.4	7.6	3.2	-6.0		
3 Spain	TF	34.9	46.4	55.9	58.0	58.7	57.3	3.7	1.1	-2.3	TF	-11.8	-16.3	-9.8	-15.9	-20.8	-1.7	-11.7	5.2	1.3	-5.1	-9.0		
4 China	TF	20.0	31.2	46.8	49.9	54.7	53.0	6.6	9.6	-3.1	TF	-9.0	-11.3	-10.8	-7.9	-14.6	-3.2	-8.2	9.6	-3.0	-9.3	-7.7		
5 Italy	TF	31.1	41.2	36.5	41.1	43.7	42.7	12.4	6.3	-2.1	TF	-5.4	-5.4	-6.5	-3.3	-6.3			-2.6	2.6	-3.7	-5.1		
6 United Kingdom	TF	21.7	23.2	28.0	30.7	30.9	30.2	9.3	0.7	-2.2	VF	-10.0	-12.7	-9.1	-20.1	-9.7	-2.6		6.8	-1.0	-1.9	-13.1		
7 Ukraine	TF	3.7	6.4	17.6	18.9	23.1	25.4	7.4	22.1	9.8	TF	-19.9	-19.9						12.3	12.3	12.3	1.1		
8 Turkey	TF	7.1	9.6	20.3	18.9	22.2	25.0	-6.7	17.6	12.3	TF	-1.5	-4.5	-4.0	0.5	-8.2	4.5	-1.8	14.6	17.4	9.4	10.0		
9 Germany	TCE	14.8	19.0	21.5	23.6	24.4	24.9	9.6	3.6	1.9	TCE	-8.6	-8.8	-9.0	-9.9	-7.5	-8.1		5.4	4.3	0.8	-2.1		
10 Mexico	TF	20.2	20.6	21.9	21.4	21.4	22.6	-2.6	0.1	5.9	TF	5.9	7.7	14.3	10.8	-0.6	0.2		5.4	2.9	6.5	9.1		
11 Malaysia	TF	7.5	10.2	16.4	17.5	21.0	22.1	6.8	19.5	5.1	TF	3.4	2.2	5.1	-7.4	8.6	7.0		1.2	3.9	8.2	7.5		
12 Austria	TCE	17.2	18.0	20.0	20.3	20.8	21.9	1.6	2.5	5.6	TCE	-2.6	-8.7	12.8	-5.8	-29.5	42.2		13.7	-0.6	2.6	4.2		
13 Russian Federation	TF	..	..	19.9	20.2	..	..	1.3	..	..	VF	-10.8	-10.8						3.4	6.2	8.8	-6.3
14 Hong Kong (China)	TF	..	8.8	14.8	15.8	17.2	17.3	7.1	8.4	1.0	TF	-2.5	0.6	7.0	-9.1	3.4	1.5	-16.0	5.3	4.1	-2.2	-2.3		
15 Canada	TF	16.9	19.6	18.8	18.3	17.9	17.1	-2.7	-1.8	-4.5	TF	-4.7	-8.2	-3.0	-7.6	-12.8	4.0		-1.9	-4.9	-4.6	-5.6		
16 Greece	TF	10.1	13.1	14.8	16.0	17.5	..	8.6	9.2	..	TCE	-26.3		-25.8	-26.8				5.7	-5.4	-5.0	-9.4		
17 Saudi Arabia	TF	3.3	6.6	8.0	8.6	11.5	14.8	7.3	33.8	28.0	TF	-60.1	-60.1	-79.5	-49.0	-20.6			53.6	75.1	-21.8	27.0		
18 Thailand	TF	7.0	9.6	11.6	13.8	14.5	14.6	19.5	4.6	0.8	TF	-14.8	-15.8	-11.9	-23.2	-12.1	-11.2		12.9	13.6	-3.4	-18.0		
19 Poland	TF	19.2	17.4	15.2	15.7	15.0	13.0	3.1	-4.4	-13.5	TF	-18.6	-18.6						-8.6	-11.2	-15.9	-17.3		
20 Portugal	TF	9.5	12.1	10.6	11.3	12.3	..	6.3	9.2	..	TCE	-13.6	-21.3	-13.3	-21.4	-25.4	2.0		21.1	3.8	1.4	-8.4		
21 Egypt	TF	2.9	5.1	8.2	8.6	10.6	12.3	4.9	22.7	15.9	VF	-9.5	-13.4	-12.4	-13.2	-14.3	-2.4	-6.0	25.1	22.6	15.1	3.7		
22 Macao (China)	TF	4.2	5.2	9.0	10.7	9.6	10.6	18.5	-9.9	10.2	TF	-9.1	-8.3	1.0	-17.0	-8.3	0.5	-21.1	17.3	16.7	7.4	1.0		
23 Netherlands	TCE	6.6	10.0	10.0	10.7	11.0	10.1	7.3	2.5	-8.2	TCE	-14.8	-14.8	-8.6	-12.1	-21.3			0.8	-11.8	-9.0	-10.1		
24 South Africa	TF	4.5	5.9	7.4	8.4	9.1	9.6	13.9	8.3	5.5	VF	-2.2	-2.2	5.8	-2.9	-9.6			12.0	3.8	1.1	5.7		
25 Croatia	TCE	1.5	5.8	8.5	8.7	9.3	9.4	2.3	7.5	1.2	TCE	-4.1	-20.0	10.2	-12.2	-33.9	8.1		29.9	0.4	0.6	-0.8		
26 Hungary	TF	2.9	..	10.0	9.3	8.6	8.8	-7.2	-6.7	2.0	TF	0.4	0.4						4.6	1.4	-1.1	5.9		
27 Switzerland	THS	6.9	7.8	7.2	7.9	8.4	8.6	8.8	7.4	1.9	THS	-8.3	-9.7	-3.3	-11.1	-13.4	-3.6		9.2	2.7	0.4	-4.3		
28 Japan	VF	3.3	4.8	6.7	7.3	8.3	8.4	9.0	13.8	0.0	VF	-27.0	-27.2	-18.4	-41.3	-22.3	-19.7	-34.0	10.6	9.3	-2.0	-16.0		
29 Ireland	TF	4.8	6.6	7.3	8.0	8.3	8.0	9.1	4.1	-3.7	TF	-6.3	-9.1	-2.9	-5.5	-16.0	0.6		4.3	1.3	-6.6	-5.2		
30 Morocco	TF	2.6	4.3	5.8	6.6	7.4	7.9	12.2	12.9	6.4	TF	9.8	4.4	7.9	7.6	-0.5	23.9		14.4	10.5	1.2	5.4		
31 Singapore	TF	6.1	6.1	7.1	7.6	8.0	7.8	7.2	4.9	-2.2	VF	-12.1	-13.6	-12.8	-15.1	-13.1	-6.1	-13.0	6.8	-0.2	-4.5	-7.8		
32 Untd Arab Emirates	THS	2.3	3.9	7.1	..	..	..	..	..	..	THS(2)	3.0	3.0						5.7	9.7	2.2	14.5
33 Belgium	TCE	5.6	6.5	6.7	7.0	7.0	7.1	3.7	0.7	0.6	TCE	-8.0		-6.0	-9.6				1.8	2.4	-0.3	-1.5		
34 Tunisia	TF	4.1	5.1	6.4	6.5	6.8	7.0	2.7	3.2	4.2	TF	1.3	-0.9	1.9	2.1	-5.0	8.8	-1.1	6.2	4.8	0.6	9.5		
35 Korea, Republic of	VF	3.8	5.3	6.0	6.2	6.4	6.9	2.2	4.8	6.9	VF	18.7	24.3	25.3	25.7	22.2	20.8	0.8	12.0	6.3	4.0	5.9		
36 Czech Rep	TCE	3.4	4.8	6.3	6.4	6.7	6.6	1.6	3.8	-0.5	TCE	-17.1	-17.1	-8.8	-20.6	-20.3			6.8	-0.4	-0.4	-6.3		
37 Indonesia	TF	4.3	5.1	5.0	4.9	5.5	6.2	-2.6	13.0	13.2	TF(1)	-2.4	0.0	8.0	-9.4	1.8	-10.0		15.7	8.1	13.1	16.2		
38 Sweden	TCE	2.3	3.8	4.9	4.7	5.2	..	-3.2	10.5	..	THS(3)	-7.1	-9.7	-10.7	-14.3	-4.4	0.3		10.5	5.0	-7.9	-2.7		
39 Bulgaria	TF	3.5	2.8	4.8	5.2	5.2	5.8	6.6	-0.1	12.2	TF	-4.4	-6.6	-7.6	-5.2	-6.8	-0.1		15.5	17.9	12.3	-0.1		
40 Australia	VF	3.7	4.9	5.5	5.5	5.6	5.6	0.6	2.0	-1.1	VF	-1.1	-3.5	2.7	-7.3	-4.9	7.4		0.4	-1.7	-0.4	-2.7		
41 India	TF	2.1	2.6	3.9	4.4	5.1	5.4	13.5	14.3	5.6	TF	-10.6	-13.8	-17.6	-10.6	-12.8	-3.4	-1.9	12.2	9.3	8.6	-4.9		
42 Brazil	TF	2.0	5.3	5.4	5.0	5.0	5.1	-6.4	0.2	0.5	TF													
43 Denmark	TCE	..	3.5	4.7	4.7	4.7	..	-1.0	0.6	..	NCE(1)	-12.5	-35.6	-20.0	-19.0	-48.5	37.6		25.1	-7.9	-8.8	-1.7		
44 Argentina	TF	2.3	2.9	3.8	4.2	4.6	4.7	9.2	9.3	2.3	TF	-8.9	-8.9						5.2	3.1	5.6	-4.3		
45 Bahrain	TF	1.4	2.4	3.9	4.5	4.9	..	15.5	9.2	..	VF								10.5	77.5	3.5	1.2		
46 Norway	TF	2.9	3.1	3.8	4.1	4.4	4.4	6.4	7.5	1.4	THS	-10.5	-9.3	-4.0	-9.2	-13.6	-14.1		-1.3	-0.5	-10.7	-3.9		
47 Vietnam	VF	1.4	2.1	3.5	3.6	4.2	4.2	3.0	18.0	0.2	VF	-18.8	-16.1	-17.7	-1.4	-26.8	-16.8	-28.5	6.4	10.0	-1.5	-13.8		
48 Dominican Rp	TF	1.8	3.0	3.7	4.0	4.0	4.0	7.4	0.4	0.0	TF	-3.7	-5.2	-2.4	-6.4	-6.8	-3.2	2.4	6.8	3.2	-4.5	-7.3		
49 Puerto Rico	TF	3.1	3.3	3.7	3.7	3.7	3.9	1.0	-0.9	5.6	THS(3)	-10.0	-10.0	-4.1	-12.3	-12.9			-0.5	-4.6	-0.2	-4.8		
50 Taiwan (pr. of China)	VF	2.3	2.6	3.4	3.5	3.7	3.8	4.2	5.6	3.5	VF	13.9	2.2	-6.9	-3.8	15.5	48.1	16.4	8.3	2.9	4.2	-0.8		

International Tourism Receipts

		Monthly or quarterly data series																						
		US\$						Local currencies, current prices (% on previous year)																
		1995	2000	2005	2006	2007	2008*	Series	06/05	07/06	08/07	2009*					2008*							
		(billion)									YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4			
World		405	475	680	744	857	944																	
1	United States	63.4	82.4	81.8	85.7	96.7	110.1	sa	4.8	12.8	13.8	-13.2	-11.9	-6.7	-9.8	-18.9	-17.1		24.2	21.7	13.9	-2.8		
2	Spain	25.4	30.0	48.0	51.1	57.6	61.6		5.6	3.3	-0.4	-17.2	-17.2	-13.3	-17.8	-20.4			5.4	1.3	0.2	-8.0		
3	France	27.4	30.8	44.0	46.3	54.3	55.6		4.3	7.3	-4.6	-3.5	-3.1	3.8	-0.2	-11.3	-4.4		1.8	1.4	-11.4	-3.5		
4	Italy	28.7	27.5	35.4	38.1	42.7	45.7		6.7	2.5	-0.1	-8.9	-8.9	-6.2	-11.4	-9.2			1.8	1.2	2.0	-7.7		
5	China	8.7	16.2	29.3	33.9	37.2	40.8	\$	15.9	9.7	9.7	-12.9	-15.4	-19.0	-9.2	-17.2	-10.0	-8.7	13.1	-3.7	-12.9	-4.1		
6	Germany	18.0	18.7	29.2	32.8	36.0	40.0		11.4	0.7	3.5	-8.9	-8.1	-2.8	-10.8	-10.5	-10.9		2.1	3.8	2.5	5.5		
7	United Kingdom	20.5	21.9	30.7	34.6	38.6	36.0	sa	11.5	2.6	1.6	-4.6	-4.6						2.5	9.5	-1.8	-3.4		
8	Australia	8.1	9.3	16.9	17.8	22.3	24.7		7.3	12.5	10.3	11.0	10.3	13.6	7.4	10.4	12.9		11.4	13.2	7.4	9.6		
9	Turkey	5.0	7.6	18.2	16.9	18.5	22.0	\$	-7.2	9.7	18.7	-6.0	-11.1	-9.7	-9.9	-13.2	7.7		28.4	25.9	14.4	16.3		
10	Austria	12.9	9.8	16.1	16.6	18.9	21.8		2.7	4.0	7.5	-10.5	-10.5						14.7	1.0	3.0	4.8		
11	Thailand	8.0	7.5	9.6	13.4	16.7	17.7		31.8	13.3	2.2	-19.0	-19.0						17.2	17.3	0.4	-21.2		
12	Greece	4.1	9.2	13.7	14.3	15.5	17.1		2.9	-0.3	2.8	-11.6	-18.2	-16.7	-24.1	-15.1	-2.2		7.8	8.5	1.5	-4.7		
13	Hong Kong (China)	7.8	5.9	10.3	11.6	13.8	15.3		12.9	18.7	11.0	2.3	2.3						13.9	14.2	14.0	4.0		
14	Malaysia	4.0	5.0	8.8	10.4	14.0	15.3		14.1	26.3	5.5	0.6	0.6						1.3	4.0	8.2	8.8		
15	Canada	7.9	10.8	13.8	14.6	15.3	15.1		-0.4	-0.8	-2.1	-2.2	-2.2						0.8	-3.4	-3.5	-0.6		
16	Switzerland	8.3	6.6	10.0	10.8	12.2	14.4		8.6	8.0	6.3	-0.9	-0.9						8.7	7.9	5.4	3.3		
17	Macao (China)	3.1	3.2	8.0	9.8	13.6	..		23.0	39.1														
18	Netherlands	6.6	7.2	10.5	11.3	13.3	13.4		7.3	7.4	-6.3	-18.9	-18.9						11.6	-11.4	-8.8	-13.1		
19	Mexico	6.2	8.3	11.8	12.2	12.9	13.3	\$	3.2	5.5	3.4	-7.6	-8.5	-7.5	-7.5	-10.5	-4.1		5.7	6.8	4.8	-3.8		
20	Sweden	3.5	4.1	7.4	9.1	12.0	12.5		21.1	21.0	1.4	14.4	14.4						-1.9	-10.8	8.6	10.8		
21	Belgium	4.5	6.6	9.9	10.3	10.9	12.4		3.4	-3.0	6.0	-21.2	-21.2	1.9	-33.3	-30.5			1.9	16.8	4.5	-0.7		
22	Russian Federation	4.3	3.4	5.9	7.6	9.6	11.9	\$	30.0	25.9	24.3								45.6	32.0	25.1	1.1		
23	India	2.6	3.5	7.5	8.6	10.7	11.8		18.4	13.4	16.0	-6.8	-13.2	-15.4	-12.3	-11.9	7.6	8.7	18.2	18.1	16.8	6.5		
24	Poland	6.6	5.7	6.3	7.2	10.5	11.7		10.2	29.8	-3.5	3.1	3.1						-6.3	3.1	-8.9	-0.6		
25	Egypt	2.7	4.3	6.9	7.6	9.3	11.0	\$	10.8	22.6	18.1	-17.2	-17.2						39.3	42.6	15.2	-10.0		
26	Croatia	1.3	2.8	7.5	7.9	9.3	11.0	€	4.9	7.3	10.5	-6.0	-6.0						17.3	15.8	6.9	19.9		
27	Portugal	4.8	5.2	7.7	8.4	10.1	10.9		7.6	10.9	0.5	-10.6	-15.0	-9.6	-15.4	-18.9	0.1		8.7	1.2	-0.7	-4.2		
28	Japan	3.2	3.4	6.6	8.5	9.3	10.8		34.8	11.6	1.8	-20.5	-22.1	-14.7	-34.2	-17.7	-16.2		10.9	8.3	-1.2	-9.6		
29	Singapore	7.6	5.1	6.2	7.5	9.2	10.6		15.8	15.3	8.4	0.8	0.8						23.7	7.9	5.1	-0.3		
30	Saudi Arabia	..	..	5.4	5.0	5.2	9.7		-8.6	5.4	86.1	-39.9	-39.9	-72.3	14.7	12.2			34.1	170	29.8	275
31	Korea, Republic of	5.2	6.8	5.8	5.8	6.1	9.1	\$	-0.3	6.1	47.9	43.1	49.9	63.0	98.6	9.2	22.4		38.7	30.4	28.6	85.9		
32	Czech Rep	2.9	3.0	4.7	5.5	6.6	7.7		11.7	7.5	-2.0	-7.1	-7.1						10.0	-1.9	-10.8	-4.1		
33	South Africa	2.1	2.7	7.3	7.9	8.4	7.6	sa	14.4	11.2	6.0	3.1	3.1						7.6	6.9	6.5	3.0		
34	Indonesia	5.2	5.0	4.5	4.4	5.3	7.4	\$	-1.6	20.2	38.0	-14.5	-14.5						40.9	31.7	37.8	41.6		
35	Morocco	1.3	2.0	4.6	6.0	7.2	7.1		28.1	11.8	-5.6	-18.7	-21.0	-19.5	-24.3	-19.8	-12.3		-0.9	9.3	-8.5	-17.6		
36	Denmark	3.7	3.7	5.3	5.6	6.2	6.7		4.5	2.4	0.7	-8.8	-8.8						7.8	-0.1	-3.1	3.1		
37	Ireland	2.3	2.6	4.8	5.3	6.1	6.3		10.2	3.9	-3.3	-13.4	-13.4						-0.3	1.0	-3.6	-10.6		
38	Uhtd Arab Emirates	0.6	1.1	3.2	5.0	6.1	..		54.5	21.9														
39	Hungary	3.0	3.8	4.1	4.2	4.7	6.0	€	2.0	2.3	18.9	10.9	10.9						10.4	12.9	25.2	23.0		
40	Brazil	1.0	1.8	3.9	4.3	5.0	5.8	\$	11.8	31.9	16.8	-12.5	-11.5	-16.7	-12.5	-4.7	-11.6	-17.0	20.7	17.0	22.4	7.9		
41	Ukraine	0.2	0.4	3.1	3.5	4.6	5.8	\$	11.5	31.9	-0.6	-32.4	-32.4						36.9	37.8	28.2	-8.9		
42	Taiwan (pr. of China)	3.3	3.7	5.0	5.1	5.2	5.2	\$	3.2	1.5	-0.6	17.5	17.5						-2.7	-1.0	-1.7	2.8		
43	Lebanon	..	..	5.5	5.0	5.0	..	\$	-10.2	0.6	..											
44	New Zealand	2.3	2.3	5.2	4.7	5.4	4.9		-0.5	0.6	-4.9	-1.5	-1.5						-4.1	-1.0	-6.2	-8.3		
45	Norway	2.4	2.2	3.5	3.8	4.5	4.7		7.5	7.8	0.8	-13.5	-13.5						5.8	6.6	-0.9	-1.7		
46	Argentina	2.2	2.9	2.7	3.3	4.3	4.6	\$	22.5	29.0	7.4	-11.5	-11.5						3.0	17.1	27.3	-4.9		
47	Luxembourg	1.7	1.8	3.6	3.6	4.0	4.5		-0.9	1.9	4.0	1.1	1.1						8.6	5.1	4.0	-0.8		
48	Philippines	1.1	2.2	2.3	3.5	4.9	4.4	\$	54.6	40.8	-11.0	-35.6	-35.6	-31.5	-38.4	-36.8			-0.5	0.7	-18.7	-22.7		
49	Dominican Rp	1.6	2.9	3.5	3.9	4.1	4.2	\$	11.3	3.8	2.8	-7.9	-7.9						3.3	6.3	1.8	-1.0		
50	Bulgaria	0.8	1.1	2.4	2.6	3.1	3.8		7.3	9.8	13.7	-3.1	-8.8	-8.9	-8.4	-8.9	12.0		12.8	13.6	11.7	-0.1		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

Outbound Tourism

International tourism expenditure 2008

Emerging source markets go from strength to strength

In spite of the overall cooling of tourism growth in the second half of last year, emerging source markets again turned in some of the best performances (measured in local currencies, at current prices) during 2008, with many registering growth rates of over 20% – Brazil (+34% in US dollar terms), Hungary (+28%), South Africa (+27%), India (+23%), Bulgaria and Ukraine (both +22%) and China and Saudi Arabia (+21%).

the year. By contrast, one of the most dynamic source markets in recent years lost strength in 2008 – expenditure in international travel by the Republic of Korea declined by as much as 22% and the country now ranks 13th, down from tenth position in 2007.

No major changes in the top ten

The ranking of international tourism spenders shows no major changes in 2008 apart from the fact that the Netherlands overtook the Republic of Korea and now ranks 10th instead of 12th. The first nine places remain unchanged with Germany leading (US\$ 91 billion), followed by the USA (US\$ 80 bn), the UK (US\$ 69 bn), France (US\$ 43 bn) and China (US\$ 36 bn).

As usual, it should be noted that, while the absolute volumes of international tourism expenditure are expressed in US dollars to facilitate comparative analysis, the year-to-date changes are expressed in local currencies at current prices – so exchange rate fluctuations are accounted for but inflation is not. Exchange rate fluctuations – particularly between the US dollar and euro – render comparisons in US dollars rather misleading. Attention should be paid to the fact that due to the continued depreciation of the US currency during 2008, expenditure from European source markets in particular has been magnified in dollar terms.

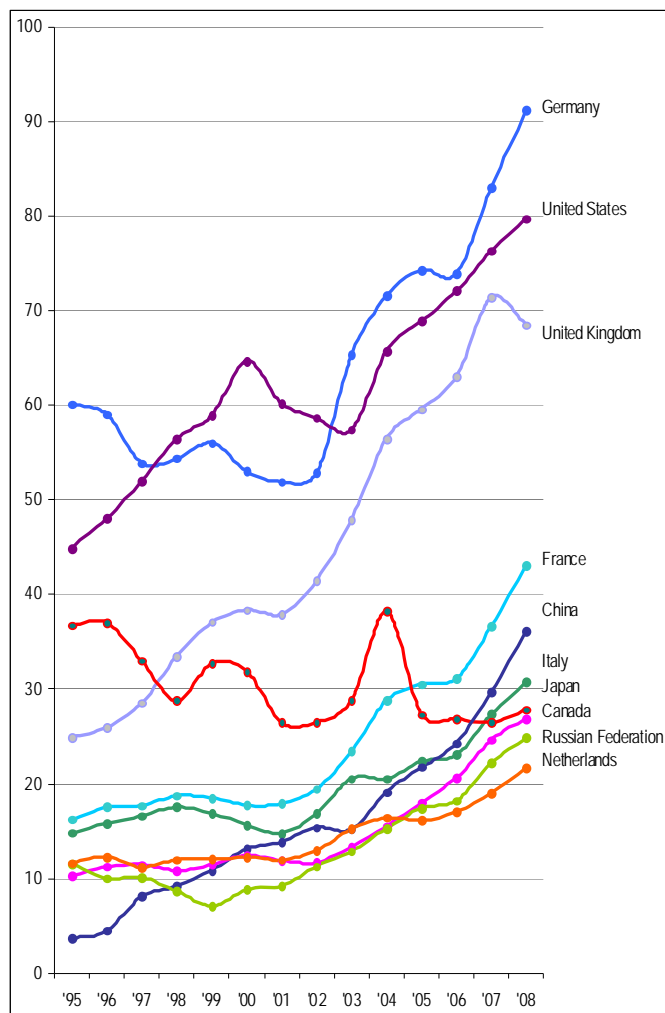
International tourism expenditure 2009 YTD

Shrinking demand evident in expenditure figures

Some 50 countries around the world each generate at least US\$ 2 billion in international tourism spending annually. From those, among the 43 countries that have so far reported data on international tourism expenditure for the first three to five months of 2009, there is, as is the case with international tourist arrivals, a clear downward trend. Of those that have reported trends, only ten have managed to accomplish any growth, while 13 source markets recorded double-digit drops in expenditure on tourism abroad (as expressed in local currencies). And, some by 20% or more – Spain, the Republic of Korea, Brazil, Taiwan (Pr. of China) and Israel. Caution must be used in interpreting the trends as results for Korea, Brazil and Taiwan (pr. of China) are reported in US dollars, and so the percentage change is exacerbated by the depreciation of the respective currencies.

Among the top spenders, Germany (-2%) and Italy (-2%) performed comparatively better than the USA (-9%), France (-10%), Japan (-5%) and Canada (-6%). It is noteworthy that expenditure on international tourism by residents of the Netherlands was up by 4%, one of the best performances among countries with data available.

International Tourism Expenditure (US\$ billion)



Source: World Tourism Organization (UNWTO) ©

Among the world's top ten spenders, apart from China, the Russian Federation did particularly well (+12%), as did France (+10%) and Canada (+8%). Only one market, Japan, recorded negative growth (-8%) – and for the second consecutive year. Among the other source countries in the top ten, Germany, the world's top spender, turned in the weakest performance (+2%), with the remainder achieving increases of between 4% and 6% for

International Tourism Expenditure

Monthly or quarterly data series

US\$ Local currencies, current prices (% on previous year)

		1995 2000 2005 2006 2007 2008*						Local currencies, current prices (% on previous year)															
		Series	06/05	07/06	08/07	2009*																	
		(billion)									YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4		
World		405	475	680	744	857	944																
1	Germany	60.2	53.0	74.4	73.9	83.1	91.2		-1.5	2.9	2.3	-2.4	-5.1	-5.1	-4.5	-5.6	5.6	6.4	2.7	0.7	1.0		
2	United States	44.9	64.7	69.0	72.1	76.4	79.7	sa	4.5	5.9	4.4	-8.7	-7.9	-6.1	-7.3	-10.4	-11.1	9.3	7.0	3.0	-1.1		
3	United Kingdom	24.9	38.4	59.6	63.1	71.4	68.5	sa	4.6	4.1	4.4	-13.0	-13.0					13.6	4.2	4.6	-4.3		
4	France	16.3	17.8	30.5	31.2	36.7	43.1		1.1	7.9	9.6	-9.9	-14.7	-11.4	-21.4	-11.2	0.0	13.5	16.5	0.1	12.9		
5	China	3.7	13.1	21.8	24.3	29.8	36.2	\$	11.8	22.5	21.4							20.9	20.9	21.9	21.9		
6	Italy	14.8	15.7	22.4	23.1	27.3	30.8		2.2	8.4	4.9	-1.6	-1.6	0.8	-3.6	-2.3		4.7	7.8	1.1	9.2		
7	Japan	36.8	31.9	27.3	26.9	26.5	27.9		3.8	-0.2	-7.6	-5.1	-6.6	-13.7	-2.5	-3.8	-0.1	-3.9	-6.8	-9.5	-10.1		
8	Canada	10.3	12.4	18.0	20.6	24.7	26.9		7.0	13.3	8.4	-5.5	-5.5					18.5	14.0	4.9	-5.3		
9	Russian Federation	11.6	8.8	17.4	18.2	22.3	24.9	\$	4.6	22.1	11.8							19.5	19.1	10.3	0.8		
10	Netherlands	11.7	12.2	16.2	17.0	19.1	21.7		4.3	2.6	6.2	4.1	4.1					2.9	8.5	7.4	4.3		
11	Spain	4.5	6.0	15.1	16.7	19.7	20.3		9.4	8.3	-3.7	-19.7	-19.7	-15.6	-21.0	-22.7		6.0	-2.1	-5.8	-10.8		
12	Belgium	8.1	9.4	15.0	15.5	17.3	19.0		2.7	2.1	2.1	-5.2	-5.2	1.3	-0.4	-13.5		0.0	-2.0	7.6	0.5		
13	Korea, Republic of	6.3	7.1	15.4	18.9	22.0	17.1	\$	22.4	16.6	-22.1	-47.1	-51.8	-54.7	-55.6	-43.6	-31.6	-4.2	-11.7	-17.8	-53.3		
14	Hong Kong (China)	10.5	12.5	13.3	14.0	15.0	16.1		5.4	7.6	6.5	-13.7	-13.7					22.8	6.6	6.6	-7.7		
15	Norway	4.2	4.6	10.5	11.7	13.7	16.0		11.3	6.9	12.2	-9.4	-9.4					20.2	11.8	13.5	11.9		
16	Australia	5.2	6.4	11.3	11.7	14.2	15.7		5.2	9.0	10.8	0.7	-1.3	-1.8	-3.5	1.2	6.6	18.7	14.6	8.8	2.8		
17	Sweden	5.4	8.0	10.8	11.5	13.9	15.2		5.4	11.1	6.5	-8.3	-8.3					16.9	4.9	7.9	-2.4		
18	Singapore	4.7	4.5	10.1	11.0	12.5	14.2		4.2	7.5	7.0	0.4	0.4					13.8	8.0	4.8	2.6		
19	Utd Arab Emirates	..	3.0	6.2	8.8	11.3	..		42.7	27.6													
20	Austria	7.6	6.3	9.3	9.6	10.6	11.3		1.8	0.8	0.1	-2.3	-2.3					7.1	-8.8	2.9	0.9		
21	Brazil	3.4	3.9	4.7	5.8	8.2	11.0	\$	22.1	42.5	33.5	-22.7	-24.5	-23.5	-31.8	-17.7	-18.0	-23	59.2	57.5	56.5	-21.3	
22	Switzerland	6.3	5.4	8.8	9.2	10.2	10.8		5.3	6.4	-4.5	-9.5	-9.5					0.8	-7.6	-4.6	-4.7		
23	Ireland	2.1	2.5	6.1	6.8	8.6	10.4		11.2	15.7	12.0	-10.1	-10.1					26.7	6.5	12.8	4.8		
24	Denmark	4.4	4.7	6.9	7.5	8.8	9.7		7.9	7.7	3.1	-7.2	-7.2					15.4	-0.6	-8.1	9.8		
25	India	1.0	2.7	6.2	6.8	8.2	9.6		13.7	9.6	22.9	11.0	11.0					51.7	14.7	42.7	-4.2		
26	Poland	5.5	3.3	5.6	7.2	7.7	9.3		24.2	-4.5	5.1	-8.9	-8.9					8.2	10.5	-1.4	6.7		
27	Mexico	3.2	5.5	7.6	8.1	8.4	8.5	\$	6.7	3.3	1.8	-13.6	-12.7	-6.4	-12.9	-18.6	-16.0	6.2	0.3	4.8	-2.8		
28	Taiwan (pr. of China)	8.5	8.1	8.7	8.7	9.1	8.5	\$	0.7	3.7	-6.8	-32.5	-32.5					3.2	2.5	-9.4	-23.0		
29	Kuwait	2.2	2.5	4.5	5.6	6.6	7.6		22.2	16.6	7.9												
30	Malaysia	2.3	2.1	3.7	4.0	5.6	6.7		4.9	30.1	17.1	-1.3	-1.3					14.8	8.8	23.9	19.8		
31	Iran	0.2	0.7	4.2	5.3	6.0	..	\$	26.5	12.9	..							12.9	12.9	13.0			
32	Saudi Arabia	..	..	3.8	1.8	4.9	5.9		-52.2	170	21.0	-15.9	-15.9	-52.9	-14.7	49.7		15.4	-13.6	11.9	-4.7
33	Indonesia	2.2	3.2	3.6	4.0	4.9	5.4	\$	12.4	21.7	10.1	-11.8	-11.8					5.1	14.8	13.6	7.8		
34	Thailand	4.3	2.8	3.8	4.6	5.1	5.2		13.9	1.9	-2.0	-6.1	-6.1					5.4	1.5	-0.9	-10.8		
35	Czech Rep	1.6	1.3	2.4	2.8	3.6	4.6		8.4	18.3	5.9	2.8	2.8					30.0	11.2	-5.4	-3.5		
36	Argentina	3.3	4.4	2.8	3.1	3.9	4.5	\$	11.1	26.5	14.9	-5.4	-5.4					18.6	17.9	27.9	2.2		
37	Finland	2.3	1.9	3.1	3.4	4.0	4.4		10.7	6.8	2.1	3.7	3.7					-1.0	0.6	5.3	3.3		
38	Portugal	2.1	2.2	3.1	3.3	3.9	4.3		8.3	7.9	2.4	-3.2	-7.4	-5.6	-5.4	-10.5	9.4	8.0	4.0	2.0	-3.6		
39	South Africa	1.9	2.1	3.4	3.4	3.9	4.2	sa	6.6	20.7	26.8	6.1	6.1					20.7	39.7	34.0	13.2		
40	Hungary	1.5	1.7	2.4	2.1	2.9	4.0	€	-11.7	27.4	27.5	12.0	12.0					21.5	36.1	28.2	23.2		
41	Ukraine	0.2	0.5	2.8	2.8	3.3	4.0	\$	1.0	16.2	22.2	-19.4	-19.4					27.8	38.7	27.1	-6.9		
42	Greece	1.3	4.6	3.0	3.0	3.4	3.9		-2.6	4.3	7.8	-9.7	-16.7	-14.2	-28.3	-7.9	10.2	26.8	2.7	15.5	-7.0		
43	Luxembourg	1.1	1.3	3.0	3.1	3.5	3.9		3.9	3.8	2.0	-4.7	-4.7					7.2	-1.7	2.1	0.7		
44	Qatar	..	0.3	1.8	3.8	..	..		113		..										
45	Turkey	0.9	1.7	2.9	2.7	3.3	3.5	\$	-4.5	18.8	7.5	4.4	11.4	2.9	13.4	18.1	-14.8	19.8	11.5	-2.0	2.9		
46	Israel	2.1	2.8	2.9	3.0	3.3	3.4	\$	3.0	9.3	5.5	-24.4	-24.4					1.0	15.2	1.7	2.5		
47	Lebanon	..	..	2.9	3.0	3.1	..	\$	3.4	3.6	..										
48	New Zealand	1.3	1.5	2.7	2.5	3.1	3.0		2.9	6.8	0.8	-4.1	-4.1					5.9	0.3	-0.5	-1.2		
49	Egypt	1.3	1.1	1.6	1.8	2.4	2.9	\$	9.5	37.1	19.2	0.0	0.0					55.6	40.6	29.7	-18.2		
50	Bulgaria	0.5	0.5	1.3	1.5	1.8	2.4		11.8	13.3	22.0	-17.6	-19.1	-21.9	-20.3	-14.9	-12.9	30.1	28.8	20.5	8.4		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

Inbound Tourism: short-term data 2009

World

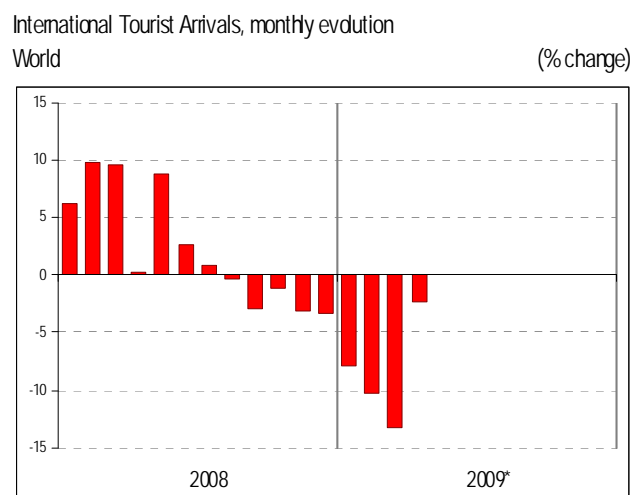
(Continued from page 1)

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

It is difficult to generalise with regard to global trends over the first four months of 2009. But cost clearly seems to have been the main driver of trends in all regions. Business travellers – the ones that have still been travelling – have generally been trading down and changing their habits. Instead of three trips, for example, they are combining everything into one extended trip, thereby spending more time away in one go – which means lower costs. A recently published report by the Economist Intelligence Unit, commissioned by Amadeus, points to a

new age of austerity for business travellers, which says that executives will make fewer, shorter and cheaper business trips in 2009 and switch from luxury extras in favour of basic efficiency and good service. Some 20% of the 354 executives who responded to the survey in Europe, North America and Asia said they thought an internet connection was more critical than a quiet room. A big question now is: “Will changes like this drive fundamental changes in the corporate travel sector of tomorrow?”

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



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

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

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

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

Trends and Prospects

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

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

An additional uncertainty has been added by the influenza A(H1N1) outbreak and its uncertain future progression. It is important to stress though that, despite of the move to the phase 6 or pandemic status on June 11, the World Health Organization (WHO) has explicitly stated that it does not recommend any restrictions on travel. The

move to phase 6 is based on the geographic spread of the influenza A(H1N1) virus and is not related to its severity. The WHO has pointed out that limiting travel and imposing travel restrictions would have very little effect on stopping the disease, but would be highly disruptive to the global community.

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

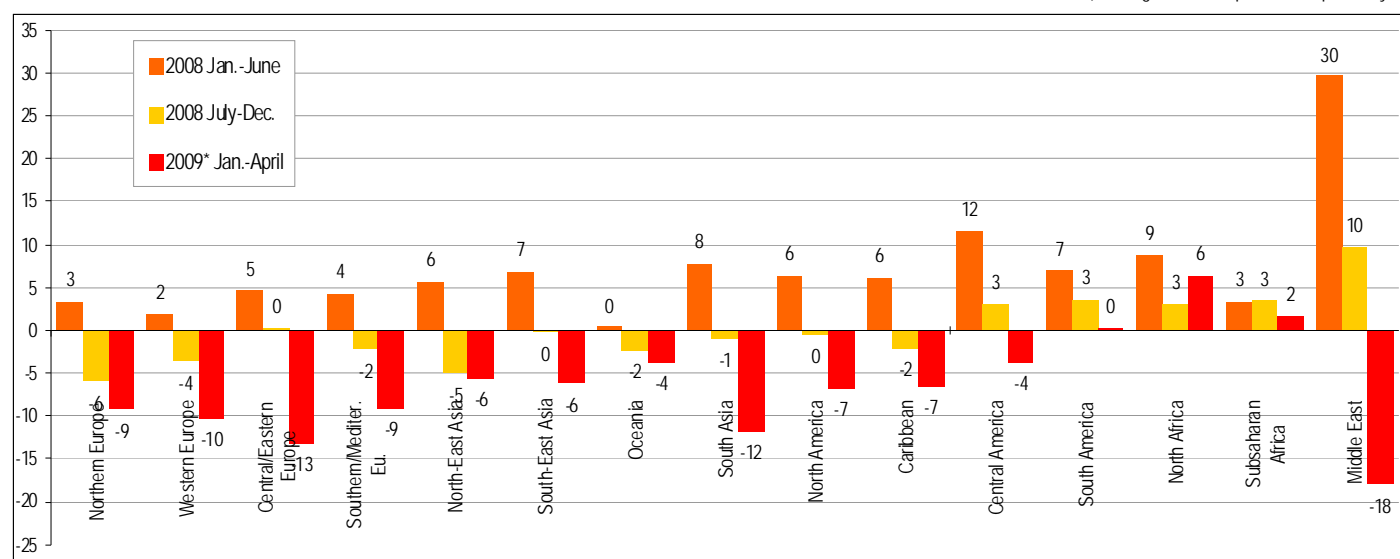
Nevertheless, some believe that there are good sides to the current crisis. The boom of the last few years resulted in excessive construction and huge speculation with regard to property prices. So, it was difficult to keep prime locations sustainable with developers often ignoring carrying capacity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

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

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

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

Global Economic Crisis: UNWTO's Response

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

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

UNWTO has been focusing on three interrelated initiatives:

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

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

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

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

This will be officially presented at the UNWTO General Assembly in Kazakhstan (2-9 October 2009) and will continue to be promoted within the G20 initiative.

Influenza A(H1N1): UNWTO's Response

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

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

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

To meet those objectives, UNWTO engaged at three levels:

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

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

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

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

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

The institutions currently collaborating to face and deal with the challenges of the influenza A(H1N1) are:

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

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UNWTO forecast for 2009

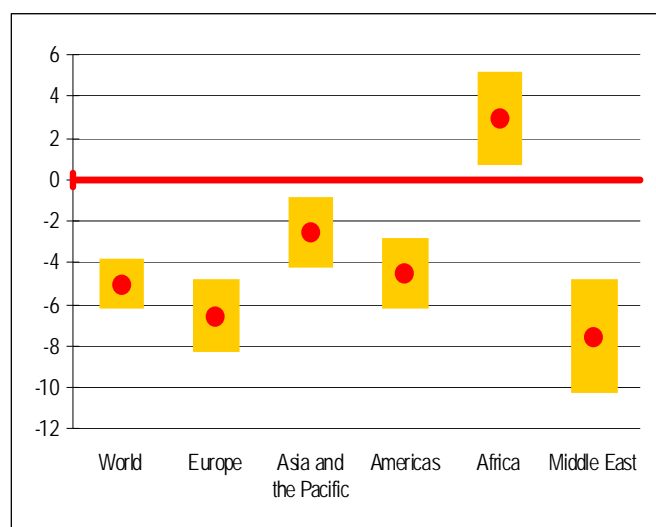
2009 forecast revised downwards and marked by uncertainty

As the whole environment for international tourism has rapidly changed since the last full issue of the *UNWTO World Tourism Barometer*, a revised forecast for the full year 2009 is included in this issue, taking account of the results for the first four months of the year and current conditions. International tourism is now forecast to decline by -6% to -4% in 2009.

In view of the rapidly deteriorating global economic situation, growth prospects have repeatedly been adjusted downwards over the past six months. While at the time of the previous UNWTO forecast in January, the International Monetary Fund was still counting on a 2.2% growth in the world economy in 2009, a decline of 1.3% is now expected. Tourism is also severely impacted, given the sharp reduction in business activity, decreasing disposable income and associated increased unemployment.

Forecast International Tourist Arrivals, 2009

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

Forecast of growth in International Tourist Arrivals

	2007	2008			2009	
	real	real			real	Full year projection
	year	year	Jan.-June	July-Dec.	Jan.-April	between
World	6.1%	1.9%	6.0%	-1.3%	-8.4%	-6% and -4%
Europe	4.2%	0.1%	3.4%	-2.5%	-10.4%	-8% and -5%
Asia and the Pacific	9.7%	1.2%	5.9%	-3.1%	-6.1%	-4% and -1%
Americas	5.2%	3.0%	6.7%	0.0%	-5.4%	-6% and -3%
Africa	8.9%	4.1%	5.1%	3.3%	3.1%	1% and 5%
Middle East	14.6%	18.2%	29.7%	9.8%	-18.1%	-10% and -5%

Source: World Tourism Organization (UNWTO) ©

After considering the latest available data, worldwide growth in international tourist arrivals is expected to end up between -6% and -4% for the full year, down from the initial -2% to 0% growth forecast at the beginning of 2009. Following the negative growth of -8% recorded in the period January-April, the pace of decline is expected to soften in the remainder of the year, with the months May-August projected at between -6% and -4%, and September-December between -5% and -3%. This is broadly in line with the prospects for May-August as expressed by the UNWTO Panel of Experts, which are somewhat less pessimistic than they were for the period January-April, in particular in the case of Asia and the Pacific, Africa and the Middle East.

As at the beginning of the year, the situation is still exceptionally volatile. Much will depend on the evolving economic conditions and on the restoration of consumer and business confidence. Is the worst already behind us? Many expect the recession to bottom out and some even see green shoots appearing on the horizon. An additional uncertainty has been added by the influenza A(H1N1) virus the outbreak and its likely future progression. According to the US Conference Board "While it is too early to determine the ultimate scope of the influenza A(H1N1) pandemic, a comparison to the 2003 SARS outbreak, (...) shows the economic impact may be short-lived and will not significantly alter long-term trends in global macro economic activity. But only time, and the final course of the current pandemic, will determine the depth of any economic damage."

Broken down by region, Europe (-8% to -5%) will be among the most negatively impacted, as the majority of its source markets have been struggling with recession since end 2008. In addition, outbound tourism from Europe's second largest market, the UK, has been strongly affected by the depreciation of the pound sterling. International tourist arrivals in the Americas are forecast to decline by between -6% and -3%, mainly as a result of the slowdown in the USA both as a source market and as a destination. In Asia and the Pacific (-4% to -1%), the situation has deteriorated faster than expected as most emerging economies have been far from immune to the global economic trade and investment contraction. This

slowdown is particularly severe when compared with the region's performance in recent years. The same applies to the Middle East, where international tourist arrivals are expected to decline by between 10% and 5% as regional income drops following sliding oil prices and a decline in demand for long-haul travel – particularly business trips. Though the Middle East will not be able to consolidate its bumper growth of 2008 (+17%), the region is still projected to record arrivals well above the level of 2007. Africa is the only bright spot on the horizon. Arrivals in the region are forecast to grow by 1% to 5%. Still, there is a large margin for both regions, and specifically for the Middle East, as the underlying data is comparatively limited and not very stable.

This forecast has been prepared by UNWTO in cooperation with the Fundación Premio Arce of the Universidad Politécnica de Madrid. In order to allow for the uncertainty related to the evolution of the economic situation and of the influenza A(H1N1), outcomes of the econometric model applied have been adjusted downwards and include a margin with variable width depending on the stability of the underlying data series. It should be realised that in this extremely volatile environment, forecasting is a far more complicated exercise than in the relative stable situation of the past years. UNWTO will continue to closely monitor developments and adjust its forecast when considered necessary to provide the most accurate analysis possible.

About these forecasts

These forecasts are developed for UNWTO by the Fundación Premio Arce of the Universidad Politécnica de Madrid and are based on econometric modelling using the series of monthly data on international tourist arrivals available for the five regions. The aim of the model is to analyse the underlying trend in the data and extrapolate this to the short-term future. The model has been tested by comparing forecasts for previous years with actual results for those years. Of course, as with any model, the forecast growth rates assume that the current conditions will not suddenly change as a result of external factors. They also include a margin of error depending on the stability of the underlying data series.

These forecasts need to be read with a certain level of caution, not only because of the above mentioned, but also because the underlying data is not perfect:

- monthly data series are not available for all countries, although the countries with monthly series included represent roughly 90% of worldwide arrivals. Coverage is in particular comparatively limited for the Middle East and Africa, and a considerable margin should be taken into account;
- monthly data is typically preliminary and many countries are expected to revise their statistics at a later date;
- the monthly series is often based on a proxy that is not the same as the indicator used for the yearly data, e.g. for France a monthly series is used on international nights in hotels and similar accommodation instead of tourist arrivals at frontiers, while for the USA the monthly series does not include arrivals from Mexico in the border areas, etc.

Elibrary

One of the most comprehensive sources of tourism information prepared by the UNWTO

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Evaluation by UNWTO's Panel of Tourism Experts

Looking for the green shoots of recovery

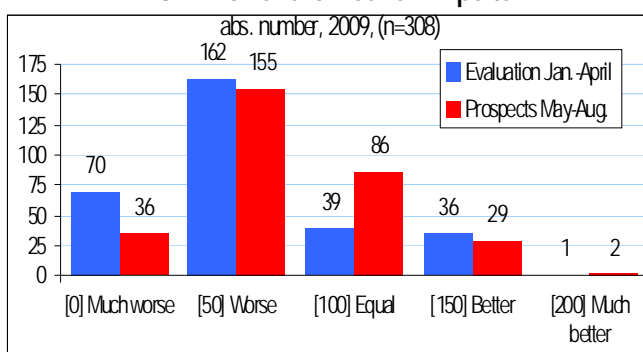
(Continued from page 1)

On a scale of 0 to 200, on which 100 implies 'equal' or 'no change', tourism experts from around the world gave an average score of just 57 to their evaluation of tourism performance in the first four months of 2009, with a slightly more positive assessment from representatives of the public sector (62) than of the private sector (54).

In the context of UNWTO's World Tourism Barometer Confidence Index, the score is the lowest ever recorded, implying 'a worse' or even 'much worse' performance – 20 points down – than in the previous period, September through December 2008. The decline in confidence is even more evident when considering that the 57 score is less than half that given 12 months ago for the period January to April 2008 (119).

Expectations for the current May through August period, meanwhile, are slightly less pessimistic, at 69 – three points up on the rating given for 'prospects' for the first four months' at the beginning of the year – well after the start of the economic recession, but before the influenza A(H1N1) outbreak.

UNWTO Panel of Tourism Experts



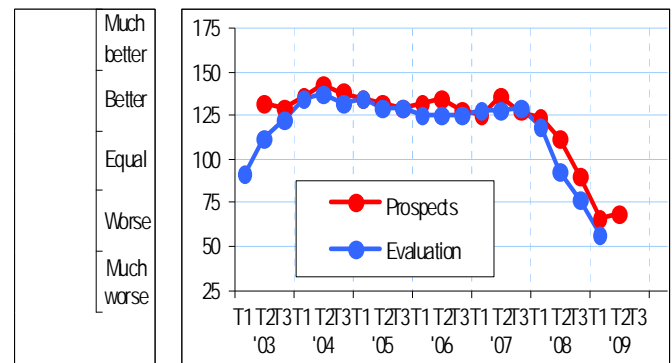
Source: World Tourism Organization (UNWTO) ©

Both the ratings and the comments from the UNWTO's Panel of Experts are unsurprising given the challenging operating environment in the first four months of 2009. But the (temporary?) sign of a modest upturn in consumer and business confidence – no doubt influenced by the impending peak period for the world's leading tourism destinations in the northern hemisphere – perhaps belies the challenges ahead. While demand for tourism has already fallen sharply in some regions, many in the industry believe the worst is still to come.

The scores accurately reflect the sharp downturn in international tourism demand in most parts of the world due to the economic crisis and a whole range of associated factors, such as increased unemployment, the reduced availability of credit, and uncertainties as to the short- to medium-term outlook for disposable incomes and jobs. Down 20 points since the previous period (September-

December 2008) and 62 points since the first four months of 2008, industry confidence has clearly taken a beating. As might be expected, the averages nevertheless mask some fairly significant variations from one region and one sector to another, as highlighted by the following overview of responses.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Evaluation January-April 2009

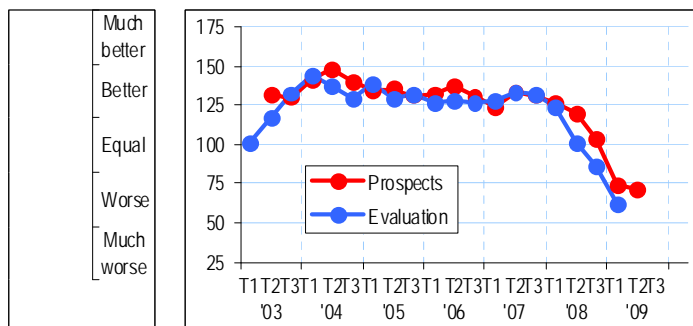
Tourism experts in all regions rated the first four months of this year as considerably worse than the final four-month period of 2008. The difference in scores was most marked among experts from the Middle East (a score of 63, down from 104) and Africa (79, down from 109), although Africa achieved by far the best rating of all regions – almost 30 points above that for Europe (51), for example. Experts in the Americas and Asia and the Pacific came out slightly above average for the world overall – with scores of 62 and 59 respectively. (See graphs in the section on the regions.)

In terms of the evaluation by activity, Global Operators (those operating in all, or more than one, regions of the world) were the most negative by a very wide margin, evaluating global tourism performance in January-April 2009 at a mere 40, down from 44 in the previous period (when they were also the most negative) and well below the world average of 57.

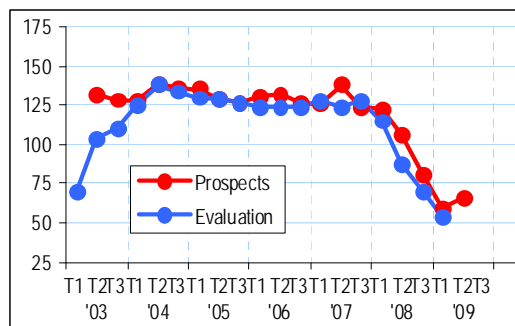
Not surprisingly, perhaps, given the terrible few months suffered by the airline industry, the Transport sector proved especially pessimistic, evaluating the months of January through April 2009 at 47 (down sharply from the previous period's score of 86). The least pessimistic sector was that of Tour Operators and Travel Agents (63), followed by Destinations (60). Scores from the other sectors ranged from 59 among experts representing Consultancy, Research & Media to 55 for the Accommodation and Catering sector and 51 for General Industry Bodies & Other.

UNWTO Panel of Tourism Experts

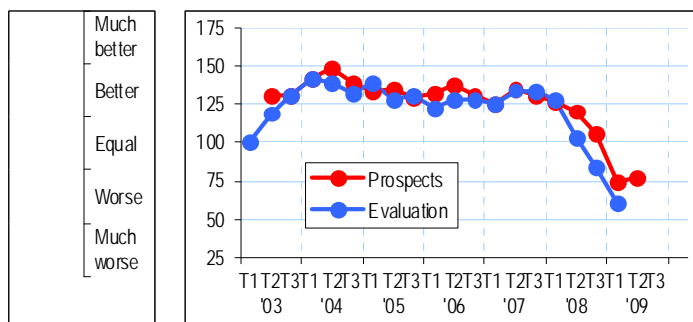
Public



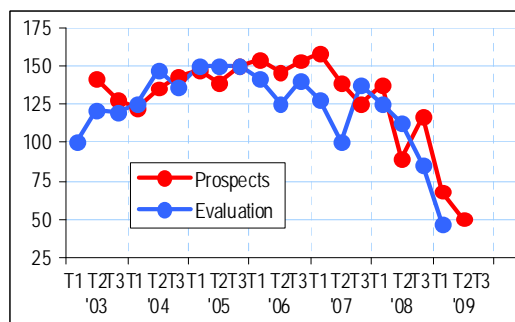
Private



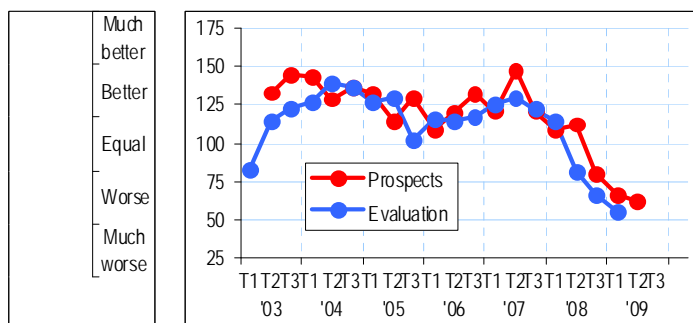
Destinations



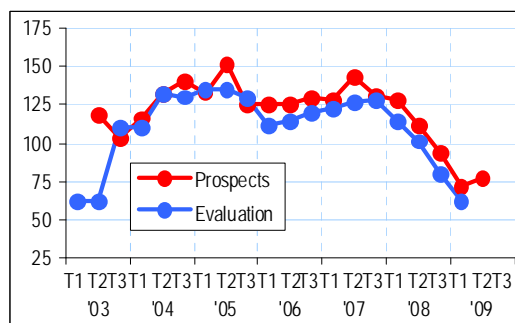
Transport



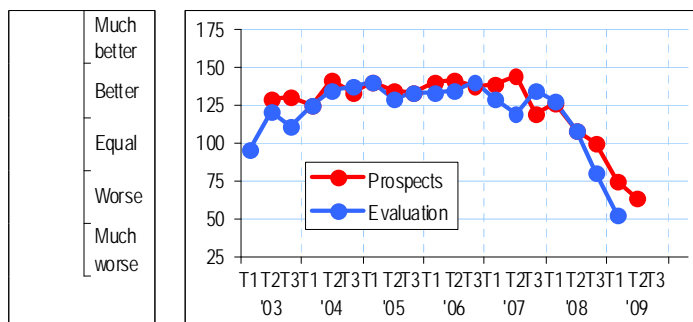
Accommodation & Catering



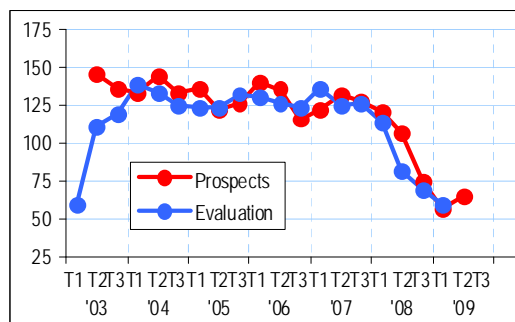
Tour Operators & Travel Agencies



General Industry Bodies & Other



Consultancy, Research & Media



For this edition responses have been received from experts based in Albania, Algeria, Andorra, Argentina, Australia, Austria, Bahamas, Belgium, Belize, Bermuda, Bhutan, Bolivia, Brazil, Bulgaria, Burkina Faso, Cambodia, Cameroon, Canada, Chile, China, Colombia, Costa Rica, Côte d'Ivoire, Croatia, Cuba, Cyprus, Czech Republic, Denmark, Dominica, Dominican Republic, Ecuador, Egypt, El Salvador, Estonia, Ethiopia, Finland, France, Germany, Greece, Guatemala, Honduras, Hong Kong (China), Hungary, Iceland, India, Indonesia, Iran (Islamic Republic of), Ireland, Israel, Italy, Jamaica, Japan, Jordan, Kenya, Lebanon, Lesotho, Liechtenstein, Lithuania, Macao (China), Malta, Marshall Islands, Mauritius, Mexico, Morocco, Mozambique, Namibia, Netherlands, New Zealand, Nicaragua, Norway, Panama, Peru, Philippines, Poland, Portugal, Puerto Rico, Republic of Korea, Reunion, Romania, Russian Federation, Senegal, Serbia, Singapore, Slovakia, Slovenia, South Africa, Spain, Swaziland, Sweden, Switzerland, Tanzania, Thailand, Tunisia, Turkey, United Arab Emirates, United Kingdom, United States, Uruguay, Uzbekistan, Venezuela, Vietnam and Zimbabwe.

Prospects May-August 2009

For the current four-month period, May-August 2009 (as already indicated, the peak tourism season for the world's leading regions in the northern hemisphere), prospects are pretty gloomy, if better than at the start of this year, by all experts except those from Africa (104). However, although the Panel of Experts in other regions all expect the months of May through August to be worse than could be expected for that period, their pessimism is tempered. Higher scores are given by experts from the Middle East (83, up from 63 for the first four months of 2009), Asia and the Pacific (76, up from 59) and the Americas (70, up from 62) than by those from Europe (59, and only slightly up from 51 for the period January-April), who seem to be predicting a very dismal summer.

By activity, the ratings for prospects are mixed. Worse scores are given for the current four months by representatives of the Transportation sector (50 as against 47), Accommodation and Catering (62 compared with 55) and General Industry Bodies (63 as against 52 for January through April). But experts representing Tour Operators/Travel Agents (78), Destinations (77) and Consultancy, Research and Media (65) are all slightly more optimistic.

However, the Global Operators (53) are once again the most bearish. How one should interpret this is not obvious as yet, but it would seem that those industry players who have a global view of the current situation see doom and gloom all around them. Clearly, the economic crisis has been transformed into a crisis of confidence, exacerbated now by the outbreak of the influenza A(H1N1).

The UNWTO Tourism Confidence Index

The UNWTO *Tourism Confidence Index* is based on the results of an email survey conducted by the UNWTO Secretariat among selected representatives of public and private sector organizations participating in the UNWTO *Panel of Tourism Experts*. The survey has been repeated every four months since May 2003 in order to keep track of actual performance, as well as perceived short-term prospects, of the tourism sector. This allows performance and prospects to be compared over time, as well as providing a comparison of the actual performance of the past four months with prospects forecast for the same period four months earlier. Results are also broken down by region and by sector of activity. These breakdowns should, however, be interpreted with caution as they may in some cases be based only on a relatively small number of responses.

The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey, in particular from countries still not included in the listing below, are kindly invited to send an email to <barom@unwto.org>.

How to read this data

For the UNWTO *Tourism Confidence Index* members of the UNWTO Panel of Tourism Experts are asked once every four months by email to answer the following two simple questions:

- *What is your assessment of tourism performance in your destination or business for the four months just ended (or about to end) as against what you would reasonably expect for this time of year?*
- *What are the tourism prospects of your destination or business in the coming four months compared with what you would reasonably expect for this time of year?*

Participants should select one of the following five options: much worse [0]; worse [50], equal [100]; better [150], much better [200]. Results are averaged and broken down by region and by activity. A value above 100 means that the number of participants who evaluate the situation as "better" or "much better", outnumber the participants who reply "worse" or "much worse".

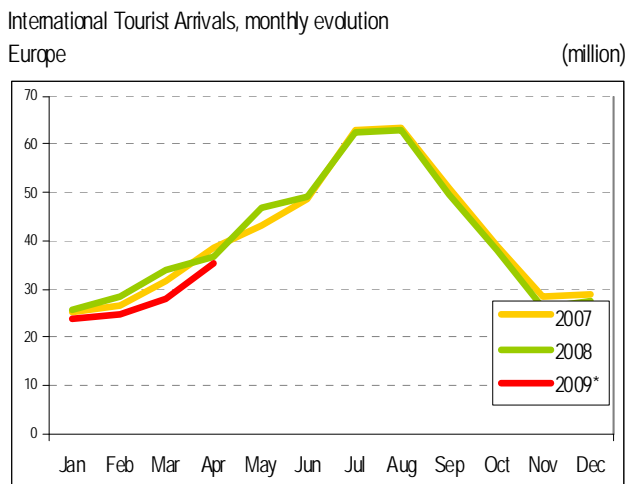
In addition, participants are also invited to include a qualitative assessment in their own words. The analysis contained in the *UNWTO World Tourism Barometer* is in large part based on their comments.

Regions

Europe

Results

The decline in tourism in Europe associated with the economic downturn has been every bit as bad as had been feared. Overall arrivals in the region in the first four months of 2009 are estimated to have fallen 10% below the levels of the same period last year, with many countries reporting double-digit declines and very few reporting increases. Little wonder that UNWTO's Panel of Experts in Europe proved the most negative of all regions with their evaluation of the January through April period at just 51, down from 72 in the previous period – and less than half the rating for the first four months of 2008.



Source: World Tourism Organization (UNWTO) ©

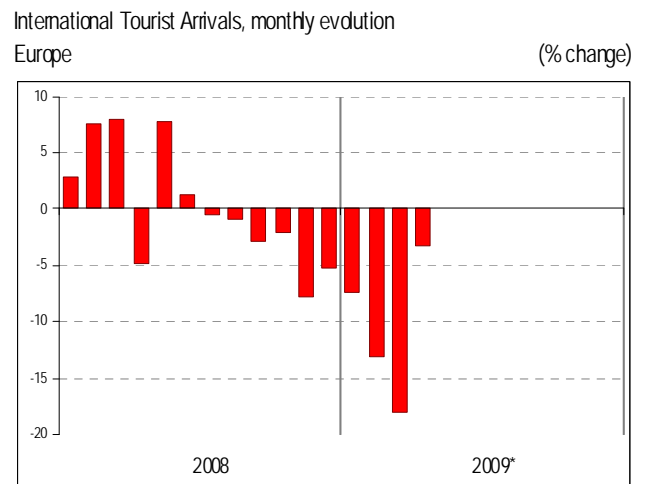
There have been large, and sometimes wild, fluctuations in the monthly figures for individual destinations. These can be partly attributed to the fact that Easter fell in March in 2008 and in April in 2009. Overall monthly figures for Europe are more even: there were estimated declines of 7% in January, 13% in February, 18% in March and 3% in April, calculated on the same months of 2008.

The decline in international arrivals was spread relatively evenly across all the subregions of Europe as most of the destinations depend heavily on regional source markets, all of which are hard hit by the crisis. In Northern Europe (-9%), only Iceland (+1.5%), with a dramatically cheaper currency, showed an increase, and only Ireland (-6%) showed a more moderate decline, and that followed an already weak performance in 2008. Despite sterling's weakness, the UK suffered a 10% drop, although it should be noted that the respective decline from the EU15 countries (the 15 members of the European Union before the 2004 enlargement) was just 4%, and monthly figures show a progressive improvement through the first four months.

In Western Europe (-10%), only France (-13% for the first two months only) and Austria (-3%) departed by more than 2 percentage points from the average. Austria also had by far the best figures in the subregion in 2009, thanks to a strong January and an impressive April, sustained by the nearby German market. Most of the winter sports resorts (including those in Switzerland, Austria, Finland and Sweden) report an excellent season, which is partly attributed to good snow conditions and partly to the late Easter, which allowed the season to be extended through much of April. But it also provides support for the idea that consumers are prepared to sacrifice their secondary holidays, but not their main holidays (since so many skiers regard their ski trip as their main annual holiday).

The overall decline for Central and Eastern Europe (-13%) included double-digit declines for most of the destinations – Slovakia (-28%), Ukraine (-20%), Poland (-19% in Q1), Romania (-19%), the Czech Republic (-17%), Lithuania (-12%) and Russia (-11%). Hungary bucked the trend and managed to maintain last year's figures. (Data for several countries is not yet available.)

In Southern/Mediterranean Europe (-9%), there were heavy declines for Portugal (-14%), Spain (-12% through May), Slovenia (-13%), Malta (-13%) and Cyprus (-9%). In many cases, the poor performances were primarily due to the sharp fall in demand from the UK. Destinations appear to be losing out – and expect to continue to lose out – to 'non-euro' destinations, especially Turkey, Egypt and Tunisia.



Source: World Tourism Organization (UNWTO) ©

Italy (-5% in Q1) did less badly, as did some countries in the western Balkans. Increases were reported by Serbia (+2.5%), FYR of Macedonia (+8%) and, reportedly, Albania. However, the numbers involved are still small. Serbia's increase is calculated on a very negative period last year. Because of its status as a major destination, the most successful destination was Turkey, which confined its decline to slightly over 1% – and that is calculated on a very strong base figure. Turkey was unable to match 2008 figures over Q1 but performance has picked up since April, notably with regard to last-minute bookings. Greece suffered a 26% decline in arrivals in the first two months.

International Tourist Arrivals by Country of Destination

Change								Monthly or quarterly data series (% change over same period of the previous year)															
Series	2000	2005	2007	2008*	06/05	07/06	08*/07	Series	2009*								2008*						
									YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4				
(1000)								YTD															
Europe	392,528	441,550	487,303	487,935	5.9	4.2	0.1		-10.4	-13.4	-7.4	-13.2	-18.1	-3.3		6.3	1.6	-1.4	-4.7				
Northern Europe	43,673	52,790	58,058	56,980	6.9	2.8	-1.9		-9.3	-12.5	-7.9	-16.5	-12.9	-0.9		7.5	0.4	-4.1	-8.9				
Denmark	TCE	3,535	4,699	4,681	..	-1.0	0.6	NCE(1)	-12.5	-35.6	-20.0	-19.0	-48.5	37.6		25.1	-7.9	-8.8	-1.7				
Finland	TF	2,714	3,140	3,519	3,583	7.5	4.3	TCE	-11.8	-10.0	-2.5	-17.9	-11.0	-18.1		8.9	4.6	-3.9	-2.5				
Iceland	TCE	634	871	1,054	1,102	11.4	8.6	THS(2)	1.5	-3.4	0.8	-0.3	-8.6	12.2		1.6	1.5	4.8	9.2				
Ireland	TF	6,646	7,333	8,332	8,026	9.1	4.1	TF	-6.3	-9.1	-2.9	-5.5	-16.0	0.6		4.3	1.3	-6.6	-5.2				
Norway	TF	3,104	3,824	4,377	4,440	6.4	7.5	THS	-10.5	-9.3	-4.0	-9.2	-13.6	-14.1		-1.3	-0.5	-10.7	-3.9				
Sweden	TCE	3,828	4,883	5,224	..	-3.2	10.5	THS	-7.1	-9.7	-10.7	-14.3	-4.4	0.3		10.5	5.0	-7.9	-2.7				
United Kingdom	TF	23,212	28,039	30,871	30,190	9.3	0.7	VF	-10.0	-12.7	-9.1	-20.1	-9.7	-2.6		6.8	-1.0	-1.9	-13.1				
Western Europe	139,658	142,596	154,897	153,154	4.9	3.5	-1.1		-10.3	-14.0	-1.9	-12.6	-23.8	0.1		7.3	-2.1	-3.6	-3.5				
Austria	TCE	17,982	19,952	20,773	21,933	1.6	2.5	TCE	-2.6	-8.7	12.8	-5.8	-29.5	42.2		13.7	-0.6	2.6	4.2				
Belgium	TCE	6,457	6,747	7,045	7,086	3.7	0.7	TCE	-8.0		-6.0	-9.6				1.8	2.4	-0.3	-1.5				
France	TF	77,190	75,908	81,900	79,300	3.9	3.8	THS	-12.6		-5.9	-18.1				6.1	-3.7	-6.3	-5.2				
Germany	TCE	18,992	21,499	24,420	24,886	9.6	3.6	TCE	-8.6	-8.8	-9.0	-9.9	-7.5	-8.1		5.4	4.3	0.8	-2.1				
Liechtenstein	THS	62	50	58	58	10.2	6.2	THS	-9.4		-7.7	-10.9				5.0	-1.8	4.2	-7.6				
Netherlands	TCE	10,003	10,012	11,008	10,104	7.3	2.5	TCE	-14.8	-14.8	-8.6	-12.1	-21.3			0.8	-11.8	-9.0	-10.1				
Switzerland	THS	7,821	7,229	8,448	8,608	8.8	7.4	THS	-8.3	-9.7	-3.3	-11.1	-13.4	-3.6		9.2	2.7	0.4	-4.3				
Central/Eastern Europe	69,351	87,453	96,476	98,858	4.6	5.5	2.5		-13.2	-14.4	-13.4	-15.0	-14.9	-10.3		4.6	4.6	3.6	-4.6				
Bulgaria	TF	2,785	4,837	5,151	5,780	6.6	-0.1	TF	-4.4	-6.6	-7.6	-5.2	-6.8	-0.1		15.5	17.9	12.3	-0.1				
Czech Rep	TCE	4,773	6,336	6,680	6,649	1.6	3.8	TCE	-17.1	-17.1	-8.8	-20.6	-20.3			6.8	-0.4	-0.4	-6.3				
Estonia	TF	1,220	1,917	1,900	..	1.2	-2.1	TCE	-5.3	-8.2	8.4	-11.4	-16.9	0.8		5.9	5.0	2.5	3.1				
Georgia	VF	387	560	1,052	1,290	75.5	7.0	TF															
Hungary	TF	..	9,979	8,638	8,814	-7.2	-6.7	TF	0.4	0.4						4.6	1.4	-1.1	5.9				
Lithuania	TF	1,083	2,000	1,486	..	9.0	-31.8	TCE	-12.1	-12.1	-4.3	-17.3	-14.5			10.2	9.2	9.0	-2.1				
Poland	TF	17,400	15,200	14,975	12,960	3.1	-4.4	TF	-18.6	-18.6						-8.6	-11.2	-15.9	-17.3				
Rep Moldova	TF	18	23	13	7	-43.5	0.0	TF															
Romania	TCE	867	1,430	1,551	1,466	-3.5	12.4	TCE	-18.7	-17.8	-18.4	-18.9	-16.3	-21.0		8.1	-2.9	-11.1	-10.1				
Russian Federation	TF		19,940	..	..	1.3	..	VF	-10.8	-10.8						3.4	6.2	8.8	-6.3		
Slovakia	TCE	1,053	1,498	1,665	1,740	6.4	4.5	TCE	-28.4	-28.4	-22.5	-34.7	-27.3			9.8	16.7	-0.6	-5.5				
Ukraine	TF	6,431	17,631	23,122	25,392	7.4	22.1	TF	-19.9	-19.9						12.3	12.3	12.3	1.1				
Southern/Medit. Eu.	139,846	158,712	177,872	178,943	7.2	4.6	0.6		-9.2	-12.3	-8.5	-11.2	-15.6	-2.6		5.8	3.6	-1.2	-4.3				
Albania	TF		..	2,205	2,724	..	..	VF								25.1	26.2	23.2	20.3		
Andorra	TF	2,946	2,418	2,189	2,059	-7.9	-1.7	TF	-18.4	-20.9	-12.0	-24.3	-24.4	-8.3	-21.3	-0.2	-10.6	-6.5	-8.0				
Bosnia & Herzg	TCE	171	217	306	322	17.7	19.8	TCE	-5.2	-5.0	-10.4	-6.5	1.3	-5.5		8.9	11.5	1.0	-1.3				
Croatia	TCE	5,831	8,467	9,307	9,415	2.3	7.5	TCE	-4.1	-20.0	10.2	-12.2	-33.9	8.1		29.9	0.4	0.6	-0.8				
Cyprus	TF	2,686	2,470	2,416	2,404	-2.8	0.6	TF	-8.9	-15.2	-7.1	-19.3	-16.4	-0.4	-9.2	4.4	2.2	-3.2	-1.3				
F.Yug.Rp.Macedonia	TCE	224	197	230	255	2.6	13.7	TCE	8.4	6.7	8.2	8.0	4.5	12.6		15.5	7.7	12.3	9.1				
Greece	TF	13,096	14,765	17,518	..	8.6	9.2	TCE	-26.3		-25.8	-26.8				5.7	-5.4	-5.0	-9.4				
Israel	TF	2,417	1,903	2,068	2,572	-4.1	13.3	TF	-19.2	-21.7	-21.7	-19.5	-23.3	-12.8	-20.1	31.5	36.4	18.7	13.6				
Italy	TF	41,181	36,513	43,654	42,734	12.4	6.3	TF	-5.4	-5.4	-6.5	-3.3	-6.3			-2.6	2.6	-3.7	-5.1				
Malta	TF	1,216	1,171	1,244	1,291	-4.0	10.6	TF	-12.9	-17.8	-19.1	-10.6	-21.4	-3.1		22.0	11.4	0.0	-10.3				
Montenegro	TCE	74	272	984	1,047	38.9	160	TCE(3)	-5.1	-10.1	-6.4	-16.1	-6.2	-22.4	7.6	32.4	8.6	2.6	4.2				
Portugal	TF	12,097	10,612	12,321	..	6.3	9.2	TCE	-13.6	-21.3	-13.3	-21.4	-25.4	2.0		21.1	3.8	1.4	-8.4				
San Marino	THS	43	50	69	..	0.0	38.0	VF	-9.6	-17.5	-11.6	-14.6	-22.2	1.4		10.9	-3.6	-4.4	-3.3				
Serbia	TCE		453	696	646	3.6	48.5	TCE(3)	2.5	-0.4	-15.2	-3.0	19.3	10.1		-3.7	-6.4	-7.0	-10.5				
Slovenia	TCE	1,090	1,555	1,751	1,771	4.0	8.3	TCE	-12.5	-14.2	1.4	-25.3	-18.2	1.2	-19.0	5.6	2.2	-0.2	-1.1				
Spain	TF	46,403	55,914	58,666	57,316	3.7	1.1	TF	-11.8	-16.3	-9.8	-15.9	-20.8	-1.7	-11.7	5.2	1.3	-5.1	-9.0				
Turkey	TF	9,586	20,273	22,248	24,994	-6.7	17.6	TF	-1.5	-4.5	-4.0	0.5	-8.2	4.5	-1.8	14.6	17.4	9.4	10.0				

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

(1) Including holiday dwellings

(2) Hotels only

(3) From 2007 on, arrivals from Montenegro / Serbia are included as foreign

As broad generalisations, it seems that business travel is more heavily affected than leisure, that domestic and short-haul travel is holding up better than long-haul, that length of stay and spending are down more than arrivals, that secondary holidays (short stays, etc) seem to have been sacrificed more often than main holidays, and that the cruise market is performing better than average. In terms of forward bookings, especially, cruise numbers have brought some solace to destinations such as Turkey, Greece and Malta. However, consumers are tending to leave bookings until the last moment, partly because of their lack of confidence in their employment prospects and financial situations, and partly in the hope of picking up last-minute special offers and bargains. But, for varying reasons, there are plenty of exceptions among the individual destinations.

As for individual business travel and the meetings industry, many corporations (especially in the USA and UK) are 'banning' travel and meetings. The UK, France, Germany, Netherlands, Spain and Austria, among others, report heavy declines in business travel and events. But Brussels reports that its business travel and meetings sectors are being sustained by demand related to the European Commission and to multinationals based in Brussels. On the other hand, Romania reports a decline in corporate team-building expeditions.

Another common observation is that domestic and short-haul leisure tourism is holding up better than long-haul. This has several dimensions and complications. Firstly, Europe's major long-haul markets, including those in North America and Asia Pacific, are themselves in recession and, for various reasons, preferring destinations closer to home. But in Spain and Portugal, for whom the prosperous segments of some Latin American markets are relatively important, long-haul may be doing better than short-haul, partly because they are euro-denominated destinations which are finding it difficult to compete in the European mass market with lower-cost destinations like Turkey, Croatia and Egypt. And some European destinations are still seeing increases from 'emerging' long-haul markets, such as India, China and several countries in the Middle East and South-East Asia.

Secondly, European travellers are themselves choosing to travel closer to home. In most European countries, this is benefiting both the domestic market and the closest neighbours. In the UK, taking domestic holidays is definitely in fashion but France also reports that the British are coming across the Channel in roughly their usual numbers. In France, international hotel nights were down 15% through April, and domestic down only 4%.

By way of evidence of the 'closer to home' trend, Croatia reports that Germans, Austrians, Swiss and Italians arriving by car are preferring Istrian resorts in the north to Dalmatian resorts further south. Greece reports a slackening in demand from most of its traditional European markets, but continued growth from neighbouring countries in the Balkans. Other Balkan countries report similar trends. But in some of the Central and Eastern European countries with the most severe economic crises,

consumers are so constrained that even domestic tourism is suffering.

The monthly or quarterly statistics included in this issue have been compiled by the UNWTO Secretariat based on preliminary data as disseminated by the institutions (e.g. National Tourism Authorities, Statistics Offices, Central Banks) of the various countries and territories through websites, news releases, and bulletins, or provided through direct contacts with officials or through international organisations such as the Caribbean Tourism Organization (CTO), the European Travel Commission (ETC), Eurostat, the Pacific Asia Travel Association (PATA) or the South Pacific Tourism Organization (SPTO). Information in this issue reflects data available at the time of preparing the *UNWTO World Tourism Barometer*. Whenever necessary, updated data will be included over time as it becomes available and without further notice.

In the tables on International Tourist Arrivals for the various UNWTO regions, series are chosen that can serve as an indicator of trends in tourism development to selected destinations. The monthly series represented do not coincide in all cases with the annual series usually reported for the various countries (e.g. visitor arrivals or nights instead of tourist arrivals) and sometimes only relate to a part of the total tourism flow (e.g. air traffic, specific entry points). Please refer to the notes on page 2 for further explanations. The (sub)regional totals are approximations for the whole (sub)region prepared by UNWTO based on trends in the countries with data available.

The data on International Tourism Receipts offers additional information on the development of inbound tourism, while the data on International Tourism Expenditure serves as an indicator of trends in outbound tourism. Both series correspond to the respective Travel Credit and Travel Debit items in the Services section of the Balance of Payments. And both cover all transactions related to the consumption by international visitors of, for instance, accommodation, food and drinks, fuel, transport in the country of destination, entertainment, shopping, etc. Data includes transactions generated by tourists (overnight/same-day visitors) as well as by same-day visitors (excursionists, including cruise passengers). It does not cover expenditure on international transport contracted outside the traveller's country of residence, which is included in the Balance of Payments under the separate item 'Transportation, passenger services'. The institutions responsible for the Balance of Payments generally estimate travel expenditure from a visitor survey or outbound survey and/or bank records of international transactions (exchange of foreign currencies in and outside the country, credit card payments, transactions between tourism businesses, etc).

So as not to be influenced by exchange rate fluctuations, the percentages included in the tables are based on values in local currencies, except where otherwise indicated.

Countries that are not included in this overview, but which have monthly data at their disposal, are kindly requested to contact the UNWTO Secretariat at barom@unwto.org.

International Tourism Receipts

	US\$					Local currencies, current prices (% on previous year)																
	2000	2005	2006	2007	2008*	Series	06/05	07/06	08/07	2009*					2008*							
										YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4		
	(million)																					
Europe	231,326	350,307	378,273	435,087	473,526																	
Northern Europe	36,051	54,254	61,181	70,720	69,855																	
Denmark	3,694	5,278	5,562	6,220	6,687		4.5	2.4	0.7	-8.8	-8.8							7.8	-0.1	-3.1	3.1	
Finland	1,411	2,186	2,375	2,837	3,118		7.6	9.5	2.4	0.9	0.9							4.6	3.0	-1.3	5.7	
Iceland	229	409	443	539	583		20.7	11.2	48.5	104.0	104							14.8	22.0	31.2	149	
Ireland	2,633	4,806	5,346	6,066	6,294		10.2	3.9	-3.3	-13.4	-13.4							-0.3	1.0	-3.6	-10.6	
Norway	2,163	3,495	3,774	4,453	4,663		7.5	7.8	0.8	-13.5	-13.5							5.8	6.6	-0.9	-1.7	
Sweden	4,064	7,405	9,084	12,002	12,482		21.1	21.0	1.4	14.4	14.4							-1.9	-10.8	8.6	10.8	
United Kingdom	21,857	30,675	34,597	38,602	36,028	sa	11.5	2.6	1.6	-4.6	-4.6							2.5	9.5	-1.8	-3.4	
Western Europe	81,495	123,221	131,849	149,603	162,018																	
Austria	9,784	16,054	16,643	18,885	21,791		2.7	4.0	7.5	-10.5	-10.5							14.7	1.0	3.0	4.8	
Belgium	6,592	9,868	10,295	10,898	12,396		3.4	-3.0	6.0	-21.2	-21.2	1.9	-33.3	-30.5				1.9	16.8	4.5	-0.7	
France	30,757	44,018	46,345	54,273	55,595		4.3	7.3	-4.6	-3.5	-3.1	3.8	-0.2	-11.3	-4.4			1.8	1.4	-11.4	-3.5	
Germany	18,693	29,173	32,801	36,038	40,018		11.4	0.7	3.5	-8.9	-8.1	-2.8	-10.8	-10.5	-10.9			2.1	3.8	2.5	5.5	
Luxembourg	1,806	3,613	3,614	4,021	4,490		-0.9	1.9	4.0	1.1	1.1							8.6	5.1	4.0	-0.8	
Netherlands	7,217	10,475	11,348	13,305	13,375		7.3	7.4	-6.3	-18.9	-18.9							11.6	-11.4	-8.8	-13.1	
Switzerland	6,645	10,020	10,802	12,182	14,352		8.6	8.0	6.3	-0.9	-0.9							8.7	7.9	5.4	3.3	
Central/Eastern Europe	20,371	32,687	38,222	48,450	57,996																	
Azerbaijan	63	78	117	178	190	\$	49.9	52.0	7.0									5.0	9.4	5.7	8.0	
Belarus	93	253	286	325	365	\$	13.0	13.5	12.5									10.9	15.2	15.8	7.0	
Bulgaria	1,074	2,412	2,612	3,130	3,804		7.3	9.8	13.7	-3.1	-8.8	-8.9	-8.4	-8.9	12.0			12.8	13.6	11.7	-0.1	
Czech Rep	2,972	4,677	5,541	6,632	7,722		11.7	7.5	-2.0	-7.1	-7.1							10.0	-1.9	-10.8	-4.1	
Estonia	508	971	1,024	1,035	1,214		4.5	-7.3	9.7	-4.4	-4.4							32.4	6.9	4.0	2.7	
Georgia	97	241	313	384	447	\$	29.5	22.7	16.4									33.7	46.9	-2.5	2.3	
Hungary	3,757	4,111	4,233	4,728	6,032	€	2.0	2.3	18.9	10.9	10.9							10.4	12.9	25.2	23.0	
Kazakhstan	356	701	838	1,013	1,012	\$	19.6	20.9	-0.2									4.8	5.1	-2.1	-6.7	
Kyrgyzstan	15	73	167	346	..	\$	128.5	106.9	..									61	64.8	20.8		
Latvia	131	341	480	671	803		39.5	28.3	11.9	13.2	13.2							24.8	8.9	7.1	13.7	
Lithuania	391	921	1,038	1,153	1,338		11.8	1.8	8.4	-14.7	-14.7							12.4	7.3	9.5	0.9	
Poland	5,702	6,287	7,221	10,506	11,653		10.2	29.8	-3.5	3.1	3.1							-6.3	3.1	-8.9	-0.6	
Rep Moldova	39	103	112	164	202	\$	8.3	47.0	23.2									26.3	42.4	34.4	-5.0	
Romania	359	1,061	1,298	1,608	2,002	€	21.2	13.4	16.0	-28.9	-30.0	-41.6	-33.7	-13.8	-26.0			25.3	15.7	9.0	17.5	
Russian Federation	3,429	5,870	7,628	9,607	11,943	\$	30.0	25.9	24.3									45.6	32.0	25.1	1.1	
Slovakia	433	1,210	1,513	2,013	2,584		19.8	10.6	11.0	-19.9		-17.4	-22.4					8.8	10.5	6.3	17.6	
Ukraine	394	3,125	3,485	4,597	5,768	\$	11.5	31.9	25.5	-32.4	-32.4							36.9	37.8	28.2	-8.9	
Southern/Mediter. Eu.	93,409	140,145	147,021	166,314	183,657																	
Albania	389	860	1,010	1,373	1,782	€	16.3	24.5	21.0	-4.1	-4.1							29.7	11.8	19.0	26.1	
Bosnia & Herzg	233	520	604	728	816		15.1	10.4	4.7									9.4	6.0	3.0	2.1	
Croatia	2,782	7,463	7,902	9,254	10,971	€	4.9	7.3	10.5	-6.0	-6.0							17.3	15.8	6.9	19.9	
Cyprus	1,941	2,331	2,400	2,685	2,737		1.8	3.9	-4.8	-7.5	-12.8	-11.6	-10.8	-14.8	-0.3			1.8	-1.3	-6.8	-0.9	
F.Yug.Rp.Macedonia	38	90	129	185	228	€	41.5	31.8	15.6									25.0	15.8	18.2	3.5	
Greece	9,219	13,731	14,259	15,513	17,114		2.9	-0.3	2.8	-11.6	-18.2	-16.7	-24.1	-15.1	-2.2			7.8	8.5	1.5	-4.7	
Israel	4,114	2,783	2,755	3,095	4,057	\$	-1.0	12.4	31.1	-17.5	-17.5							33.3	42.9	31.6	17.3	
Italy	27,493	35,398	38,130	42,651	45,727		6.7	2.5	-0.1	-8.9	-8.9	-6.2	-11.4	-9.2				1.8	1.2	2.0	-7.7	
Malta	587	755	767	910	950		0.7	8.7	-2.7									4.7	-1.1	-2.0	-11.1	
Montenegro	..	268	362	630	..		34.0	59.4			-12.7							90.9	3.8	10.7		
Portugal	5,243	7,712	8,377	10,145	10,943		7.6	10.9	0.5	-10.6	-15.0	-9.6	-15.4	-18.9	0.1			8.7	1.2	-0.7	-4.2	
Serbia	..	308	398	531	944	\$	29.3	33.5	77.7	-26.1	-26	-30.0	-26.2	-21.6				103	89.4	92.0	36.5	
Slovenia	965	1,805	1,953	2,483	3,059		7.2	16.5	14.8	-8.5	-8.5	-1.0	-13.0	-11.8				15.9	15.2	11.4	19.5	
Spain	29,967	47,970	51,122	57,645	61,628		5.6	3.3	-0.4	-17.2	-17.2	-13.3	-17.8	-20.4				5.4	1.3	0.2	-8.0	
Turkey	7,636	18,152	16,853	18,487	21,951	\$	-7.2	9.7	18.7	-6.0	-11.1	-9.7	-9.9	-13.2	7.7			28.4	25.9	14.4	16.3	

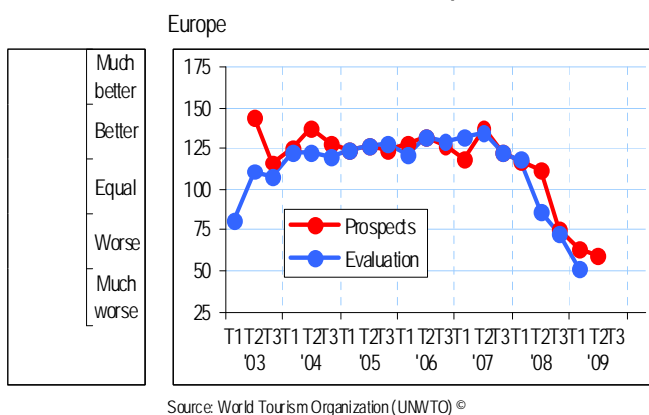
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2009)

See box at page 2 for explanation of abbreviations and signs used

Although the numbers of domestic and short-haul leisure trips may be holding up relatively well (which may mean moderate increases or declines), spending is falling. People are choosing cheaper accommodation, restaurants and attractions. Self-catering holidays and visits to friends and relatives (VFR) are popular. Camping and caravanning in the Netherlands and Denmark are reported to be increasing. Individual destinations report strong interest in all-inclusive packages, fully independent travel and internet searches and bookings, but this probably reflects intense interest in finding bargains rather than a trend in favour of any one of these (mutually somewhat conflicting) options. City breaks and other short trips, as secondary holidays, are often reported to be heavily down. In Belgium, new and renovated museums in Brussels and Wallonia were not sufficient to halt this trend. But some experts note the emergence of the 'nano-trip' – a one-night short break.

UNWTO Panel of Tourism Experts



Prospects

The strong fluctuations in monthly arrivals figures, the uncertainties about economic trends and the tendency, in current conditions, for consumers to postpone their bookings until the last moment (especially in some key markets like the UK) make it very difficult to assess prospects for the all-important summer season. But it seems that consumers were a little more confident in April and May than they had been earlier in the year. Coupled with the idea that, however willing they have been to postpone or cancel their secondary holidays, they will be determined to protect their principal summer holidays, this is allowing the optimists in the tourism and travel industry to hope that the arrivals figures over the next four months will be only slightly lower than those in the same period of 2008. However, there is general agreement that consumers will be economising: length of stay will be shorter and spending lower.

A frequent observation is the importance of relative exchange rates, and especially the strength of the euro against the US dollar, pound sterling and the floating currencies of some countries in Scandinavia and Eastern

Europe – to the direction of tourism flows. But it should be noted that the extravagant shifts in relative exchange rates that took place in September-October 2008 have since been gradually and erratically unwound, partly if not completely. This is not to deny that some euro-denominated destinations (including Greece, Spain and Portugal) are suffering from a persistent disadvantage in pricing, but the factor is not as powerful as once seemed likely.

Many destinations are reporting reductions in capacity, with bankruptcies among accommodation and service providers and reductions in employment. Tour operators have seen a big cut-back in advance bookings. If last-minute bookings for summer holidays prove as good as the optimists hope, some of this capacity can presumably be restored reasonably quickly – and many destinations still have excess capacity, as investments begun during the boom come on stream. But airline capacity has also been reduced significantly, especially on less intensive (often, recently introduced) routes. And this capacity will be clearly more difficult to restore at short notice.

Destinations which had been diversifying into new, smaller markets in Europe may find themselves relying more heavily on their traditional markets again, and new smaller destinations in Europe may find themselves short of airlift capacity. Destinations voicing such fears include Malta, Estonia, Latvia and Lithuania (where the national carrier, Flylial, has ceased operations) and, in Spain, the Canaries and Balearic Islands.

Most of the responses from the Panel of Experts in Europe were written in the lull between the first reports of the outbreak of the influenza A(H1N1) and the recent surge in the numbers of reported cases in many countries. Nevertheless, several experts mention the problem as a threat of unpredictable dimensions.

Time will tell whether the optimism about the summer season in Europe is fulfilled. But analysts are warning that the apparent revival in European economies is limited in scope: business activity is still declining and disposable incomes are set to fall. Most countries in Europe are undergoing a fundamental shift towards government spending, at the expense of private spending. However this shift is financed by increases in taxation, by inflation or by declines in real incomes – and it suggests that, beyond the summer season, any recovery in tourism generated within Europe will be modest.

As for individual destinations, Austria hopes to benefit from Linz being this year's European Capital of Culture, and of the 200th anniversary of Haydn's death to attract the European market. Despite worsening economic conditions, the Austrian Government has decided that the budget for tourism will not be reduced in 2009. On the contrary – an additional budget of 4 million euro has been allocated for promotion. Some 3 million will go to domestic tourism and the rest to countries with borders with Austria, a trend common to many European destinations (for complete information on stimulus measures by country see www.unwto.org/trc - Response Actions).

Asia and the Pacific

Results

Experts in Asia and the Pacific were among the most negative in terms of their evaluation of tourism's performance in the first four months of 2009. But, while their rating of prospects for the next four-month period remains modest (at 76), some now seem to believe that recovery is in sight – if not yet around the corner.

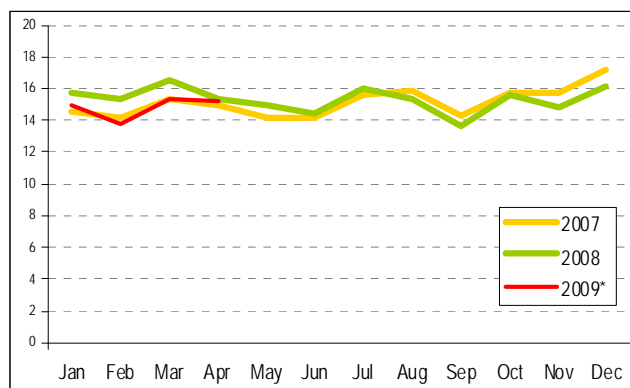
The region suffered a 6% decline in arrivals from January to April and the industry generally expects the decline to continue through the first half of 2009, at least. Oceania has turned in the best performance of all subregions in Asia and the Pacific this year so far, recording a drop in arrivals of 4% through April. This compares with estimated declines of 6% for North-East and South-East Asia and 12% for South Asia.

The first part of the year has been significantly affected by the economic conditions as growth slowed considerably in Asia and consumer and business confidence started to stall. In the short term, much will also depend on developments with regard to the influenza A(H1N1) virus. While the media in Asia have been relatively quiet on the subject, even after WHO raised its alert level to phase 6, or pandemic status, the effects of SARS in 2003 is still vivid in both consumers' and the industry's memories. But any impact will only show up in arrivals for the months of May and June.

International Tourist Arrivals, monthly evolution

Asia and the Pacific

(million)



Source: World Tourism Organization (UNWTO) ©

In the past few months, Asian source markets like China and India have been among the few worldwide showing growth, with most of this for intra-regional destinations. But demand has definitely been dampened by the influenza A(H1N1) outbreak as many people fear not only the virus while travelling but being put in quarantine, either in the destination or once back in their countries. And there are lingering fears surrounding the possible mutation of the virus.

Meanwhile, other factors have also played a significant role in influencing tourism demand in Asia since the beginning of the year. The global economic

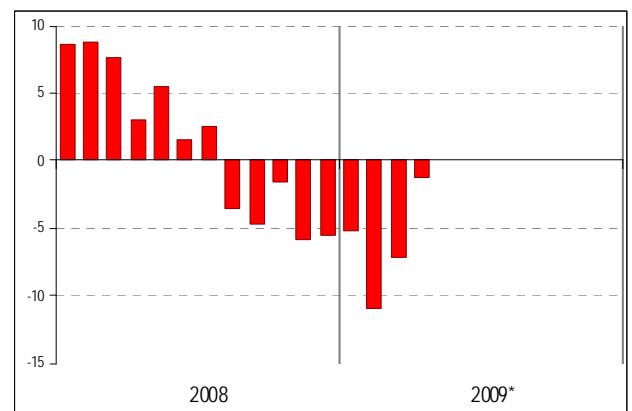
situation, which has resulted in a decline in air traffic to/from and within the region, has led to a number of airlines reducing capacity (and parking aircraft) – IATA reports an 8% decline in capacity through May. Tourism demand has also been negatively affected by factors such as the residual effects of the Mumbai terrorist attacks in late November 2008 and the civil unrest leading to airport closures in Thailand at the end of the year, with some of that activity spilling over into 2009.

Leading destinations in Oceania, Australia (-1%) and New Zealand (-4%) contributed to limiting the overall decline. In New Zealand's case, all major long-haul markets were down, but Australia continued to show positive growth. Experts in Australia say that all sectors have been affected by the global financial crisis and the influenza A(H1N1) outbreak.

International Tourist Arrivals, monthly evolution

Asia and the Pacific

(% change)



Source: World Tourism Organization (UNWTO) ©

Although data is missing for many destinations in the subregion, few Pacific islands recorded positive growth in the first three to four months of 2009. The exceptions were the Cook Islands (+2.5%), Kiribati (+87%), Samoa (+10%) and Vanuatu (+33%). Among those suffering declines, French Polynesia was down 27% (to April) and the Marshall Islands 30%.

Since most countries in North-East Asia achieved double-digit growth in the first few months of 2008, the declines seen for the January through April period this year seem even more dramatic. Nevertheless, two destinations – the Republic of Korea and Taiwan (pr. of China) – bucked the trend with increases in arrivals of 19% and 14%, respectively. In both cases, this was due to strong demand from China, although the Republic of Korea also benefited from increases in other markets, notably Japan and South-East Asia, because of the weak Korean won. Taiwan (prov. of China) has seen numbers from mainland China soar since the market was officially opened up in July 2008.

Elsewhere in the subregion, tourism performance was not so good, with Hong Kong (China) recording a 2% decline, and China and Macao (China) a drop of 9%. Although most experts cite the global economic crisis as the main reason for the drop in arrivals, some of the blame lays with the influenza A(H1N1) outbreak, which has

dampened demand from leading Asian markets since end-April – the main sources of business for these destinations. The Japanese school excursion segment has been particularly hard hit, affecting longer-haul destinations like Australia and New Zealand as well. And data shows it also caused a sharp drop in travel to Hong Kong (China) in May (-16%), reversing the still positive trend in the first four months.

Macao's tourist arrivals have fallen due to a drop in casino business (as a result of the credit crunch) and Beijing's curb on mainland Chinese travelling to the city. Nevertheless, more than 50% of visitors are day-trippers

and these seem to have been the most affected, although the opening of new hotel capacity must have seriously impacted average occupancy and hotel revenues.

South-East Asia's 6% decline is largely attributed to the estimated 15% drop in arrivals in Thailand in the first four months. The Tourism Authority of Thailand (TAT's) recently reduced its forecast to 12 million foreign arrivals in 2009 (compared with 14 million forecast at the start of the year and 14.6 million achieved in 2008). The Thai Hotels Association (THA) says that average hotel occupancy in the first five months of 2009 plunged to 50%, compared with 70% in a 'normal' period.

International Tourist Arrivals by Country of Destination

	Series	Change							Monthly or quarterly data series															
									(% change over same period of the previous year)															
		2000	2005	2007	2008*	06/05	07/06	08*/07	Series	2009*								2008*						
				(1000)			(%)		YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4					
Asia and the Pacific		110,142	153,551	181,890	184,123	8.0	9.7	1.2		-6.1	-7.7	-5.2	-10.9	-7.1	-1.2	8.4	3.4	-1.8	-4.3					
North-East Asia		58,349	85,875	100,926	100,981	7.0	9.8	0.1		-5.6	-7.5	-4.7	-9.7	-8.2	-0.2	-11.6	9.8	1.8	-4.5	-5.4				
China	TF	31,229	46,809	54,720	53,049	6.6	9.6	-3.1	TF	-9.0	-11.3	-10.8	-7.9	-14.6	-3.2	-8.2	9.6	-3.0	-9.3	-7.7				
Hong Kong (China)	TF	8,814	14,773	17,154	17,320	7.1	8.4	1.0	TF	-2.5	0.6	7.0	-9.1	3.4	1.5	-16.0	5.3	4.1	-2.2	-2.3				
Japan	VF	4,757	6,728	8,347	8,351	9.0	13.8	0.0	VF	-27.0	-27.2	-18.4	-41.3	-22.3	-19.7	-34.0	10.6	9.3	-2.0	-16.0				
Korea, Republic of	VF	5,322	6,023	6,448	6,891	2.2	4.8	6.9	VF	18.7	24.3	25.3	25.7	22.2	20.8	0.8	12.0	6.3	4.0	5.9				
Macao (China)	TF	5,197	9,014	9,621	10,605	18.5	-9.9	10.2	TF	-9.1	-8.3	1.0	-17.0	-8.3	0.5	-21.1	17.3	16.7	7.4	1.0				
Taiwan (pr. of China)	VF	2,624	3,378	3,716	3,845	4.2	5.6	3.5	VF	13.9	2.2	-6.9	-3.8	15.5	48.1	16.4	8.3	2.9	4.2	-0.8				
South-East Asia		36,076	48,543	59,662	61,617	9.4	12.3	3.3		-6.3	-7.1	-4.3	-13.0	-4.3	-3.6		7.2	6.6	2.6	-3.0				
Cambodia	TF		1,333	1,873	2,001	19.4	17.7	6.8	TF	-4.4	-5.5	-3.8	-9.2	-3.5	-0.1		16.2	9.2	7.4	-4.6				
Indonesia	TF	5,064	5,002	5,506	6,234	-2.6	13.0	13.2	TF(1)	-2.4	0.0	8.0	-9.4	1.8	-10.0		15.7	8.1	13.1	16.2				
Malaysia	TF	10,222	16,431	20,973	22,052	6.8	19.5	5.1	TF	3.4	2.2	5.1	-7.4	8.6	7.0		1.2	3.9	8.2	7.5				
Myanmar	TF	208	232	248	193	13.5	-5.9	-22.1	TF	-1.1	-0.4	6.6	1.7	-8.1	-3.8		-30.6	-27.4	-39.4	24.0				
Philippines	TF	1,992	2,623	3,092	3,139	8.4	8.7	1.5	TF								8.5	5.2	-0.8	-6.3				
Singapore	TF	6,062	7,079	7,957	7,778	7.2	4.9	-2.2	VF	-12.1	-13.6	-12.8	-15.1	-13.1	-6.1	-13.0	6.8	-0.2	-4.5	-7.8				
Thailand	TF	9,579	11,567	14,464	14,584	19.5	4.6	0.8	TF	-14.8	-15.8	-11.9	-23.2	-12.1	-11.2		12.9	13.6	-3.4	-18.0				
Vietnam	VF	2,140	3,478	4,229	4,236	3.0	18.0	0.2	VF	-18.8	-16.1	-17.7	-1.4	-26.8	-16.8	-28.5	6.4	10.0	-1.5	-13.8				
Oceania		9,631	10,985	11,202	11,089	0.2	1.7	-1.0		-3.7	-5.8	-2.0	-8.7	-6.5	4.0		1.6	-1.2	-1.8	-2.7				
Australia	VF	4,931	5,499	5,644	5,582	0.6	2.0	-1.1	VF	-1.1	-3.5	2.7	-7.3	-4.9	7.4		0.4	-1.7	-0.4	-2.7				
Cook Is	TF	73	88	97	94	4.4	5.1	-3.0	TF	2.5	1.8	-0.5	4.3	2.0	4.2		0.3	-6.1	-2.8	-2.6				
Fiji	TF	294	550	539	583	-0.9	-1.1	8.2	TF	-24.8		-27.6	-21.7				19.3	7.6	6.8	1.5				
French Polynesia	TF	252	208	218	196	6.5	-1.5	-10.0	TF	-27.4	-26.6	-23.7	-29.8	-26.2	-29.6		-9.4	-7.2	-8.3	-15.1				
Guam	TF	1,287	1,228	1,225	1,140	-1.3	1.1	-6.9	TF	-10.5	-9.1	-9.4	-10.8	-7.1	-4.0	-21.5	-1.8	-1.0	-11.3	-13.3				
Kiribati	TF	5	3	5	..	45.1	6.9	..	VF	87.0	87.0	23.5	62.0	212.0			-19.5	-40.5	-4.4	4.9				
Marshall Is	TF	5	9	7	6	-36.8	24.1	-16.7	TF	-29.7	-20.4	8.8	-44.7	-14.8	-60.9		-26.3	-29.9	14.0	-6.6				
N. Mariana Is	TF	517	498	385	388	-13.9	-10.3	0.8	VF	-5.1	-2.9	2.1	-11.5	1.7	-12.5		1.0	10.0	-2.5	0.8				
New Caledonia	TF	110	101	103	104	-0.2	2.9	0.3	TF	-6.2	-11.3	-5.5	-10.1	-17.4	10.9		3.8	4.6	-5.4	-0.4				
New Zealand	VF	1,787	2,383	2,466	2,459	1.6	1.8	-0.3	VF	-3.6	-7.4	-3.7	-8.5	-9.7	9.2	1.0	4.2	-3.6	-2.1	-1.5				
Palau	TF	58	86	93	..	0.3	7.7	..	TF	-13.5	-11.8	-9.6	-20.2	-4.7	-19.5		2.9	-15.4	-19.7	-4.0				
Papua New Guinea	TF	58	69	104	120	12.2	34.0	15.4	TF	0.7		9.1	-9.1				-1.2	15.7	13.4	10.2				
Samoa	TF	88	102	122	122	13.8	5.6	-0.5	TF	10.1	7.7	3.4	14.1	6.9	16.7		-2.5	0.4	-2.9	2.5				
Vanuatu	TF	58	62	81	91	9.7	18.8	12.3	VF	32.8	32.8	32.5	26.0	42.0			15.8	-6.2	24.2	55.4				
South Asia		6,085	8,147	10,100	10,436	2.08	2.6	3.3		-11.8	-14.1	-17.3	-11.3	-13.5	-2.7	-5.4	9.4	5.6	2.0	-3.3				
Bhutan	TF	8	14	21	28	27.3	21.6	31.2	TF	-7.1	-31.7	25.4	-38.0	-38.0	34.4		41.4	37.6	5.0	37.9				
India	TF	2,649	3,919	5,082	5,367	13.5	14.3	5.6	TF	-10.6	-13.8	-17.6	-10.6	-12.8	-3.4	-1.9	12.2	9.3	8.6	-4.9				
Maldives	TF	467	395	676	683	52.3	12.3	1.1	TF	-10.3	-10.8	-4.8	-13.9	-13.3	-8.8		5.1	2.4	-1.6	-2.1				
Nepal	TF	464	375	527	..	2.3	37.2	..	VF(2)	-7.8	-16.7	-15.8	-16.2	-17.6	15.8	-5.0	16.0	-3.9	-6.2	8.8				
Pakistan	TF	557	798	840	823	12.5	-6.6	-2.0	TF	-10.5	-12.8	-14.3	-7.2	-15.5	-3.5		-5.7	-1.0	-7.0	5.9				
Sri Lanka	TF	400	549	494	438	1.9	-11.7	-11.2	TF	-19.8	-21.3	-32.4	-15.7	-10.5	-12.4	-20.6	0.7	-1.5	-26	-15.6				

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

(1) Foreign arrivals through thirteen selected Ports of Entry

(2) Air arrivals only

Apart from Vietnam (-19%) – highly affected by events in Thailand as a significant part of long-haul travellers uses this country as a gateway to enter Vietnam and other Mekong destinations – and Singapore (-12%), other South-East Asian destinations have all managed to contain their losses, resulting in relatively modest declines in arrivals. For Indonesia (-2%), this was due to positive growth for Bali, now fully recovered from the tragic terrorist attacks in 2002 and 2005. And Malaysia even recorded an increase (+3%) in the first four months. But the general consensus seems to be that demand is well down and not expected to recover in the short term. Hoteliers in Singapore are taking the opportunity of

reducing room inventory so they can remodel and upgrade their room stock in preparation for better times.

South Asia's 12% drop in arrivals is partly attributable to the dramatic 20% decline for Sri Lanka (through May) as the county struggled to limit the damage wrought by the continued unrest and violence. But in terms of overall numbers, India's 11% drop has had a far greater impact. And all other destinations in the subregion recorded negative performances in the first three or four months of this year, some in double digits. Both the Maldives (-10%) and Bhutan (-7%) say their declines are due to a drop in demand from Western markets, notably the UK, Germany, and Italy, as well as Japan in Bhutan's case.

International Tourism Receipts

	US\$					Local currencies, current prices (% on previous year)															
	2000	2005	2006	2007	2008*	Series	06/05	07/06	08/07	2009*							2008*				
										YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4	
	(million)																				
Asia and the Pacific	85,349	135,316	156,948	186,962	207,557																
North-East Asia	39,427	65,340	75,235	85,775	97,507																
China	16,231	29,296	33,949	37,233	40,843	\$	15.9	9.7	9.7	-12.9	-15.4	-19.0	-9.2	-17.2	-10.0	-8.7	13.1	-3.7	-12.9	-4.1	
Hong Kong (China)	5,907	10,294	11,638	13,754	15,300		12.9	18.7	11.0	2.3	2.3						13.9	14.2	14.0	4.0	
Japan	3,373	6,630	8,469	9,334	10,821		34.8	11.6	1.8	-20.5	-22.1	-14.7	-34.2	-17.7	-16.2		10.9	8.3	-1.2	-9.6	
Korea, Republic of	6,834	5,806	5,788	6,138	9,078	\$	-0.3	6.1	47.9	43.1	49.9	63.0	98.6	9.2	22.4		38.7	30.4	28.6	85.9	
Taiwan (pr. of China)	3,738	4,977	5,136	5,213	5,182	\$	3.2	1.5	-0.6	17.5	17.5						-2.7	-1.0	-1.7	2.8	
South-East Asia	26,830	34,546	43,915	55,355	60,831																
Cambodia	304	840	963	1,135	1,221	\$	14.7	17.8	7.6												
Indonesia	4,975	4,522	4,448	5,346	7,375	\$	-1.6	20.2	38.0	-14.5	-14.5						40.9	31.7	37.8	41.6	
Malaysia	5,011	8,847	10,424	14,047	15,277		14.1	26.3	5.5	0.6	0.6						1.3	4.0	8.2	8.8	
Philippines	2,156	2,265	3,501	4,931	4,388	\$	54.6	40.8	-11.0	-35.6	-35.6	-31.5	-38.4	-36.8			-0.5	0.7	-18.7	-22.7	
Singapore	5,142	6,211	7,535	9,162	10,575		15.8	15.3	8.4	0.8	0.8						23.7	7.9	5.1	-0.3	
Thailand	7,489	9,576	13,401	16,669	17,651		31.8	13.3	2.2	-19.0	-19.0						17.2	17.3	0.4	-21.2	
Oceania	14,295	25,745	26,296	32,041	34,095																
Australia	9,274	16,866	17,840	22,298	24,660		7.3	12.5	10.3	11.0	10.3	13.6	7.4	10.4	12.9		11.4	13.2	7.4	9.6	
Marshall Is	3	6	7	5	3																
New Zealand	2,272	5,169	4,738	5,400	4,912		-0.5	0.6	-4.9	-1.5	-1.5						-4.1	-1.0	-6.2	-8.3	
Solomon Is	4	3	4	4	4		26.8	-14.4	1.6								-4.6	-18.3	34.2	-6.5	
Tonga	7	15	16	15	..		11.2	-8.8									196	228			
South Asia	4,797	9,685	11,502	13,790	15,125																
Bangladesh	50	70	80	76	..		22.8	-4.8									12.5	25.3			
Bhutan	10	19	24	30	39	\$	29.4	24.4	30.1								37.3	29.0	11.2	36.3	
India	3,460	7,493	8,634	10,729	11,832		18.4	13.4	16.0	-6.8	-13.2	-15.4	-12.3	-11.9	7.6	8.7	18.2	18.1	16.8	6.5	
Iran	467	1,069	1,452	1,486	..	\$	35.9	2.3	..								2.2	2.5	2.3		
Maldives	321	287	512	602	636	\$	78.8	17.6	5.6												
Nepal	158	132	128	198	336		-1.1	41.8	77.9	24.8	25						111	90.5	38.7	82.4	
Pakistan	81	182	255	276	245	\$	40.1	8.2	-11.2	-25.0	-25.0	-16.7	-30.4	-28.0			-7.7	-9.0	-10.8	-18.2	
Sri Lanka	248	429	410	385	342		-1.2	0.0	-13.0								-0.1	-3.7	-29.0	-16.0	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2009)

See box at page 2 for explanation of abbreviations and signs used

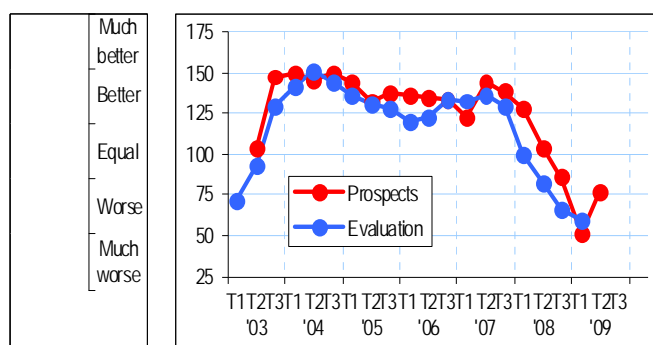
Prospects

Uncertainty reigns. This is clear from the wide range of comments – many conflicting – regarding Asia and the Pacific's tourism prospects over the next four months. The Pacific Asia Travel Association (PATA), a reliable sounding board, believes that the current four-month

period will be “worse than it was last year [when arrivals showed a very modest increase], but better (perhaps) than from January through April 2009”. But this is a marginal call, PATA says, as the signs of some easing in the rate of decline in visitor numbers are very patchy and numbers could still plummet again. This next period also has to factor in the lingering impacts of the influenza A(H1N1) outbreak.

UNWTO Panel of Tourism Experts

Asia and the Pacific



Source: World Tourism Organization (UNWTO) ©

Among the positive developments reported by experts in the region, several stimulus measures aimed at increasing demand have been implemented, and a lot of additional financial resources have been pumped into the marketplace, and this period might see some of those actually pay off. The lifting of restrictions on foreign ownership of travel agencies and tour operators in China should also result in more competitive package tour rates in the future, boosting demand. Hong Kong (China) has lifted visa restrictions for Russians in an effort to stimulate arrivals from that market and the Macao Government, as part of its overall economic stimulus package, is allocating US\$ 12.5 million in subsidies for the tourism industry, including airlines, over a six-month period. Cambodia's Ministry of Tourism has embarked on a major new promotional strategy, involving cross-border cooperation with its neighbours and improved airline access.

Singapore is counting on its usually successful annual event, the Great Singapore Sale in June, to stimulate demand in neighbouring markets, and aggressive marketing by the government of the Republic of Korea, together with a weak won, is expected to continue to generate increased arrivals.

At the same time, eight Asian visitor bureaus have united to boost the continent's market share in the growing global business events industry by relaunching the Asian Association of Convention and Visitor Bureaus (AACVB). A new agenda is being implemented and will be driven by the eight CVBs from China, Hong Kong (China), the Republic of Korea, Macao (China), Malaysia, Philippines, Singapore and Thailand.

Preannouncement

3rd UNWTO/PATA Forum on Tourism Trends and Outlook 15 – 17 November, 2009 Guilin, China

This 3rd edition of the Forum is jointly organised by the World Tourism Organization (UNWTO) and Pacific Asia Travel Association (PATA), hosted by Guilin Municipal People's Government and in collaboration with Hong Kong Polytechnic University.

The forum will provide a platform for governments, industry and academics to analyze the current economic situation and its impact on tourism, with a focus on sharing market intelligence and strategies on response and the way forward.

Against this background, the forum will:

- Analyze the current economic situation and its impact on the tourism sector with a special focus on Asia and the Pacific
- Debate the short-term prospects for international tourism, focusing on major source markets' behaviour and changes
- Identify and explore the long-term key tourism trends that will shape the future of the sector, focusing on the Asia Pacific region.

The two-day Conference will be divided into two sessions:

- The technical session (first day) is aimed at a select audience of practitioners and will provide a platform to exchange views, experiences and practises with regard to the current tourism trends resulting from the on-going economic crisis.
- The plenary session (second day) is open to a broader audience and will focus on practices and recovery strategies adopted by Asia Pacific destinations and the industry at times of adverse economic situations, short- and long-term prospects and benefits, and strategies for future tourism development in the Asia Pacific region.

The forum is aimed at participants from the following areas:

- Senior management and research officials from National Tourism Administrations and National Tourism Organizations
- Practitioners from tourism industries (tour operators, hotels, transport services, telecommunications, financial bodies, consultancy firms, etc)
- Research institutes and universities

For more information:

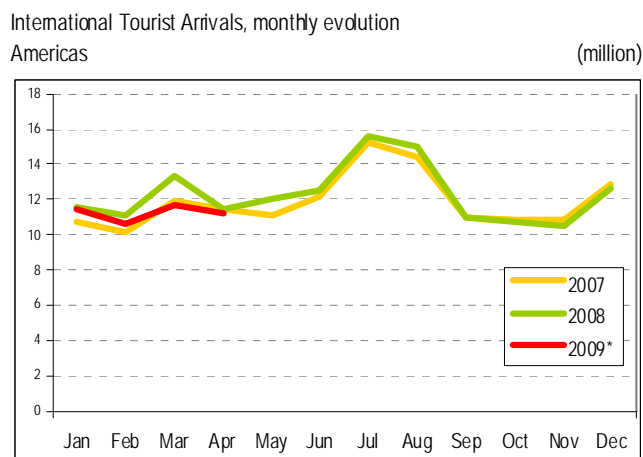
www.unwto.org/asia/activities/en/upcoming.php

The Americas

Results

Preliminary figures for arrivals in the Americas in the first four months of 2009 suggest that tourism in this part of the world is weathering the world economic recession slightly better than in other key regions. Arrivals are estimated to be down 4% on the same period last year, compared with declines of 10% in Europe, 6% in Asia Pacific and 8% in the world as a whole.

Nevertheless, as in other regions, there is a preoccupation throughout the Americas with the economic downturn, and especially with the situation in the USA, which is both the principal source market and the main destination in the region.



Source: World Tourism Organization (UNWTO) ©

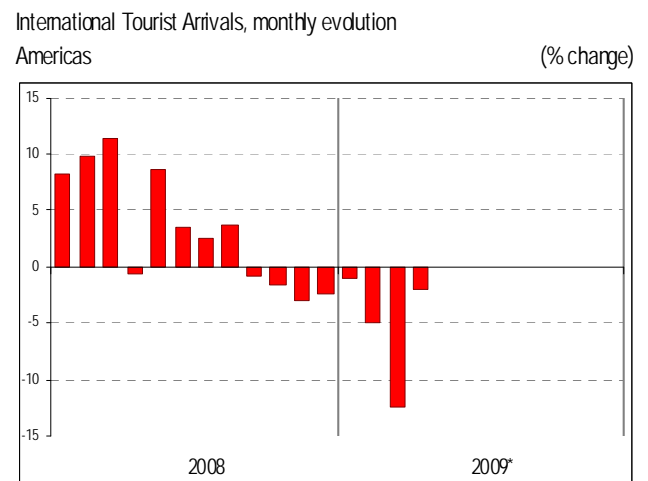
North America (-7%) is the subregion that has been hardest hit, and mainly due to the performance of the USA, which represents nearly 40% of total arrivals in the whole region. Arrivals in the USA were down 14% in the first three months of this year, including a decline of as much as 20% in March (in part due to the Easter holidays effect). Arrivals from Western Europe and Asia Pacific fell considerably over the three-month period. Among the top 20 source markets to the USA, only France, Brazil, China and Argentina showed increases in Q1; the strongest declines came from Mexico, the UK, Sweden, Spain and the Republic of Korea, all down by 20% or more. Few destinations in the USA escaped the fall in demand. New York is now expecting a 5% decline for the full 12 months of 2009 as a result of trends in Q1, and Hawaii's tourism industry has suffered particularly badly. This is due to a number of factors, including: last year's collapse of Aloha and ATA airlines and big cuts in airline capacity generally; the removal by Norwegian Cruise Line of two ships from the inter-island market; and the global financial meltdown, resulting in significant declines in lifetime savings, which has made long-distance leisure travel more difficult.

The USA's neighbours had hoped that a tendency to take holidays closer to home during the recession would work to their benefit, allowing an increase – or at least not

such a strong decrease – in US visits to Canada, Mexico, the Caribbean and Central America. Except in a few cases, this does not seem to be happening: to the extent that US citizens are cutting back on travel, they are very often cutting out trips abroad altogether – US air traffic outbound was down by 9% in the first three months.

Overall, arrivals in Canada were down 5% in the first four months of 2009 (following declines in previous years). US overnight arrivals have gained some ground (+1.6% through April) but same-day trips are still 3% down in spite of the easing in the exchange rate and fuel prices. Travel from some long-haul markets such as China or Germany has recovered but arrivals from the UK and Japan continue to fall.

The year started promising for Mexican tourism in spite of the effects of the economic downturn on both leisure and business travel (in an economy heavily dependent on exports to, and tourism from, the USA); and of reported escalating cartel drug-related violence. But such positive trend has been halted by the influenza A(H1N1) outbreak, which largely closed down the tourism industry for several weeks in end April-May. The impact of the outbreak has not yet shown up in the arrivals statistics (+6% in the first four months of the year, although arrivals in March and April were flat), but comments by UNWTO's Panel of Experts in the region were almost uniformly gloomy. Hotel occupancy and revenue per available room plummeted in late April and May and, although a number of governments – including that of the USA and Canada – had lifted travel advisories warning against travel to Mexico by mid-May, the drop in demand seems to have persisted through to June.



Source: World Tourism Organization (UNWTO) ©

The Caribbean is heavily dependent on the North American and European leisure markets. Yet it seems to have been unable to take advantage of any tendency for US citizens to travel closer to home during the recession, and is suffering in European markets from high air fares and reduced propensities to spend. While there are a number of gaps in coverage, individual destinations have largely reported declines in the first few months of the year, with 12 destinations showing double-digit decreases in arrivals.

International Tourist Arrivals by Country of Destination

International Tourism Arrivals by Country of Destination				Change				Monthly or quarterly data series													
								(% change over same period of the previous year)													
								Series	2009*	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2					Q3	Q4
Series	2000	2005	2007	2008*	06/05	07/06	08*/07	Series	2009*	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4		
				(1000)			(%)														
Americas		128,193	133,335	142,851	147,187	1.9	5.2	3.0		-5.4	-6.4	-1.0	-4.9	-12.4	-2.0	9.8	3.7	2.0	-2.2		
North America		91,507	89,892	95,287	97,795	0.8	5.2	2.6		-6.8	-7.7	-1.9	-4.8	-14.4	-4.1	9.9	3.6	1.3	-2.8		
Canada	TF	19,627	18,771	17,931	17,128	-2.7	-1.8	-4.5	TF	-4.7	-8.2	-3.0	-7.6	-12.8	4.0	-1.9	-4.9	-4.6	-5.6		
Mexico	TF	20,641	21,915	21,370	22,637	-2.6	0.1	5.9	TF	5.9	7.7	14.3	10.8	-0.6	0.2	5.4	2.9	6.5	9.1		
United States	TF	51,238	49,206	55,986	58,030	3.6	9.8	3.6	TF(1)	-14.3	-14.3	-9.1	-11.5	-19.9		15.4	7.6	3.2	-6.0		
Caribbean		17,086	18,821	19,770	20,251	3.4	1.6	2.4		-6.5	-7.5	-2.6	-7.9	-11.2	-3.5	8.9	2.9	-0.5	-3.7		
Anguilla	TF	44	62	78	68	17.5	6.4	-12.1	TF	-21.4		-18.8	-23.5			-13.0	-13.2	-4.3	-16.8		
Antigua, Barb	TF	207	267	262	266	2.2	-4.0	1.4	TF(2)	-14.2	-14.1	-9.8	-14.5	-17.6	-11.3	-18.4	8.8	7.6	-1.8	-9.2	
Aruba	TF	721	733	772	827	-5.2	11.2	7.1	TF	-8.0	-8.0	-2.3	-7.7	-13.3		20.6	9.2	2.0	-2.1		
Bahamas	TF	1,544	1,608	1,528	1,463	-0.5	-4.6	-4.2	TF(2)	-15.2	-16.2	-15.2	-14.7	-17.9	-12.4	3.4	-2.1	-8.9	-11.6		
Barbados	TF	545	548	575	568	2.7	2.1	-1.2	TF	-8.6	-8.6	-7.2	-8.1	-10.3		10.8	-11.1	0.4	-4.2		
Bermuda	TF	332	270	306	264	10.9	2.2	-13.7	TF	-22.4		-17.3	-26.0			-8.9	-12.2	-13.7	-19.7		
Bonaire	TF	51	63	74	74	1.6	16.9	0.0	TF							5.1	12.2	-3.5	-12.2		
Br. Virgin Is	TF	272	337	358	346	5.7	0.5	-3.4	TF	-25.1		-13.8	-36.2			3.6	-3.4	-3.1	-13.3		
Cayman Islands	TF	354	168	292	303	59.3	9.1	3.9	TF	-12.5	-14.3	-9.4	-12.8	-18.8	-6.7	9.0	9.7	7.1	-11.3		
Cuba	TF	1,741	2,261	2,119	2,316	-4.9	-1.4	9.3	VF	2.1	2.0	7.9	1.2	-2.4	1.6	3.7	15.2	14.3	2.9	1.8	
Curaçao	TF	191	222	300	409	5.5	27.9	36.4	TF							47.8	29.8	16.3			
Dominica	TF	70	86	88	..	7.7	-5.3	..	TF		-3.1	6.7	32.5	-37.8	20.4	-6.3	-10.9	-10.2	-2.0		
Dominican Rp	TF	2,978	3,691	3,980	3,980	7.4	0.4	0.0	TF	-3.7	-5.2	-2.4	-6.4	-6.8	-3.2	2.4	6.8	3.2	-4.5	-7.3	
Grenada	TF	129	99	129	124	20.4	8.8	-4.1	TF	-4.6	-4.6	11.9	-9.2	-16.9		-0.4	-7.9	-1.5	-7.4		
Jamaica	TF	1,323	1,479	1,701	1,767	13.5	1.3	3.9	TF	2.0	0.2	4.2	2.2	-4.5	7.8	13.3	3.7	-0.4	-1.2		
Martinique	TF	526	484	503	480	4.0	-0.1	-4.6	TF	-11.1	-11.1	-5.6	-6.5	-20.0		-2.4	-4.3	-7.5	-4.5		
Montserrat	TF	10	10	8	7	-17.8	-2.7	-5.0	TF	-11.4	-12.6	-9.3	-13.6	-14.2	-7.1	-5.7	-7.9	-2.9	-3.8		
Puerto Rico	TF	3,341	3,686	3,687	3,894	1.0	-0.9	5.6	THS(3)	-10.0	-10.0	-4.1	-12.3	-12.9		-0.5	-4.6	-0.2	-4.8		
Saba	TF	9	11	12	12	-3.9	6.0	3.2	TF	1.4	1.9	7.0	-1.1	0.0	0.1	1.9	10.4	4.4	-4.3		
Saint Lucia	TF	270	318	287	296	-4.9	-5.0	2.9	TF	-8.8	-13.7	-7.6	-13.2	-18.9	8.8	-9.0	17.7	0.6	-0.7	-6.6	
St. Maarten	TF	432	468	469	475	0.0	0.3	1.3	TF(2)	-16.1	-16.1	-8.3	-14.1	-24.7		7.6	2.2	5.6	-11.2		
St. Vincent, Grenadines	TF	73	96	90	..	2.0	-8.0	..	TF	-12.9		1.2	-24.2			-16.1	-4.8	-5.3	5.5		
US. Virgin Is	TF	546	582	510	..	-2.1	-10.5	..	VF(2)	-10.1	-12.7	-5.8	-6.2	-23.4	-2.1	6.4	2.4	-5.8	-14.4		
Central America		4,346	6,301	7,752	8,310	9.8	12.0	7.2		-3.7	-4.5	4.5	-6.3	-11.6	-1.1	14.0	8.8	4.3	1.8		
Belize	TF	196	237	252	244	4.5	1.8	-3.1	TF	-7.7		-2.4	-12.4			1.7	-3.2	-4.5	-6.3		
Costa Rica	TF	1,088	1,679	1,980	2,089	2.7	14.8	5.5	TF	-12.0	-12.0	0.0	-17.5	-18.9		18.7	4.7	4.0	-6.7		
El Salvador	TF	795	1,127	1,339	1,385	13.5	4.7	3.5	TF	-22.1	-18.9	-4.6	-18.6	-30.9	-20.6	-33.6	8.8	15.0	-5.6	-1.9	
Guatemala	TF		..	1,448	1,527	..	..	5.4	VF	4.1	3.9	4.6	5.7	1.6	4.6	6.2	3.1	5.8	6.1
Honduras	TF	471	673	831	899	9.8	12.6	8.2	TF	2.5	2.5	5.8	5.8	-3.8		17.7	5.4	3.5	5.7		
Nicaragua	TF	486	712	800	858	5.2	6.8	7.2	TF	10.8	4.5	13.3	8.3	-6.5	37.3	7.0	9.0	6.5	4.2	9.4	
Panama	TF	484	702	1,103	1,308	20.1	30.8	18.6	TF	2.7	3.3	17.2	-4.2	-2.4	0.7	25.8	23.6	17.4	8.5		
South America		15,255	18,322	20,041	20,832	2.7	6.5	3.9		0.2	-2.1	0.5	-2.1	-5.6	10.8	9.3	3.6	7.5	0.0		
Argentina	TF	2,909	3,823	4,562	4,665	9.2	9.3	2.3	TF	-8.9	-8.9					5.2	3.1	5.6	-4.3		
Brazil	TF	5,313	5,358	5,026	5,050	-6.4	0.2	0.5	TF												
Chile	TF	1,742	2,027	2,507	2,699	11.1	11.3	7.7	TF	4.4	0.5	9.8	1.1	-13.6	20.2	12.4	14.7	-1.5	6.9	5.6	
Colombia	VF	557	933	1,195	1,222	12.9	13.5	2.2	VF	11.2	7.5	9.6	5.6	7.3	24.2		3.4	2.6	6.9	-3.7	
Ecuador	VF	627	860	937	1,005	-2.2	11.5	7.2	VF	-1.2	-3.7	-5.0	-0.1	-5.4	10.4	-3.8	7.0	4.2	8.5	8.9	
Guyana	TF	105	117	131	133	-2.7	15.9	1.0	TF	-0.3	-7.1	-10.3	-5.5	-5.9	11.3	7.9	6.0	-15.9	-2.9	23.3	
Paraguay	TF	289	341	416	428	14.0	7.0	3.0	TF	5.6	3.7	1.2	1.9	9.5	12.5	-12.0	1.4	17.1	2.4		
Peru	TF	828	1,571	1,916	2,058	9.6	11.4	7.4	TF	1.5	0.2	0.7	-1.8	1.9	6.0	12.5	13.2	9.1	-4.4		
Uruguay	TF	1,968	1,808	1,752	1,921	-3.2	0.2	9.7	TF	7.3	1.4	1.4	2.6	-0.6	47.6	18.0	3.3	12.9	2.0		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

(1) Excluding Mexican visitors not travelling beyond the 25 miles U.S. border zone

(2) Non-resident air arrivals only

(3) Non-resident hotel registrations only

International Tourism Receipts

	US\$					Local currencies, current prices (% on previous year)															
	2000	2005	2006	2007	2008*	Series	06/05	07/06	08/07	2009*						2008*					
										YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4	
	(million)																				
Americas	130,801	145,241	154,506	171,286	188,067																
North America	101,472	107,363	112,538	124,897	138,485																
Canada	10,778	13,760	14,642	15,333	15,106		-0.4	-0.8	-2.1	-2.2	-2.2							0.8	-3.4	-3.5	-0.6
Mexico	8,294	11,803	12,177	12,852	13,289	\$	3.2	5.5	3.4	-7.6	-8.5	-7.5	-7.5	-10.5	-4.1			5.7	6.8	4.8	-3.8
United States	82,400	81,799	85,720	96,712	110,090	sa	4.8	12.8	13.8	-13.2	-11.9	-6.7	-9.8	-18.9	-17.1			24.2	21.7	13.9	-2.8
Caribbean	17,156	20,811	22,224	23,226	23,516																
Anguilla	56	86	107	109	..		25.0	1.9										-4.0	-13.3	2.6	
Antigua, Barb	291	335	327	338	..		-2.5	3.4										8.6	4.7	-2.3	
Aruba	815	1,094	1,080	1,255	1,412		-1.3	16.3	12.5									22.9	21.4	9.8	-2.2
Bahamas	1,734	2,069	2,056	2,187	2,153		-0.6	6.4	-1.6									4.9	-4.0	-2.4	-5.0
Barbados	723	897	1,057	1,199	1,192		17.8	13.5	-0.6									7.4	7.4	-5.7	-11.5
Bermuda	431	429	494	568	431		15.2											-15.1	-20.0	-28.1	-29.8
Bonaire	59	87	91	110	121		4.6	20.5	10.5									30.6	9.1	-2.7	2.3
Cayman Islands	559	356	513	479	353		44.1														
Cuba	1,737	2,150	2,127	2,141	2,267					-13.7	-13.7							23.6	15.8	6.9	-5.9
Curaçao	189	244	277	327	378		13.6	18.1	15.6									33.6	18.7	19.0	-3.0
Dominica	48	56	72	74	..		28.9	3.9										10.4	-0.6	5.5	
Dominican Rp	2,860	3,518	3,917	4,064	4,176	\$	11.3	3.8	2.8	-7.9	-7.9							3.3	6.3	1.8	-1.0
Grenada	93	71	94	110	..		31.4	17.3										5.5	-12.3	-8.4	
Jamaica	1,333	1,545	1,873	1,897	1,872	\$	21.2	1.3	-1.3									0.4	-12.3	-3.2	-1.6
Montserrat	9	9	8	7	..		-16.5	-0.8										-5.8	-9.6	-4.5	
Puerto Rico	2,388	3,239	3,369	3,414	3,645	\$	4.0	1.3	6.8												
Saint Lucia	281	356	294	317	..		-17.4	8.0										15.6	4.9	2.8	
St. Kitts-Nevis	58	110	132	126	..		19.4	-4.2										17.1	3.6	-6.8	
St. Maarten	512	659	651	662	663		-1.1	1.6	0.3									4.8	-4.3	3.6	-3.3
St. Vincent, Grenadines	82	105	113	111	..		7.8	-1.8										-33.3	-34.3	-22.3	
Central America	2,958	4,668	5,383	6,217	6,798																
Belize	111	214	260	291	281		21.7	11.7	-3.3									-2.0	-2.9		
Costa Rica	1,302	1,671	1,732	2,029	2,250	\$	3.7	17.1	10.9									25.0	10.8	10.1	-2.2
El Salvador	217	543	793	847	894	\$	46.0	6.8	5.6									18.0	30.3	8.1	-28.9
Guatemala	482	791	919	1,055	1,068	\$	16.1	14.8	1.3									1.9	-2.8	2.4	3.3
Honduras	260	463	488	557	621	\$	5.4	14.0	11.5									16.4	1.0	15.6	14.0
Nicaragua	129	206	231	255	276	\$	11.8	10.6	8.3	16.1	16.1							16.9	6.0	5.0	5.2
Panama	458	780	960	1,185	1,408		23.1	23.4	18.8	7.2	7.2							17.0	22.6	21.3	15.3
South America	9,215	12,400	14,361	16,946	19,268																
Argentina	2,904	2,729	3,344	4,314	4,633	\$	22.5	29.0	7.4	-11.5	-11.5							3.0	17.1	27.3	-4.9
Bolivia	68	239	244	292	275	\$	2.3	19.6	-5.9									5.7	5.7	-15.1	-15.1
Brazil	1,810	3,861	4,316	4,953	5,785	\$	11.8	14.8	16.8	-12.5	-11.5	-16.7	-12.5	-4.7	-11.6	-17.0		20.7	17.0	22.4	7.9
Chile	819	1,109	1,213	1,478	1,757	\$	9.4	21.8	18.9	2.6	2.6							33.6	33.9	11.9	3.8
Colombia	1,030	1,222	1,554	1,669	1,844	\$	27.2	7.4	10.5									10.1	10.0	16.7	5.5
Ecuador	402	486	490	623	763	\$	0.8	27.3	22.4									22.0	20.0	22.5	24.9
Paraguay	73	78	92	102	105	\$	17.9	11.3	3.1									1.2	9.6	-12.3	16.3
Peru	837	1,308	1,570	1,723	1,991	\$	20.0	9.7	15.6	3.5	3.5							20.1	18.6	15.3	9.1
Uruguay	713	594	598	809	1,042	\$	0.6	35.3	28.9									23.7	5.1	48.2	37.4
Venezuela	423	650	768	817	895	\$	18.2	6.4	9.5												

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2009)

See box at page 2 for explanation of abbreviations and signs used

Overall arrivals in the Caribbean are estimated to have fallen by 6%. The main reasons given are sharp falls in airline capacity as well as in cruise visits. The most popular destinations have fared slightly better, with Cuba and Jamaica even recording a 2% growth from January to April and May respectively. Among the other big destinations, arrivals in the Dominican Republic fell 4% through May and those in Puerto Rico fell by 10% in the first three months of this year.

Tourism in Central America through 2008 was riding high on the world economic boom and the regional integration associated with the formation of the Central American Free Trade Area (DR-CAFTA). But with the economic downturn and political and social unrest in some countries, trends in the first months of this year have been very mixed, resulting in an overall 4% decline through April. There were sharp declines in two of the most visited destinations, Costa Rica (-12%) and El Salvador (-22%) – impacted by a strong decline of arrivals from nationals residing abroad – but modest increases in the other countries except Belize. Nicaragua bucked the trend with an 11% growth through May benefiting from the elimination of visa requirements for nationals from neighbouring Costa Rica and currency depreciation.

South America is the only subregion in the Americas – and the only subregion in the world apart from North and Sub-Saharan Africa – to resist the downward trend. Arrivals were flat in the first four months of the year, with a marked acceleration in April (+11%) that can partly be ascribed to the incidence of Easter in April this year. But this average disguises some marked variations.

Given the easing of their exchange rates, many of the leading destinations might have expected a recovery in long-haul arrivals in recent months, but this has been prevented by the caution of consumers in North America and Europe about committing themselves to long-haul, and therefore more expensive destinations. Most countries are reporting that it is domestic and intra-regional demand that is sustaining growth. This applies particularly to Brazil, whose economy seems to be coming through the recession relatively better than others. The increasingly popular North-East region of the country for example is reporting a continued increase in domestic demand. Chile (+4% through May), which has achieved notable success in recent years with nature- and adventure-based attractions for long-haul visitors, has seen a decline in the long-haul market. However, this has been more than balanced by Chileans choosing to take their holidays within Chile this year, and by the continued growth in intra-regional travel (including a reversal in the previous decline in arrivals from Argentina).

Uruguay (+7%) and Paraguay (+6%) have also seen a continued increase in arrivals from Brazil and a recovery in arrivals from Argentina. Bolivia has been less favoured, with social and political tensions and reports of dengue fever in the west of the country. Peru (+1.5%) and Ecuador (-1%) also report diminishing interest from North America and Europe, but arrivals in Colombia have continued to

grow (+11%), with notable success in adventure and cruise products.

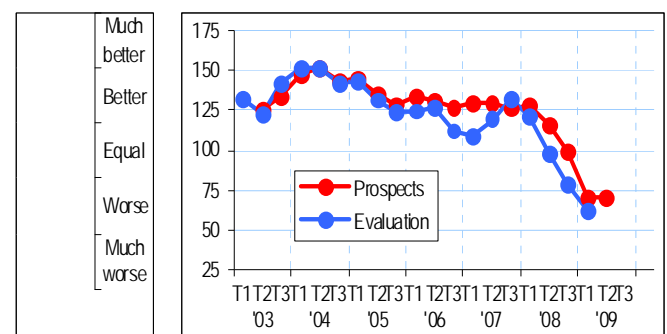
The only destination in South America which has so far reported a significant decline is Argentina (-9% in Q1) mostly due to the important drop in arrivals from North America and Europe. Argentina had sustained an extended increase in arrivals based on the regional prosperity and an extraordinarily favourable exchange rate, but these factors have been somehow eroded.

Prospects

The decline in spending power in mature North American and European markets has inevitably undermined growth for the Americas region overall, even for countries more dependent on business from neighbouring markets such as Central and South America. And this has been compounded by political and security unrest. Still South America has one of the best performances. Positive developments also include new and refreshed hotel capacity in many Caribbean destinations such as Jamaica and the permission given by the US Administration for unlimited travel to Cuba by Cuban Americans.

UNWTO Panel of Tourism Experts

Americas



Source: World Tourism Organization (UNWTO) ©

In contrast to the situation in most of the region, there is a general sense of optimism in much of South America, which hopes to come out of a relatively shallow recession fairly quickly – an idea which is encouraged by the recent improvement in the commodities prices on which so many countries in the area depend. Consumer spending in many of these countries is still rising. But given the risk that the recession in North America and Europe might be more prolonged, continued growth will have to come mostly from domestic and short-haul markets, as it has in recent months. Countries on the west coast of South America are also looking for a possible recovery in the prospects for travel from Asia, with which they have growing economic relations. This seems unlikely in the short term as most outbound travel growth from key Asian sources has been to Asian destinations this year. But it is worth noting that China has overtaken the USA as Brazil's most important export market which will surely fuel business traffic between the two countries.

There has been a good deal of media attention on the upturn in consumer confidence in the USA in recent months, related to the popularity of President Obama and optimism about his team's economic policies. This contrasts sharply with the warnings from many economists and industry leaders that, whatever the latest figures for GDP, asset prices and industrial production, the pressures on consumers will continue to intensify.

In May, the US Travel Association (UST) said that Americans are expected to take 322 million domestic leisure person-trips during June, July and August 2009. This represents a decline of only 2.2% on the 329 million trips taken in the same period in 2008, which suggests that the recovery in consumer confidence mentioned above may sustain leisure travel through the peak summer season, at least domestically. However, coupled with the recent monthly arrivals trends in neighbouring countries, it also suggests that Americans, cautious about their employment and earnings prospects, will tend to take their holidays within the USA. Seemingly, not even neighbouring countries, let alone long-haul destinations, will benefit.

The introduction of the latest phase of the Western Hemisphere Travel Initiative (WHTI) might also discourage outbound travel to neighbouring destinations. It means that Americans who want to cross back over the border after trips to Mexico and Canada must now show passports or specially issued identification cards. Air travellers have had to show passports when returning from bordering nations since 2006, but complaints from the travel industry – and a backlog of passport applications – prompted a delay in the requirement for those arriving by land or sea.

On the positive side, however, is the news that the US House of Representatives has passed legislation that will help the USA attract more international visitors with an improved visa programme. The legislation, HR 2410 – the 'Foreign Relations Authorization Act' – includes a provision that will allow the secretary of state to conduct a two-year pilot programme that uses secure, remote video-conferencing technology to conduct tourist visa interviews. The result, proponents argue, will be a visa process that is more convenient for foreign travellers. Also good news is the fact that the Senate recently agreed to create a tourism bill based on a proposed measure that would create a private organisation to promote the USA as a tourism destination abroad. The company would be funded by private contributions matched by up to US\$ 100 million a year from the federal government. The bill also would establish assessments, including a US\$ 10 per-trip fee on foreign travellers, to help pay for the government's matching funds. It should be noted that, while generally in favour of the proposal, many in the industry are against the plan to create yet another organisation to manage the process.

Canada, for now, expects no significant improvement in arrivals in the next few months, and is particularly worried about the effects of the US Government's implementation of the final phase of the WHTI on cross-

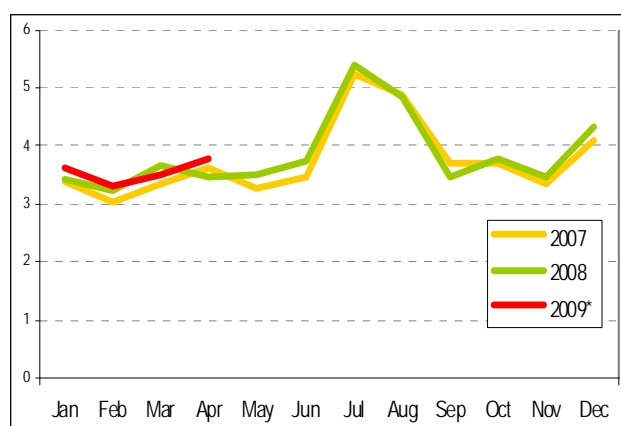
border traffic from the USA. Meanwhile, the Mexican tourism authorities and inbound travel trade are making great efforts to allay fears and promote the destination in the aftermath of the initial A(H1N1) panic but, given the poor immediate prospects for a recovery in travel from the USA and Europe, they face an uphill struggle. Many Panel experts throughout the region – indeed, the whole world – share Mexico's concerns about the possible evolution of influenza A(H1N1).

Africa and the Middle East

Results

As is often the case, there are a large number of gaps in arrivals data for Africa and the Middle East for the four months under review, so this means that current trends are somewhat approximate and may well change over time. For the moment, Africa is the only region in the world to record an increase in arrivals this year to date (+3% through April), with North Africa up 6% as against a 2% rise for Sub-Saharan Africa. At the other extreme, the Middle East is showing a decline so far of 18%.

International Tourist Arrivals, monthly evolution
Africa (million)



Source: World Tourism Organization (UNWTO) ©

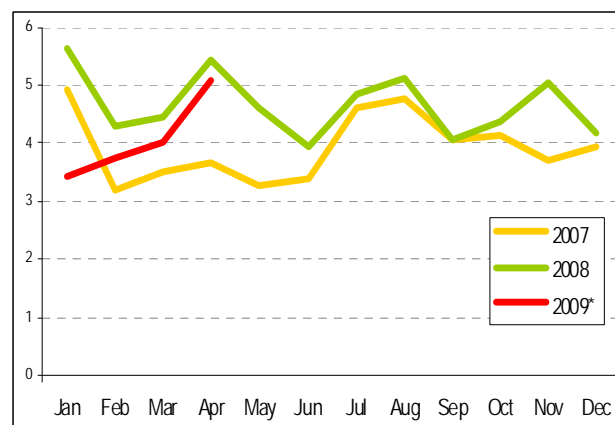
The much better-than-average performance of Africa is reflected in the relatively positive evaluation given by UNWTO's Panel of Experts in the region – the second time this year that they have rated the previous period's performance more enthusiastically than experts in any other region. And, while still negative, they are relatively bullish about prospects for the months of May through August, perhaps suggesting that they feel less concerned by either the global economic crisis or the influenza A(H1N1) outbreak than industry players in other parts of the world.

Middle East experts, on the other hand, are a lot less enthusiastic about the region's tourism performance so far this year, yet they remain more optimistic (or rather, less pessimistic) than experts in any other region except Africa about the outlook for the current four-month period.

North Africa's strong performance is attributable to Morocco's 10% increase from January to April, with the Easter holidays in Europe boosting arrivals in April by 24%. Morocco's appeal as a short-break and main holiday destinations has been sustained due to new resort development, attractive prices (at least, in comparison to those in eurozone destinations) and strong government support of the industry. As an example, the government has set aside more than US\$ 37 million for promotions and to help attract new airlines to the country. Morocco saw growth in arrivals from all markets, except the UK, and a

significant 25% increase in arrivals of Moroccans residing abroad. Tunisia enjoyed 1% growth in the first five months, and 9% in April (also thanks to Easter). The government is focusing on a long-term tourism strategy aimed at a higher degree of diversification of the country's tourism products and markets.

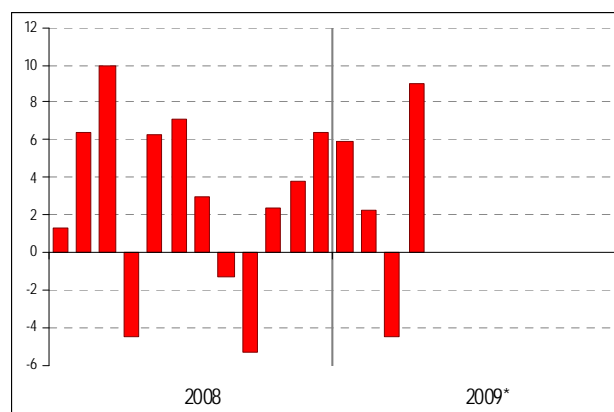
International Tourist Arrivals, monthly evolution
Middle East (million)



Source: World Tourism Organization (UNWTO) ©

Subsaharan Africa's 2% increase through the month of April is an estimate based on trends from only a few countries. There is a lack of full data for the four months for all the leading destinations with the exception of Kenya, whose arrivals count (+59%) reflects the strong bounce-back from the low levels to which they plummeted last year as a result of post-election unrest. For South Africa (+2%), 2009 data is only available for January and February. Experts nonetheless report that the weakening of the rand has made it easier to sell the destination, although it is more expensive for marketing abroad. And increased competition is being felt from other countries in the region and elsewhere.

International Tourist Arrivals, monthly evolution
Africa (% change)



Source: World Tourism Organization (UNWTO) ©

Among the scant news available for other destinations in the subregion, Swaziland reports a drop from long-haul markets but sustained demand from regional sources. Senegal says that business travel continues to be good but that leisure travel demand is down. And Mauritius

highlights the fact that its 10% drop in arrivals to March masks widely differing performances from one market to another. Number one source France was only down 2%, for example – much less than for other European source markets – while Asian arrivals fell by 21%.

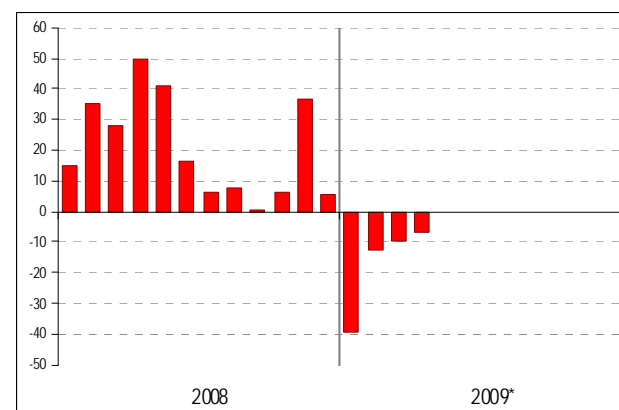
The leading destinations in the Middle East both report declines: Egypt's arrivals fell by 10% through the month of May, while Saudi Arabia's were down as much as 60% in Q1. Sun and beach tourism is the sector that has been hit hardest in Egypt, with Red Sea resorts such as Sharm-el-Sheikh suffering declines in occupancy rates of more than 10 percentage points. In sharp contrast, Lebanon's tourism is continuing to recover strongly. After a 31% increase in arrivals in 2008, they continued to rise through the month of May this year, by more than 69%. In addition to the development of new tourism products and stepped-up promotions, the country is benefiting from a huge rise in demand from the Lebanese Diaspora and

regional Arab markets, which has particularly boosted rural tourism.

International Tourist Arrivals, monthly evolution

Middle East

(% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by Country of Destination

	Series	Change						Monthly or quarterly data series												
		2000	2005	2007	2008*	06/05	07/06	08*/07	(% change over same period of the previous year)											
									Series	2009*							2008*			
									YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4	
		(1000)						(%)												
Africa		27,886	37,279	45,107	46,960	11.1	8.9	4.1	3.1	1.1	5.9	2.3	-4.5	9.0		6.7	3.6	1.0	6.2	
North Africa		10,240	13,911	16,349	17,223	8.4	8.5	5.4	6.4	2.2	5.3	5.2	-2.5	16.6		10.6	7.5	1.0	7.3	
Morocco	TF	4,278	5,843	7,408	7,879	12.2	12.9	6.4	TF	9.8	4.4	7.9	7.6	-0.5	23.9	14.4	10.5	1.2	5.4	
Tunisia	TF	5,058	6,378	6,762	7,049	2.7	3.2	4.2	TF	1.3	-0.9	1.9	2.1	-5.0	8.8	-1.1	6.2	4.8	0.6	9.5
Subsaharan Africa		17,646	23,368	28,758	29,737	12.8	9.1	3.4	1.7	0.7	6.1	1.2	-5.4	5.0		5.2	1.3	1.0	5.8	
Angola	TF	51	210	195	294	-42.2	60.4	51.0	TF							77.4	30.1	59.7	39.3	
Cape Verde	TF	115	198	267	285	22.2	10.4	6.7	TF											
Gambia	TF	79	108	143	147	15.7	14.3	2.9	TF	-32.4	-32.4	-29.7	-49.5	-6.8		32.2	-8.6	-8.6	-22.8	
Guinea-Bissau	TF		5	30	38	133	159	26.4	TF							65.8	43.9	10.2	-13.8	
Kenya	TF	899	1,536	..	..	7.0	..	..	VF(1)	59.3	65.5	41.7	113.8	55.2	39.1	-49.2	-33.2	-28.6	-13.5
Lesotho	TF		..	292	285	..	-15.7	-2.5	VF							-5.8	-16.1	-15.6	28.5	
Mali	TF	86	143	164	190	6.9	7.4	15.9	THS											
Mauritius	TF	656	761	907	930	3.6	15.1	2.6	TF	-9.9	-9.9	-3.7	-13.5	-13.3		7.2	3.2	2.7	-2.2	
Senegal	THS/TF	389	769	875	..	12.6	1.0	..	TF	-6.8	-8.1	-8.0	-11.6	-4.5	-2.5	0.7	-0.6	-3.5	-0.8	
Seychelles	TF	130	129	161	159	9.3	14.7	-1.4	TF	-9.0	-14.2	-12.1	-15.5	-14.7	-4.1	4.9	7.0	2.3	-4.1	-9.7
Sierra Leone	TF	16	40	32	36	-15.8	-5.1	12.5	TF											
South Africa	TF	5,872	7,369	9,091	9,592	13.9	8.3	5.5	VF	-2.2	-2.2	5.8	-2.9	-9.6		12.0	3.8	1.1	5.7	
Swaziland	THS	281	839	870	..	4.1	-0.4	..	VF	-0.8	-0.8	7.8	0.3	-9.9		-3.7	-8.0	-4.4	1.7	
Togo	THS	60	81	86	74	16.5	-8.6	-14.0	THS											
Middle East		24,866	37,856	47,048	55,609	8.4	14.6	18.2		-18.1	-22.4	-39.5	-12.9	-10.0	-6.6	24.3	35.8	4.8	15.5	
Egypt	TF	5,116	8,244	10,610	12,296	4.9	22.7	15.9	VF	-9.5	-13.4	-12.4	-13.2	-14.3	-2.4	-6.0	25.1	22.6	15.1	3.7
Jordan	TF	1,580	2,987	3,430	3,729	8.0	6.4	8.7	TF	2.7	-0.5	-2.6	-0.8	1.7	10.0	-14.9	2.4	19.1	26.3	
Lebanon	TF	742	1,140	1,017	1,333	-6.7	-4.3	31.0	TF	69.2	53.6	22.7	84.9	57.5	64.2	126.8	7.3	20.9	43.8	39.4
Oman	THS/TF	571	1,114	1,124	1,273	19.9	-15.9	13.3	THS											
Palestine	THS	310	88	264	370	39.8	115	40.0	THS	-10.4	-10.4	29.9	13.0	-44.8		75.2	77.4	-4.7	41.8	
Saudi Arabia	TF	6,585	8,037	11,531	14,757	7.3	33.8	28.0	TF	-60.1	-60.1	-79.5	-49.0	-20.6		53.6	75.1	-21.8	27.0	
Syrian Arab Republic	TF	2,100	3,571	4,158	5,430	18.5	-1.7	30.6	VF	2.1	2.1					11.2	23.6	41.7	29.2	
Uhtd Arab Emirates	THS	3,907	7,126	..	..	..	..	..	THS(2)	3.0	3.0					5.7	9.7	2.2	14.5
Yemen	THS	73	336	379	404	13.8	-0.8	6.6	THS							12.9	-12.3	6.1	20.6	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2009)

See box at page 2 for explanation of abbreviations and signs used

(1) Tourist arrivals in the International Airports of Jomo Kenyatta, Mobassa and Moi, as well as by Cruise Ships

(2) Dubai only

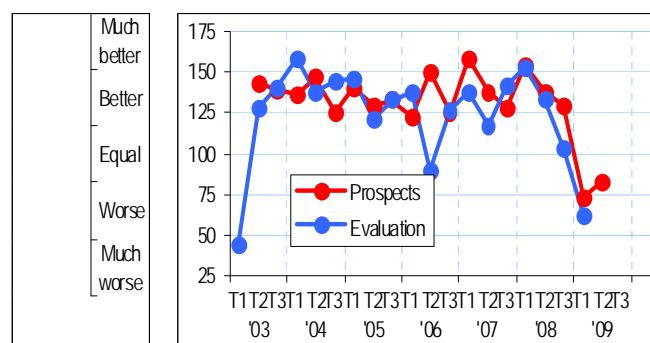
Jordan's 3% increase masks a drop in demand for corporate meetings and conferences. But this gap has been filled to some degree by new leisure markets, including religious/pilgrimage tourism. There is no data available for the United Arab Emirates but Dubai reports a 3% increase in Q1 – hoteliers account for a drop in corporate travel business, while leisure package tours are reportedly doing quite well as a result of low rates and big discounts. Cruise arrivals in Dubai are also reported to be up 25% on 2008.

Prospects

If the sentiment of the experts from the Middle East/Africa is an accurate reflection of things to come, prospects for both regions over the period May through August are better than for other parts of the world. However, there are a number of uncertainties, not least due to the fact that Ramadan falls much earlier this year, starting on 20 August, which will undoubtedly impact negatively on demand before the end of the current review period on the Middle East and North Africa – particularly for destinations depending heavily on intra-regional markets.

UNWTO Panel of Tourism Experts

Middle East



Source: World Tourism Organization (UNWTO) ©

International Tourism Receipts

	US\$					Local currencies, current prices (% on previous year)															
	2000	2005	2006	2007	2008*	Series	06/05	07/06	08/07	2009*						2008*					
										YTD	Q1	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4	
	(million)																				
Africa	10,440	21,843	24,833	29,002	30,194																
North Africa	3,822	7,037	8,710	10,218	10,640																
Morocco	2,039	4,621	5,967	7,162	7,148		28.1	11.8	-5.6	-18.7	-21.0	-19.5	-24.3	-19.8	-12.3		-0.9	9.3	-8.5	-17.6	
Sudan	5	89	252	262	331	\$	183	3.7	26.3								8.6	22.5	67.4	12.0	
Tunisia	1,682	2,143	2,275	2,575	2,932		8.9	9.0	9.5	2.9	2.9						16.3	3.3	10.1	10.7	
Subsaharan Africa	6,618	14,807	16,123	18,784	19,554																
Botswana	222	562	537	546	553		9.2	6.9	12.6												
Cape Verde	41	127	228	303	350		77.5	21.6	8.0	-21.8	-21.8						18.7	18.3	4.6	-7.1	
Ethiopia	57	168	162	176	..	\$	-3.6	8.8	..								87.1	212	194		
Kenya	283	579	687	917	752	\$	18.7	33.3	-17.9	-6.5	-6.5						-34.2	-19.2	-3.2	-11.2	
Lesotho	23	31	36	43	33		24.7	23.5	-10.0												
Mauritius	542	871	1,007	1,299	1,449		24.3	27.4	1.3	-15.6	-14.1	-18.9	-12.3	-9.8	-20.3		10.7	14.0	-0.2	-15.2	
Mozambique	74	130	140	163	190	\$	7.8	17.0	16.3								39.3	33.7	38.8		
Namibia	160	348	384	434	378		17.6	17.6	2.1								-15.0	9.2	19.1	1.0	
Reunion	296	442	335	447	..	€	-24.9	22.1									6.1	6.1			
Seychelles	139	192	228	285	258		19.0	51.7	28.1								96.7	49.0			
Sierra Leone	10	64	23	22	65		-63.2	-3.6	195.0												
South Africa	2,675	7,327	7,875	8,418	7,609	sa	14.4	11.2	6.0	3.1	3.1						7.6	6.9	6.5	3.0	
Middle East	17,405	27,375	29,923	34,661	45,027																
Egypt	4,345	6,851	7,591	9,303	10,985	\$	10.8	22.6	18.1	-17.2	-17.2						39.3	42.6	15.2	-10.0	
Jordan	723	1,441	2,060	2,311	2,943		43.0	12.2	27.5	2.5	2.5						-3.9	19.1	41.2	49.4	
Kuwait	98	164	203	222	257		22.9	6.8	9.5												
Saudi Arabia	..	5,424	4,961	5,228	9,720		-8.6	5.4	86.1	-39.9	-39.9	-72.3	14.7	12.2			34.1	170	29.8	27.5	

Source: World Tourism Organization (UNWTO) ©

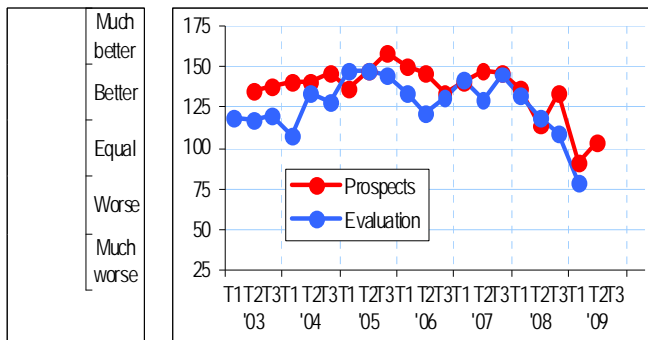
(Data as collected by UNWTO January 2009)

See box at page 2 for explanation of abbreviations and signs used

As in other parts of the world, airline performance is a major concern. Until now, the Middle East has been the only world region to report, according to IATA, an increase in air capacity (+11% through May) which has strongly eroded load factors. Nonetheless, there are no major indications of future capacity cuts – Emirates for example is reported to be adding 18% seat capacity this year. So some subregions may benefit. In a recently published report on Middle East Aviation, the Centre for Asia Pacific Aviation shows it is also fairly bullish about the region's recovery prospects, maintaining that the aviation sector remains vibrant. In addition, hotel groups say they are still firmly committed to the region. However, in Africa, Namibia expects a 20% drop in arrivals as a result of Air Namibia's announced closure of its direct service to London from May.

UNWTO Panel of Tourism Experts

Africa



Source: World Tourism Organization (UNWTO) ©

As the northern hemisphere summer approaches booking trends suggest that the next few months could prove slightly more successful. New excavations in Egypt, especially the discovery of what is now believed to be the tomb of Cleopatra and Mark Anthony, are also generating a lot of interest.

The June 2009 Confederations Cup, seen as the pre-FIFA World Football Cup event in South Africa, should boost arrivals for the destination, as should the British Lions' Rugby Tour, and Algeria is counting on the positive impact of the Pan-African Cultural Festival it is hosting in Algiers, for which visitors from 48 countries have already registered.

In focus

Industry trends

This section covers issues related to different clusters of the tourism sector such as transport and accommodation. For that purpose, the *UNWTO World Tourism Barometer* counts on the regular collaboration of UNWTO's Affiliate Members. Comprising private sector representatives, educational institutions, tourism associations and local tourism authorities, the Affiliate Members are key players in the promotion of public-private partnerships that support UNWTO's overall aims – promoting responsible, sustainable and universally accessible tourism and contributing to economic development and international understanding, with particular attention paid to the interests of developing countries (for further information see the UNWTO website at www.unwto.org/afiliados).

The Secretariat is also pleased to count on the participation of Deloitte in the section dedicated to the hospitality industry. The objective for future editions is to broaden the scope of the *In focus* section and expand the collaboration to other organisations and sectors, such as the meetings industry, the cruise sector, etc.

UNWTO is the only UN agency which groups the public and private sector among its Members. The Affiliate Members provide:

- A unique networking with ministers and senior decision-makers.
- Specialized events dealing with priority areas of today presented by leading industry experts.
- Extensive and unique documents and research reports free of charge for our Affiliates through our world class e-library.
- Valuable intangible benefits associated with the UNWTO brand as a hallmark of quality and ethics in tourism.
- Value for money: membership at € 2,400 (US\$ 3,600) per year.

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UNWTO Affiliate Members

Gregory Duffell

President and CEO

Pacific Asia Travel Association (PATA)

<www.pata.org>



The Pacific Asia Travel Association (PATA) *is the leading authority on Pacific Asia travel and tourism. The PATA mission is to contribute to the growth, value and quality of travel and tourism within the Pacific Asia area on behalf of PATA members.*

1. What has been the impact of the current financial and economic crisis on tourism (domestic and international) in Asia and the Pacific? What markets and segments have been most affected?

The bad news is that the entire region, with one or two notable exceptions (Republic of Korea and Bali), is feeling the pinch. The good news is that the travel and tourism industry in the Asia Pacific region has an enviable track record in bouncing back from adversity. We've seen this on a number of occasions over the past 25 years, most notably following the Asian financial crisis of 1997 and the SARS outbreak in 2003. The economic downturn is providing fantastic travel deals for consumers but it is creating massive bottom line problems for the aviation and hospitality sectors.

2. How are PATA members acting in face of the crisis and what actions/initiatives is PATA undertaking to support them?

Destinations across the region are investing huge sums to attract business from the leisure and MICE markets. We're providing advice and counsel on a daily basis and, importantly, creating opportunities for networking and business development. PATA has launched a series of webinars focussing on business opportunities, such as healthcare tourism. We've just returned from Pakistan where we held seminars attended by leading public and private sector operators. Our recent annual meeting in Macao (China) featured a one-day Business Forum on 'Discovering Opportunities in Tough Times'.

3. Tourism in the Asia Pacific region has shown strong growth but has also suffered from severe setbacks over the past decade, with most notoriously the Asian financial crisis in the late 1990s and the SARS outbreak in 2003. How does the current economic crisis compare?

It's right up there at the top of the league table! One leading hotelier in Thailand described the current situation as the worst in 20 years and it's true that the five star hotels

are hurting. That's partly because we're seeing changes in travel trends. Leisure travellers are choosing destinations closer to home and staying in less expensive accommodation. LCCs such as Air Asia are bucking the trend and making money. But the drop in arrivals numbers across the region is a worry.

4. How do you see the sector after this crisis? What do you consider are the major challenges for the tourism industry in Asia?

The industry will recover –there's no doubt about that. Leisure travel is no longer a luxury item– it's an essential ingredient in the equation to establish a sensible work-life balance. The MICE industry is set to become increasingly competitive as more destinations create purpose-built venues. That's good news for event organisers and meetings planners. What worries us all at PATA is the heavy discounting in the hospitality sector. The desire to slash room rates to attract business is understandable but we would prefer to see consumers being offered added-value incentives such as free nights (stay four nights, pay for three etc), breakfast, internet access, tours and spa treatments. We think it's better to maintain room rates at a level which does not undermine the property's fundamental financial stability and offer attractive add-ons to entice consumers.

5. Besides supporting members at this time of uncertainty, what are the current priorities in PATA's agenda?

PATA is entirely about its members. We have a fantastic heritage stretching back over 58 years but it's important that our Association is seen as being 'fit for purpose' in the 21st century. We must be relevant to the needs of our members, be they a global airline or a small boutique hotel. We're now reshaping PATA, through a fundamental restructuring of our governance, to ensure that we do, indeed, meet the needs of our members. We're building a new website that will provide opportunities for online networking and business transactions. We're also, importantly, looking to strengthen our relationships with travel and tourism organisations around the world. I'm looking forward, in particular, to working closely with UNWTO's Secretary General Taleb Rifai and his team in a number of areas.

6. What would you identify as key areas for collaboration in the near future between PATA and UNWTO?

There's no doubt that we can do much together - our knowledge and expertise in this region can be of very great benefit to the UNWTO. We're active in the core group of the UNWTO Tourism Resilience Committee and working very closely together on the UNWTO conference in Hangzhou this September, which immediately precedes the PATA Travel Mart in the same city. We're also partner in the annual UNWTO/PATA Forum on Tourism Trends and Outlook in Guilin (China) scheduled for November (see announcement page 31).

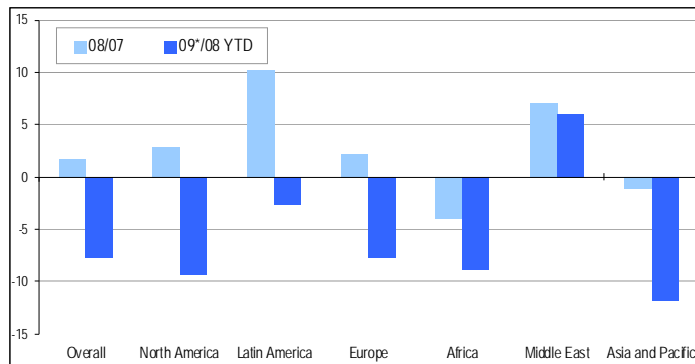
Transport

Airlines

IATA's Monthly International Statistics (MIS)

Following a 1.8% increase in 2008 (an average that was dragged down in the second half of the year), members of the International Air Transport Association (IATA) in all regions of the world except the Middle East (including Israel and Iran) saw declines in international passenger traffic, measured in revenue passenger-km (RPK), from January through May. The worldwide traffic trend was -8%, with average passenger load factor at 72% (down from 76% in the full year 2008). The best-performing region by airline registration, the Middle East, recorded a 6% increase in RPK, while the worst was Asia Pacific (down 12%). It is important to note that these figures relate only to IATA member airlines that report monthly data, and the growth pattern of other carriers, especially low-cost carriers (LCCs) might be different. In Europe, in particular, LCCs have enjoyed growth rates well above average in recent years.

International traffic of IATA reporting carriers by region of airline registration
(% change)



Source: compiled by UNWTO from IATA

According to IATA, international passenger demand weakened from the -3% recorded in April to -9% in May. But both the past two months have been slightly stronger than the 11% decline reached in March, even after adjusting for the distortions caused by the timing of Easter. This indicates that a floor may now have been reached, IATA says. However, the capacity adjustment of -5% in May did not keep pace with the fall in demand during the same month. Moreover, although the impact of the recession appears to be stabilising, strong headwinds from debt and low asset prices are expected to weaken and delay any significant recovery.

“We may have hit bottom, but we are a long way from recovery,” said Giovanni Bisignani, IATA’s Director General and CEO, announcing the latest results. “After a 20% fall in international passenger revenue in the first quarter, we estimate that the drop accelerated to as much as -30% in May.”

As expected, May was the first full month to feel the impact of the influenza A(H1N1) virus outbreak on air travel, with Mexican carriers seeing their traffic fall almost 40% and Latin American airlines suffering a decline of 9% in May compared to the previous year.

Airports

The performance of IATA’s reporting carriers correlates fairly well with the results of the world’s airports, compiled by Airports Council International (ACI). The latter uses number of passengers handled as its base measure. ACI data for the months of January through April 2009 points to a 8% decline year-on-year in international passenger throughput. The Middle East was the only region showing growth (+5%), while Europe recorded the sharpest decline (-9%) followed by Asia Pacific (-8%). (ACI airport results are not yet available for the month of May).

Air transport data

The air transport data presented here refers to IATA members’ scheduled international passenger traffic, according to region of airline registration, as well as to the traffic of the member airlines of the major regional airline associations broken down by routes operated. It should be taken into account that this data reflects the vast majority of, but not all air traffic, as the carriers included are mostly full-service airlines and the traffic operated by charter and low-cost airlines is only reflected to a rather limited extent.

Airline data is a particularly good indicator of short-term trends in medium- and long-haul traffic. For short-haul traffic, however, air transport is in competition with alternative modes of transport (in particular land-based, but also over water), and might be subject to shifts between different means of transport (depending on relative price, perception of safety, etc.). Furthermore, traffic is not expressed here in numbers of passengers carried, but rather measured in terms of revenue passenger-kilometres (RPK), with one RPK representing one paying passenger transported over one kilometre. This means that each long-haul passenger contributes more to total traffic measured in RPK than each short-haul passenger does.

Preliminary Air Transport Statistics

	Revenue Passenger-Km (RPK)								Capacity		Load factor		Passengers	
	2008	07/06	08/07	09*/08 Monthly data					08/07	09*/08	08/07	09*/08	08/07	09*/08
				YTD	Jan	Feb	Mar	Apr	May	YTD		YTD		YTD
	(billion)		(%)	(% on previous year)						(%)		(%)		(%)

International Air Transport Association (IATA), Monthly International Statistics (MIS)

Scheduled international traffic of IATA reporting carriers by region of airline registration

Overall	2,436 ¹	7.4	1.8	-7.7	-5.6	-10.6	-10.5	-2.6	-9.3	3.7	-3.9	75.8	72.1	1.6 ¹
North America	430	5.5	2.9	-9.4	-6.2	-12.2	-13.4	-4.1	-10.9	4.1	-5.2	79.9	75.2	1.0
Latin America	101	8.1	10.2	-2.6	-1.4	-3.8	-6.5	7.5	-9.2	9.2	1.3	74.0	70.6	9.8
Europe	857	6.3	2.2	-7.8	-5.3	-10.1	-11.5	-2.5	-9.4	3.8	-4.8	76.9	72.7	1.4
Africa (incl. Egypt)	73	9.2	-4.0	-8.8	-5.3	-13.2	-13.5	-6.4	-6.0	-8.8	-6.4	70.2	70.0	4.2
Middle East (incl. Israel, Iran)	240	18.1	7.1	6.0	2.9	0.4	5.1	11.5	9.5	8.7	11.8	74.9	70.6	9.3
Asia and Pacific	735	6.8	-1.2	-11.8	-8.7	-14.4	-13.0	-7.6	-14.3	2.1	-7.5	73.4	70.7	-2.2

Air Transport Association of America (ATA) - Scheduled Passenger Traffic Statistics ATA US Member Airlines

Scheduled mainline service	1,142	2.1	3.7	-9.6	-8.9	-12.8	-11.4	-5.5		1.0	-8.3	80.2	77.3	-0.2	-10.1
Domestic (incl. USA-Canada)	777	0.5	2.4	-10.1	-10.5	-13.2	-10.8	-6.3		-0.8	-10.4	80.5	79.0	-0.7	-10.6
International	365	5.9	6.7	-8.5	-5.7	-12.1	-12.7	-3.7		5.0	-3.9	79.5	73.9	2.8	-6.5
Atlantic	181	9.7	11.2	-7.3	-4.8	-12.2	-12.4	-1.0		10.0	-2.2	79.3	71.5	6.3	-8.3
Latin	90	5.6	7.6	-5.0	-2.9	-7.8	-9.0	0.4		2.4	0.0	79.0	75.5	3.1	-3.5
Pacific	94	0.2	-0.7	-14.2	-9.9	-16.5	-17.2	-13.1		-1.3	-10.7	80.5	76.5	-4.4	-11.7

Asociación Latinoamericana de Transporte Aéreo (ALTA) - Member Airlines Traffic Data

Total	169	7.8	9.1	0.7	3.2	-1.7	-2.1	3.3		8.6	3.7	71.2	69.1	6.0	0.1
Domestic	66	8.1	5.6	2.7	8.5	0.6	1.0	0.1		7.3	6.1	67.4	65.5	3.1	0.5
International	102	7.6	11.5	-0.6	-0.1	-3.2	-4.0	5.6		9.5	2.0	73.9	71.6	12.0	-0.7
Latin America	39	22.2	15.5	-2.3	5.1	-2.6	2.0	-13.0		15.0	4.1	71.8	67.8	15.7	2.5
Extra Latin America	63	0.6	9.3	0.5	-3.0	-3.6	-7.4	20.6		6.4	0.6	75.3	74.2	6.8	-4.9
North America	34	6.2	3.1	5.7	0.8	0.3	-7.9	39.8		-0.4	6.7	74.1	73.8	3.0	-2.5
Europe	23	-6.3	19.5	-2.8	-6.2	-5.4	-3.7	4.7		17.3	-6.0	76.1	74.5	23.0	-0.8
Asia and the Pacific	3	26.4	10.2	-5.2	-8.5	-7.0	-4.2	-0.7		14.6	5.2	78.7	75.6	7.9	-5.5
Charter	3	-26.8	11.3	-25.5	-15.7	-28.1	-35.0	-27.0		6.7	-22.9	79.9	76.3	9.4	-26.1

Association of European Airlines (AEA) - Passenger Traffic of AEA Member Airlines

Total scheduled	792	5.4	1.2	-6.0	-3.9	-9.1	-9.1	-2.4		3.0	-3.5	76.0	72.7	-1.5	-8.2
Domestic	57	1.4	-7.4	-11.2	-15.2	-8.7	-8.4	-8.4		-4.6	-8.6	66.2	63.7	-7.8	-12.4
Total International	735	5.8	1.9	-5.7	-3.2	-9.1	-9.1	-2.0		3.7	-3.1	76.9	73.3	1.2	-6.8
Cross-border Europe	185	7.2	2.0	-6.6	-6.3	-10.2	-10.2	-0.8		3.4	-3.8	68.7	63.1	0.6	-8.0
North Africa	9	6.8	6.4	0.4	-4.8	-3.0	-3.0	12.6		3.3	-0.2	70.6	68.0	4.8	-0.4
Middle East	29	10.2	8.2	4.7	2.9	0.5	0.5	15.1		9.3	8.8	73.7	69.3	11.5	5.9
Total long-haul among which:	513	5.1	1.5	-6.0	-2.6	-9.4	-9.4	-3.6		3.5	-3.7	80.8	77.8	1.4	-5.8
North Atlantic	199	5.4	0.0	-8.1	-4.4	-12.6	-12.6	-4.2		1.0	-6.0	81.4	75.8	-0.6	-8.2
Mid Atlantic	51	0.7	2.8	-4.7	-0.7	-8.2	-8.2	-3.0		3.9	-1.4	83.1	82.6	3.6	-4.8
South Atlantic	52	15.7	7.5	-5.0	-0.6	-8.8	-8.8	-2.6		12.9	-3.3	81.1	78.4	6.1	-5.6
Far East/Australasia	154	3.3	0.6	-6.7	-3.6	-8.7	-8.7	-6.0		3.3	-3.1	80.5	78.7	1.0	-6.4
Sub Saharan Africa	56	4.8	2.9	0.2	1.8	-3.0	-3.0	3.9		4.7	-0.2	77.2	76.9	3.6	2.1

Association of Asia Pacific Airlines (AAPA) - Consolidated Passenger Traffic

International operations	592	4.2	-1.4	-11.8	-9.3	-14.1	-13.2	-7.4	-15.0	1.4	-6.1	75.0	71.3	-2.1	-10.5
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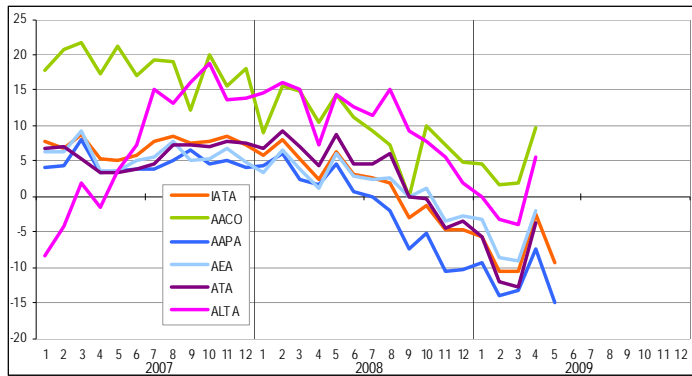
Arab Air Carriers Organization (AACO) - AACO members' scheduled operations

Total	255	27.1	12.9	4.6	4.6	1.8	1.9	9.7		13.1	11.0	73.6	70.5	7.5	
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Source: compiled by UNWTO from IATA, ATA, ALTA, AEA, AAPA and AACO

¹ All IATA carriers

Air traffic on international routes by month (RPKs)
(% change over same month previous year)



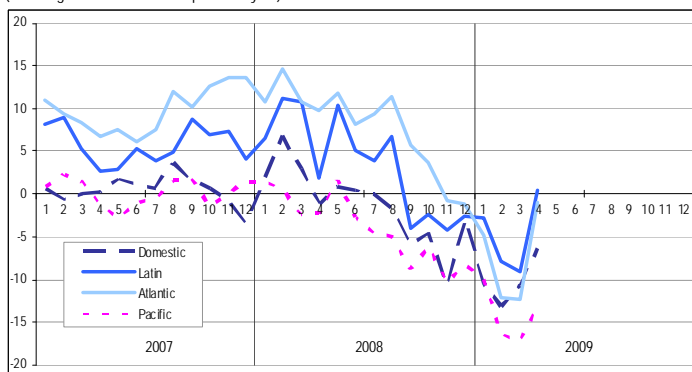
Source: compiled by UNWTO from IATA, AACO, AAPA, AEA, ATA and ALTA

North America

Weak demand on domestic as well as international routes resulted in a 10% decline in traffic systemwide in the first four months of 2009 for the member airlines of the Air Transport Association of America (ATA), which account for some 90% of revenue passenger-miles (RPM) of US airline traffic. International services recorded an 9% decrease as against a 10% drop in demand for domestic flights. Routes to/from Latin America were the least affected (-5%), while traffic fell by 14% on Pacific routes.

The number of passengers travelling on US airlines fell by 10% in April (or by 6% on international services alone). Preliminary figures suggest that May showed a very similar pattern. Meanwhile, ATA airlines' passenger revenues fell 26% in May 2009 versus the same month in 2008 – the seventh consecutive month in which passenger revenue has fallen over the previous year. Revenue declines extended beyond the mainland USA to the transAtlantic, transPacific and Latin American markets. And, as for IATA, May results also reflect the impact of the influenza A(H1N1) outbreak.

ATA: Air traffic on selected routes by month (RPKs)
(% change over same month previous year)



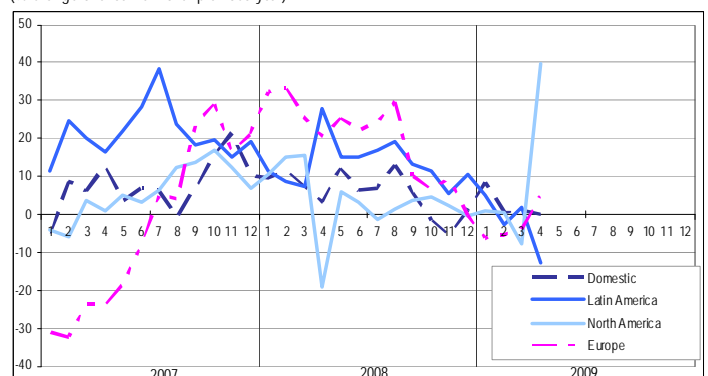
Source: compiled by UNWTO from ALTA

Latin America

The Asociación Latinoamericana de Transporte Aéreo (ALTA) reports a growth of 1% in the total traffic of its member airlines, thanks to a 3% increase on domestic routes. International traffic, meanwhile, fell by 1% – a very modest decline compared with the performance of most other airline associations. North America was the best performing route network for ALTA (+6%), but the trend for all other routes to/from points outside Latin America was negative.

The number of passengers carried by ALTA members from January through April 2009 remained unchanged over the previous year but seat load factor fell by two percentage points to 69%.

ALTA: Air traffic on selected routes by month (RPKs)
(% change over same month previous year)



Source: compiled by UNWTO from ALTA

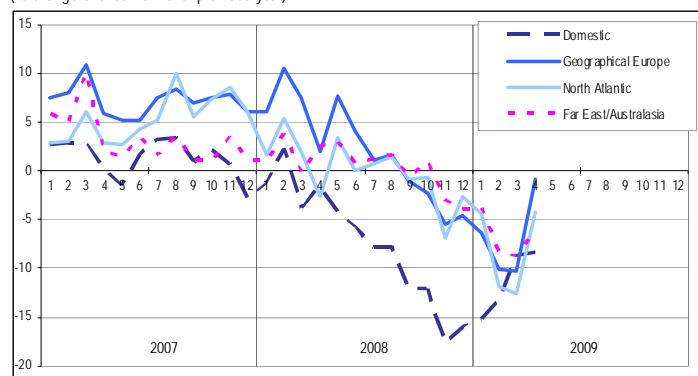
Europe

The Association of European Airlines (AEA) has reported a decline of 6% in total scheduled traffic over the first four months of 2009, with international traffic down by a similar percentage and domestic traffic falling at almost twice that level. For the month of April alone, the decline was 2%, which compared with -9% in March and -6% (adjusted for the 2008 leap year) in February. While at first sight a distinct improvement, AEA warned that the shift of the Easter traffic peak from March 2008 to April 2009 had distorted the growth rates in each of these months.

The month of May is estimated to have been worse, according to AEA's preliminary weekly figures for the last four weeks of the month and the first week of June. In response to shrinking demand airlines have been moving and reducing capacity. While the capacity adjustment is not yet in line with the unprecedented drop in demand (overall capacity is down 3% through April), AEA says it is nevertheless contributing to a cost reduction in the face of severely depressed revenues.

In the four-month period, AEA members (like IATA and ATA) achieved their best traffic performance on Middle Eastern routes (+5%), with traffic flat on routes to/from North and Sub-Saharan Africa. The North Atlantic (-8%) and Far East/Australasia (-7%) routes suffered the sharpest declines.

AEA: Air traffic on selected routes by month (RPKs)
(% change over same month previous year)



Source: compiled by UNWTO from AACO

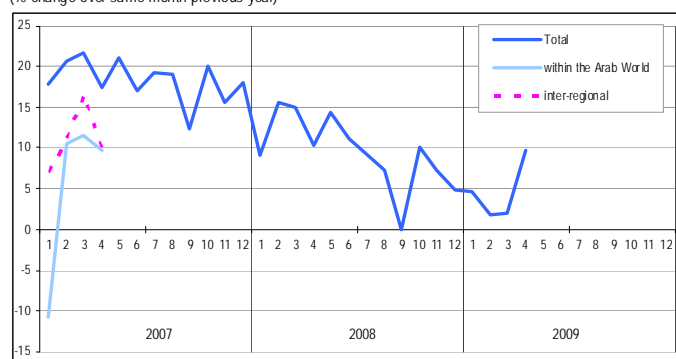
Asia and the Pacific

In the first five months of 2009, member airlines of the Association of Asia Pacific Airlines (AAPA) recorded an 12% drop in traffic on international operations with a concomitant fall (-11%) in passengers, resulting in a 4 percentage point drop in seat load factor to 71%. The month of May was the worst over the period (-15%). Moreover, May's 15% fall in passenger numbers undermines any optimism that a recovery is underway. Market conditions are still clearly deteriorating.

Middle East and North Africa

Data from the Arab Air Carriers Organization (AACO) provides added weight to the argument that the Middle East is the only region whose air transport has remained in positive growth figures this year. Expansion of capacity continued at a rate of 11% between January and April 2009, while traffic increased by 5%. As a result the load factor was some 3 percentage points down, to 71% from 74% in full year 2008.

AACO: Air traffic on selected routes by month (RPKs)
(% change over same month previous year)



Source: compiled by UNWTO from AACO

Prospects for 2009

Short-term forecast ICAO

According to projections released by the International Civil Aviation Organization (ICAO) at the beginning of June, global air traffic, expressed in terms of passenger-kilometres performed, is now projected to decline by approximately 4% in 2009. This bleak forecast reflects the worsening of economic prospects with shrinking worldwide GDP. After steep declines in traffic in the first months of the year, signs of stabilisation have emerged and further improvements in traffic results are expected for the remaining months of the year. The markets of North America and Asia and the Pacific will be the most adversely affected as the recession in the United States and Japan, and the downturn in China, take their toll. European airlines are also expected to suffer limited traffic declines due to the relatively good performance of low-cost carriers. While the traffic of African airlines is also projected to decline, the Middle Eastern and Latin American markets will register a positive growth, due to aggressive airlines and airports strategies and strong domestic demand.

As the economy improves, a moderate recovery is forecast for 2010 with a positive growth rate of about 3.3% and the momentum will continue in 2011 with a growth of 5.5%. The regional breakdown of these forecasts is provided in the table below.

Regional Growth in Passenger Kilometres Performed (PKPs) (%)

Region	2009	2010	2011
	Percentage change over previous year		
	Preliminary	Forecast	Forecast
World	-3.8	3.3	5.5
North America	-7.2	1.3	2.6
Latin America & Caribbean	5.3	7.5	8.0
Europe	-3.0	2.9	5.5
Asia and Pacific	-4.5	3.6	6.5
Africa	-4.2	6.5	7.0
Middle East	8.0	9.5	12.0

Source: International Civil Aviation Organization (ICAO)

OAG airline capacity outlook for the next 6 months

According to the airline capacity outlook for the second half of 2009 released at the end of June by OAG, a global aviation data company, the world's airlines will offer 3.7% fewer flights and 2.6% fewer seats than they did a year ago. The total number of flights (14.1 million) will be at the lowest level since the second half of 2005. The decline in flights is a little larger than the decline in seats, reflecting the trend towards larger aircraft particularly in the regional market. The numbers highlight the airline industry's attempts to adjust to a weak economic climate. However, capacity still remains almost 20% higher than the levels of the early 2000s.

Hospitality



Hotel performance weakens across the globe

Against the backdrop of the global economic crisis, operating a business in any industry is a balancing act. However, industries dependent on discretionary spend such as travel and tourism are taking an even tougher blow with optional outgoings being examined under the microscope. For the hotel industry, this means suppressed demand and more vacant hotel rooms across the globe.

Now that April's hotel performance results are in and the Easter distortion is over, we have a better view into how 2009 is shaping up and how dramatic an effect the economic crisis is having on the industry. Analysis by Deloitte, the business advisory firm, reports double-digit decline in revenue per available room (revPAR) across all world regions, with Asia and the Pacific and Europe suffering the most and the Middle East experiencing the least dramatic declines.

Last year, the Middle East achieved its fifth consecutive year of double-digit revPAR growth. 2009 tells a different story as the economic downturn limits demand while, at the same time, a considerable amount of new room supply is entering the region. Even with this imbalance, the Middle East was the least affected world region with revPAR down 15% year-to-April 2009. The main culprit was occupancy, which fell 6.8 percentage points with average room rates also dropping 6%. Despite this contraction, hoteliers in the Middle East still achieved the strongest occupancy (64%), average room rates (US\$ 224) and revPAR (US\$ 143) in terms of world hotel performance, and a few cities in the region are still booming over the same timeframe last year. Beirut has continued to achieve the strongest revPAR growth in the region and world, up a staggering 155% to US\$ 116 year-to-April 2009. Increased political stability helped the city's hoteliers increase their occupancy 31 percentage points to 69%, while average room rates grew 39% to US\$ 170. Further south in the Middle East, the coastal city of Jeddah in Saudi Arabia is thriving as a gateway city for Islamic pilgrimages to the holy cities of Makkah and Medina. Jeddah pulled up the regional average as revPAR jumped

28% to US\$ 118. Meanwhile, Abu Dhabi was one of the only other cities in the region that remained in positive territory, with 11% revPAR growth to US\$ 280. Demand still outweighs new supply in the UAE capital, resulting in the highest occupancy (81%), average room rates (US\$ 344) and revPAR (US\$ 280) in the Middle East. On the flip side, Dubai is facing the challenge of decreased demand from some of its source markets in recession, as well as thousands of new rooms coming into the market. Hotel performance there pulled down the region's performance, with a 35% drop in revPAR to US\$ 203.

North America was the first region to slip into the red at the end of 2008, reporting a 2% decline in revPAR and the lowest levels of revPAR in the world at US\$ 65. Year-to-April 2009 revPAR continued on its downward course and fell 18%. This placed the region close behind the level of decline in the Middle East; however the region still achieved the lowest levels of revPAR in the world at US\$ 53. RevPAR in Mexico City was down 29% to US\$ 57 year-to-April 2009 suffering from depressed demand due to the economic downturn and the negative publicity from gang-related violence. Then, at the end of April, influenza A(H1N1) hit the headlines. May results will show the full devastation this pandemic is having on Mexico's hotel industry but weekly results from STR show that occupancy during the week of the outbreak fell to around 30%. Heading north into the US, revPAR in New York City experienced the largest drop in revPAR in the USA - down 31% to US\$ 135 as a result of occupancy falling 10 percentage points to 69% and a 21% drop in average room rates to US\$ 198. Despite this, the Big Apple still achieves the highest average room rates and revPAR in the USA. Hotel performance in Washington DC pulled up the regional average and reported a minor 3% drop in revPAR to US\$ 100 year-to-April 2009. While occupancy fell 2.5 percentage points to 63%, average room rates continued to grow 1% to US\$ 158. Although this is marginal growth, it is the only performance indicator that remains in positive territory in the USA across the markets covered by STR. Hotels there benefited from the inauguration celebrations held for President Obama at the beginning of the year and his ongoing popularity is proving to be a magnet for tourists.

Hotel performance by region

	Occupancy (%)			Average Room Rate - US\$			RevPAR - US\$		
	Year-to-April			Year-to-April			Year-to-April		
	2009*	2008	Change (%p)	2009*	2008	Change (%)	2009*	2008	Change (%)
Europe	55.2	61.6	-6.4	121	162	-24.9	67	100	-32.7
Europe (in euros)	55.2	61.6	-6.4	93	105	-11.2	52	65	-20.5
Middle East	63.8	70.6	-6.8	224	238	-5.8	143	168	-14.9
Asia and the Pacific	58.3	68.4	-10.1	119	145	-18.8	69	99	-30.3
North America	52.8	59.2	-6.4	100	110	-8.8	53	65	-18.7
Central and South America	58.1	66.0	-7.9	110	124	-11.0	64	82	-21.6

Source: STR Global and Smith Travel Research. © 2009 STR Global Limited. All rights reserved (%p: percentage points)

Hotels in Central and South America reported a 22% drop in revPAR in the year to April 2009 placing the region in third position behind the Middle East and North America. Occupancy was down 8 percentage points to 58%, while average room rates dropped US\$ 14 to US\$ 110. The least affected cities were Santiago and San Juan, with revPAR drops of 14% and 17% respectively. São Paulo was not as fortunate and revPAR declined by just over 25% to US\$ 42, mainly as a result of average room rates declining 20% to US\$ 77.

The second most affected region was Asia Pacific with revPAR down US\$ 30 (or 30%) to US\$ 69 year-to-April 2009. This drop was mainly due to average room rates contracting 19% to US\$ 119 but occupancy also fell 10 percentage points to 58%. The terrorist attacks in Mumbai at the end of last year have not helped performance in India and revPAR in the city dropped 53% to US\$ 108. This decline was mainly due to hoteliers slashing their average room rates 41% to make up for the 15.3 percentage point decline in occupancy. Elsewhere in India, revPAR in New Delhi is suffering to exactly the same degree - down 53%. Meanwhile, in Thailand, the political protests in Bangkok have contributed to a revPAR decline of 42% to US\$ 50 while revPAR in Phuket also suffered, down 43% to US\$ 81. Beijing is also experiencing the post-Olympic and Paralympic Games slump, with revPAR down 42% to US\$ 42. The best performing cities in the region were those that were able to grow average room rates resulting in revPAR contractions of under 5% including Bali (-3%), Osaka (-2%) and Tokyo (-2%).

When measured in US currency, the slowdown in the global economy has affected Europe the most, down 33% or US\$ 33 to US\$ 67. A 25% decrease in average room rates was mostly to blame for the drop but occupancy also fell 6 percentage points to 55%. However, in euro performance was not as bad, down just 21% to euro 52 year-to-April 2009. But the strength of the euro is keeping many tourists away (especially from the UK and the USA), as the region is becoming much more expensive than in the past few years. Within the eurozone, the worst affected cities include Düsseldorf (-43%), Barcelona (-43%), Venice (-42%) and Amsterdam (-41%). Outside the eurozone, revPAR in Geneva fell 31% but despite this, Switzerland's financial capital achieved the strongest average room rates and revPAR in Europe at US\$ 290 and US\$ 160 consecutively. The strongest occupancy in Europe was in London, down only 2.3 percentage points to 74%. Meanwhile, Moscow pulled down the regional average, with a US\$ 121 deduction from the Russian capital's revPAR reaching US\$ 129.

Hotel performance by region (Year-to-April)

		Occupancy (%)		
		2009*	2008	Change (%p)
North America				
Canada	Montreal	50.9	53.4	-2.5
	Toronto	55.7	61.1	-5.3
	Vancouver	57.8	63.9	-6.1
United States	Atlanta	53.0	62.1	-9.2
	Boston	50.9	59.1	-8.1
	Chicago	48.3	57.3	-9.1
	Dallas	52.6	60.4	-7.8
	Denver	52.3	59.4	-7.1
	Houston	61.8	66.7	-4.9
	Los Angeles	62.3	72.4	-10.1
	Miami	71.2	80.5	-9.3
	New Orleans	61.4	70.0	-8.6
	New York	68.5	78.4	-9.9
	Orlando	65.8	74.0	-8.1
	Philadelphia	56.6	62.1	-5.6
	Phoenix	61.9	72.8	-10.9
	San Diego	60.6	69.9	-9.3
	San Francisco	62.7	70.2	-7.5
	Seattle	54.0	63.3	-9.3
	St Louis	49.4	53.8	-4.4
	Washington DC	63.3	65.7	-2.5
Mexico	Cancun	69.4	71.7	-2.3
	Mexico City	50.5	61.9	-11.4
Central and Southern America				
Costa Rica	San Jose	57.0	69.7	-12.7
Peru	Lima	53.8	59.1	-5.3
Brazil	Rio de Janeiro	68.5	65.6	2.9
	Sao Paulo	54.1	61.6	-7.5
Argentina	Buenos Aires	57.6	72.3	-14.7
Chile	Santiago	64.0	77.9	-13.9
Asia and the Pacific				
China	Beijing	43.8	62.6	-18.8
	Shanghai	44.8	56.6	-11.8
Hong Kong (China)	Hong Kong	72.8	82.2	-9.4
Taiwan (pr. of China)	Taipei	67.5	71.3	-3.8
Japan	Osaka	73.3	78.9	-5.6
	Tokyo	67.8	76.5	-8.7
Korea, Republic of	Seoul	81.5	72.4	9.1
Vietnam	Hanoi	56.8	71.0	-14.3
Thailand	Bangkok	52.1	74.1	-22.0
	Phuket	61.3	80.4	-19.1
Malaysia	Kuala Lumpur	59.8	68.3	-8.5
Singapore	Singapore	66.9	79.0	-12.1
Indonesia	Jakarta	60.4	67.5	-7.1
	Bali Island	64.2	74.9	-10.7
Philippines	Manila	67.9	76.0	-8.1
India	Mumbai	60.9	76.2	-15.3
	New Delhi	65.1	82.1	-17.0
Australia	Sydney	78.0	82.7	-4.7
New Zealand	Auckland	72.8	78.8	-6.0

Source: STR Global

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Data for North America sourced Smith Travel Research.

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Lower consumer and business confidence as a result of the global economic downturn has suppressed travel demand and hoteliers are increasingly feeling the pinch. The remainder of 2009 will be a challenging time for hoteliers as travel patterns are postponed, shortened or cancelled altogether. With close links to the strength of the economy, the hoteliers are eagerly waiting improvements in the key economies around the world.

Analysis has been provided by Deloitte & Touche LLP using data from STR Global and Smith Travel Research. This commentary has been written by Marvin Rust – Global Managing Partner of Hospitality at Deloitte and Laura Baxter – Assistant Manager in the Tourism, Hospitality and Leisure team at Deloitte.

For further information please call the team at Deloitte on +44 (0) 20 7007 1099 or visit www.deloitte.co.uk/tourismhospitalityleisure.

Hotel performance by region (Year-to-April)

		Occupancy (%)		
		2009*	2008	Change (%p)
Europe				
Iceland	Reykjavik	43.4	47.3	-4.0
Norway	Oslo	57.3	63.5	-6.2
Sweden	Stockholm	57.6	62.2	-4.6
Denmark	Copenhagen	50.5	57.5	-6.9
Ireland	Dublin	54.6	63.9	-9.4
United Kingdom	London	74.4	76.7	-2.3
Netherlands	Amsterdam	59.7	72.4	-12.7
Belgium	Brussels	60.6	67.9	-7.2
Luxembourg	Luxembourg	61.0	67.4	-6.4
Germany	Frankfurt am Main	56.5	63.0	-6.4
	Berlin	58.7	61.5	-2.8
France	Paris	69.6	75.4	-5.8
Austria	Vienna	54.6	63.6	-8.9
Switzerland	Geneva	55.2	66.9	-11.8
	Zurich	60.8	68.8	-7.9
Czech Rep	Prague	45.9	57.2	-11.3
Slovakia	Bratislava	38.2	56.8	-18.6
Hungary	Budapest	41.8	55.5	-13.7
Poland	Warsaw	55.3	63.8	-8.5
Russian Federation	Moscow	57.1	63.9	-6.7
Portugal	Lisbon	50.9	60.2	-9.2
Spain	Madrid	55.2	65.6	-10.4
	Barcelona	54.7	64.7	-10.0
Italy	Milan	58.3	68.2	-9.9
	Rome	53.7	60.3	-6.6
Greece	Athens	48.6	60.8	-12.2
Turkey	Istanbul	59.3	68.8	-9.6
Israel	Tel Aviv	49.7	75.6	-25.9
Middle-East & Africa				
Egypt	Cairo	67.6	81.4	-13.8
	Sharm El-Sheikh	70.9	84.2	-13.3
Jordan	Amman	57.3	69.8	-12.5
Lebanon	Beirut	68.6	37.4	31.2
Kuwait	Kuwait City	61.8	64.5	-2.8
Qatar	Doha	70.5	79.4	-8.8
Untd Arab Emirates	Dubai	72.3	86.2	-13.8
	Abu Dhabi	81.3	87.1	-5.9
Saudi Arabia	Riyadh	68.2	82.7	-14.5
Oman	Muscat	64.1	80.1	-15.9
Kenya	Nairobi	62.3	38.3	24.0
South Africa	Greater Cape Town	64.7	75.5	-10.8
	Greater Johannesburg	54.3	72.8	-18.5

Source: STR Global

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Elibrary

One of the most comprehensive sources of tourism information prepared by the UNWTO

The Elibrary is an online collection of more than 1000 books in Spanish, English, French, Russian and Arabic, with new titles being added every day. It also allows cross-referenced searches of a large number of publications in their respective languages.

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Meetings industry

ICCA - Country and city rankings of international meetings organised in 2008



The International Congress and Convention Association (ICCA) publishes a yearly country and city ranking by number of meetings organised. The ICCA rankings cover meetings organised by international associations which take place on a regular basis and which rotate between a minimum of three countries. The data represents a 'snapshot' of qualifying events in the ICCA Association Database as sampled in early May 2009.

The ICCA Data department has been monitoring and analysing trends in international association meetings for the past 30 years. The ICCA Database has identified 7,475 events which took place in 2008, a rise of approximately 800 over 2007, partly reflecting the strength of the market. "That represents more than 10% growth in our database of such events," said Martin Sirk, ICCA CEO, "and reflects the extraordinary dynamism of this market segment. Many of these events have been created as offshoots of established larger association events to service regional or precise subject-specific needs, generating new competition in the marketplace and tremendous opportunities for new business development in all regions of the world."

As has been the case since 2004, the USA and Germany are first and second in the ranking measured by the number of international meetings organised in 2008. The numbers 3 and 4, Spain and France, had a considerable increase in the number of meetings compared to 2007. The United Kingdom moves from 4th place in 2007 to 5th in 2008. The Netherlands is a newcomer in the top 10, replacing Austria. Asian countries also have their stake in the international meetings market: China and the Republic of Korea are among the top 20 ICCA countries. Brazil, which occupies the 7th position, is the only country from Latin America to appear in the ranking.

For the first time in three years, Vienna shares the top place with Paris as the most popular city. Barcelona, in third place, had an increase of 30 meetings over 2007. Remarkable newcomers in the top 20 are Athens, Buenos Aires, São Paulo and Tokyo. Stockholm and Seoul both climb in the rankings to 8th and 9th positions.

The results for 2008 have been remarkable as ICCA's researchers have never before identified so many international association meetings taking place in a single year. Due to the current global turbulence,

there will be some reductions in average attendance in 2009, following marginal declines in 2008, but there are almost no event cancellations and postponements taking place, and the overall mood of international association meeting planners is unmistakably positive.

ICCA claims that destinations with a healthy mix of inter-governmental association, and corporate meetings are best positioned to do well during periods of economic crisis, but that the international association sector provides the foundation stone. Long decision-making lead times enable destinations and venues to plan the rest of their business mix around a strong portfolio of association events, which can be targeted to fill 'soft' periods in the diary.

In the era of knowledge, data and specialist information are the key currencies that drive today's global economy, and international associations and their major meetings are primary players in the creation, development and dissemination of this knowledge. Thus, association meetings are going to become even more important: for scientific and medical progress; to find solutions to societal and environmental challenges; to provide top level elite education; as tools for national and regional economic development; and to share ideas on quality control, accreditation, and new ways of learning.

Each year, ICCA produces two statistics reports on the international association meetings market: the full ICCA statistics report for 2008 is released in June. The 10 year statistics report covering 1999-2008 will be published late July.

For further information please visit www.iccaworld.com.

ICCA country and city ranking measured by number of meetings organised in 2008

Rank	Country	# Meetings	Rank	City	# Meetings
1	United States	507	1	Paris	139
2	Germany	402		Vienna	139
3	Spain	347	3	Barcelona	136
4	France	334	4	Singapore	118
5	United Kingdom	322	5	Berlin	100
6	Italy	296	6	Budapest	95
7	Brazil	254	7	Amsterdam	89
8	Japan	247	8	Stockholm	87
9	Canada	231	9	Seoul	84
10	Netherlands	227	10	Lisbon	83
11	China-P.R.	223	11	Copenhagen	82
12	Austria	196	12	Sao Paulo	75
13	Switzerland	194	13	Prague	74
14	Australia	182	14	Beijing	73
15	Portugal	177	15	Athens	72
16	Republic of Korea	169		Buenos Aires	72
17	Sweden	163		Istanbul	72
18	Finland	142	18	Bangkok	71
19	Greece	123	19	London	68
20	Belgium	122		Tokyo	68

Source: International Congress and Convention Association (ICCA)

The economic environment

Unprecedented decline in economic growth

The global economy is undergoing its most severe recession of the post second world war period inflicted by a massive financial crisis and acute loss of confidence. Since the September 2008 financial blow-up, economies around the world have been suffering a rapid deterioration with a sharp drop in industrial production, trade and employment. According to the International Monetary Fund (IMF), advanced economies experienced an unprecedented 7.5% decline in real GDP during the fourth quarter of 2008, and output is estimated to have continued to fall almost as fast during the first quarter of 2009. Emerging and developing economies have been seriously hit as well by the global economic crisis.

As a result, IMF forecast the world economy to decline by 1.3% in 2009. Despite the unparalleled stimuli response put in place, the recovery is expected to be slow and weak. Much will depend on coordinated action to heal the financial sector, while continuing to support demand with monetary and fiscal easing.

Since the publication of the latest UNWTO World Tourism Barometer two major pieces of comprehensive analysis on the world economy have become available. The International Monetary Fund (IMF) published its April 2009 edition of the *World Economic Outlook* (WEO), while the United Nations Department of Economic and Social Affairs (DESA) issued in May a mid-year update on its *World Economic Situation and Prospects 2009* (WESP).

United Nations *World Economic Situation and Prospects 2009*, Update as of mid-2009

According to the mid-2009 update of the *World Economic Situation and Prospects 2009* (WESP), “The world economy is deeply mired in the most severe financial and economic crisis since World War II. With its increasing impact both in scope and depth worldwide, the crisis poses a significant threat to world economic and social development, including to the fulfilment of the Millennium Development Goals (MDGs) and other internationally agreed development goals.”

The UN baseline forecast for the world economy has been revised downwards compared with the pessimistic scenario of the WESP 2009 published in January – which pointed to a contraction of 0.4% in 2009. In the baseline scenario, the world economy, which registered an expansion of 2.1% in 2008, is expected to shrink by 2.6% in 2009 and to grow by 1.6% in 2010, or from 3.3% in 2008 to -1.0% in 2009 and 2.7% in 2010 using purchasing power parity weighting (see box for the methodological note).

Even if a mild recovery is expected in 2010, the report warns that risks remain on the downside. A more prolonged recession in most countries is possible if financial markets do not unclog soon and if the fiscal stimuli do not gain sufficient traction. In addition, the fragile situation could be exacerbated if the influenza A(H1N1) virus outbreak becomes much more serious.

In a more optimistic scenario – although an increasingly less likely scenario for the UN – world economic recovery would begin in the second half of 2009, resulting in an expansion of 2.3% in 2010. But this scenario would require problems in financial markets to be resolved in the first half of 2009 with fiscal stimulus measures having a visible effect during the year. The report points out that, by May 2009, such conditions were far from present.

Developing countries are being hit hard by the crisis that originated in the developed countries, through capital reversals, rising borrowing costs, collapsing world trade and commodity prices, and subsiding remittance flows. According to the WESP update report, at least 60 developing countries are expected to suffer declining per capita incomes.

Bearing in mind that the global policy response has been unprecedented, the UN recommends further actions in four major areas:

1. further decisive and cooperative action is needed to restore the financial health of banks, especially in developed countries;
2. the fiscal stimulus measures should be better coordinated and aligned with global sustainable development objectives;
3. fundamental reforms of the international financial system are needed to overcome the systemic flaws that caused this crisis in the first place, and in order to guard against future crises;
4. a new framework for global economic governance in line with early 21st century realities needs to be created.

The full United Nations World Economic Situation and Prospects, Update as at mid-2009 is available for download at www.un.org/esa/policy/wess/wesp.html.

GDP growth measurement, methodological note

World aggregated growth of Gross Domestic Product (GDP) as reported by the UN is calculated as a weighted average of individual country GDP growth rates, where weights are based on GDP in 2000 prices and exchange rates (i.e. at 2000 market value).

IMF estimates growth rates on the basis of GDP in purchasing power parity (PPP). This is done because the purchasing power of a US dollar varies from one economy to another. As a US dollar usually buys quite a lot more goods and services in emerging economies, their GDP is more strongly weighted in the aggregate, in general resulting in a higher growth rate as emerging economies tend to grow faster. For instance, at market value the weight of the USA is 25% and of China 6%, while at PPP their weights are respectively 21% and 11%.

IMF World Economic Outlook, April 2009

The International Monetary Fund's (IMF's) April 2009 World Economic Outlook (WEO) indicates that the global economy is undergoing its most severe recession of the post-war period, inflicted by a massive financial crisis and an acute loss of confidence. Against the expansion of 3.2% recorded in 2008, world GDP is projected to decline by 1.3% in 2009 – a 1.75 percentage point downward revision from the January WEO Update. While the rate of contraction is expected to moderate from the second quarter of 2009 onwards, output per capita is projected to decline in countries representing three quarters of the global economy. Growth is projected to re-emerge in 2010, but at just 1.9% – still well below potential.

The advanced economies experienced an unprecedented 7.5% decline in real GDP during the fourth quarter of 2008, and output is estimated to have continued to fall almost as fast during the first quarter of 2009. Against this background, advanced economies are forecast to contract by 3.8% in 2009. Emerging and developing economies – which are also suffering badly – are expected to post a modest growth of 1.6%, bouncing back to 4.0% in 2010.

The IMF points out that the wide-ranging and often unorthodox policy responses undertaken have made limited progress in stabilising financial markets and containing the downturn. While there have been some encouraging signs of improving sentiment since the G20 meeting in early April, confidence in financial markets is still low, weighing against the prospects for an early economic recovery. Getting back on the growth track will depend on stepping up efforts to heal the financial sector, while continuing to support demand with monetary and fiscal easing.

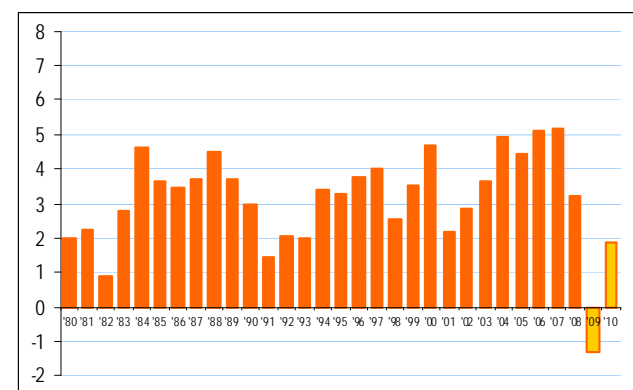
Regional and country outlook

The USA – coping with recession

The largest financial crisis since the Great Depression has pushed the USA into a severe recession. Despite large cuts in interest rates – currently close to zero – credit is exceptionally costly or hard to get for many households and firms. In addition, households are being hit by large

World

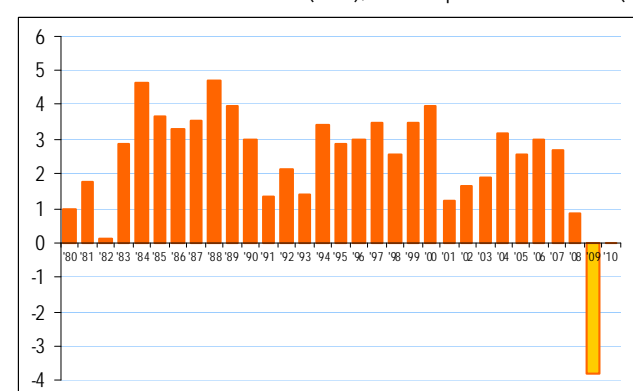
Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Advanced economies

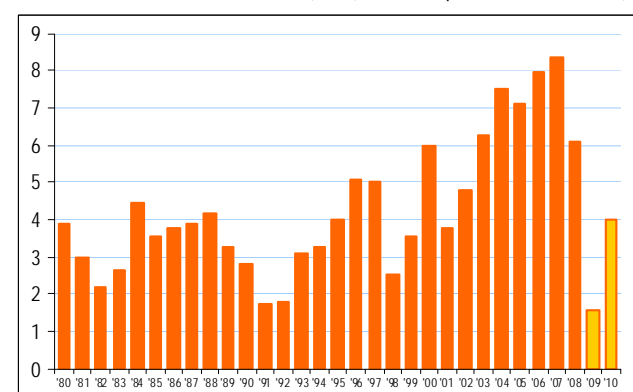
Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Emerging market and developing countries

Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Overview of the economic growth projections by the International Monetary Fund (IMF), World Economic Outlook, October 2008

	GDP	Growth of Gross Domestic Product (GDP), constant prices												
	US\$ bn	Change over previous year (%)							Current projections		Trend ¹			Average (%)
		2008	2003	2004	2005	2006	2007	2008	2009*	2010*	08-07	09*-08	10*-09*	1995-2008
World (purchasing power parity (PPP) weighted)	60,690	3.6	4.9	4.5	5.1	5.2	3.2	-1.3	1.9	--	--	++	4.2	
Memorandum: at market exchange rates		2.7	4.0	3.4	3.9	3.8	2.1	-2.5	1.0	--	--	++	3.3	
of which:														
Advanced economies	42,100	1.9	3.2	2.6	3.0	2.7	0.9	-3.8	0.0	--	--	++	2.8	
Emerging market and developing countries	18,590	6.3	7.5	7.1	8.0	8.3	6.1	1.6	4.0	--	--	++	6.2	

Source: Compiled by UNWTO from International Monetary Fund, World Economic Outlook (www.imf.org/external/pubs/ft/weo/weorepts.htm)

¹ Percentage points change to previous year: -- < -1; - [-1,-0.2]; = [-0.2,0.2]; + [0.2,1]; ++ >1

financial and housing wealth losses, much lower earnings' prospects and higher uncertainties about job security, all of which have driven consumer confidence to a record low. Although the outlook remains uncertain due to the nature of the ongoing crisis, there have been tentative signs of improving business sentiment and firming consumer demand. Unprecedented monetary and fiscal stimulus, coupled with a wide range of measures to stabilise house prices and to heal the financial sector, have started to show signs of paying off.

The IMF recently upped its forecast for the US economy. It expects the US economy to contract by 2.5% in 2009, with a modest expansion of 0.75% in 2010. This compares with that in the April WEO, which projected a contraction of 2.8% in 2009 and zero growth in 2010. Nevertheless, the combination of financial strains and ongoing adjustments in the housing and labour markets is expected to restrain growth for some time, with a solid recovery projected only in mid-2010.

Even if the decline in economic activity has slowed and financial conditions have improved, the downside risks still remain significant – including foreclosures and further house price declines, as well as rising corporate distress. The Fund points out that the US authorities face three interdependent challenges in order to spur recovery. First, they need to ensure economic and financial stabilisation to set the stage for a sustained recovery. Second, strategies must be developed to unwind massive public interventions, and these should be coordinated internationally. Finally, there is the challenge of addressing the long-term legacies of the crisis, notably through fiscal and financial reforms. (2009 Article IV Consultation with the United States of America, www.imf.org/external/np/ms/2009/061009.htm transcript of news conference 15 June 2009, www.imf.org/external/np/tr/2009/tr061509.htm).

Europe – severely affected

Economic activity in much of advanced Europe has suffered sharp contractions since mid-2008, worsening during the fourth quarter of 2008 under the financial and economic impact of the September 2008 financial blow-out.

The eurozone – mired in recession – has been hard hit by the collapse in trade on the heels of the global financial turmoil, exacerbated by a correction of home-grown imbalances in some countries and an intensification of financing constraints. As a result, real GDP is forecast to drop by more than 4% in the eurozone in 2009, down from an expansion of 1% in 2008. Twin feedback loops have been operating: one across borders owing to the tight financial and trade integration of the region, and another between the financial sector and the real economy, with the recession now adding to the financial sector's woes. Nevertheless, signs of improvement have emerged, according to the Concluding Statement of the IMF Mission on Euro-Area Policies (www.imf.org/external/np/ms/2009/060809.htm).

The decline in activity should moderate through the remainder of 2009 and give way to a modest recovery

starting in the first half of 2010, but the IMF warns that the recovery is likely to be slow and its shape and timing highly uncertain. Ongoing deleveraging, corporate restructuring and rising unemployment will weigh on domestic demand. The adjustment of global imbalances and the relatively strong real exchange rate will limit support from the external side.

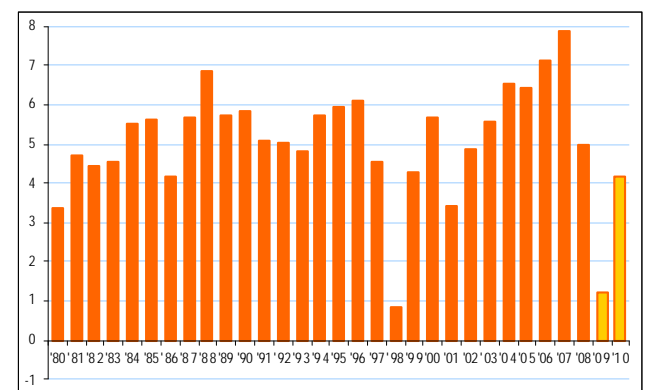
Economic activity has taken a particularly sharp turn for the worse in many emerging European economies. Real GDP in the emerging economies is projected to contract by about 3.7% in 2009 and recover to about 1% in 2010, down from growth rates of 4-7% during 2002-2007. The reasons for the sharp reversal in performance include, to varying degrees, overheating during pre-recession booms, excessive reliance on short-term foreign capital that funded these booms, ownership of banks by distressed foreign financial institutions, and a large share of manufacturing in activity.

But the CIS countries are expected to face the largest reversal of economic fortune in the short-term because their economies are being badly hit by three major shocks: the financial turbulence, which has greatly curtailed access to external funding; slumping demand from advanced economies; and the related fall in commodity prices, notably for energy. Real GDP in the region, which expanded by 8.6% in 2007, is projected to contract by just over 5% in 2009, the lowest rate among all emerging regions. In 2010, growth is expected to return to over 1%.

The downside risks around the projections for both advanced and emerging economies are large, particularly for the latter, where external financial constraints could worsen further. The key risk is a disorderly deleveraging of large intra-European cross-border bank exposures.

Asia and the Pacific

Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Asia – suffering from the collapse of global trade

Asia has been hit hard by the global crisis, mainly through the trade channel, as production and exports have plummeted across the region. Advanced economies in the region – Japan, Hong Kong (China), the Republic of Korea, Singapore and Taiwan (Pr. of China) – are among the most affected, due to their high export dependence and trade exposure to the drop in global demand for automobiles,

Overview of the economic growth projections by the International Monetary Fund (IMF), World Economic Outlook, October 2008

	GDP US\$ bn	Growth of Gross Domestic Product (GDP), constant prices											
		Change over previous year (%)						Current projections		Trend ¹			Average (%)
		2003	2004	2005	2006	2007	2008	2009*	2010*	08-07	09*-08	10*-09*	1995-2008
		2008											
By UNWTO regions:													
Europe	22,566	2.5	3.7	3.1	4.3	4.0	1.9	-4.1	0.0	--	--	++	3.2
Euro area	13,633	0.8	2.2	1.7	2.9	2.7	0.9	-4.2	-0.4	--	--	++	2.3
Germany	3,668	-0.2	1.2	0.8	3.0	2.5	1.3	-5.6	-1.0	--	--	++	1.6
France	2,866	1.1	2.2	1.9	2.4	2.1	0.7	-3.0	0.4	--	--	++	2.3
Italy	2,314	0.0	1.5	0.7	2.0	1.6	-1.0	-4.5	-0.4	--	--	++	1.4
Spain	1,612	3.1	3.3	3.6	3.9	3.7	1.2	-3.0	-0.7	--	--	++	3.8
Netherlands	869	0.3	2.2	2.0	3.4	3.5	2.0	-4.8	-0.7	--	--	++	3.0
Belgium	506	1.0	2.8	2.2	3.0	2.6	1.1	-3.8	0.3	--	--	++	2.4
Austria	415	0.8	2.5	2.9	3.4	3.1	1.8	-3.0	0.2	--	--	++	2.6
Greece	358	5.6	4.9	2.9	4.5	4.0	2.9	-0.2	-0.6	--	--	-	4.1
Ireland	273	4.5	4.7	6.4	5.7	6.0	-2.3	-8.0	-3.0	--	--	++	7.1
Finland	274	1.8	3.7	2.8	4.9	4.2	0.9	-5.2	-1.2	--	--	++	3.9
Portugal	244	-0.8	1.5	0.9	1.4	1.9	0.0	-4.1	-0.5	--	--	++	2.3
United Kingdom	2,674	2.8	2.8	2.1	2.8	3.0	0.7	-4.1	-0.4	--	--	++	3.0
Sweden	485	1.9	4.1	3.3	4.2	2.6	-0.2	-4.3	0.2	--	--	++	3.0
Norway	456	1.0	3.9	2.7	2.3	3.1	2.0	-1.7	0.3	--	--	++	3.1
Denmark	343	0.4	2.3	2.4	3.3	1.6	-1.1	-4.0	0.4	--	--	++	2.0
Switzerland	493	-0.2	2.5	2.5	3.4	3.3	1.6	-3.0	-0.3	--	--	++	2.1
Poland	526	3.9	5.3	3.6	6.2	6.7	4.8	-0.7	1.3	--	--	++	5.0
Russian Federation	1,677	7.3	7.2	6.4	7.7	8.1	5.6	-6.0	0.5	--	--	++	5.0
Turkey	729	5.3	9.4	8.4	6.9	4.7	1.1	-5.1	1.5	--	--	++	4.7
Americas	19,986	2.4	4.2	3.4	3.6	3.1	1.9	-2.4	0.5	--	--	++	3.3
United States	14,265	2.5	3.6	2.9	2.8	2.0	1.1	-2.8	0.0	-	--	++	3.1
Canada	1,511	1.9	3.1	2.9	3.1	2.7	0.5	-2.5	1.2	--	--	++	3.3
Latin America and Caribbean	4,210	2.2	6.0	4.7	5.7	5.7	4.2	-1.5	1.6	--	--	++	3.8
Brazil	1,573	1.1	5.7	3.2	4.0	5.7	5.1	-1.3	2.2	-	--	++	3.2
Mexico	1,088	1.7	4.0	3.2	5.1	3.3	1.3	-3.7	1.0	--	--	++	3.9
Argentina	326	8.8	9.0	9.2	8.5	8.7	7.0	-1.5	0.7	--	--	++	3.9
Venezuela	319	-7.8	18.3	10.3	10.3	8.4	4.8	-2.2	-0.5	--	--	++	3.3
Colombia	241	4.6	4.7	5.7	6.9	7.5	2.5	0.0	1.3	--	--	++	3.4
Chile	170	4.0	6.0	5.6	4.6	4.7	3.2	0.1	3.0	--	--	++	4.6
Peru	128	4.0	5.0	6.8	7.7	8.9	9.8	3.5	4.5	+	--	+	5.0
Asia and the Pacific	15,416	5.7	6.6	6.5	7.3	8.0	5.1	1.4	4.2	--	--	++	5.8
Japan	4,924	1.4	2.7	1.9	2.0	2.4	-0.6	-6.2	0.5	--	--	++	1.3
Australia	1,011	3.0	3.8	2.8	2.8	4.0	2.1	-1.4	0.6	--	--	++	3.8
New Zealand	128	4.1	4.5	2.8	1.9	3.2	0.3	-2.0	0.5	--	--	++	3.2
Newly Industrialized Asian Economies	1,737	3.1	5.9	4.7	5.6	5.7	1.6	-5.6	0.8	--	--	++	4.8
Korea, Republic of	947	2.8	4.6	4.0	5.2	5.1	2.2	-4.0	1.5	--	--	++	4.7
Taiwan (pr. of China)	393	3.5	6.2	4.2	4.8	5.7	0.1	-7.5	0.0	--	--	++	4.6
Hong Kong (China)	216	3.0	8.5	7.1	7.0	6.4	2.5	-4.5	0.5	--	--	++	4.1
Singapore	182	3.8	9.3	7.3	8.4	7.8	1.1	-10.0	-0.1	--	--	++	5.9
Developing Asia	7,239	8.2	8.6	9.0	9.8	10.6	7.7	4.8	6.1	--	--	++	8.2
China	4,402	10.0	10.1	10.4	11.6	13.0	9.0	6.5	7.5	--	--	+	10.4
India	1,210	6.9	7.9	9.2	9.8	9.3	7.3	4.5	5.6	--	--	++	7.5
Pakistan	168	4.8	7.4	7.7	6.2	6.0	6.0	2.5	3.5	=	--	+	5.0
Indonesia, Malaysia, Philippines, Thailand	1,176	5.6	5.9	5.2	5.5	6.1	4.7	-0.3	2.1	--	--	++	4.1
Iran	345	7.2	5.1	4.7	5.8	7.8	4.5	3.2	3.0	--	--	=	5.5
Africa	1,280	5.5	6.7	5.8	6.1	6.2	5.2	2.0	3.9	--	--	++	5.5
South Africa	277	3.1	4.9	5.0	5.3	5.1	3.1	-0.3	1.9	--	--	++	3.9
Algeria, Morocco, Tunisia	286	6.5	5.2	4.3	4.3	3.5	4.0	3.0	4.0	+	-	++	4.6
Nigeria	214	10.3	10.6	5.4	6.2	6.5	5.3	2.9	2.6	--	--	-	7.4
Middle East	1,560	6.9	6.4	6.3	5.7	5.6	6.5	2.1	3.8	+	--	++	5.1
Saudi Arabia	482	7.7	5.3	5.6	3.0	3.5	4.6	-0.9	2.9	++	--	++	3.6
Untd Arab Emirates	260	11.9	9.7	8.2	9.4	6.3	7.4	-0.6	1.6	++	--	++	7.1
Egypt	162	3.2	4.1	4.5	6.8	7.1	7.2	3.6	3.0	=	--	-	5.8

Source: Compiled by UNWTO from International Monetary Fund, World Economic Outlook (www.imf.org/external/pubs/ft/weo/weorepts.htm)

¹ Percentage points change to previous year: -- < -1 ; - [-1,-0.2] ; = [-0.2,0.2] ; + [0.2,1] ; ++ > 1

electronics, and other consumer goods. Growth for Japan is projected to decline by 6.2% in 2009, exacerbated by the yen's strength and tighter credit conditions. Activity in advanced Asia as a whole is expected to drop sharply, and some economies could even experience deflation.

Also constrained by lower capital inflows and tighter credit conditions, real activity in emerging Asia is slowing sharply, too. Emerging Asia is expected to continue to grow in 2009 (3.3%) at a much lower pace, led by China and India. Growth in China is forecast to slow to about 6.5% in 2009, or less than half the 13% growth rate recorded pre-crisis in 2007, but still a strong performance given the global context. The growth of India is expected to slow further to 4.5% in 2009, down from 7.3% in 2008.

The risks to the outlook for the region remain tilted squarely to the downside. A key concern is that a deeper or longer recession in advanced economies outside Asia will reduce external demand even further, with negative repercussions for exports, investment and growth.

Latin America and the Caribbean –growing pressures

As in other emerging regions, financial sector stress and deleveraging in advanced economies are raising borrowing costs and reducing capital inflows across Latin America and the Caribbean. In addition, the decline in commodity prices is pounding large economies in the region. The collapse in growth in advanced economies, particularly in the USA, has lowered demand for exports, weakened tourism, and lowered workers remittances – key supports in the Caribbean and Central America.

Real GDP is forecast to contract by 1.5% in 2009, before staging a modest recovery in 2010 of 1.6%. Considering the very challenging external environment, most countries are weathering the storm well relative to earlier experiences with global turbulence, thanks to improvements in policy frameworks and balance sheet positions.

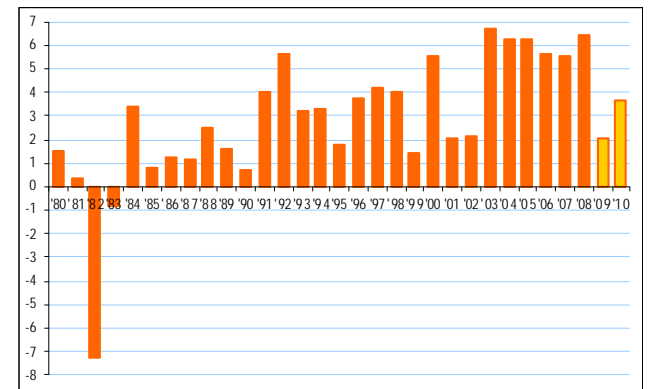
Middle East – hit by lower oil prices

The extremely large fall in the price of oil is hitting the region hard. The deterioration in external financing conditions and reversal of capital inflows are also taking a toll. Although highly expansionary policies are set to mitigate their impact, these adverse shocks are expected to have severe negative effects on economic activity. In the region as a whole, growth is projected to decline from 6.5% in 2008 to 2.1% in 2009.

The current account balance of the region is expected to swing into a small deficit. With dwindling surpluses in oil-producing countries, fiscal balances are set to deteriorate substantially, as revenues decline and governments use the buffers accumulated during the recent boom to sustain domestic demand by maintaining ongoing investment projects.

Middle East

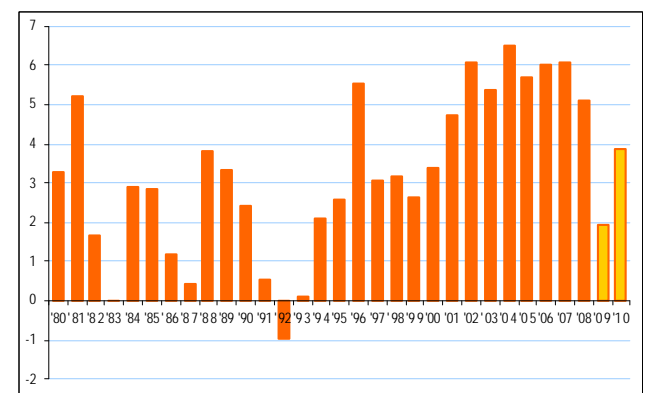
Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Africa

Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

Africa – hard-won gains at risk

Relatively weak financial linkages with advanced economies have not shielded African countries from the global economic storm. The main shock buffeting the continent is severe deterioration in external growth, which is reducing demand for African exports and curtailing workers' remittances. The sharp fall of commodity prices is also hitting the resource-rich countries hard and the tightening of global credit is reducing capital inflows.

For the region as a whole, growth is projected to decline from 5.2% in 2008 to 2% in 2009. On average, the downturn is most pronounced in oil-exporting countries and in key emerging and frontier markets.

Full World Economic Outlook reports of the International Monetary Fund (IMF) are available for download at www.imf.org/external/pubs/ft/weo.

Unemployment – the real challenge

The deepening of the global financial and economic crisis is taking a heavy toll on employment worldwide. Following a period of continuing job creation in advanced economies, there has been a rapid rise in unemployment since mid-2008 and this is expected to become worse in 2009 and 2010. To a lesser or greater extent, unemployment rates will increase in all advanced economies.

According to the IMF's April 2009 projections, unemployment rates in advanced economies are expected to reach 8.1% in 2009 (up from 5.8% in 2008), with rates of 8.9% in the USA (up from 5.8% in 2008) and 10.1% in the eurozone (up from 7.6% in 2008). Most eurozone economies will record unemployment rates above 8%, but Spain (17.7%) and Ireland (12.0%) will be the most affected, posting double-digit rates. Spain and Ireland are suffering mounting job losses driven by the downturn in construction. Outside the euro area, the UK and Sweden are expected to reach unemployment rates of 7.4% and 8.4% respectively in 2009. Iceland will suffer a dramatic increase in unemployment (from 1.7% in 2008 to 9.7% in 2009) following the collapse of its financial sector. In Asia, the most significant deterioration in employment rates is expected in the 'new industrialised economies' (NIEs), with unemployment rising to 10.1%, and in Australia and New Zealand (6.8% and 6.5% respectively).

The IMF's unemployment projections for advanced economies in 2010 are even worse (9.2%), in line with the zero real GDP growth expected the same year for these economies. As long as growth is below its normal rate, unemployment will continue to increase. Therefore, the IMF's forecast implies that unemployment will peak only at the end of 2010 and then decrease slowly over time after 2010.

The International Labour Office (ILO) highlights the unprecedented increase in unemployment and in the number of workers at risk of falling into poverty around the world in 2009. In its *Global Employment Trends Update*, May 2009, the ILO revised upwards its unemployment projections to levels ranging from 210 million to 239 million unemployed worldwide in 2009, corresponding to global unemployment rates of 6.5% and 7.4% respectively.

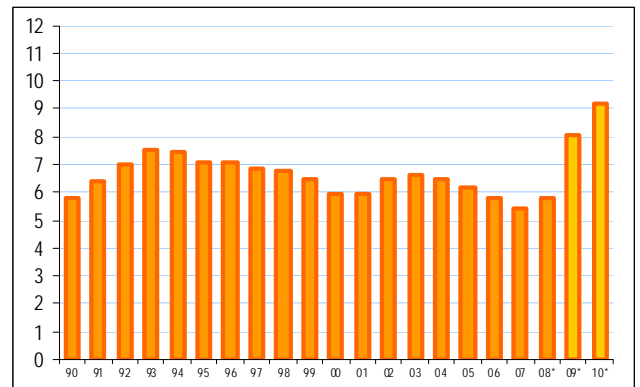
According to the UN *World Economic Situation and Prospects 2009*, Update at mid-2009, "Lessons from past financial crises indicate that it typically takes four to five years for unemployment rates to return to pre-crisis levels after economic recovery has set in. Since global recovery should not be expected before the end of 2009, and will be weak at best in 2010, most countries will need to achieve strong growth acceleration during 2011-2015 to offset the job destruction and displacement of workers caused by the crisis."

The full ILO Global Employment Trends Update, May 2009 is available for download at www.ilo.org/global/lang-en/docName--WCMS_106504/index.htm.

Unemployment rate

Advanced economies

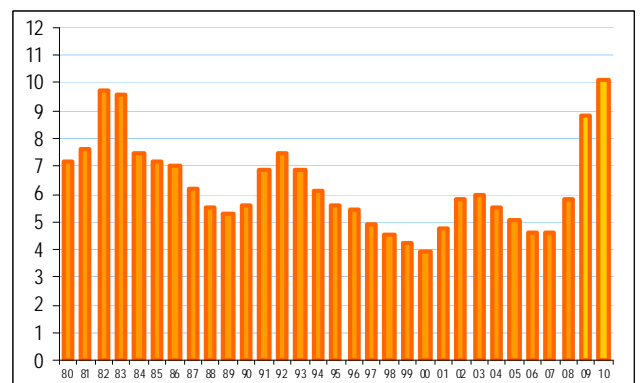
(%)



Source: International Monetary Fund

United States

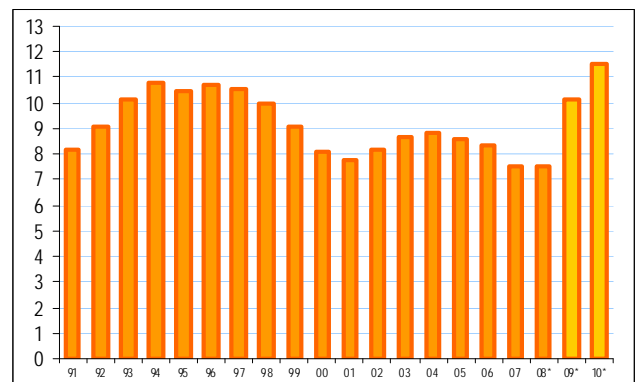
(%)



Source: International Monetary Fund

Euro area

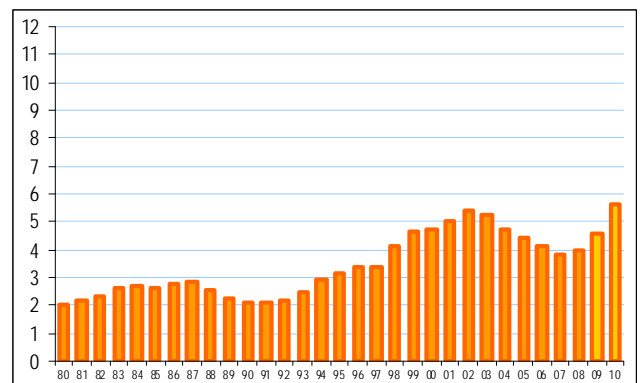
(%)



Source: International Monetary Fund

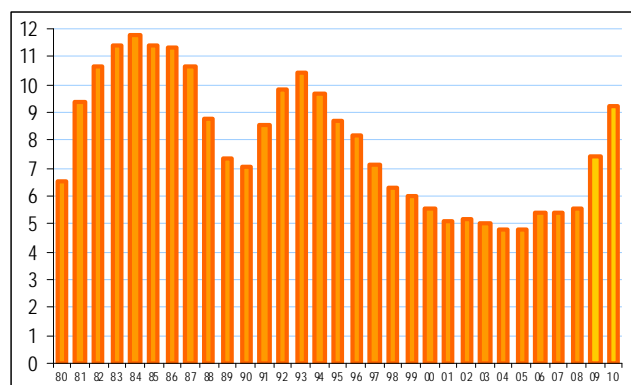
Japan

(%)



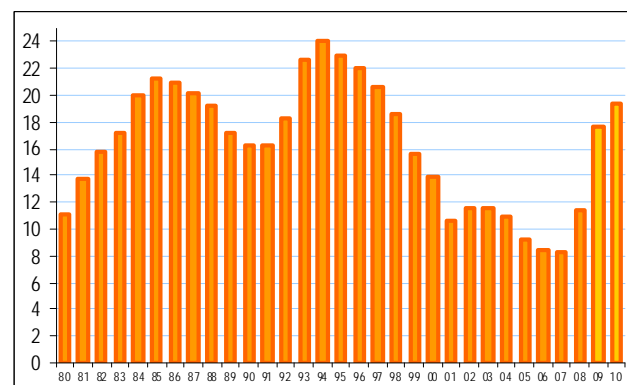
Source: International Monetary Fund

United Kingdom (%)



Source: International Monetary Fund

Spain (%)



Source: International Monetary Fund

Overview of the unemployment projections by the International Monetary Fund (IMF), World Economic Outlook, April 2009

Unemployment rate (%)

											Current projections				Average			
	1995	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009*	2010*	07-06	08-07	09*-08	10*-09*	1995-2008	
Advanced economies	7.1	5.9	5.9	6.5	6.7	6.4	6.2	5.8	5.4	5.8	8.1	9.2	+	-	--	--	6.4	
Europe																		
Euro area	10.5	8.1	7.8	8.2	8.7	8.8	8.6	8.4	7.5	7.6	10.1	11.5	++	=	--	--	8.9	
Austria	3.9	3.6	3.6	4.2	4.3	4.8	5.2	4.8	4.4	3.8	5.4	6.2	+	++	--	--	4.3	
Belgium	9.7	6.9	6.6	7.5	8.2	8.4	8.5	8.3	7.5	6.8	9.5	10.5	++	++	--	--	8.2	
Finland	15.4	9.8	9.1	9.1	9.0	8.8	8.4	7.7	6.8	6.4	8.5	9.3	++	+	--	--	10.0	
France	11.2	9.1	8.4	8.9	9.0	9.2	9.3	9.2	8.3	7.8	9.6	10.3	++	+	--	--	9.6	
Germany	8.0	7.5	7.6	8.4	9.3	9.8	10.6	9.8	8.4	7.3	9.0	10.8	++	++	--	--	8.7	
Greece	9.1	11.4	10.8	10.3	9.7	10.5	9.9	8.9	8.3	7.6	9.0	10.5	++	++	--	--	10.0	
Ireland	12.2	4.3	3.9	4.4	4.7	4.5	4.4	4.4	4.5	6.1	12.0	13.0	=	--	--	--	6.3	
Italy	11.2	10.2	9.1	8.6	8.5	8.1	7.7	6.8	6.1	6.8	8.9	10.5	++	--	--	--	9.1	
Luxembourg	3.0	2.5	2.3	2.6	3.5	3.9	4.3	4.5	4.4	4.4	6.8	6.0	=	=	--	++	3.4	
Netherlands	6.6	2.8	2.2	2.8	3.7	4.6	4.7	3.9	3.2	2.8	4.1	5.0	++	+	--	--	3.9	
Portugal	7.2	4.0	4.0	5.0	6.3	6.7	7.6	7.7	8.0	7.8	9.6	11.0	-	+	--	--	6.2	
Spain	22.9	13.9	10.6	11.5	11.5	11.0	9.2	8.5	8.3	11.3	17.7	19.3	+	--	--	--	14.0	
Denmark	10.4	5.4	4.7	4.8	5.7	5.8	5.1	3.9	2.7	1.7	3.2	4.5	++	++	--	--	5.7	
Sweden	8.8	5.6	4.9	4.9	5.6	6.3	7.6	7.0	6.1	6.2	8.4	9.6	++	=	--	--	7.0	
United Kingdom	8.7	5.5	5.1	5.2	5.0	4.8	4.8	5.4	5.4	5.5	7.4	9.2	=	-	--	--	5.9	
Cyprus	2.6	3.4	3.0	3.3	4.1	4.7	5.3	4.6	3.9	3.7	4.6	4.3	++	+	--	+	3.7	
Iceland	5.0	1.3	1.4	2.5	3.4	3.1	2.1	1.3	1.0	1.7	9.7	9.3	+	--	--	+	2.5	
Israel	6.9	8.8	9.3	10.3	10.8	10.4	9.0	8.4	7.3	6.0	7.5	7.7	++	++	--	-	8.5	
Norway	4.9	3.4	3.5	3.9	4.5	4.5	4.6	3.4	2.5	2.6	3.7	4.7	++	=	--	--	3.8	
Switzerland	3.7	1.7	1.6	2.3	3.4	3.5	3.4	3.0	2.5	2.7	3.9	4.6	++	-	--	--	3.0	
Americas																		
Canada	9.5	6.8	7.2	7.6	7.6	7.2	6.8	6.3	6.0	6.2	8.4	8.8	+	-	--	-	7.6	
United States	5.6	4.0	4.7	5.8	6.0	5.5	5.1	4.6	4.6	5.8	8.9	10.1	=	--	--	--	5.1	
Asia and the Pacific																		
Australia	8.2	6.3	6.8	6.4	5.9	5.4	5.1	4.8	4.4	4.3	6.8	7.8	+	+	--	--	6.3	
Japan	3.2	4.7	5.0	5.4	5.3	4.7	4.4	4.1	3.8	4.0	4.6	5.6	+	-	--	--	4.3	
New Zealand	6.3	6.0	5.3	5.2	4.6	3.9	3.7	3.8	3.6	4.1	6.5	7.5	+	--	--	--	5.2	
Newly Industrialized Asian Economies	10.5	8.1	7.8	8.2	8.7	8.8	8.6	8.4	7.5	7.6	10.1	11.5	++	=	--	--	8.9	
Hong Kong (China)	3.2	4.9	5.1	7.3	7.9	6.8	5.6	4.8	4.0	3.5	6.3	7.5	++	+	--	--	4.9	
Korea, Republic of	2.1	4.4	4.0	3.3	3.6	3.7	3.7	3.5	3.3	3.2	3.8	3.6	+	=	--	+	3.8	
Singapore	1.8	2.7	2.7	3.6	4.0	3.4	3.1	2.7	2.1	3.1	7.5	8.6	++	--	--	--	2.7	
Taiwan (pr. of China)	1.8	3.0	4.6	5.2	5.0	4.4	4.1	3.9	3.9	4.1	6.3	6.1	=	-	--	+	3.6	

Source: Compiled by UNWTO from International Monetary Fund, World Economic Outlook (www.imf.org/external/pubs/ft/weo/weorepts.htm)

* percentage points change to previous year: ++ < -0.5; + [-0.5, -0.1]; - [-0.1, 0.1]; -- > 0.5

Commodities, inflation, interest rates

The intensification of the global financial and economic crisis has led to a sharp decline in commodity prices, including oil, food and metals. The IMF's *WEO* of April 2009 points out that the decline in global oil demand was entirely attributable to sharply decelerating demand in advanced economies. After peaking at an all-time record high (in both nominal and real terms) of US\$ 143 a barrel on 11 July 2008, oil prices collapsed to about US\$ 38 by end-December. Since then, prices have broadly stabilised in the US\$ 40–50 range, with some recent upticks beyond that range. In effect, according to the International Energy Agency (IEA) in the June 2009 Oil Market Report (www.oilmarketreport.org), crude futures averaged US\$ 60 a barrel in May 2009 and reached US\$ 10 a barrel higher by early June. The IEA has adjusted its global oil demand forecast for 2009 – moving it slightly upwards – following stronger-than-expected early-year OECD demand, although these revisions do not necessarily imply economic recovery, but may reflect a slowing in previously sharp decline. Global oil demand is projected to decline 2.9% in 2009.

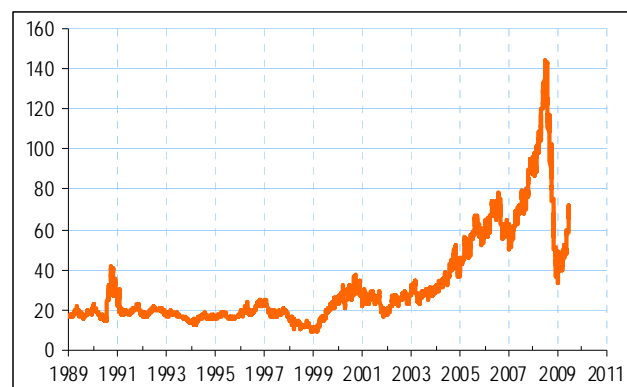
As oil and food prices have plummeted and demand is slumping, inflation pressures are subsiding fast. According to the IMF, inflation in 2009 and 2010 is expected to be negative or close to zero in most advanced economies, with rising risks of deflation. This is down from 3–4% growth rates in 2008. In emerging and developing economies, inflation rates are also projected to drop markedly, from 9.3% in 2008 to 5.7% in 2009.

As a result, monetary policy has been eased. The Federal Reserve lowered its benchmark interest rate virtually to zero in December 2008 and brought the USA to the zero rate policy implemented by Japan. The Bank of England cut policy rates in successive steps from 5.75% in 2007 to 0.5% in 2009. The European Central Bank has lowered interest rates seven times from 4.25% in October 2008 to the current 1%. Despite these strong cuts, credit to the private sector remains constrained.

In advanced economies, the IMF warns that scope for easing monetary policy further should be used aggressively to counter deflationary risks and support demand. Although policy rates are already near the zero floor in many countries, whatever policy room remains should be used quickly. Emerging economies also need to ease monetary conditions to respond to the deteriorating outlook. For many of those economies, the task of central banks is further complicated by the need to sustain external stability in the face of highly fragile financing flows and balance sheet mismatches because of domestic borrowing in foreign currencies. Thus, while most central banks in these economies have lowered interest rates in the face of the global downturn, they have been appropriately cautious in doing so to maintain incentives for capital inflows and to avoid disorderly exchange rates moves.

Crude Oil Spot Price Brent (daily)

(US\$ per barrel)

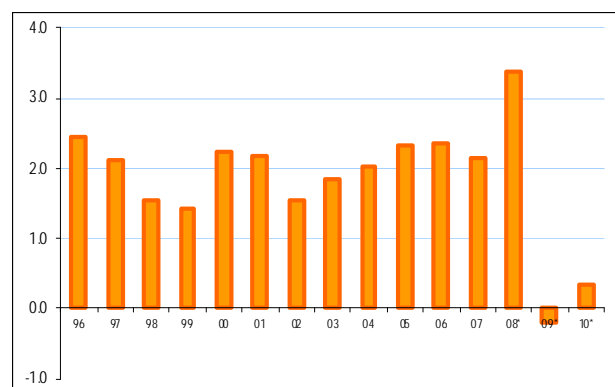


Source: US Department of Energy, Energy Information Administration

Inflation

Advanced economies

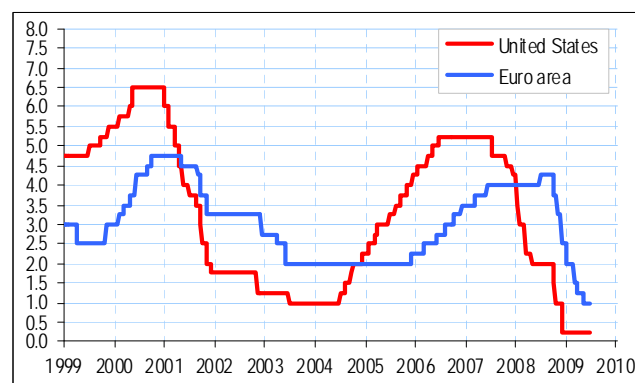
(%)



Source: International Monetary Fund

Interest rate Federal Reserve and ECB

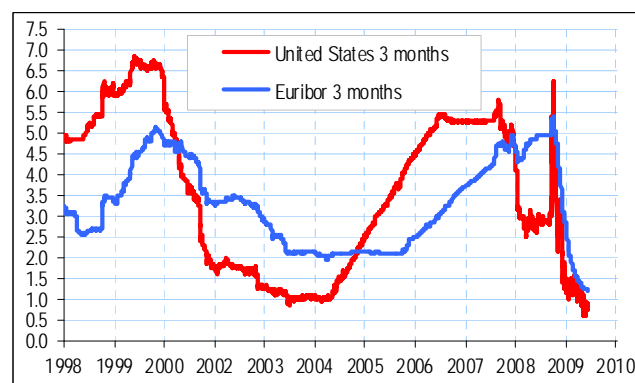
(%)



Source: Federal Reserve and European Central Bank (ECB)

Interest rates on international markets

(%)



Source: Banco de España based on European Banking Federation and Agencia Reuters

Exchange rates

During the period January-May 2009 the US dollar lost 3% against the euro. The euro exchanged at US\$ 1.37 in May (1 US\$ = €0.73) compared to US\$ 1.32 in January. The US dollar has weakened versus most major European currencies, with significant losses against the Norwegian krone (-8%) and the Pound sterling (-7%). The US dollar also lost ground to various currencies in the Americas region, most notably the Brazil real (-10%), the Chilean peso (-9%), the Canadian dollar (-6%) and the Mexican peso (-5%). Furthermore, the US dollar has weakened against the South African rand (-15%), the Australian dollar (-12%), the New Zealand dollar (-9%), the Korean won (-8%) and the Indonesia rupiah (-7%).

Exchange rate euro to US dollar (US\$ per €)

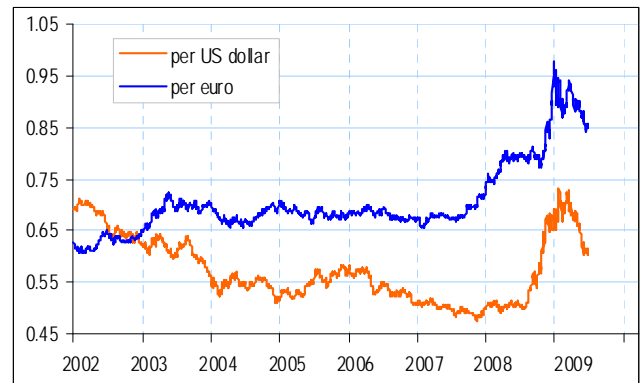


Source: De Nederlandse Bank

A relief for the US dollar was that there was only little change during these first five months with respect to its rate versus the Polish zloty, the Russian Rouble, the Hong Kong dollar, the Indian rupee, the Philippine peso, the Tunisian dinar and the UAE dirham. The US dollar has also kept its value against the Chinese yuan renmibi since January 2009, which may be sign of a slowdown in the Chinese currency's appreciation. Some currencies were weaker than the US dollar. The US dollar gained 7% against the Japanese yen. In the Americas, the US dollar appreciated against the Jamaican dollar (+10%) and the Argentine peso (+7%).

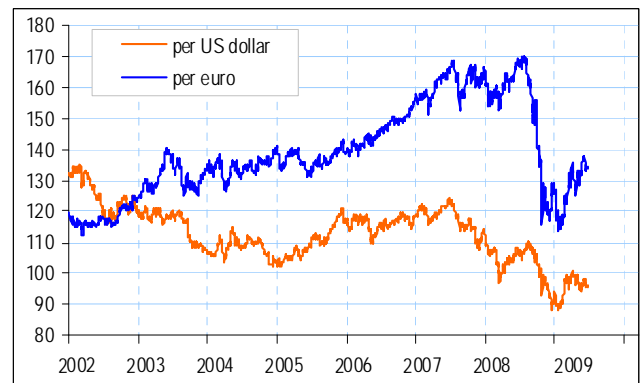
On the other side of the coin, the euro gained 3% against the US dollar. The appreciation by 10% of the euro to the Japanese yen is particularly significant.

Exchange rate British pound



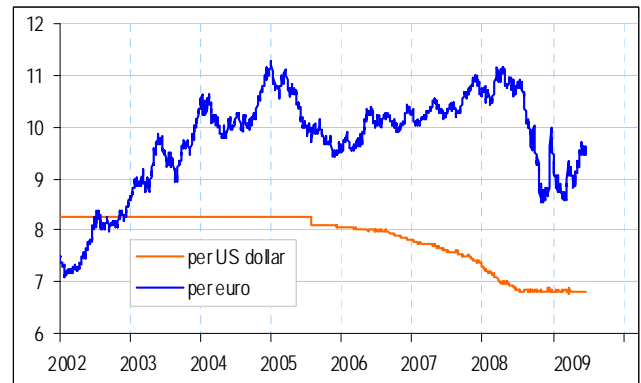
Source: De Nederlandse Bank

Exchange rate Japanese yen (100)



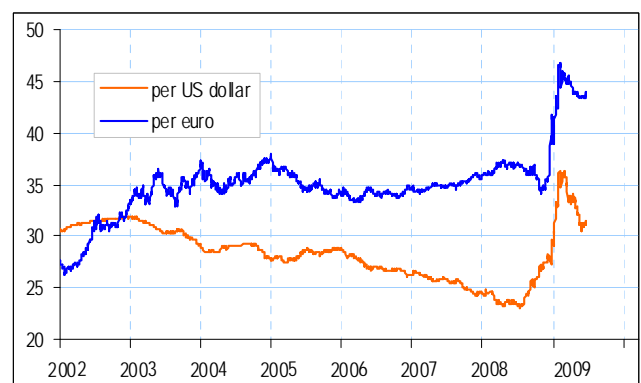
Source: De Nederlandse Bank

Exchange rate Chinese yuan renminbi



Source: De Nederlandse Bank

Exchange rate Russian rouble



Source: De Nederlandse Bank

Exchange rates

	Currency units per US dollar									Currency units per euro								
	Average		07/06	08/07	2008	2009	year ago	J.-M.09	Average	07/06	08/07	2008	2009	year ago	J.-M.09			
	2007	2008	%	%	May	Jan	May	%	2007	2008	%	%	May	Jan	May	%		
US dollar	-	-			-	-	-		1.37	1.47	9.2	7.3	1.56	1.32	1.37	-12.3	3.1	
Canadian dollar	1.07	1.06	-5.5	-1.0	1.00	1.23	1.15	15.3	-6.1	1.47	1.56	3.1	6.2	1.55	1.62	1.57	1.2	-3.2
Mexican peso	10.93	11.08	0.2	1.4	10.44	13.88	13.18	26.3	-5.0	14.97	16.29	9.4	8.8	16.24	18.38	18.00	10.8	-2.1
Jamaican dollar	69.04	72.43	5.5	4.9	70.66	80.65	88.63	25.4	9.9	94.63	106.54	15.1	12.6	109.93	106.78	120.98	10.0	13.3
Guatemalan quetzal	7.68	7.55	0.9	-1.7	7.45	7.83	8.09	8.7	3.3	10.52	11.11	10.2	5.5	11.58	10.37	11.05	-4.6	6.5
Honduran lempira	18.90	18.88	0.0	-0.1	18.90	18.88	18.91	0.0	0.2	25.90	27.77	9.1	7.2	29.41	25.00	25.82	-12.2	3.3
Argentine peso	3.15	3.20	1.8	1.7	3.23	3.53	3.77	16.7	6.9	4.31	4.71	11.1	9.2	5.03	4.67	5.15	2.4	10.3
Brazilian real	1.94	1.82	-10.6	-6.5	1.66	2.31	2.07	24.6	-10.4	2.66	2.67	-2.4	0.3	2.58	3.06	2.82	9.3	-7.6
Chilean peso	522	518	-1.7	-0.7	471	622	566	20.3	-9.0	715	762	7.3	6.6	732	824	773	5.6	-6.1
Colombian peso	2075	1952	-12.1	-5.9	1776	2262	2224	25.2	-1.7	2843	2870	-4.1	1.0	2763	2994	3036	9.9	1.4
Peruvian new sol	3.13	2.91	-4.5	-6.8	2.80	3.15	3.00	6.9	-4.9	4.29	4.29	4.3	0.0	4.36	4.17	4.09	-6.2	-2.0
Euro	0.73	0.68	-8.4	-6.8	0.64	0.76	0.73	14.0	-3.0	-	-			-	-	-		
Danish krone	5.44	5.07	-8.5	-6.8	4.80	5.63	5.46	13.8	-3.1	7.45	7.46	-0.1	0.1	7.46	7.45	7.45	-0.2	-0.1
Swedish krona	6.75	6.54	-8.4	-3.1	5.98	8.10	7.75	29.5	-4.3	9.25	9.62	0.0	3.9	9.31	10.73	10.58	13.7	-1.3
Pound sterling	0.50	0.54	-8.0	8.4	0.51	0.69	0.65	27.3	-6.6	0.68	0.80	0.4	16.4	0.79	0.92	0.88	11.7	-3.7
Czech koruna	20.26	16.96	-10.2	-16.3	16.13	20.52	19.58	21.4	-4.6	27.77	24.95	-2.0	-10.2	25.10	27.17	26.73	6.5	-1.6
Hungarian forint	183	171	-12.9	-6.8	159	211	207	29.7	-2.3	251	252	-4.9	0.1	248	280	282	13.8	0.7
Polish zloty	2.76	2.39	-11.0	-13.5	2.19	3.20	3.23	47.7	1.1	3.78	3.51	-2.9	-7.2	3.40	4.23	4.41	29.6	4.3
Croatian kuna	5.35	4.91	-8.2	-8.3	4.66	5.56	5.39	15.5	-3.1	7.34	7.22	0.2	-1.5	7.25	7.36	7.35	1.3	-0.1
Norwegian krone	5.85	5.59	-8.7	-4.4	5.06	6.96	6.44	27.4	-7.5	8.02	8.22	-0.4	2.6	7.86	9.22	8.79	11.8	-4.6
Swiss franc	1.20	1.08	-4.3	-10.0	1.04	1.13	1.11	6.1	-1.8	1.64	1.59	4.4	-3.4	1.62	1.49	1.51	-6.9	1.2
Russian rouble	25.55	24.76	-5.9	-3.1	23.72	31.97	31.92	34.5	-0.2	35.02	36.42	2.7	4.0	36.90	42.33	43.57	18.1	2.9
Turkish lira	1.30	1.30	-9.5	-0.6	1.25	1.60	1.56	24.8	-2.9	1.79	1.91	-1.2	6.7	1.94	2.12	2.13	9.5	0.1
Israeli new shekel	4.11	3.57	-7.8	-13.0	3.38	3.91	4.07	20.2	3.9	5.63	5.25	0.6	-6.6	5.26	5.18	5.55	5.5	7.1
UAE dirham		3.67			3.67	3.67	3.68	0.0	0.1		5.40			5.72	4.86	5.02	-12.2	3.2
Moroccan dirham	8.19	7.71	-6.9	-5.8	7.36	8.42	8.22	11.6	-2.4	11.22	11.35	1.6	1.1	11.45	11.15	11.22	-2.1	0.6
Tunisian dinar	1.28	1.23	-3.9	-4.1	1.17	1.37	1.37	17.0	-0.1	1.75	1.80	4.9	2.9	1.83	1.82	1.87	2.6	3.0
South African rand	7.05	8.20	3.7	16.3	7.63	9.91	8.39	9.9	-15.4	9.66	12.06	13.2	24.8	11.87	13.13	11.45	-3.6	-12.8
Japanese yen	118	104	1.2	-11.9	104	90	97	-7.4	6.8	161	152	10.4	-5.5	162	120	132	-18.8	10.1
Chinese yuan renminbi	7.60	6.95	-4.6	-8.6	6.97	6.84	6.82	-2.1	-0.2	10.42	10.22	4.1	-1.9	10.85	9.05	9.32	-14.1	2.9
Hong Kong dollar	7.80	7.79	0.4	-0.2	7.80	7.76	7.75	-0.6	-0.1	10.69	11.45	9.6	7.1	12.13	10.27	10.58	-12.8	3.0
Taiwan dollar	32.84	31.47	1.0	-4.2	30.60	33.38	32.86	7.4	-1.5	45.01	46.28	10.2	2.8	47.60	44.19	44.86	-5.8	1.5
Singapore dollar	1.51	1.41	-5.2	-6.3	1.37	1.49	1.46	6.9	-2.0	2.06	2.08	3.5	0.6	2.13	1.97	1.99	-6.2	1.0
Korean won	929	1092	-2.7	17.6	1037	1361	1253	20.8	-8.0	1273	1606	6.2	26.2	1613	1802	1710	6.0	-5.1
Thai baht	32.26	32.96	-14.9	2.2	32.10	34.91	34.61	7.8	-0.9	44.21	48.48	-7.1	9.6	49.94	46.22	47.24	-5.4	2.2
Malaysian ringgit	3.43	3.32	-6.3	-3.2	3.22	3.57	3.52	9.4	-1.4	4.71	4.89	2.2	3.9	5.01	4.73	4.81	-4.0	1.6
Indonesian rupiah	9,141	9,631	-0.3	5.4	9,280	11,181	10,357	11.6	-7.4	12,528	14,165	8.8	13.1	14,437	14,802	14,137	-2.1	-4.5
Philippine peso	45.99	44.31	-10.3	-3.6	43.00	47.10	47.33	10.1	0.5	63.03	65.17	-2.1	3.4	66.90	62.35	64.60	-3.4	3.6
Vietnamese dong	16097	16392	0.8	1.8	16127	17513	17726	9.9	1.2	22062	24109	10.1	9.3	25089	23186	24195	-3.6	4.4
Australian dollar	1.19	1.18	-10.1	-0.7	1.05	1.48	1.31	24.1	-11.9	1.63	1.74	-1.9	6.5	1.64	1.96	1.78	8.8	-9.2
New Zealand dollar	1.36	1.41	-11.9	3.9	1.29	1.82	1.66	29.1	-8.9	1.86	2.08	-3.9	11.5	2.00	2.41	2.27	13.3	-6.1
Fiji dollar	1.61	1.58	-6.9	-1.5	1.49	1.80	2.13	43.0	18.6	2.20	2.33	1.6	5.8	2.32	2.38	2.91	25.5	22.2
Indian rupee	41.16	43.19	-9.0	4.9	42.03	48.71	48.57	15.6	-0.3	56.41	63.52	-0.6	12.6	65.38	64.48	66.30	1.4	2.8
Pakistan rupee	60.80	70.21	0.8	15.5	67.56	78.89	80.68	19.4	2.3	83.32	103.26	10.0	23.9	105.10	104.44	110.13	4.8	5.5
Sri Lanka rupee	111	108	6.3	-2.2	108	114	117	8.3	2.7	152	159	16.1	5.0	168	151	160	-4.9	5.8

Source: compiled by UNWTO based on data from De Nederlandse Bank (DNB)/European Central Bank (ECB) and the Bank of Canada

World Tourism Organization (UNWTO) Publications



UNWTO World Tourism Barometer

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

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



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

The Indian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

India is one of the fastest-growing outbound travel markets in the world. Trips abroad have grown from 3.7 (1997) to 9.8 million (2007) and international tourism expenditure has increased from US\$ 1.3 (1997) to US\$ 8.2 billion (2008). With more than 1.1 billion inhabitants and GDP increasing by more than 8% every year, the country offers enormous potential for future growth in outbound travel. Recognizing the importance of this market, the ETC and the UNWTO have undertaken detailed research on the Indian outbound market. This publication covers issues such as travellers' behaviour and patterns – destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the media or internet use trends. The report also sets out recommendations on how to best promote a destination in the Indian market.

Available in English



Published: 2009
Price: € 75

Handbook on Tourism Destination Branding

All over, governments have become aware of tourism's power to boost their nation's development and prosperity. As more tourism destinations emerge and competition for visitors becomes more intense, a destination's ability to project itself on the world stage and differentiate itself from others is ever more important. Recognizing the value of successfully building and managing a destination's brand, the ETC and the UNWTO provide a useful and practical handbook for both marketing novices and experienced destination managers. Introduced by Simon Anholt, it offers a step-by-step guide to the branding process accompanied by strategies for brand management. Case studies illustrate the various concepts, present best practices from around the world and provide fresh insight into destination branding. It concludes with a section on evaluating brand impact and a set of practical recommendations.

Available in English



Published: 2009
Price: € 75

The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination

China is one of the fastest growing outbound markets in the world. Rising incomes and relaxation of restrictions on foreign travel led to a growth of 22% a year in trips abroad since 2000 (34.5 million in 2006). China ranks 5th worldwide in terms of spending on international tourism (US\$ 30 billion in 2007). In 1995, the World Tourism Organization (UNWTO) predicted that China would generate 100 million arrivals worldwide by 2020, making it the fourth largest market in the world (Tourism 2020 Vision). In view of recent trends, China may reach that target well before 2020. To better understand the structure and trends of this market is the aim of the new ETC/UNWTO report *The Chinese Outbound Travel Market with Special Insight into the Image of Europe as a Destination*.

Available in English

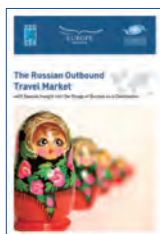


Published: 2008
Price: € 75

The Russian Outbound Travel Market with Special Insight into the Image of Europe as a Destination

Russia is the 9th biggest outbound travel market in the world, generating in 2007 US\$ 22 billion in spending abroad. To better understand the structure and trends of this growing market is the aim of this ETC/UNWTO report, which identifies key trends in the Russian outbound travel – among others, the market size and value, growth in trip volume and spending, purpose of trip, destination choice, the role of the travel trade and online distribution. In addition, the publication provides information on government policy affecting outbound travel, notably visa issues and traffic rights for foreign airlines operating to/from the country. All this information is critical to helping destinations and commercial operators plan ahead with greater foresight, providing guidance on the short-term opportunities and the longer-term potential for investment in this market.

Available in English



Published: 2009
Price: € 75

Handbook on Tourism Forecasting Methodologies

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

Available in English



Published: 2008
Price: € 45

Handbook on E-marketing for Tourism Destinations

This handbook is the first of its kind for tourism destinations. It is a practical 'how-to' manual designed to help staff at national, regional and city tourism organisations, to improve their e-marketing skills and manage new projects. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advises among others on how to build better content, get distribution of it, use CRM, succeed with online PR and get into mobile marketing. Web analytics, online research methods, and performance measurement get full treatment and new areas like digital television are covered. Also, it includes over 30 examples of e-marketing in action.

Available in English



Published: 2008
Price: € 75

Cruise Tourism – Current Situation and Trends

Over the past years, worldwide demand for cruise tourism has posted some of the biggest gains within the tourism sector. The constant dynamism in cruise activity, as well as the increasing number of countries that include cruises as a key product for their tourism development, has led to update and expand the first edition of the UNWTO study of 2003. This new study discusses subjects like the current supply and demand for cruises as well as its characteristics and trends. A new element includes the relationship between destinations and cruise lines, analysing key factors such as legislation, promotion and the economic impact of cruises through reference cases. It presents current trends in this industry in terms of innovation, safety and security, and sustainability, and identifies the major lines that will shape the sector.

Available in Spanish, only



Published: 2008
Price: € 80

The **World Tourism Organization** is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 161 countries and territories and more than 350 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

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