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This issue and the accompanying *Statistical Annex* of the *UNWTO World Tourism Barometer* include an analysis of preliminary results for international tourist arrivals as reported by destinations around the world for the first eight months of 2012. This analysis is complemented by data on receipts from and expenditure on international tourism for the first part of 2012. Furthermore, it includes an evaluation by the UNWTO Panel of Experts of the period May-August and an outlook for the period September-December. Finally, it presents an overview of air transport booking trends until the end of the year.

This release is available only in electronic format, through the UNWTO eLibrary, and is free of charge for members. The release is provided in English only, while the Statistical Annex is available in English, French, Spanish and Russian.

## Robust demand for international tourism despite uncertain economy

In the period January to August 2012 the number of international tourists hit a record 705 million worldwide, a growth of 4% compared to the same period in 2011, or 28 million more tourists. With this data, UNWTO is confident that a total of one billion tourists will have travelled internationally by the end of the year. The comparative strength of tourism in a period of continued economic uncertainty is further confirmed by the positive data on tourism earnings and expenditure.

## Quick overview of key trends

### International tourism up by 4% through August

- A total of 143 countries have now reported data on international arrivals for the first 6 to 9 months of 2012: 118 (83%) have seen arrivals increase, of which 49 (34%) with double-digit figures, while 25 (17%) have reported a decline. Over 90 countries have reported data at least up to August 2012.

- Based on this sample of reporting destinations, international arrivals are estimated to have increased by 4% from January to August 2012 compared to the same period in 2011.
- All world regions recorded growth in international arrivals except the Middle East. Growth was stronger in Asia and the Pacific (+7%) and Africa (+6%), followed by the Americas (+4%) and Europe (+3%). The Middle East (-1%) continues to show signs of recovery, with particularly promising results in Egypt.
- Emerging economies (+5%) have regained the lead over advanced ones (+4%) due to strong results in sub-regions as varied as North Africa (+11%), Central and Eastern Europe (+9%), South Asia (+8%), South-East Asia (+8%), North-East Asia (+7%), Central America (+7%) and South America (+6%).

International Tourist Arrivals, monthly evolution

World

(% change)

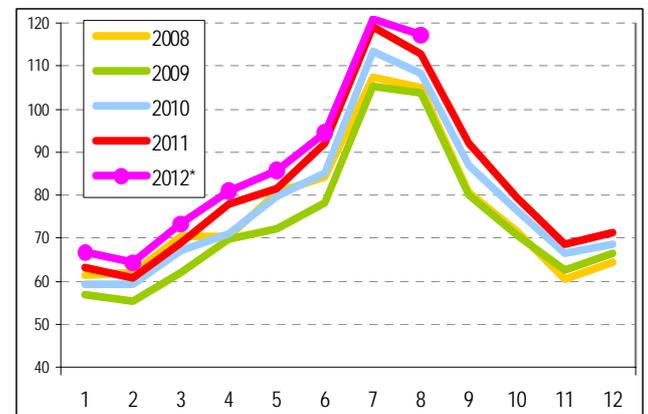


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World

(million)



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 periodically updated. Issues contain as regular sections: an overview of short-term tourism data from destinations, 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 Tourism Trends and Marketing Strategies Programme, with the collaboration of consultants, Nancy Cockerell and David Stevens. The UNWTO Secretariat wishes to express its sincere gratitude to all those who have participated in the elaboration of the *UNWTO World Tourism Barometer*, in particular all institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable contributions.

For more information on the *UNWTO World Tourism Barometer*, including copies of previous issues, please refer to the Facts & Figures section on the UNWTO website at [www.unwto.org/facts/menu.html](http://www.unwto.org/facts/menu.html).

We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org), tel +34 915678205 / fax +34 915678217.



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The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published end of January 2013 by the occasion of the Spanish tourism fair Fitur.

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

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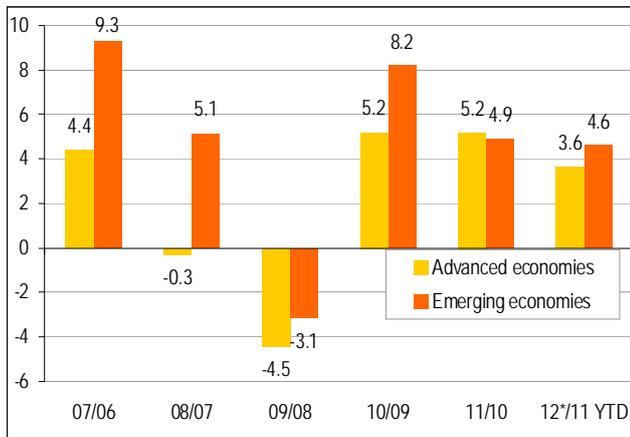
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- Among the world's ten top tourism destinations, Germany (8th in ranking) recorded the highest growth, with 7% more international arrivals in January-August 2012 than in the same period last year, followed by the United States (2nd) with +6%, and Spain (4th) with +4%.

International Tourist Arrivals (% change)



Source: World Tourism Organization (UNWTO) ©

**International tourism demand remains resilient amidst economic uncertainty**

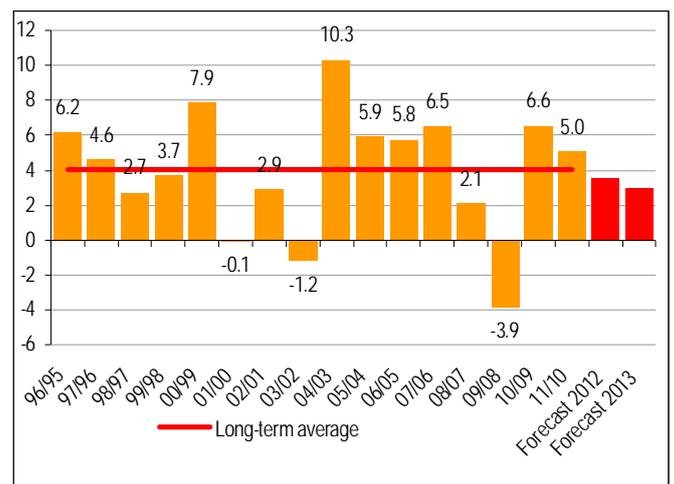
- In absolute numbers, international tourist arrivals worldwide reached 705 million in the period January-August 2012, up 28 million from the same period last year (677 million).
- Tourism growth slowed in June (+3%) and July (+1%) compared with the first five months of the year (average of +5%), yet strengthened in August (+4%). This is positive news as August accounts for the highest volume of international tourist arrivals in the year.
- The almost 50 countries that have already reported data up to September indicate that growth is continuing at a moderate rate.
- Globally, international tourism results have so far not been seriously affected by the economic volatility, with growth continuing above the average of 3.8% a year projected for the decade 2010-2020 according to UNWTO's long-term forecast *Tourism Towards 2030*.
- According to the latest survey of the UNWTO Panel of Experts, prospects for international tourism expansion are weakening, but remain positive. Tourism performance in the period May-August 2012 (score of 115) was evaluated as to have been weaker than expected four months ago (score of 118). The outlook for the September-December period (score of 109) reflects confidence fading further. Experts from emerging economies are rather more optimistic about this period (score of 123) than those from advanced economies (score of 97).
- Analysis of air passenger travel trends for the last four months of 2012 as well as for the full year 2012 based on air transport booking data from business intelligence tool Forwardkeys indicates that international air travel worldwide is expected to grow by 5% in 2012, while domestic air travel declines slightly.

- For the full year 2012, UNWTO is maintaining its early year forecast, announced in January, of a 3% to 4% growth in international tourist arrivals.
- "This growth is a very positive result in view of the global economic situation. We must remain cautious, however, as we have also observed some weaker months during the year, a trend that might return in the remainder of the year," said UNWTO Secretary-General, Taleb Rifai.

**One Billion Tourists: One billion Opportunities**

- In 2011, international tourist arrivals reached 990 million (revised due to updated data). With the expected growth of 3% to 4% in 2012, UNWTO remains confident that a record of one billion tourists will be reached for the first time by December 2012.
- The date of 13 December has been designated to symbolically mark the arrival of the one billionth tourist. In order to celebrate this historic milestone UNWTO launched the campaign *One Billion Tourists: One billion Opportunities* calling on one billion tourists to make their actions count, for more information see <http://1billiontourists.unwto.org>.
- For 2013 growth is expected to continue but at a more moderate rate in the range of 2% to 4%. A comprehensive forecast by region will be included in the *UNWTO World Tourism Barometer* of January 2013.
- In 2011, receipts from international tourism, including international passenger transport, (exports from tourism) totalled US\$ 1.2 trillion or 30% of exports of services and close to 6% of the world's exports of goods and services. For more information on tourism in 2011 see *UNWTO Tourism Highlights*. <http://mkt.unwto.org/en/content/tourism-highlights>.

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©



# 1 BILLION TOURISTS BILLION OPPORTUNITIES



**On 13 December 2012, the one-billionth tourist will arrive somewhere in the world.**

Through simple actions, from buying locally to using their towels for more than a day, this tourist can make a real difference to the people and places they visit.

Now imagine if every one of the one billion tourists did the same. **One billion small actions, one very big impact.**

Join the UNWTO campaign at <http://1billiontourists.unwto.org/> and help us turn one billion tourists into one billion opportunities.

## GET INVOLVED

### 1 VOTE

Vote for the travel tip you'll commit to on your next trip to make it an opportunity for good.

### 2 SHOUT

Shout with us on 13 December when we'll reveal the most popular tip to the world.

### 3 JOIN

Join the Faces of the One Billion by sending us a photo from one of your trips.



# 1BILLIONTOURISTS.UNWTO.ORG

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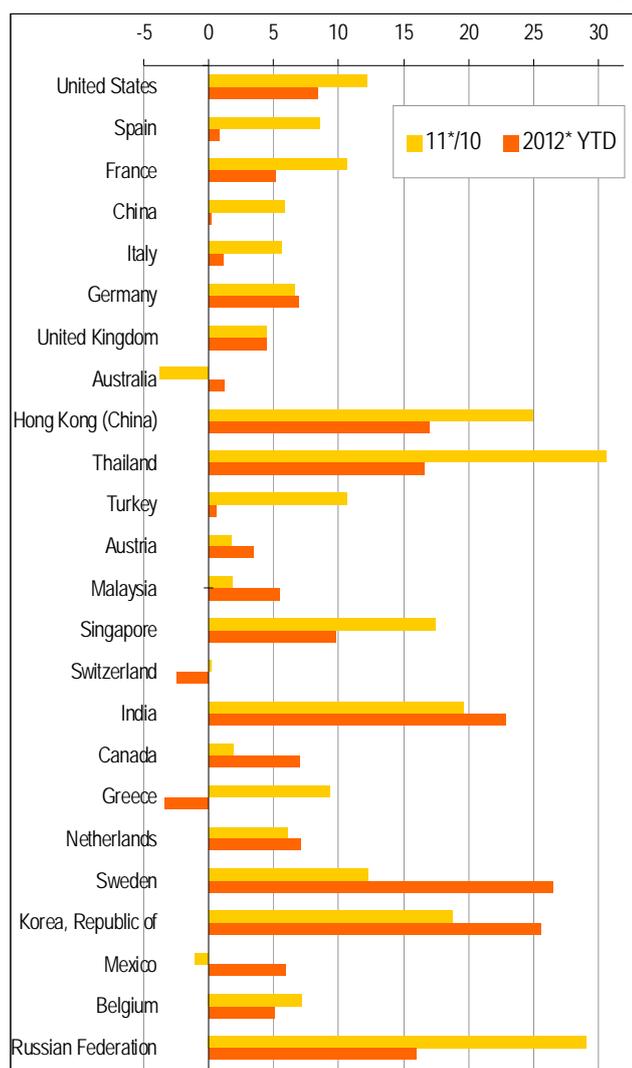
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## International Tourism Receipts and Expenditure

### Arrivals growth confirmed by results in receipts

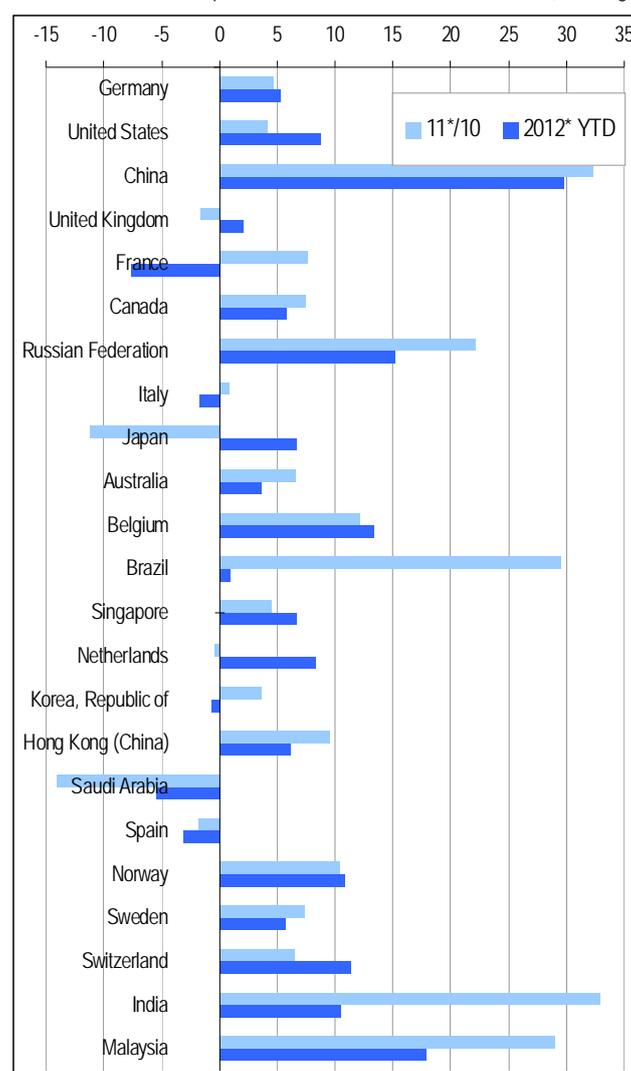
- Of 111 destinations reporting tourism receipt data for the first part of 2012, 99 countries (89%) saw growth in earnings, of which 47 in double digits (42%), while 12 (11%) saw declines.
- Among the 10 largest international tourism earners, receipts grew significantly in Hong Kong (China) (+17%), United States (+8%), Germany (+7%), France (+5%) and the United Kingdom (+4%) in the first six to nine months of the year.
- A number of other major destinations reported double-digit growth in receipts, such as Japan (+48%), Sweden (+26%), South Africa (+26%), the Republic of Korea (+26%), India (+23%), Poland (+19%), Thailand (+17%), the Russian Federation (+16%), Egypt (+13%), the Czech Republic (+13%), Taiwan (pr. of China) (+11), Singapore (+10%) and Croatia (+10%).

International Tourism Receipts (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourism Expenditure (% change)



Source: World Tourism Organization (UNWTO) ©

### China and the Russian Federation see highest growth in tourism expenditure

- In terms of expenditure abroad on tourism, demand from both emerging and advanced economy source markets during the first six to nine months of 2012 remained steady.
- So far 45 of the 50 largest outbound markets reported data on tourism expenditure abroad for the first part of 2012. Of these 33 (73%) saw expenditure grow, with among them 13 in double digits (29%), while 12 (27%) saw declines.
- Among the top 10 international markets by expenditure on travel abroad, growth was significant in China (+30%), Russian Federation (+15%), United States (+9%), Canada (+6%), Germany (+5%), and Australia (+4%) as well as in Japan, where a 7% increase confirms the recovery of this important market. Following a decline in recent years, the UK recorded a modest 2% growth in tourism expenditure, while both Italy and France showed declines in expenditure on travel abroad.
- Other major advanced economy outbound markets that reported significant growth were Austria (+16%), Belgium

(+13%), Switzerland (+11%), Norway (+11%), the Netherlands (+8%), Singapore (+7%), Czech Republic (+7%), Hong Kong (China) (+6%), Finland (+6%) and Sweden (+6%).

- Among the emerging economies, in addition to China and Russian Federation, double-digit growth in expenditure was posted by Venezuela (+31%), Poland (+22%), Malaysia (+18%), Argentina (+16%), Philippines (+14%), India (+11%) and Indonesia (+10%).

## Regional results

### *Central & Eastern Europe leads European tourism*

- **Europe** saw a 3% growth in international tourist arrivals in January-August 2012 compared to the same period last year. Northern Europe saw a very modest 0.2% increase in arrivals due to negative figures in Ireland, Norway and Sweden, and zero growth in the UK. This contrasts with Central & Eastern Europe which recorded a 9% advance due to strong growth in most destinations including the larger ones, especially the Russian Federation (+12%), Hungary (+8%) and Poland (+7%).
- Western Europe posted a 4% increase in arrivals with solid growth in Germany (+8%), Austria and the Netherlands (both +5%). Southern & Mediterranean Europe recorded a modest 1%, but on top of a very strong 2011, and partly due to the recovery of destinations in North Africa and the Middle East. Results across its larger destinations were mixed: Spain (+4%), Croatia (+3%), Portugal (+3%) and Turkey (+2%) saw growth in arrivals, while Greece (-6%) and Italy (-2%) recorded a decline.

### *Asia & the Pacific fastest growing region*

- International tourist arrivals between January and August put **Asia & the Pacific** at the top of world regions in terms of growth; with 7% more inbound tourists than in the same period last year. South and South-East Asia both recorded an 8% increase in arrivals fuelled by countries such as Thailand (1.2 million more tourists or +9%), Cambodia (0.5 million more or +25%), Vietnam (0.4 million or +10%) and the Philippines (0.3 million or +10%).
- North Asia also recorded high growth (+7%) due to excellent arrival figures in Japan (1.7 million more tourists, or +41%) which is recovering from the 2011 Tohoku earthquake and is well on track to returning to the 8 million tourist mark. Korea also saw outstanding growth (+1.3 million tourists or +21%), as well as Hong Kong (China) which received 1 million more international tourists or +7%, and Taiwan (pr of China) which saw nearly 1 million more arrivals, an impressive growth of 24%.

### *South and Central America drive growth in the Americas*

- **The Americas** saw a 4% growth in tourist arrivals in January through August 2012 compared to the same period last year, with Central and South America (7% and 6% respectively) driving demand. The Caribbean sub-region also reported a solid 5% increase in arrivals, while North America posted a growth of 3%.
- Central America's largest destination, Costa Rica (2.2 million tourists in 2011) recorded a 7% increase in arrivals this year up to August, while Nicaragua (+12%), El Salvador (+7%), Panama (+6%), and Guatemala (+5%), all receiving over 1 million tourists in 2011, also performed well.
- Among the top destinations in South America, Chile saw a remarkable 16% increase in international arrivals compared to the same period last year, followed by Ecuador (+14%) and Peru (+11%), while Argentina posted a modest 1% increase, and Uruguay a decline of 6%. Among other destinations, it is worth mentioning Venezuela, which saw a 22% increase in overnight visitors, and Paraguay, 15%.

### *North Africa and the Middle East recover some lost ground*

- In **Africa** (+6%), the recovery of Tunisia (+30%) has contributed to the good results of North Africa (+10%) while available information from countries in Sub-Saharan Africa (+4%) reflects a consolidation of growth seen in previous years. South Africa (the largest destination in the sub-region with 8 million arrivals in 2011) posted 11% growth.
- Despite some very mixed performances, the **Middle East** (-1%) is recording improved results compared to 2011. Egypt is experiencing a major rebound (+20%) after last year's 32% decline, while the United Arab Emirates, Oman and Jordan all recorded approximately 10% growth. Lebanon (-15%) is still suffering the conflict in neighbouring Syria, while Saudi Arabia reported a 21% decline in tourist arrivals following last year's bumper increase.

The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the complimentary excerpt of this document.

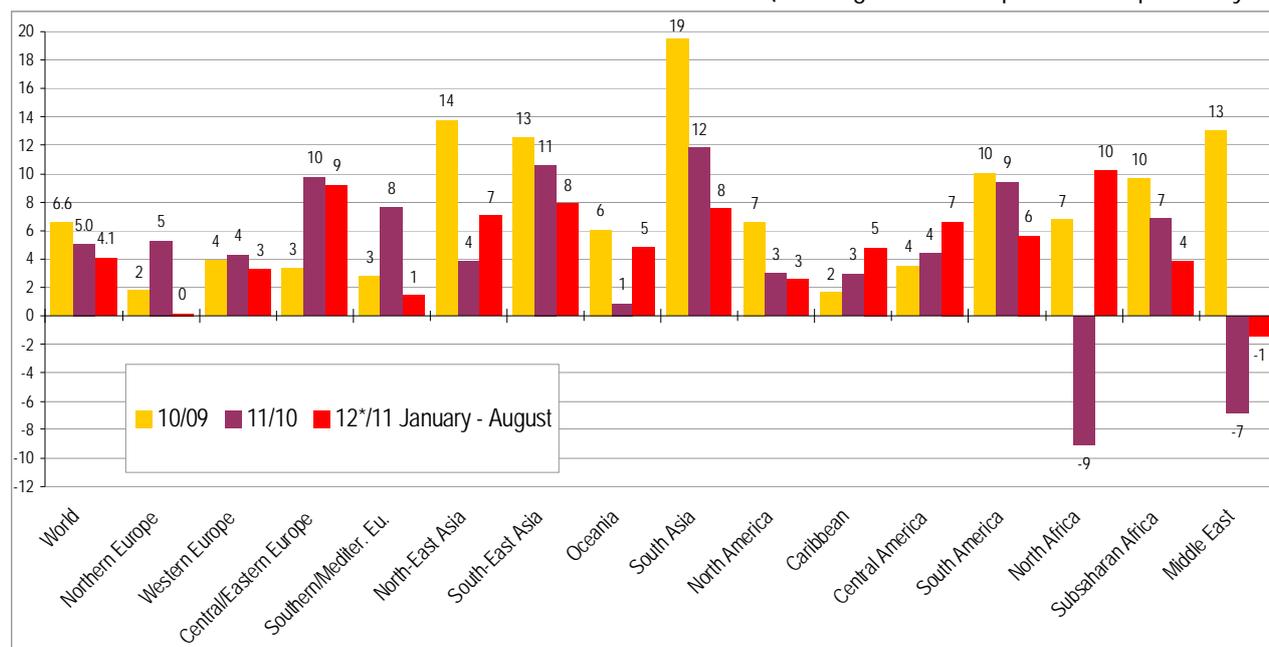
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International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year					Share	Change			Monthly/quarterly data series (percentage change over same period of the previous year)												
	2000	2005	2009	2010	2011		2011	09/08	10/09	11/10	2012*								2011			
	(million)					(%)	(%)			YTD	Q1	Q2	Mar	Apr	May	Jun	Jul	Aug	Q1	Q2	Q3	Q4
<b>World</b>	674	799	884	942	990	100	-3.9	6.6	5.0	4.1	6.0	3.9	6.6	3.9	5.1	2.7	1.4	4.1	3.9	6.8	5.0	3.6
Advanced economies <sup>1</sup>	417	455	476	501	527	53.3	-4.5	5.2	5.2	3.6	6.5	3.6	7.2	4.6	6.3	0.4	1.1	2.4	3.1	6.7	5.3	4.8
Emerging economies <sup>1</sup>	256	344	408	441	462	46.7	-3.1	8.2	4.9	4.6	5.5	4.3	6.0	3.2	3.8	5.8	1.9	6.4	4.6	6.9	4.6	2.5
<i>By UNWTO regions:</i>																						
<i>Europe</i>	384.9	441.4	462.7	477.2	509.1	51.4	-5.1	3.1	6.7	3.4	4.8	3.6	3.6	3.6	6.6	1.1	1.6	3.0	5.3	8.7	5.8	5.2
Northern Europe	43.3	56.8	57.1	58.1	61.1	6.2	-5.5	1.8	5.3	0.2	4.0	1.8	1.3	5.8	5.7	-4.0	-3.7	-4.0	5.4	10.5	3.7	1.4
Western Europe	139.7	141.7	148.5	154.3	161.0	16.3	-3.0	3.9	4.3	3.3	5.9	3.4	5.8	2.3	9.8	-0.8	0.4	2.8	3.9	5.4	3.3	5.3
Central/Eastern Eu.	69.3	90.4	92.6	95.7	105.0	10.6	-10.3	3.3	9.8	9.2	9.2	9.5	9.6	9.2	9.8	9.6	9.0	8.8	7.7	9.8	6.9	8.3
Southern/Mediterranean Eu.	132.6	152.5	164.5	169.1	182.0	18.4	-3.6	2.8	7.6	1.4	0.9	1.2	-1.5	0.4	2.8	0.4	0.9	2.7	5.0	10.5	8.0	4.6
- of which EU-27	323.7	352.4	356.8	366.0	387.6	39.2	-4.7	2.6	5.9	2.4	4.5	2.3	3.2	2.6	6.3	-1.2	0.8	1.6	4.5	8.3	5.5	4.6
<i>Asia and the Pacific</i>	110.1	153.6	181.1	205.0	218.1	22.0	-1.6	13.2	6.4	7.3	8.5	7.6	10.8	8.4	6.7	7.6	4.0	6.4	4.9	6.0	8.2	6.8
North-East Asia	58.3	85.9	98.0	111.5	115.8	11.7	-2.9	13.8	3.8	7.0	7.7	7.9	10.8	9.2	7.1	7.2	3.8	6.4	2.1	0.7	5.1	7.3
South-East Asia	36.1	48.5	62.1	69.9	77.3	7.8	0.5	12.5	10.6	7.9	9.8	7.5	10.3	8.3	6.6	7.6	4.6	7.0	8.0	14.3	14.2	6.4
Oceania	9.6	11.0	10.9	11.6	11.7	1.2	-1.8	6.1	0.9	4.8	4.6	6.3	10.5	3.6	4.1	11.7	1.5	5.2	-0.5	0.6	0.2	3.1
South Asia	6.1	8.1	10.0	12.0	13.4	1.4	-2.1	19.5	11.8	7.5	11.1	6.0	14.0	4.7	5.6	7.7	3.7	3.5	16.9	16.5	11.7	8.8
<i>Americas</i>	128.2	133.3	141.3	150.2	156.3	15.8	-4.7	6.3	4.1	3.6	7.2	2.2	9.1	2.0	1.2	3.3	0.1	2.1	2.9	6.2	3.8	3.2
North America	91.5	89.9	93.0	99.2	102.1	10.3	-5.1	6.6	3.0	2.5	8.1	0.5	12.0	0.4	-0.7	1.8	-1.4	0.8	0.8	5.2	3.5	1.9
Caribbean	17.1	18.8	19.2	19.5	20.1	2.0	-4.5	1.6	2.9	4.8	5.2	5.4	6.8	3.5	5.8	7.3	2.1	4.7	2.4	3.5	1.4	4.2
Central America	4.3	6.3	7.6	7.9	8.3	0.8	-7.0	3.5	4.4	6.6	7.0	6.9	8.3	2.8	7.0	11.4	5.1	6.2	2.7	4.2	2.8	4.7
South America	15.3	18.3	21.4	23.6	25.8	2.6	-2.3	10.0	9.4	5.8	6.6	5.3	2.2	7.0	4.7	4.1	4.5	5.3	9.7	15.3	7.7	7.0
<i>Africa</i>	26.2	34.8	45.9	49.8	50.2	5.1	3.4	8.5	0.8	6.1	5.9	6.9	8.1	7.8	6.3	6.6	-3.6	16.6	5.0	-1.4	-2.4	-0.6
North Africa	10.2	13.9	17.6	18.8	17.1	1.7	2.5	6.7	-9.1	10.2	8.9	11.6	11.6	12.7	15.0	8.4	-8.1	41.3	-9.1	-9.7	-11.3	-6.1
Sub-Saharan Africa	16.0	20.9	28.3	31.0	33.1	3.3	3.9	9.7	6.8	3.8	4.8	4.3	6.7	5.5	2.3	5.4	0.8	2.6	11.4	3.7	5.1	2.1
<i>Middle East</i>	24.1	36.3	53.0	59.9	55.9	5.6	-4.3	13.0	-6.8	-1.4	-0.3	-4.6	1.8	-7.3	-5.3	-1.1	-0.2	3.9	-6.4	1.2	-3.6	-12.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO November 2012)

<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177,

at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

See box at page 'Annex-1' for explanation of abbreviations and signs used



# World Tourism Organization UNWTO Publications

## UNWTO World Tourism Barometer

The UNWTO World Tourism Barometer aims at providing all those involved in tourism with up-to-date statistics and adequate analysis, in a timely fashion. Issues cover short-term tourism trends, a retrospective and prospective evaluation of current tourism performance by the UNWTO Panel of Experts, and a summary of economic data relevant for tourism. The information is updated throughout the year.

Available in English, French, Spanish and Russian



## The Middle East Outbound Travel Market

The Middle East region is one of the fastest growing tourist generating regions in the world. Outbound travel from the Middle East has more than quadrupled from 8 million in 1990 to 36 million in 2010. Published jointly by ETC and UNWTO, The Middle East Outbound Market, provides an in depth analysis of the structure and trends of this market, helping destinations and commercial operators plan ahead with greater foresight.

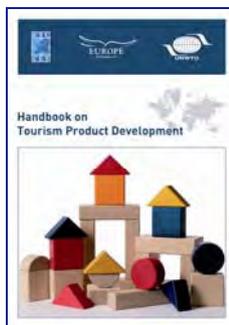
Available in English



## Handbook on Tourism Product Development

The UNWTO/ETC Handbook on Tourism Product Development outlines the essential elements in the process of tourism product development planning and implementation. It demonstrates a range of successful approaches and case studies from around the world and sets out best practice examples and benchmarks by which destinations can assess their own product development system and methods.

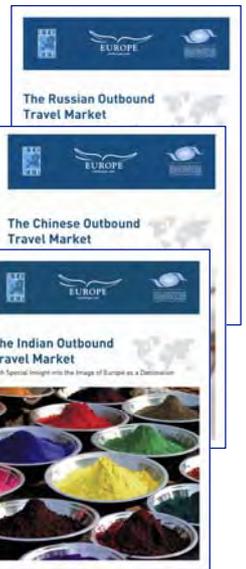
Available in English



## The Chinese Outbound Travel Market, The Indian Outbound Travel Market and The Russian Outbound Travel Market

The Indian, the Chinese and the Russian Outbound Travel Markets are some of the fastest growing, and consequently increasingly important markets in the world. The UNWTO and ETC have jointly published detailed studies on each unique market, which aim to provide the necessary information to better understand the structure and trends of these growing markets. Topics covered include: destination choice, purpose of travel, spending, holiday activities and market segmentation, as well as the use of the internet and social media.

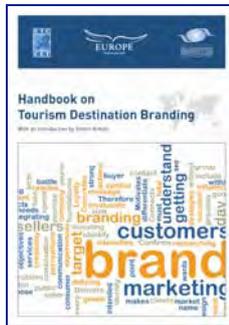
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## Handbook on Tourism Destination Branding

This handbook is a recognition by UNWTO and ETC of the value of successfully building and managing a destination's brand. With an Introduction by Simon Anholt, the handbook presents a step-by-step guide to the branding process, accompanied by strategies for brand management. Given case studies illustrate concepts, present best practices from around the world and provide fresh insight into destination branding.

Available in English and Spanish



## Global Report on LGBT Tourism

As the global visibility of the lesbian, gay, bisexual and transgender (LGBT) community increases, there has been a steady increase in interest in this community as a consumer group, a trend which is particularly evident in the travel industry. With the knowledge and support of the International Gay and Lesbian Travel Association, as well as the UNWTO Affiliate Members, this report examines LGBT tourism from a social, political and economic perspective.

## The Power of Youth Travel

With outbound travel from the world's emerging economies being boosted by new, affluent travellers and the age bracket for youth travel expanding across the world, young people are quickly becoming a consumer group to take seriously. The Power of Youth Travel features commentary from specialists, UNWTO Affiliate Members and other selected organizations on the importance of Youth Travel for economic development, global development and young travellers themselves.

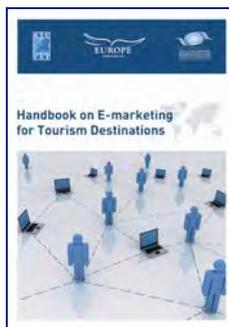
Available in English



## Handbook on E-marketing for Tourism Destinations

This handbook is a practical 'how-to' manual designed to help staff in national, regional and city tourism organisations, to improve their e-marketing skills. It covers all the basics such as web design, search engine optimisation, social networking and e-commerce, and advises how to build better content, assure distribution, use CRM, succeed with online PR and get into mobile marketing.

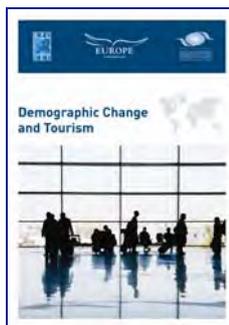
Available in English and Spanish



## Demographic Change and Tourism

The UNWTO/ETC report on Demographic Change and Tourism aims to be a reference for destinations and the industry, a means to achieve a better understanding of current and future demographic changes (e.g. population growth and ageing, migration and family diversification) and how these will impact upon tourism, how to anticipate and react upon them in the most competitive way.

Available in English



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