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This issue of the *UNWTO World Tourism Barometer* and its accompanying Statistical Annex include an analysis of results for international tourism for the first half of 2015 based on arrivals and receipts data reported by destinations around the world, as well on international tourism expenditure data for source markets around the world. Furthermore, this issue includes data on hotel performance, the meetings industry and air transport bookings from business intelligence tool ForwardKeys.

This release is available only in electronic format. The full document can be downloaded free of charge for members and subscribed institutions through the UNWTO elibrary at www.e-unwto.org/toc/wtobarometereng/current. The release is available in English only, while the Statistical Annex is provided in four languages through the UNWTO elibrary at:

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21 million more international tourists in the first half of 2015

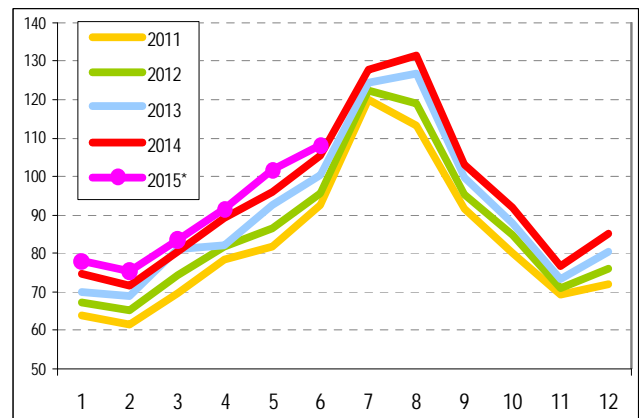
The number of international arrivals of overnight visitors (tourists) grew by 4% in the first half of 2015 according to the data analysed in this issue of the *UNWTO World Tourism Barometer*. Destinations worldwide received some 538 million international tourists between January and June 2015, an increase of 21 million compared to the same period of 2014.

Europe, Asia and the Pacific and the Middle East all recorded 5% growth in international arrivals and the Americas 4%. Limited data available for Africa points to an estimated 6% decrease in the number of international tourists in the region. At the subregional level, the Caribbean and Oceania (both +7%) were the best performers, together with Central and Eastern Europe and Central America (both +6%).

In spite of this overall growth, results by destination are rather mixed. Safety and security remain a global concern while the economic scenario is comparatively more volatile with the recovery of advanced economies contrasting with the slowdown of emerging economies. Tourism demand has also been impacted by lower oil prices and currency fluctuations.

International Tourist Arrivals, monthly evolution

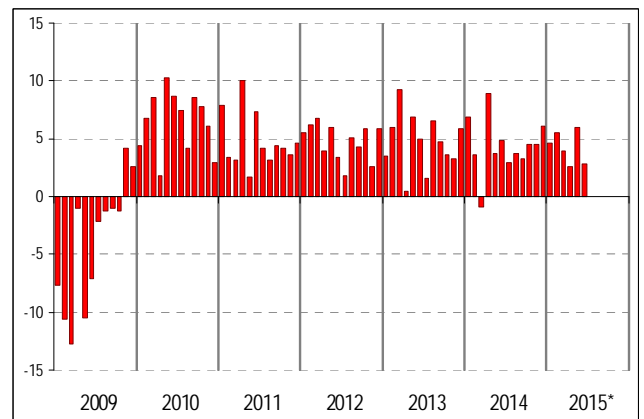
World (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World (% change)



Source: World Tourism Organization (UNWTO) ©

“These results show that, despite increased volatility, tourism continues to consolidate the positive performance it has had over the last five years and to provide development and economic opportunities worldwide”, said UNWTO Secretary-General, Taleb Rifai. “As UNWTO prepares to meet in Medellin, Colombia, for its 21st General Assembly, this is the appropriate moment to call for a stronger support to tourism as the sector has the potential to deliver on some of the most pressing challenges of our time, namely job creation, economic growth and social inclusion”, he added.

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 Market Trends Programme. 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 915678198 / fax +34 915678217.



The World Tourism Organization (UNWTO) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

UNWTO's membership includes 156 countries, six territories, two Permanent Observers, and over 450 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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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

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Data collection for this issue was closed end of August 2015.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published October 2015.

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

If you are interested in receiving the UNWTO World Tourism Barometer and you are not a UNWTO Member, you can subscribe to the next three issues for € 70 (pdf version delivered electronically) or € 100 (pdf plus hard copy).

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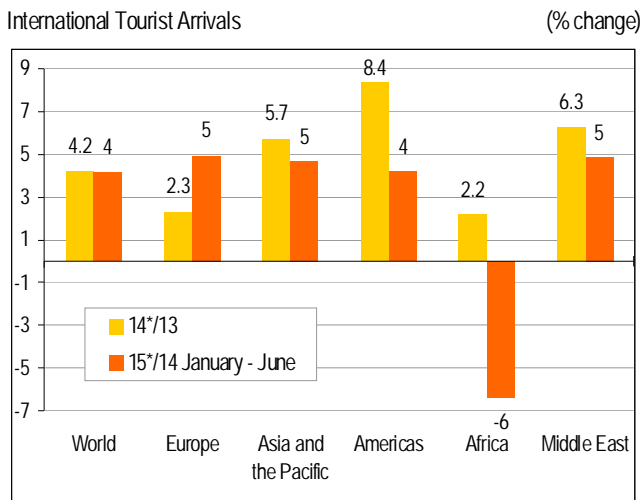
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[Continuation from page 1]

According to the UNWTO forecast issued at the beginning of 2015, international tourist arrivals are expected to increase by 3% to 4% worldwide for the whole year, in line with the long-term forecast of an average growth of 3.8% a year set for the period 2010 to 2020.



Source: World Tourism Organization (UNWTO) ©

Regional Results

Europe, the most visited region in the world, led growth and increased international arrivals by 5%, benefiting from a weaker currency in the euro area. Growth was driven by the recovery in Central and Eastern Europe (+6%), while Western Europe, Northern Europe and Southern Mediterranean Europe (each +5%) all outgrew the worldwide average.

Asia and the Pacific recorded a 5% increase in international arrivals in the first half of 2015, with Oceania (+7%) in the lead. Destinations in North-East Asia and South-East Asia (both +5%) reported rather mixed results, led by Japan (+47% through July) and Thailand (+30% through July). South Asia recorded a comparatively modest 4% increase in arrivals after two years of double-digit growth.

International arrivals in the Americas grew by 4% in the first half of 2015, consolidating last year's strong results. All four subregions recorded positive growth, although with variations across destinations. The strong US dollar fuelled robust outbound demand from the United States. The Caribbean (+7%) and Central America (+6%) led growth. In North America (+3%), arrival numbers were strong in Canada and Mexico (both +8%),

while for the United States indications point to more modest growth. Most destinations in South America (+4%) reported sound results, in spite of Brazil's outbound travel stalling.

The limited data available for Africa indicates that international tourist numbers were down by 6% with a decline of 10% in arrivals to North Africa and 4% in Sub-Saharan Africa. Alongside the impacts of the terrorist attacks, African destinations have been impacted by the aftermath of the Ebola outbreak in a few West African countries and the slower growth of regional economies depending on the export of oil and other commodities.

International tourist arrivals in the Middle East grew by 5% consolidating the recovery initiated in 2014. (Data for Africa and Middle East should be taken with caution as it is based on limited available data.)

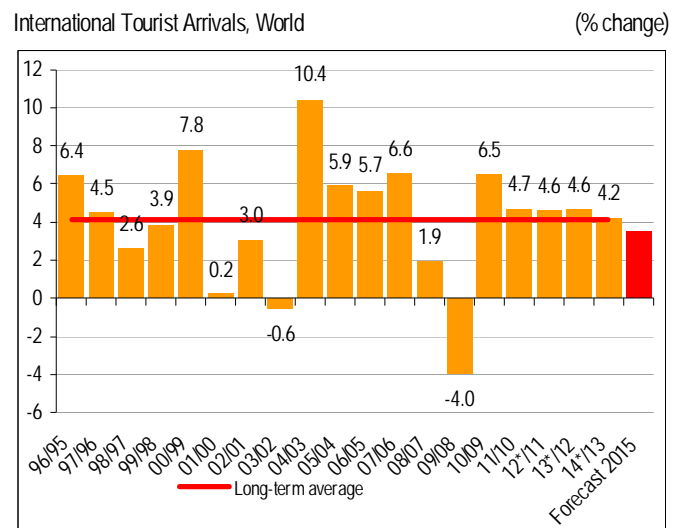
Source markets show mixed results

In terms of outbound tourism, data for the first quarters of 2015 shows a diverse picture in spending abroad.

Among the emerging markets, China and India both started the year with double-digit growth in the first quarter, while expenditure from the Russian Federation and Brazil reflected the slower economic growth in both markets and the depreciation of the rouble and the real against the US dollar and the euro.

As for the traditional advanced economy source markets, demand from the United States, France, Sweden and Spain remains strong, while it is weaker in Germany, the United Kingdom, Italy and Canada.

Please note that results presented here reflect preliminary data reported to date and are subject to revision.



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)												
	1995	2000	2005	2010	2011	2012	2013	2014*		2014*	13/12	14*/13	2015*	2014*								
	(million)									(%)	(%)	YTD	Q1	Q2	Mar	Apr	May	Jun	Q1	Q2	Q3	Q4
World	527	674	809	949	994	1,039	1,087	1,133	100	4.6	4.2	4.1	4.6	3.8	3.9	2.6	6.0	2.8	3.1	5.5	3.1	4.8
Advanced economies ¹	336	420	466	513	538	559	585	618	54.5	4.6	5.7	4.6	4.3	4.7	2.9	3.3	7.6	3.4	4.4	7.4	4.5	6.0
Emerging economies ¹	191	254	343	436	456	480	502	515	45.5	4.7	2.5	3.7	4.9	2.5	4.9	1.8	3.9	1.9	1.9	3.3	1.1	3.5
<i>By UNWTO regions:</i>																						
Europe	304.6	386.6	453.2	489.4	520.6	540.9	566.9	580.1	51.2	4.8	2.3	4.9	5.6	4.5	4.8	2.5	7.4	3.5	1.6	3.2	1.3	2.3
Northern Europe	36.4	44.8	59.9	62.8	64.5	65.5	67.4	70.2	6.2	2.9	4.2	4.9	4.2	5.4	7.3	6.7	7.6	2.8	4.4	6.0	2.6	1.5
Western Europe	112.2	139.7	141.7	154.4	160.4	166.2	170.8	174.6	15.4	2.8	2.2	4.6	4.0	5.0	0.9	1.3	9.1	4.2	-0.7	4.7	1.2	3.7
Central/Eastern Eu.	58.1	69.6	95.3	98.9	108.8	118.9	127.8	120.6	10.6	7.5	-5.6	6.0	7.5	4.9	7.9	4.2	5.8	4.7	-1.0	-7.0	-11.0	-4.3
Southern/Medit. Europe	98.0	132.6	156.4	173.3	186.9	190.4	201.0	214.8	19.0	5.6	6.9	4.6	6.6	3.6	5.7	1.0	6.9	2.6	4.9	7.2	7.5	6.5
- of which EU-28	268.0	330.5	367.9	384.3	404.8	417.0	433.2	453.6	40.0	3.9	4.7	5.5	5.3	5.7	4.5	3.5	9.0	4.4	2.2	5.7	4.2	5.1
Asia and the Pacific	82.1	110.4	154.0	205.4	218.4	233.6	249.7	264.0	23.3	6.9	5.7	4.7	4.2	5.1	3.0	5.2	7.1	3.0	6.0	6.6	4.0	6.1
North-East Asia	41.3	58.3	85.9	111.5	115.8	122.8	127.0	136.1	12.0	3.4	7.2	4.6	4.5	4.6	2.0	7.1	7.6	-1.1	5.2	8.6	6.4	9.0
South-East Asia	28.5	36.3	49.0	70.5	78.0	84.9	94.5	97.2	8.6	11.3	2.9	4.6	3.4	6.0	2.7	3.0	6.5	8.8	5.7	1.6	0.6	3.6
Oceania	8.1	9.6	10.9	11.4	11.5	11.9	12.5	13.2	1.2	4.6	6.0	7.1	8.5	5.4	10.8	4.8	5.5	6.2	5.2	8.6	4.7	6.0
South Asia	4.2	6.1	8.1	12.0	13.1	14.1	15.8	17.4	1.5	12.0	10.4	3.8	3.9	3.6	5.8	1.3	7.0	2.8	14.0	19.1	2.5	-0.6
Americas	109.1	128.2	133.3	150.1	155.5	162.5	167.5	181.6	16.0	3.1	8.4	4.2	4.7	3.7	3.6	3.4	3.5	4.2	4.5	13.5	6.5	9.7
North America	80.7	91.5	89.9	99.5	102.2	106.4	110.2	120.6	10.6	3.6	9.5	3.4	3.2	3.6	2.2	2.9	2.8	5.0	7.8	13.9	6.1	10.7
Caribbean	14.0	17.1	18.8	19.5	19.9	20.6	21.1	22.4	2.0	2.8	6.1	7.2	7.7	6.6	6.2	6.3	7.6	6.1	2.9	6.6	7.0	8.6
Central America	2.6	4.3	6.3	7.9	8.3	8.9	9.1	9.6	0.8	2.6	5.6	6.1	6.1	6.1	7.5	2.1	8.1	8.9	3.6	10.3	3.6	5.3
South America	11.7	15.3	18.3	23.1	25.1	26.7	27.1	28.9	2.6	1.5	6.8	3.9	6.3	1.0	5.1	3.6	2.1	-2.1	-3.9	19.4	9.3	8.3
Africa	18.7	26.2	34.8	49.5	49.5	51.9	54.5	55.7	4.9	4.9	2.2	-6.4	-5.0	-7.8	-2.1	-10.4	-3.7	-8.9	7.0	4.7	-4.2	-3.4
North Africa	7.3	10.2	13.9	18.8	17.1	18.5	19.6	19.8	1.7	6.0	0.9	-10.3	-5.7	-13.7	-1.6	-11.3	-6.9	-21.2	15.4	8.2	-6.9	-8.6
Subsaharan Africa	11.5	16.0	20.9	30.8	32.4	33.4	34.8	35.8	3.2	4.4	2.9	-4.3	-4.7	-3.8	-2.3	-9.8	-1.6	1.1	3.7	2.5	-2.0	-1.0
Middle East	12.7	22.4	33.7	54.7	49.5	50.1	48.6	51.7	4.6	-2.9	6.3	4.8	9.2	0.8	8.3	1.3	2.3	-1.1	-6.8	4.3	32.8	12.7

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO August 2015)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2015, page 150,at www.imf.org/external/ns/cs.aspx?id=29.

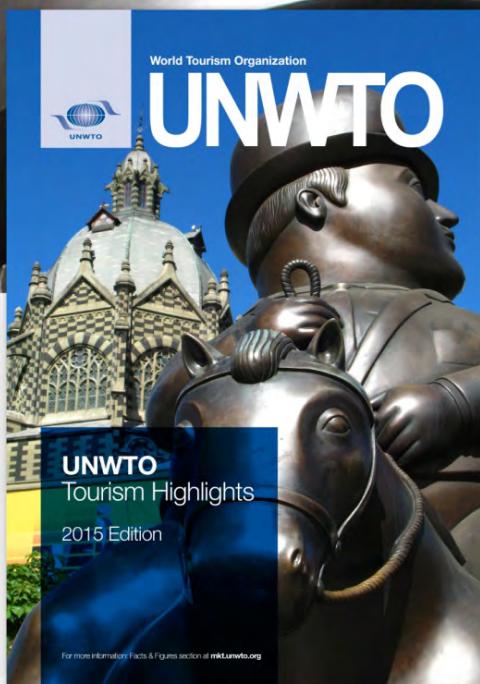
See box at page 'Annex-1' for explanation of abbreviations and signs used

Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014	2015*	average a year 2005-2014	projection 2015* (issued January) between
	real, change								
	full year						Jan.-June		
World	-4.0%	6.5%	4.7%	4.6%	4.6%	4.2%	4.1%	3.8%	+3% and +4%
Europe	-5.1%	3.1%	6.4%	3.9%	4.8%	2.3%	4.9%	2.8%	+3% and +4%
Asia and the Pacific	-1.6%	13.1%	6.3%	7.0%	6.9%	5.7%	4.7%	6.2%	+4% and +5%
Americas	-4.7%	6.2%	3.6%	4.5%	3.1%	8.4%	4.2%	3.5%	+4% and +5%
Africa	2.5%	9.4%	0.0%	4.9%	4.9%	2.2%	-6.4%	5.4%	+3% and +5%
Middle East	-5.4%	13.1%	-9.6%	1.2%	-2.9%	6.3%	4.8%	4.9%	+2% and +5%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO August 2015)



UNWTO Tourism Highlights 2015 Edition

UNWTO has released its *UNWTO Tourism Highlights, 2015 Edition*, presenting a concise overview of international tourism in the world based on the results of the year 2014.

UNWTO Tourism Highlights aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. The 2015 Edition presents in 16 pages a snapshot of international tourism in the world for 2014 based on the latest available information collected from national sources. Trends and results are analyzed for the world, regions and major regional destinations, with statistics included on international tourist arrivals and international tourism receipts. Furthermore, it provides the ranking of top tourism destinations by arrivals and receipts, as well as information on outbound tourism generating regions and a list of top source markets in terms of spending.

Electronic copies can be downloaded in English, Spanish and French free of charge from <http://mkt.unwto.org/highlights>

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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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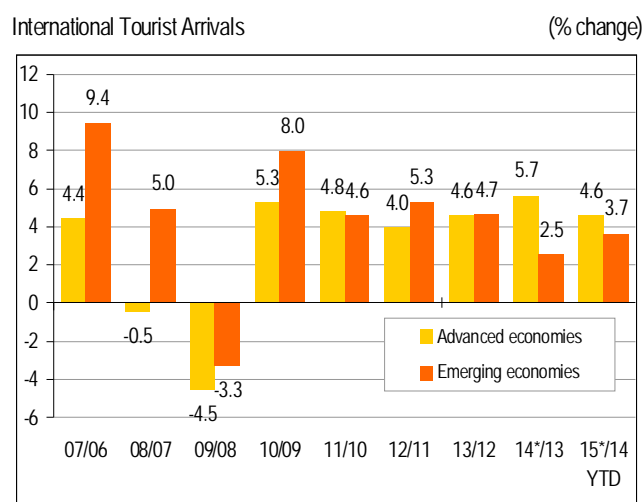
For more information on the *UNWTO World Tourism Barometer*, please refer to the Facts & Figures section on the UNWTO website at www.unwto.org/facts.

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Inbound tourism: short-term trends 2015

Generally robust results but with variations by destination

- A total of 141 countries and territories have so far reported data on international tourist arrivals (overnight visitors) for at least two to up to seven months of the period January through July 2015 (out of 220). Of these, 106 countries (75%) have reported an increase in tourist arrivals, with 33 (23%) reporting double-digit growth, while 35 countries (25%) posted a decrease. 110 countries have reported results for at least the first six months of 2015.
- Based on this sample of destinations that reported data, it is estimated that destinations worldwide recorded 538 million international tourist arrivals between January and June 2014, some 21 million more than the 517 million recorded in the same period of 2014.
- This increase in tourist arrivals is equivalent to 4% globally compared to the first half of last year, revealing a generally robust tourism sector despite ongoing political, economic and security challenges in some parts of the world.



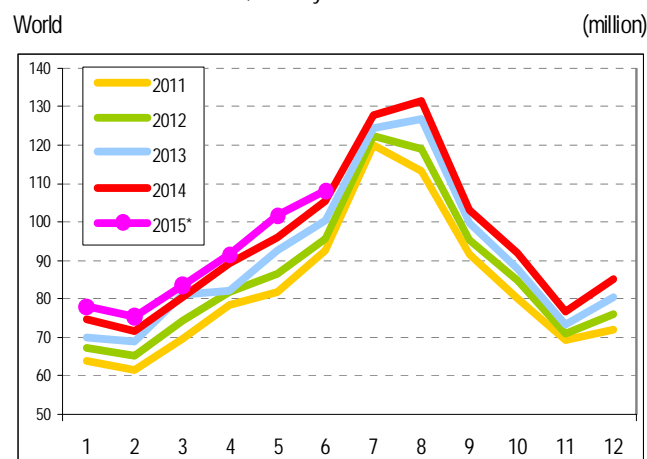
Source: World Tourism Organization (UNWTO) ©

- While many destinations share in the overall growth, results are more mixed than usual. Safety and security remain a concern for a number of destinations. The current economic scenario is comparatively volatile with a gradual pickup of economic growth in advanced economies contrasting with a slowdown in emerging ones. Lower oil prices are contributing to tourism growth globally, though weakening demand from oil exporting markets. Exchange rate variations are also redirecting travel flows. A stronger US dollar is fuelling outbound demand from the United States, though slowing inbound travel. Euro area destinations are benefitting from a more favourable exchange rate,

as are destinations elsewhere that have seen their currencies depreciate.

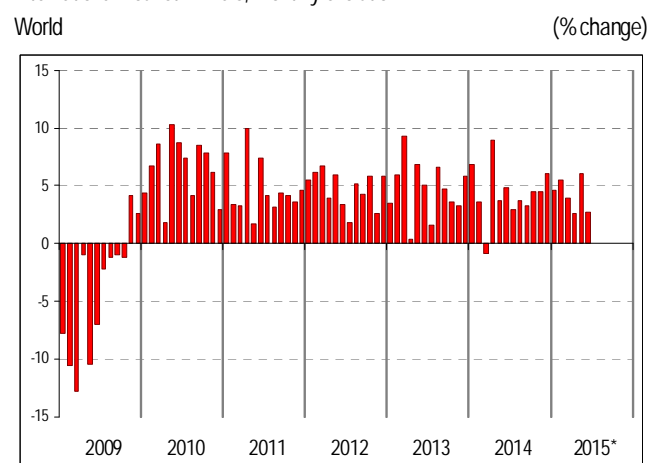
- In advanced economies (+5%) international arrivals grew somewhat faster than in emerging economies (+4%), as they benefited comparatively more from an improvement in economic conditions and the lower oil prices, while emerging economies show a more mixed picture.

International Tourist Arrivals, monthly evolution



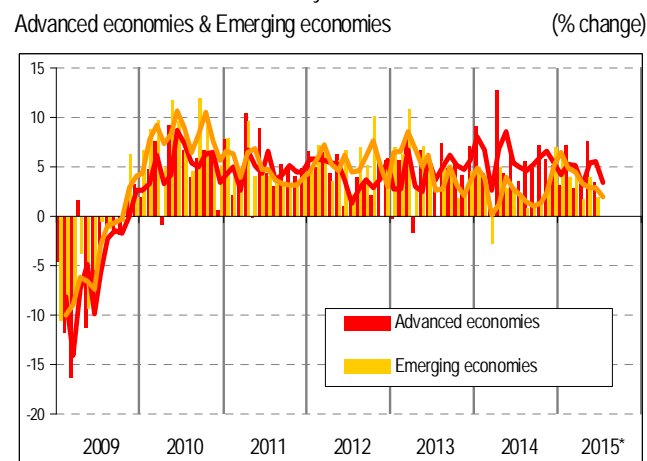
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

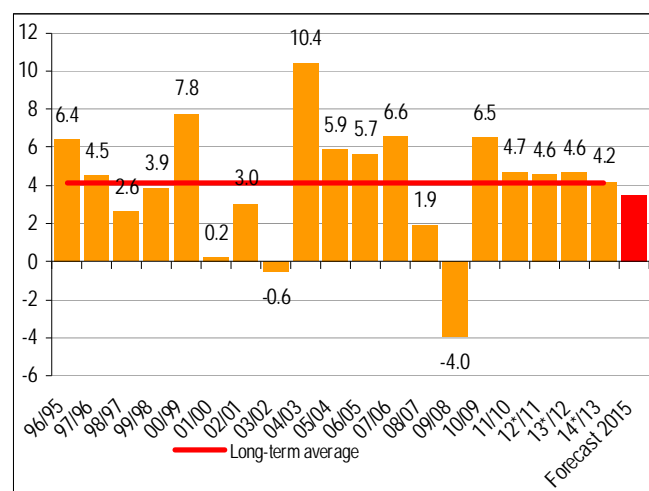
- By region, Europe, Asia and the Pacific and the Middle East all recorded 5% growth in international arrivals, and the Americas 4%, while in Africa demand was down by 6%.
- Two subregions recorded 7% growth: the Caribbean and Oceania. Furthermore, Central America and Central and Eastern Europe both recorded 6%, in the latter case as a result of a rebound on negative figures last year.
- Growth was somewhat faster in the first three low season months of January (+5%), February (+6%) and March (+4%) than in the three following ones, April (+3%), May (+6%) and June (+3%). The Easter holiday did not cause a mayor shift in arrivals between March and April this year like in previous years, as it fell in the first part of April in both 2014 and 2015.
- For destinations in the Middle East and North Africa, June results were weak due to Ramadan taking place for the most part in this month. This is expected to be compensated in July, as is already visible in results reported by Morocco, Lebanon and Qatar.
- The first semester normally accounts for around 45% of the total international arrivals count of the year (the second semester counts with 3 more days and the Northern hemisphere high season months of July and August fall into it).

- Results already reported by the 56 countries that have data up to July indicate that growth is continuing at a healthy rate. The pace of growth might moderate slightly, though, as the peak season months tend to show slower growth than shoulder season months.
- So far, global results for the first half of 2014 slightly exceed UNWTO's forecast issued at the beginning of 2015, according to which international tourist arrivals are expected to increase by 3% to 4% for the full year 2015. The projected pace of growth is close to the level achieved in the last four years (between 4% and 5% each) and in line with UNWTO's long-term forecast of 3.8% per year for the period 2010 to 2020.

Outlook for the remainder of the year

- Growth is expected to continue in the second half of 2014. The solid results of the first half year as well as the growth of destinations in Oceania, the Caribbean, including Mexico, and Southern and Mediterranean Europe indicate a continued strong appetite for leisure travel.

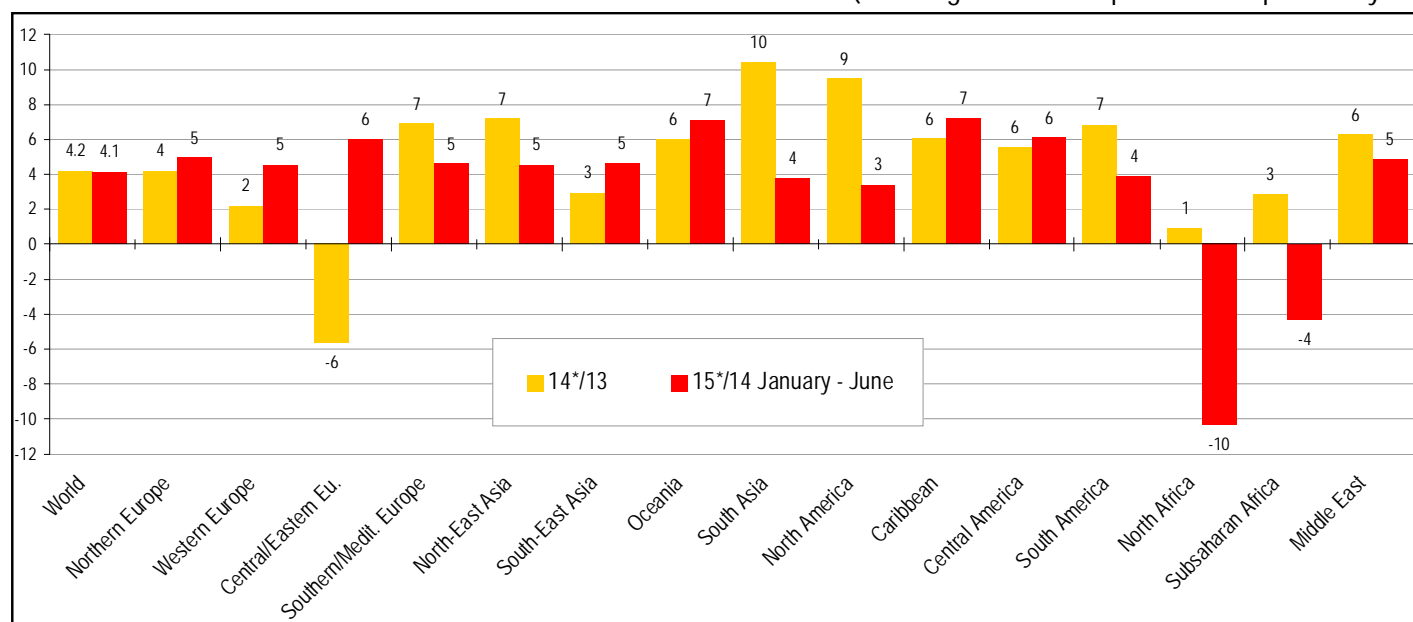
International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals

(% change over same period of the previous year)

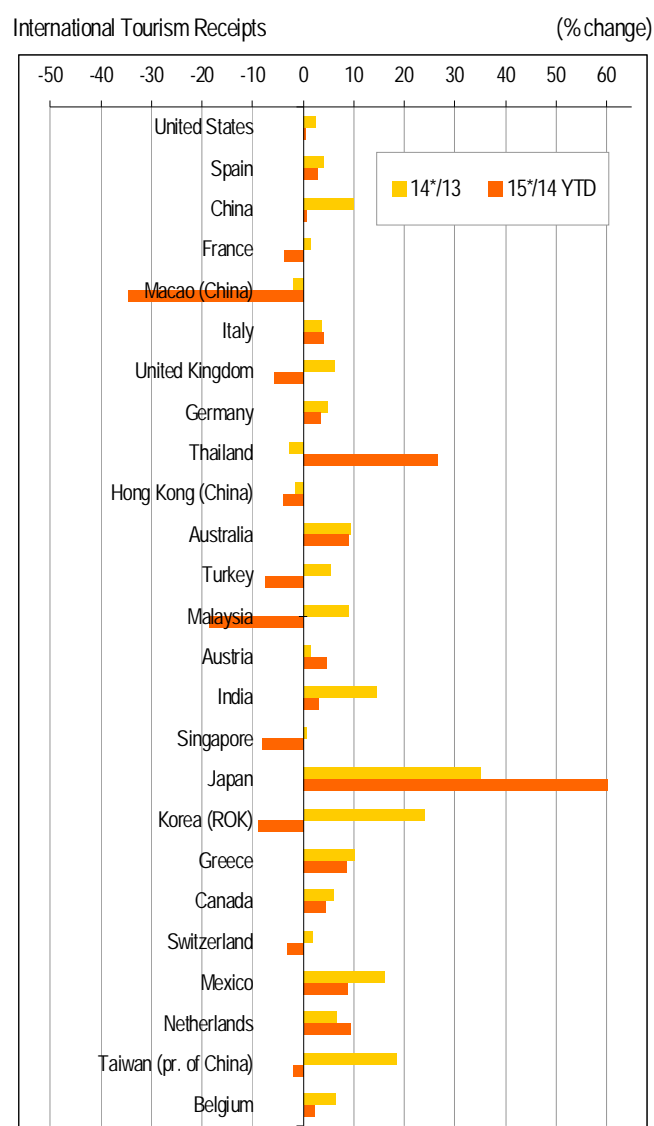


Source: World Tourism Organization (UNWTO) ©

International tourism receipts

Somewhat slower growth compared to the full year 2014

- Year to date figures on international tourism receipts show mixed results according to data reported by destinations for a minimum of three (January-March) and a maximum of seven months (January-July) of 2015. With few exceptions, the positive results in arrivals are broadly confirmed by the international tourism receipts reported for the first part of the year, though growth is in many cases somewhat slower compared to the full year 2014.
- Of the 120 destinations reporting preliminary tourism receipts data for the first three to seven months of 2015, a total of 82 reported growth in earnings (68%), of which 39 in double digits (31%), while 38 (32%) posted declines. This indicates that earnings followed the positive trend seen in arrivals.



Source: World Tourism Organization (UNWTO) ©

- Of the top 10 tourism earners, the highest growth was recorded by Thailand (9th biggest earner) which saw a 27% increase in receipts through June, rebounding from last year's weaker results. Italy (7th) reported 4% growth, while the world's second highest earner, Spain recorded 3% growth in receipts, as did Germany (8th). The United States (1st) and China (4th) both saw a more modest 1% increase this period, while the other four destinations in the top 10 all suffered declines. Hong Kong (China), France and the United Kingdom all earned 4% to 6% less, while Macao reported a 35% decline in the first two quarters, compared to the same period last year. Some of this data, however, is still likely to be revised.
- A number of other major destinations reported strong growth in receipts this period, especially Japan (17th) which enjoyed a remarkable 60% increase in earnings through July, following three years of double-digit growth. New Zealand (+17% Q1), Sweden (+16%) and Croatia (+14% Q1) also reported growth in double digits, as did Portugal (+12%), South Africa (+12% Q1), Hungary, Norway and Ireland (all +10%). Other top performers this period were Australia, Mexico, the Dominican Republic, Greece, and the Netherlands, all reporting a 9% increase in tourism earnings.

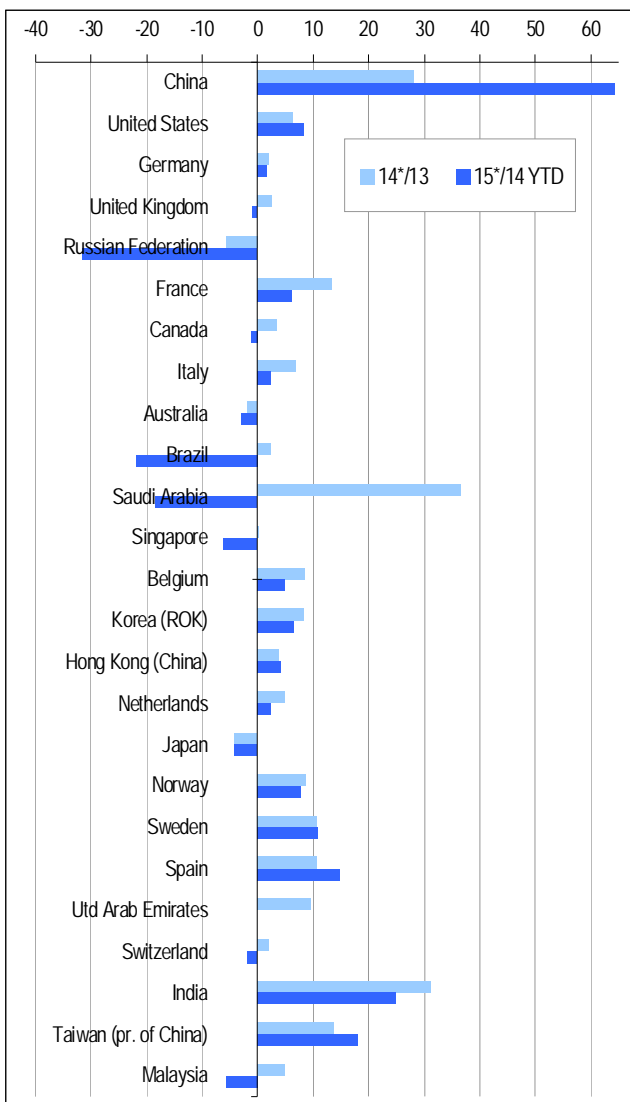
International tourism expenditure

Mixed results among emerging and advanced markets

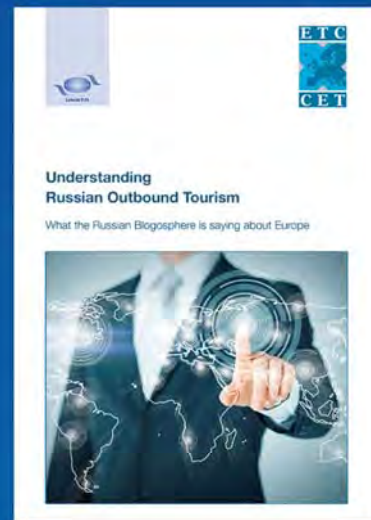
- So far, 46 out of the top 50 outbound markets have reported preliminary data on international tourism expenditure for the first three to seven months of 2015. Of these, 31 (67%) saw an expenditure increase, 11 of which in double digits (24%), while 15 (33%) reported declines.
- International tourism demand generated by emerging markets is mixed as reflected in international tourism expenditure data. Among the BRIC countries, China and India both reported double-digit growth in the first quarter, though second quarter data is likely to change this picture still. Expenditure from the Russian Federation (-32%) and Brazil (-22%), on the other hand, declined considerably, reflecting sluggish economic growth in both markets and the depreciation of the rouble and the real against the US dollar and the euro.
- In the top ten, except for China, tourism spending also grew notably in the United States (+8% through July) and France (+6%) while Germany and Italy (both +2%) saw more moderate increases. In the United Kingdom, Canada and Australia, tourism spending declined slightly. Some of this data, however, is still likely to be revised.

- Beyond the top 10, except for India already mentioned, double-digit growth was also reported by Taiwan (pr. of China) (+18%), the Czech Republic (+17%), Israel (+16% Q1), Spain (+15%), Egypt (+15%), South Africa (+13% Q1), Ireland (+11% Q1) Sweden (+11%) and Colombia (+10% Q1). Other strong source markets this period were Mexico, Poland and Thailand (all recording +9%) as well as Portugal and Norway (both +8%).

International Tourism Expenditure (% change, local currencies)



Source: World Tourism Organization (UNWTO) ©



Understanding Russian Outbound Tourism

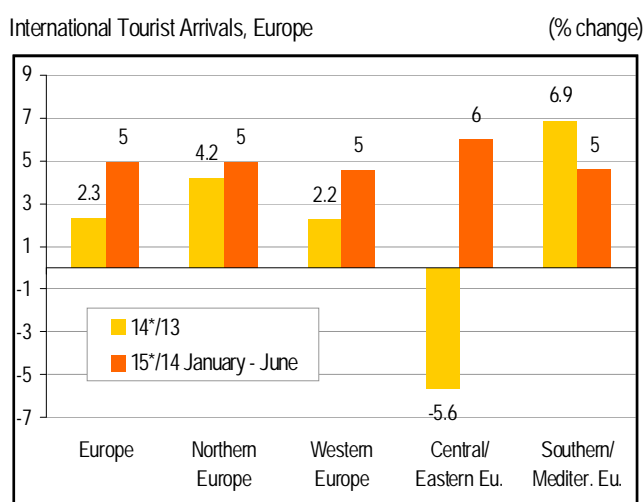
This joint ETC/UNWTO report provides useful insight into trends, themes and behaviour of Russian tourists based on 'netnographic' research – or ethnography adapted to the online social world. The study analyses the Russian consumer mindset with regard to preferred destinations, travel planning and segments, through the analysis of online blogs, posts and Internet searches, to provide tips on tapping the world's fifth largest outbound tourism market.

See further www.e-unwto.org/content/n21242

Regional results

Europe

In the first half of 2015, Europe enjoyed 5% growth in international tourist arrivals, compared to the same period of 2014, thanks to the rebound of Central and Eastern Europe (+6%) and continued strong results in the other three subregions, Northern Europe, Western Europe and Southern Mediterranean Europe (all +5%). Robust intra-regional demand contributed to this growth, as well as the consolidating recovery in European economies. A decline in arrivals from the Russian Federation due to its weaker economy impacted some destinations, but was generally offset by stronger source markets elsewhere. The lower value of the euro against the US dollar and the British pound also had a positive effect on euro area destinations. The 28 countries of the European Union (EU-28) boasted 6% more arrivals this period, a remarkable feat for a group with many large and rather mature destinations.



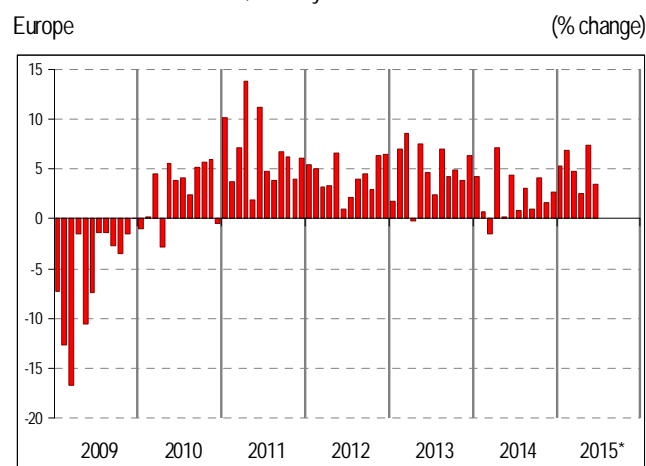
Source: World Tourism Organization (UNWTO) ©

Central and Eastern Europe (+6%) returned to solid growth in January-June 2015 after a decline in international arrivals in 2014, following the conflict in Ukraine and the slowdown of the Russian economy. Most destinations recorded robust growth in the first part of 2015, including its largest destination the Russian Federation (+8%) which has become more affordable due to the depreciation of the rouble. Hungary and Romania recorded 18% more international arrivals each, while Slovakia and the Czech Republic reported increases of 10% and 8% respectively. Tajikistan virtually doubled international arrivals, but from a low base. Baltic destinations Estonia (-6%) and Lithuania (+0%) reported weaker results, partly due to a drop in Russian tourists.

Southern and Mediterranean Europe (+5%) continued to enjoy robust growth in the first six months of 2015, after strong results in 2014 (+7%) as the economic recovery advances in the euro zone. Spain, the world's third largest tourism destination by international arrivals, recorded 5%

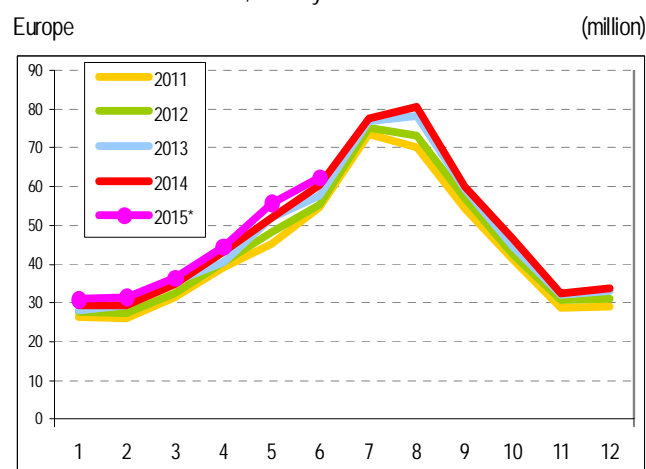
growth through July, and is expecting another year of robust results. Italy, which is hosting the 2015 Expo in Milan, also enjoyed a 5% increase in arrivals (through May) after more moderate 2% growth in 2014. Arrivals in Greece surged 21% through June, following two years of double-digit growth. However, Greece's base numbers in this part of the year are comparatively low as seasonality is pronounced, with the bulk of international tourists arriving in the July-September period.

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Other traditional Mediterranean destinations, Andorra (+14%), Croatia (+10%) and Portugal (+8%) also performed well this first half of the year, as did island destinations Cyprus (+7%) and Malta (+5%). Smaller Eastern Mediterranean destinations Bosnia & Herzegovina (+29%), Montenegro (+23%), Slovenia, Serbia (both +13%) and FYR Macedonia (+12%) all reported double-digit growth so far this year. In Turkey (0%), international arrivals were flat, as a result of the tension in neighbouring countries and the decline in tourists from the Russian Federation.

Northern Europe (+5%) continued to enjoy solid growth this first half of 2015, though figures vary across countries. Iceland (+27%) continues to boast double-digit growth after hitting the one million visitor mark last year. Ireland recorded a 12% increase in the first six months,

while Sweden (+8%), Denmark and Norway (both +5%) also posted sound results. Growth in the United Kingdom (+3%) was slower than last year (+5%) as the stronger pound has made travel to the UK more expensive for euro area source markets. Finland (-10%) reported fewer tourists than the same period last year due to a decline in Russian arrivals, which unlike other destinations, was not compensated by growth from other source markets.

International arrivals in Western Europe were up 5% in the first half of the year, thanks to solid results in the Netherlands and Austria (both +7%) as well as Germany (+6%). France, the world's top tourism destination, recorded a 4% increase through May. In Switzerland (+2%) growth has been moderate so far, owing to the appreciation of the strong Swiss Franc.



World Statistics Day 20 October 2015: Better Data. Better Lives.

On 3 June 2015, the United Nations General Assembly adopted a resolution designating 20 October 2015 as second World Statistics Day, under the general theme 'Better data. Better lives'.

This celebration follows the success of the first WSD, held five years ago on 20-10-2010 and dedicated to the core values that permeate statistical work: service, integrity and professionalism.

As expressed by UN Secretary General Ban Ki-moon, "statistics are a vital tool for economic and social development" and "an essential public service" promoting "peace and democracy by giving citizens reliable and impartial public information about their communities".

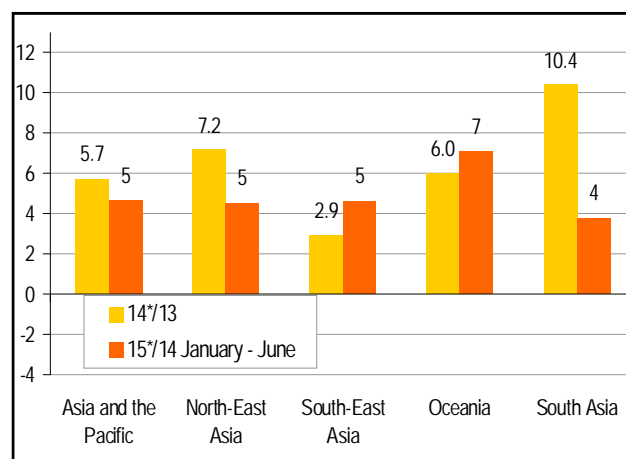
Please visit the official site for more information:
<https://worldstatisticsday.org/>.

The full text of the World Statistics Day resolution is available at:
<https://worldstatisticsday.org/2015/06/03/general-assembly-resolution/>.

Asia and the Pacific

Asia and the Pacific recorded a 5% increase in international tourist arrivals in the first half of 2015, led by Oceania (+7%). Growth in South-East Asia and North-East Asia (both +5%) was in line with the regional average. South Asia recorded a more modest 4% increase in arrivals this period, after strong growth in 2014.

International Tourist Arrivals, Asia and the Pacific (% change)



Source: World Tourism Organization (UNWTO) ©

In North-East Asia, international tourist arrivals were up 5% in the first six months of 2015, with mixed results across destinations. Japan continues to enjoy remarkable growth in international arrivals (+47%), driven by intra-regional demand and supported by stepped-up promotion and the depreciation of the yen. China and Taiwan (pr. of China) both recorded a modest 3% increase in international arrivals. By contrast, the two Chinese Special Administrative Regions Hong Kong and Macao posted declines of 5% and 6% respectively. Inbound travel to the Republic of Korea (-8%) also decreased due to a sharp decline in arrivals in the months of June and July, impacted by the recent MERS outbreak. However, arrivals are expected to start to rebound in the second half of the year.

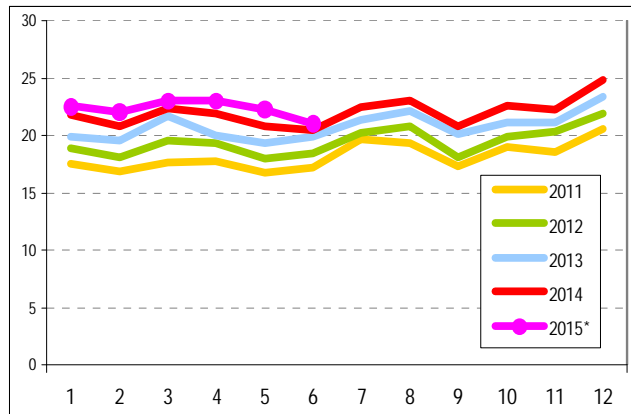
South-East Asia saw a 5% increase in arrivals during the period January to June 2015, with some rather erratic results among destinations. Thailand (+30%) led growth, enjoying a strong rebound from last year's negative results. Myanmar (+17% Q1), Laos (+13%), the Philippines (+9%), Cambodia (+5%) and Indonesia (+3%) all reported growth, while Malaysia (-9% Q1), Vietnam (-9%) and Singapore (-3%) posted declines.

Arrivals in South Asia increased 4% in the first half of 2015 compared to the same period last year, driven by India, the largest destination in the subregion, which reported 5% more arrivals. Sri Lanka also contributed to the subregion's growth, with arrivals up 17% through July, while Maldives posted a modest 2% increase.

Oceania is enjoying solid growth of 7% this period, driven by major destinations New Zealand and Australia, which reported 9% and 7% growth respectively. Fiji also posted a strong 9% increase in international arrivals, while

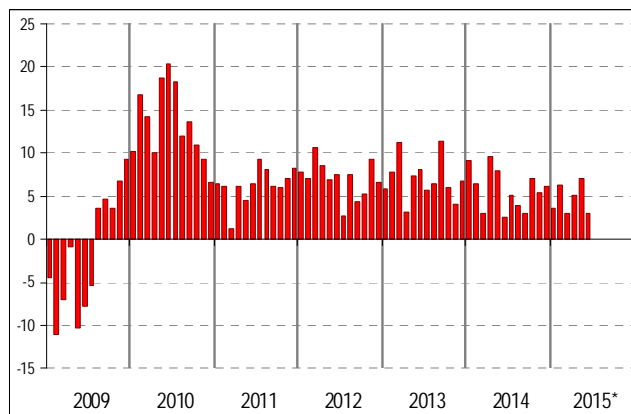
Guam (+2%) reported more modest figures. Among the smaller island destinations in the subregion, Palau (+32%), the Northern Mariana Islands and New Caledonia (both +11%) contributed to growth.

International Tourist Arrivals, monthly evolution
Asia and the Pacific (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution
Asia and the Pacific (% change)



Source: World Tourism Organization (UNWTO) ©



Save the date!!

The 9th UNWTO/PATA Forum on Tourism Trends and Outlook

Tourism and the Experience Economy

19-21 October, 2015
Guilin, China

This 9th edition of the Forum is jointly organised by the World Tourism Organization (UNWTO) and the Pacific Asia Travel Association (PATA), hosted by Guilin Municipal People's Government and in collaboration with The Hong Kong Polytechnic University.

The forum will provide a platform for governments, industry and academics to share information, to analyse global trends and the broader environment impacting on tourism, and to map out the appropriate course of actions.

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

- The plenary sessions (on the first day) are open to a broad audience. These sessions, conducted by renowned international speakers from the tourism sectors, will be devoted to the current issues on tourism and the experience economy.
- The technical sessions (on the second day) are aimed at a selected audience. The session will provide practitioners and academics with the opportunity to exchange the latest tourism research results, trends and emerging issues on tourism and the experience economy from both public and private sector perspectives.

The Forum is aimed at participants from the following areas:

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

For more information and registration please see:
<http://asiapacific.unwto.org/event/9th-unwtopata-forum-tourism-trends-and-outlook>



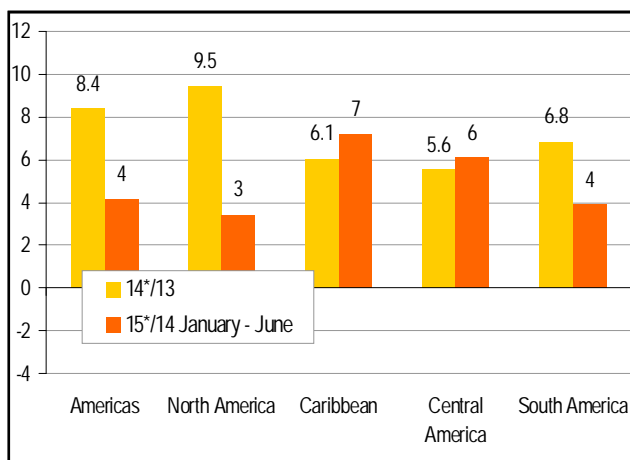
The Americas

International tourist arrivals in the Americas were up 4% in the first half of 2015 compared to the same period last year, consolidating last year's strong results. All four subregions recorded positive growth, although with variations across destinations. The Caribbean (+7%) and Central America (+6%) led growth, while the larger subregions South America (+4%) and North America (+3%) grew at a more moderate pace. Robust demand from United States travellers, aided by a strong US dollar, fuelled much of the region's growth. International departures from the US were up 6% through June (+8% to North America and +5% to overseas destinations).

(+10%), Trinidad & Tobago (+9%) and Saint Kitts & Nevis (+7%) all reported significant increases this period.

Central America recorded a 6% increase in international tourist arrivals through June, mostly the result of strong growth in Panama, which reported 17% more arrivals. Guatemala (+5%) and El Salvador (+4%) enjoyed more moderate growth, while the subregion's largest destination Costa Rica (+2%) has seen weaker results so far. Expansion in air connections and hotel capacity are favouring inbound tourism in the subregion.

International Tourist Arrivals, Americas (% change)

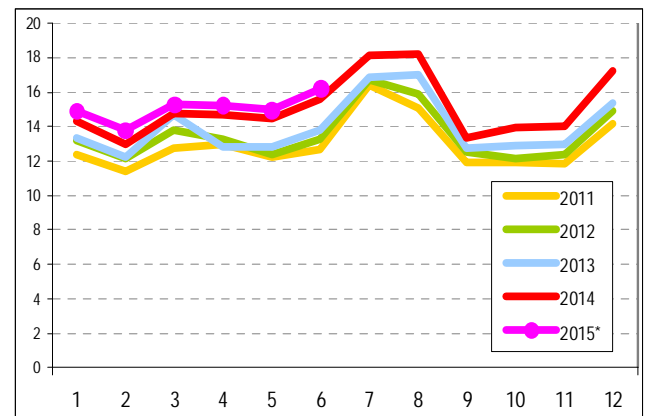


Source: World Tourism Organization (UNWTO) ©

Demand for Caribbean destinations remained strong in January to June 2015, with arrivals increasing 7% over the same period in 2014. Cuba (+17%) and the Dominican Republic (+8%) led growth as they are enjoying strong demand from North American and European source markets. Improvements in supply and quality of tourism products are benefitting these and other destinations. Cuba is enjoying a boost in arrivals partly due to the agreement with the United States to end the trade embargo and normalize diplomatic relations. Puerto Rico (+4% through April) and Jamaica (+3%) also turned in good results, while smaller destination Aruba (+16%) is headed for another year of strong growth. Barbados (+15%), Haiti

International Tourist Arrivals, monthly evolution

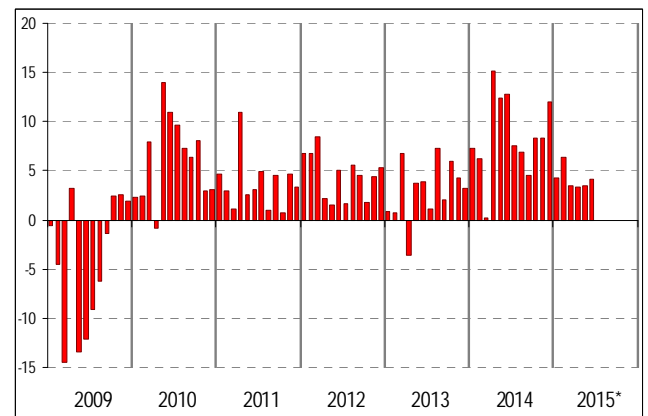
Americas (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

Americas (% change)



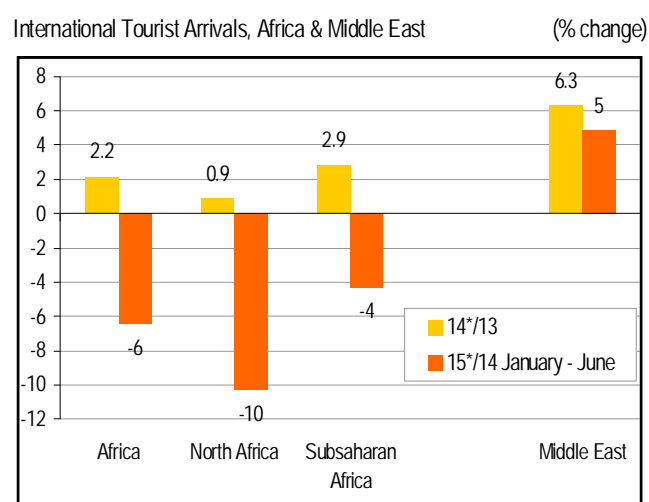
Source: World Tourism Organization (UNWTO) ©

Arrivals in North America, the largest subregion in the Americas, grew by an estimated 3% in the first six months of 2015 over the same months last year. Mexico and Canada both reported an increase of 8% through June, driven by strong outbound demand from the United States. Data for the United States itself is still pending due to technical issues, however data on international tourism receipts (+1% through July) point to more modest growth.

South America recorded a 4% increase in arrivals this period, though results were mixed across destinations. Chile (+20%) enjoyed double-digit growth in the first half of the year, with arrivals surging in the month of June (+47% compared to June 2014) as the Copa America Chile 2015 soccer championship kicked off. Colombia (+18%) is benefitting from higher perceived security following the peace negotiations earlier in the year, which is unlocking much demand for this important destination. Peru (+8%), Ecuador (+6%) and Uruguay (+4%) also turned in good results this period, while Argentina (+1%) reported slower growth. Data for Brazil, the subregion's largest destination, is still unavailable, though recent data on tourism receipts suggests a decline in arrivals through July.

Africa and the Middle East

Africa dipped into negative growth in the second half of 2014 and continued to struggle in the first half of 2015. International tourist arrivals through June are estimated to have decreased by 6% compared to the still positive first half of 2014. Both subregions, North Africa (-10%) and Subsaharan Africa (-4%), recorded lower inbound figures, as geopolitical factors continue to impact major destinations. The terrorist threats and attacks in Tunisia and Kenya among others, and the lingering effects of the Ebola outbreak in a few West African destinations have weighed down on demand overall, while slower growth of regional economies depending on the export of oil and other commodities have furthermore weakened key intraregional outbound markets.



Source: World Tourism Organization (UNWTO) ©

In North Africa (-10%), Tunisia (-22%) saw a considerable decline in arrivals through July, as demand suffered from the terrorist attacks in March and June this year. Morocco's results (+1%) turned positive in July with strong growth in this month offsetting the subdued results of the first half of the year.

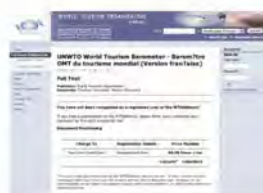
In Subsaharan Africa arrivals are estimated to have declined 4% in the first half of 2015 based on limited data available so far. Top destination South Africa reported 7% fewer arrivals through May, while Swaziland (-6%) also posted weaker results this period. Kenya (-19%) faced a considerable decline, impacted by the Garissa University College terrorist attack in April. By contrast, island destinations are bucking the trend: Seychelles (+17%), Mauritius (+10%), Reunion (+10%), Madagascar (+6%) and Cabo Verde (+1%) all reported positive growth. Concerns about the recent Ebola epidemic and security issues in some destinations continue to impact international tourism in the subregion. A more complete picture will be available as data is reported by more countries. In the second half of the year, though, growth is expected to return, among other reasons because data is to be compared to the negative second half of 2014.

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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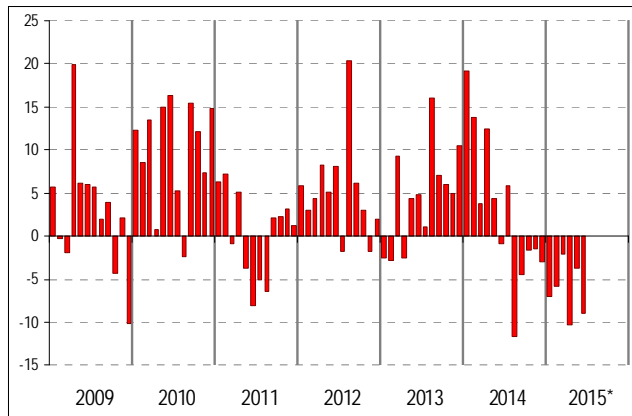


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International Tourist Arrivals, monthly evolution

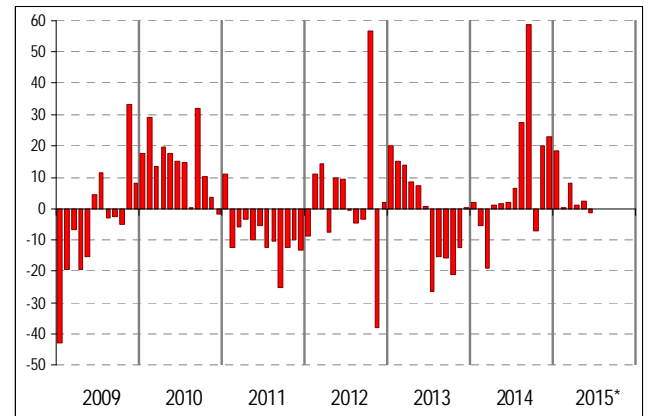
Africa (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

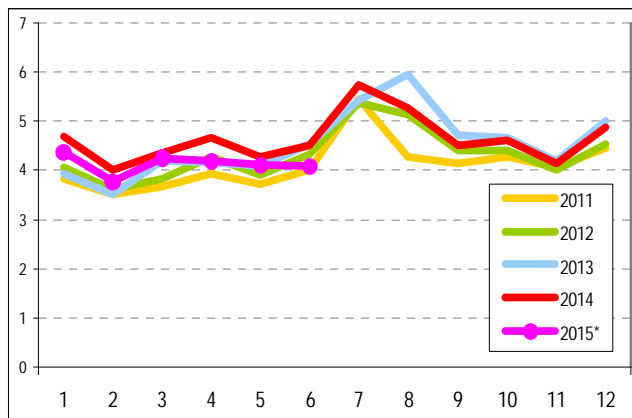
Middle East (% change)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

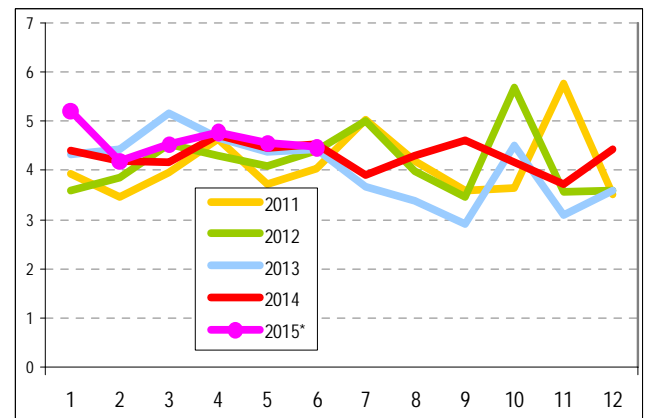
Africa (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

Middle East (million)



Source: World Tourism Organization (UNWTO) ©

International arrivals in the Middle East are estimated to have increased 5% in the first half of 2015, though data is still pending from major destination the United Arab Emirates (Dubai). In Egypt (+8%), arrivals continued the rebound that started in the second half of 2014. Saudi Arabia (+19% Q1), Lebanon (+18%), Qatar (+8%) and Oman (+6%) also enjoyed healthy growth this period, while Jordan (-9% Q1) and Palestine (-34%) reported declines. Weaker Russian outbound demand has also constrained growth in some destinations.

For destinations in both the Middle East and North Africa, June results were weak due to Ramadan taking place for the most part in this month. This is expected to be compensated in July arrivals data, as is already visible for Morocco, Lebanon and Qatar.

Hospitality

The global hospitality industry in the first half of 2015



Performance between the regions in the global hospitality industry was rather varied in the first six months of 2015. According to STR Global, Europe and the Americas posted positive results in all key measures – average occupancy, average daily room rate (ADR) and revenue per available room (RevPAR). Asia Pacific and Africa & the Middle East, on the other hand, maintained occupancy at about the same level overall, while ADR and RevPAR declined, with some subregions bucking the trend.

Europe

The European hotel industry reported positive results overall in the first half of 2015. Average occupancy increased by 1.7 percentage points (%p) to 67.4%. Eastern Europe, which is rebounding from last year's subdued

performance, recorded the biggest increase in average occupancy of all the subregions (+3.2%p to 57.6%). Southern Europe continued to exhibit positive results (+2.2%p up to 64.4%). Northern Europe and Western Europe both improved occupancy by 1.4%p to 73.2% and 66.6% respectively. In euro, ADR for the region averaged euro 111 for the first half year, up 7.9% compared with the same period of the previous year. This was mainly driven by the solid increase of +14.4% in Northern Europe. Northern Europe (+16.6%) and Southern Europe (+10.4%) both recorded double-digit RevPAR growth, lifting RevPAR growth for the region to 10.7%.

London remains top of the list of best-performing markets in terms of occupancy (79.7%), albeit with lower occupancy than the same period last year (-0.6%p), ahead of Dublin (79.2%, +4.7%p), Amsterdam (76.9%, +3.0%p), Luxembourg (76.8%, +2.3%p), Paris (75.6, -3.5%p) and Copenhagen (75.0%, +5.4%p). Moscow found itself at the bottom of the list (56.4%, -2.2%p), followed by Bratislava (57.6%). The latter, however, recorded the biggest increase in occupancy (+5.8%p). Furthermore, in Eastern Europe, Budapest, Prague and Warsaw also improved occupancy by 5 percentage points. In Southern Europe, occupancy in Lisbon, Athens, Madrid and Barcelona was up by 3 to 5 percentage points. Tel Aviv reported the largest decrease in occupancy, falling 5.5 percentage points to 68.4%.

Hotel performance by region

	Occupancy			Average Room Rate			RevPAR		
	year-to-June		Change	year-to-June		Change	year-to-June		Change
	2014	2015*		2014	2015*		2014	2015*	
	(%)	(%p)	US\$	(%)	US\$	(%)	US\$	(%)	
Americas	63.6	64.9	1.3	116	120	3.4	74	78	5.5
North America	63.6	65.0	1.4	114	119	4.0	73	77	6.3
Caribbean	71.2	73.4	2.2	239	249	4.3	170	183	7.6
Central America	58.8	59.7	0.9	119	119	0.3	70	71	1.8
South America	60.5	58.5	-2.0	135	105	-22.5	82	61	-25.0
Asia and the Pacific	66.6	66.6	0.0	116	108	-6.7	77	72	-6.6
North-East Asia	66.0	65.9	-0.1	101	96	-4.3	66	63	-4.6
South-East Asia	66.8	66.5	-0.3	135	124	-7.9	90	83	-8.4
Australia & Oceania	73.0	74.2	1.2	161	141	-12.2	117	105	-10.7
Central & South Asia	59.8	62.0	2.2	127	118	-7.0	76	73	-3.6
Africa & Middle East	64.4	64.1	-0.3	167	163	-2.4	107	104	-2.9
North Africa (incl. Egypt)	50.5	53.7	3.2	94	91	-2.9	47	49	3.2
Southern Africa	59.3	58.5	-0.8	128	118	-8.3	76	69	-9.4
Middle East	72.5	70.3	-2.2	202	199	-1.4	146	140	-4.4
				euro	(%)		euro	(%)	
Europe	65.7	67.4	1.7	103	111	7.9	68	75	10.7
Northern Europe	71.8	73.2	1.4	100	114	14.4	72	84	16.6
Western Europe	65.2	66.6	1.4	117	122	4.5	76	81	6.7
Eastern Europe	54.4	57.6	3.2	80	76	-4.8	43	44	0.8
Southern Europe	62.2	64.4	2.2	101	107	6.6	63	69	10.4

Source: STR (North America) and STR Global. © 2015 STR and STR Global. All rights reserved; (%p: percentage points)

= up = down

Hotel performance, selected cities

		Occupancy (%)			
		Change			
		(year-to-June)	2014	2015*	(%p)
Europe		65.7	67.4	1.7	
Northern Europe		71.8	73.2	1.4	
Denmark	Copenhagen	69.6	75.0	5.4	
Finland	Helsinki	63.9	63.5	-0.4	
Ireland	Dublin	74.5	79.2	4.7	
United Kingdom	London	80.3	79.7	-0.6	
Western Europe		65.2	66.6	1.4	
Austria	Vienna	67.2	67.2	0.0	
Belgium	Brussels	67.1	69.1	2.0	
France	Paris	79.1	75.6	-3.5	
Germany	Berlin	70.3	72.5	2.2	
	Frankfurt	66.8	68.3	1.5	
Luxembourg	Luxembourg	74.5	76.8	2.3	
Netherlands	Amsterdam	73.9	76.9	3.0	
Switzerland	Geneva	68.3	67.6	-0.7	
	Zurich	69.3	70.3	1.0	
Eastern Europe		54.4	57.6	3.2	
Czech Rep	Prague	63.7	68.2	4.5	
Hungary	Budapest	63.4	68.7	5.3	
Poland	Warsaw	68.1	72.7	4.6	
Russian Federation	Moscow	58.6	56.4	-2.2	
Slovakia	Bratislava	51.8	57.6	5.8	
Southern Europe		62.2	64.4	2.2	
Greece	Athens	64.0	67.8	3.8	
Israel	Tel Aviv	73.9	68.4	-5.5	
Italy	Milan	65.3	66.4	1.1	
	Rome	67.1	66.3	-0.8	
Portugal	Lisbon	65.5	70.6	5.1	
Spain	Barcelona	69.0	72.4	3.4	
	Madrid	64.2	68.5	4.3	
Turkey	Istanbul	64.7	66.8	2.1	

Source: STR Global

= up

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= down

Americas

The Americas recorded a 1.3 percentage point increase in occupancy during the period January to June 2015 to 64.9% and a 3.4% gain in ADR to US\$ 120, resulting in a 5.5% increase in RevPAR to US\$ 78. The Caribbean posted the highest average occupancy of all four American subregions at 73.4% (+2.2%p). North America's growth in all three metrics was close to the region's average, while Central America recorded a somewhat more modest improvement compared to the same period the previous year. By contrast, South America reported declines in the three key performance metrics, with occupancy decreasing by 2.0%p to 58.5%, and ADR and RevPAR decreasing by 22.5% and 25% respectively.

Among the key destinations in the Americas, Cancun posted the biggest increase in occupancy of 6.0%p to 80.2%. Oahu, capital of the state of Hawaii achieved the

highest occupancy level of 83.9%, followed by San Francisco (83.1%) and New York (82.2%). The largest occupancy decrease was in Rio de Janeiro (-8.3%p to 64.8%). "Brazil's performance reflects difficult to match comparisons from the same period in 2014, when the country hosted the FIFA World Cup", says STR Global.

Hotel performance, selected cities

		Occupancy (%)			
		Change			
		(year-to-June)	2014	2015*	(%p)
Americas		63.6	64.9	1.3	
North America		63.6	65.0	1.4	
Canada	Montreal	64.5	66.5	2.0	
	Toronto	69.3	69.2	-0.1	
	Vancouver	68.1	71.3	3.2	
Mexico	Cancun	74.2	80.2	6.0	
	Mexico City	65.2	64.4	-0.8	
United States	Phoenix, AZ	68.8	72.1	3.3	
	Anaheim, CA	76.1	77.7	1.6	
	Los Angeles, CA	79.0	79.6	0.6	
	San Diego, CA	74.4	77.4	3.0	
	San Francisco, CA	81.9	83.1	1.2	
	Denver, CO	74.0	75.6	1.6	
	Washington, DC	69.3	72.0	2.7	
	Miami, FL	81.0	80.8	-0.2	
	Orlando, FL	76.9	80.1	3.2	
	Atlanta, GA	68.8	71.8	3.0	
	Oahu Island, HI	83.6	83.9	0.3	
	Chicago, IL	65.6	67.4	1.8	
	New Orleans, LA	71.8	74.1	2.3	
	Boston, MA	72.0	74.0	2.0	
	New York, NY	82.4	82.2	-0.2	
	Philadelphia, PA-NJ	67.4	67.6	0.2	
	Dallas, TX	69.4	72.1	2.7	
	Houston, TX	74.2	71.4	-2.8	
Central America		58.8	59.7	0.9	
Costa Rica	San Jose	60.3	65.4	5.1	
South America		60.5	58.5	-2.0	
Argentina	Buenos Aires	60.2	60.6	0.4	
Brazil	Rio de Janeiro	73.1	64.8	-8.3	
	Sao Paulo	62.1	60.4	-1.7	
Chile	Santiago	67.0	65.0	-2.0	
Colombia	Bogotá	54.2	54.9	0.7	
Peru	Lima	70.9	71.7	0.8	

Source: STR Global

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Data for North America sourced STR

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Hospitality industry data

The hotel data presented in this section has kindly been provided by STR Global Ltd and Smith Travel Research, Inc.

STR Global and STR track hotel performance data from over 46,000 hotels worldwide which represent all segments of the mainly branded hotel supply. Hotel performance results for the majority of capital and gateway cities around the world is also available.

Occupancy = rooms sold / rooms available, i.e. the percentage of available rooms that were sold during a specified period of time. Occupancy is calculated by dividing the number of rooms sold by the number of rooms available. Occupancy takes account of growth in both demand and supply. If demand grows, but is outstripped by growth in supply, occupancy will decrease.

ADR (Average Daily Rate) = room revenue / rooms sold, i.e. a measure of the average rate paid for rooms sold, is calculated by dividing room revenue by rooms sold.

RevPAR (Revenue per available room) = room revenue / rooms available (or = occupancy x ADR), i.e. the total guest room revenue divided by the total number of available rooms. RevPAR differs from ADR in that RevPAR is affected by the share of unoccupied available rooms, while ADR shows only the average rate of rooms actually sold.

For further information on methodology, see:
www.strglobal.com/resources/glossary.

For further information on STR Global and STR please visit:
www.strglobal.com.

For STR and STR Global Data News see also:
www.hotelnewsnow.com/Category/38/Data.

Asia and the Pacific

Results in Asia and the Pacific were comparatively weaker in the period from January to June 2015. The region maintained occupancy at 66.6%, but the average daily rate decreased by 6.7% to US\$ 108, and RevPAR by 6.6% to US\$ 72. This decline is partly a reflection of the appreciation of the US\$ in relation to many of the regional currencies, rendering revenue earned in local currencies lower in US\$ terms.

Osaka and Tokyo, Japan, Sydney, Australia, Auckland, New Zealand, Hong Kong (China) and Singapore reported occupancy rates above 80%. The highest increase in occupancy was recorded in Bangkok, Thailand (+21.2%p to 76.0%), while Bali, Indonesia reported the largest decline in occupancy (-8.6%p to 56.6%).

The value of the Japanese yen has made Japan a cheaper option for travellers, according to STR Global, thereby boosting demand. Thailand's performance continues to improve as the country becomes further removed from last year's social unrest. On the other hand, government austerity measures are the main reason behind the occupancy decline in Indonesia, according to STR Global. Tourism in South Korea is suffering from the recent MERS outbreak.

Hotel performance, selected cities

		Occupancy (%)			
				Change	
		(year-to-June)	2014	2015*	(%p)
Asia and the Pacific			66.6	66.6	0.0
North-East Asia			66.0	65.9	-0.1
China	Beijing	66.4	68.7	2.3	
	Shanghai	68.9	71.7	2.8	
Hong Kong (China)	Hong Kong	85.9	81.6	-4.3	
Japan	Osaka	85.4	89.8	4.4	
	Tokyo	85.2	86.3	1.1	
Korea, Republic of	Seoul	75.3	68.3	-7.0	
Taiwan (pr. of China)	Taipei	67.4	69.0	1.6	
South-East Asia			66.8	66.5	-0.3
Indonesia	Bali	65.2	56.6	-8.6	
	Jakarta	66.6	58.3	-8.3	
Malaysia	Kuala Lumpur	71.8	63.9	-7.9	
Philippines	Manila	69.5	67.9	-1.6	
Singapore	Singapore	82.8	80.7	-2.1	
Thailand	Bangkok	54.8	76.0	21.2	
	Phuket	69.7	73.1	3.4	
Vietnam	Hanoi	65.8	74.9	9.1	
Australia & Oceania			73.0	74.2	1.2
Australia	Sydney	82.7	84.6	1.9	
New Zealand	Auckland	81.6	81.6	0.0	
Central & South Asia			59.8	62.0	2.2
India	Bangalore	57.9	63.5	5.6	
	Delhi	58.5	63.3	4.8	
	Mumbai	70.5	74.4	3.9	

Source: STR Global

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Hotel performance, selected cities

		Occupancy (%)			
				Change	
		(year-to-June)	2014	2015*	(%p)
Africa & Middle East			64.4	64.1	-0.3
Middle East			72.5	70.3	-2.2
Jordan	Amman	67.1	52.5	-14.6	
Kuwait	Kuwait	54.5	58.5	4.0	
Lebanon	Beirut	46.4	50.6	4.2	
Oman	Muscat	73.0	66.0	-7.0	
Qatar	Doha	75.8	74.5	-1.3	
Saudi Arabia	Riyadh	65.1	64.8	-0.3	
Untd Arab Emirates	Abu Dhabi	75.2	74.5	-0.7	
	Dubai	83.3	80.4	-2.9	
North Africa (incl. Egypt)			50.5	53.7	3.2
Egypt	Cairo	39.6	54.0	14.4	
	Sharm El-Sheikh	57.8	60.5	2.7	
Southern Africa			59.3	58.5	-0.8
Kenya	Nairobi	55.5	53.4	-2.1	
South Africa	Cape Town	68.9	65.0	-3.9	

Source: STR Global

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Africa & the Middle East

Results in Africa and the Middle East were down overall in all three indicators. The region's occupancy decreased by 0.3%p to 64.1%, ADR decreased by 2.4% to US\$ 163, and RevPAR receded by 2.9% to US\$ 104.

North Africa is the only subregion reporting positive results in occupancy (+3.2%p) and RevPAR (+3.2%), strongly driven by Egypt (classified as North Africa by STR). By contrast, occupancy in the Middle East decreased by 2.1%p to 70.3% and by 0.7%p to 58.5% in Southern Africa, with both subregions also recording drops in ADR and RevPAR.

The highest hotel occupancy was recorded in Dubai and Abu Dhabi, United Arab Emirates (80.4% and 74.5% respectively), and Doha, Qatar (74.5%). Cairo, Egypt reported the highest increase in occupancy, rising by 14.4%p to 54.0%, whereas Amman, Jordan experienced the largest decrease, falling by 14.6%p to 52.5%.

The Middle East's weaker performance is a reflection of growth in supply outpacing demand in Q2, as well as Ramadan moving into June from July 2014. Furthermore, the negative results in Jordan have lowered the regional average. "The situation in Syria and the number of refugees entering Jordan has affected hotel performance in the country", says STR Global. Demand and pipeline

growth in South Africa have all remained slow due to its recent economic performance, according to STR Global. By contrast, "Egypt has continued to experience positive results since the final travel advisories were lifted in August 2014 and tourist destinations were once again open for business".

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Meetings industry

The International Association Meetings Market – International Congress and Convention Association (ICCA)



ICCA releases data on the most popular cities and countries for association meetings ranked by participant numbers

ICCA, the International Congress and Convention Association, was founded in 1963 at a time when the meetings industry was beginning to expand rapidly. With current membership standing at almost 1,000 companies and organisations in over 90 countries worldwide, it is the most global association within the meetings industry and one of the most prominent organisations in the world for international meetings. ICCA membership comprises leading companies and organisations specialising in handling, transporting and accommodating international meetings and events. ICCA specialises in the international association meetings sector, offering unrivalled data, communication channels, and business development opportunities.

ICCA's research department collects the data on international association meetings on which all of its statistical reports are based. The ICCA Association Database covers meetings organised by international associations that take place on a regular basis, rotate between a minimum of three countries and have at least 50 participants. In the recently-released *Statistics Report 2014*, ICCA analyses international association meetings that took place during 2014 based on data available at the time of editing. ICCA's Association Database is designed as a sales and marketing resource to enable its members to target future international association meetings, which is why it does not include one-off events or events which do not move between locations.

Regions – The majority of meetings take place in Europe

The 11,505 international association meetings held in 2014 that have been identified to date attracted a total of 4.6 million participants, or an average of almost 400 per meeting. After the decline suffered in 2008, the average number of participants is on the increase again. The majority of meetings gathered less than 250 participants, mainly coming from Europe, Asia, the Middle East and North America.

In 2014, the majority of international association meetings took place in Europe with 6,316 meetings, a market share of 55%. Asia / Middle East trailed behind in

second place with 2,105 meetings (18%). North America with 1,270 meetings represents 11% of all meetings and Latin America with 1,194 represents 10%, highlighting the fact that the share of the former has been slightly decreasing over the past decade whilst the share of the latter is on the increase. Oceania and Africa follow with 312 and 308 meetings respectively, representing 3% each.

ICCA country ranking

measured by estimated number of participants in 2014

Rank	Country	# participants	# Meetings	# participants per meeting
1	United States	365,000	831	440
2	Spain	289,000	578	500
3	Germany	264,000	659	400
4	France	233,000	533	440
5	United Kingdom	199,000	543	370
6	Italy	175,000	452	390
7	Australia	152,000	260	580
8	Japan	147,000	337	440
9	Canada	134,000	265	500
10	Netherlands	133,000	307	430
11	China	128,000	332	390
12	Brazil	127,000	291	440
13	Republic of Korea	115,000	222	520
14	Sweden	105,000	238	440
15	Austria	103,000	287	360
16	Turkey	95,000	190	500
17	Argentina	80,000	191	420
18	Mexico	78,000	165	470
19	Malaysia	71,000	133	540
20	Portugal	70,000	229	310
21	Switzerland	68,000	226	300
22	Denmark	68,000	164	420
23	Colombia	63,000	150	420
24	South Africa	62,000	124	500
25	India	60,000	116	520

Source: International Congress and Convention Association (ICCA)

Countries – Few changes in the top ten ranking

For the first time this year ICCA has published country and city rankings by estimated total number of participants in 2014 as part of its public abstract of the *Statistics Report*.

The top five countries by estimated total number of participants consists of the same countries as contained in the ranking by number of meetings, but the positions have changed: The United States comes first in both rankings, with 831 qualifying meetings and 365,000 participants in 2014. In terms of the number of participants, Spain is one place higher in the ranking ahead of Germany, which is in third place. France and the United Kingdom switch places compared to the ranking by number of meetings to take fourth and fifth place respectively.

Cities – Paris, Barcelona and Madrid top the city charts

As in the city ranking by number of meetings, Paris comes first, with an estimated total of 131,000 participants attending 214 association meetings in 2014. Barcelona follows closely behind, with 127,000 participants attending 182 meetings in 2014. However, the city ranks fifth in terms of the number of meetings, which means that Barcelona is host to relatively large meetings. Third in the city ranking, by both number of meetings and number of participants, is Madrid with 91,000 participants attending 200 meetings. London comes fourth in the ranking by participants and sixth in the ranking by number of meetings, and Vienna comes fifth in terms of participants and second in the ranking by number of meetings.

ICCA city ranking

measured by estimated number of participants in 2014

Rank 2014	City	# participants	# Meetings	# participants per meeting
1	Paris	131,000	214	610
2	Barcelona	127,000	182	700
3	Madrid	91,000	200	460
4	London	90,000	166	540
5	Vienna	82,000	202	410
6	Amsterdam	79,000	133	600
7	Berlin	77,000	193	400
8	Istanbul	76,000	130	580
9	Copenhagen	58,000	105	550
10	Singapore	57,000	142	400
11	Munich	57,000	81	700
12	Seoul	54,000	99	540
13	Melbourne	53,000	61	870
14	Sydney	53,000	82	650
15	Milan	53,000	58	910
16	Stockholm	52,000	95	550
17	Beijing	50,000	104	480
18	Tokyo	50,000	90	560
19	Toronto	49,000	59	830
20	Kuala Lumpur	48,000	79	610
21	Prague	47,000	118	400
22	Buenos Aires	43,000	91	480
23	Hong Kong	42,000	98	430
24	Lisbon	41,000	109	370
25	Taipei	39,000	92	430

Source: International Congress and Convention Association (ICCA)

Characteristics of meetings

The ICCA Statistics Report also analyses other indicators such as frequency, subject, favourite months and the average length of meetings.

Most of the qualifying international association meetings are held on an annual basis (59%). Biennial meetings accounted for 22%.

September remains the favourite month for associations to hold international meetings, representing 17% of the total, followed by June and October (both 14%).

The average length of meetings in 2014 remained at 3.7 days.

Regarding the subjects of international association meetings, the shares of the top 10 subjects have remained virtually unchanged over the past decade. Medical science (17%) has been the leading subject for the past ten years, followed by technology and science (both 14%).

In terms of meeting facilities, hotels are the most frequently used type of venue accounting for a 44% market share of all total congress venues used. Universities, which have increased their share in recent years, are in second place, accounting for 23%, but 2 percentage points down on 2013. Conference / Exhibition Centre venues (23%) follow closely in third position.

Over the past ten years, the average income from registration fees and the average total expenditure by delegates on all international meetings has been growing at a steady pace. The average fee per delegate per meeting was US\$ 518 in 2014, up US\$ 40 while the average expenditure per delegate per meeting was US\$ 2,352, which translates into a US\$ 180 increase.

Statistics Report is a ‘snapshot’

Readers should note that numbers are still likely to vary as the Statistics Report is a ‘snapshot’ of qualifying meetings in the ICCA Association Database as sampled in May 2015, and that future statistics may be amended as ICCA becomes aware of additional qualifying meetings.

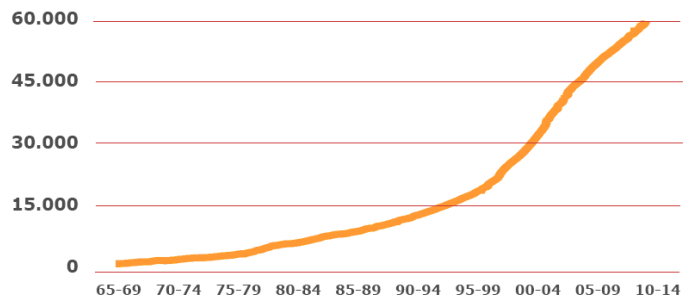
Over the last twelve months ICCA has undertaken a major review of historical data, removing all meetings from the statistics which no longer met the strict three-country rotation criterion and clamping down on single meetings which might previously have appeared as multiple separate meetings. As a result the normal levels of growth appear slightly reduced, even though ICCA believes that the underlying rate of growth is almost certainly still robust.

As ICCA’s CEO, Martin Sirk, commented: “What was striking in this year’s exercise is actually the very large number of meetings we identified over the last twelve months for the year 2013 – more than 600 meetings were identified worldwide, and we’re pretty certain we’ll have equal success in finding more qualifying 2014 meetings over the next twelve months. Most commentators are naturally focusing on the new 2014 rankings, but the nature of this business means that we always continue to identify many qualifying meetings long after each annual announcement. We can’t stress this point strongly enough: ICCA’s rankings are a snapshot of a moment in time of a database designed for sales and marketing purposes, for a

very specific segment of the market, a segment, moreover, where decisions are made three to six years in advance. Any destination wishing to accurately present its true performance in the international meetings field needs to complement the ICCA statistics and rankings with its own robust measurement of all meetings business won for the future and hosted in the past year”.

More extensive rankings by participant numbers, as well as the worldwide and regional rankings by number of meetings, are included in ICCA's public abstract of its 2014 Statistics Report, which can be downloaded from www.associations.iccaworld.com.

50-year growth pattern in the number of international association meetings



Download "A modern history of international association meetings: 1963-2012" from www.icca50.com

** As included in the ICCA Association Database, which only includes association meetings taking place regularly, rotating between at least 3 different countries and attracting 50 or more participants*

12 UNWTO AWARDS

UNWTO is now accepting submissions for the 12th UNWTO Awards for Excellence and Innovation in Tourism. Entries with complete documentation will be accepted until 30 October 2015.

For full information, please visit the UNWTO Knowledge Network website <http://know.unwto.org>

Submission and Contact: UNWTO Knowledge Network
World Tourism Organization
awards@unwto.org
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Transport

Air transport booking trends



Reservations for international air travel in September to December 2015 up by 7%

In this contribution based on air transport booking data from business intelligence tool Forwardkeys, air passenger travel is evaluated for the months from May to August of 2015 and travel trends for September to December 2015 are analysed based on reservations.

The analysis reflects data available in the ForwardKeys database as at 31 August 2015, covering departures taking place in May-August 2015 and bookings with a scheduled departure date from 1 September to 31 December 2015. Bookings for September-December 2015 are compared with bookings for the same period of 2014 available in the database at the same point in time a year ago.

The booking trend provides an insight into how bookings are developing, although this does not necessarily indicate the exact number of trips that will be taken as booking behaviour can vary over time, with lead times decreasing or increasing depending on external factors, price development and promotion.

The database covers air travel reservations through the major Global Distribution Systems (GDS), but only partially includes direct bookings with airlines (such as low-cost carriers) or charter flights.

General Trend

Continued growth in international departures in May to August 2015

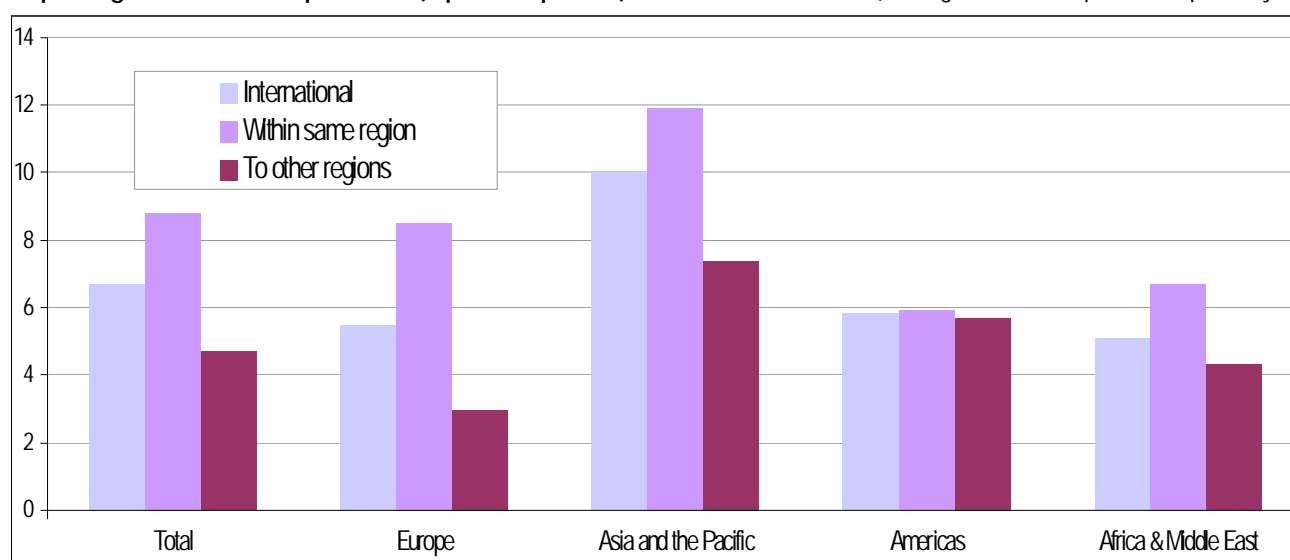
- Global air traffic increased by 5% in May-August 2015, the peak tourism season in the world's leading regions in the Northern Hemisphere, compared to the same period last year.
- International departures grew by 4% this period, driven by strong demand for air travel within the same region (+5%) as opposed to travel to other regions (+2%) which saw lower growth.
- By world region, Asia and the Pacific enjoyed the fastest growth in international departures (+5%) followed by Europe (+4%) and the Americas (+3%). Africa and the Middle East (-1%) recorded a small decline in outbound travel.
- Domestic air travel was up 7% this period, reflecting strong demand in a few large markets, mostly in the Americas (the US and Brazil) and in Asia and the Pacific (China, India, Japan and Australia).

Positive outlook for September - December 2015

- Total bookings for the period September-December 2015 increased 8% compared to the same four months in 2014, pointing to strong demand for air travel at the end of the year.
- International bookings are up 7%, fuelled by strong demand for flights within the same region (+9%) and to a lesser extent to other regions (+5%).
- Growth in reservations for intraregional flights is higher in Asia and the Pacific (+12%) and Europe (+9%), while those for interregional travel are led by Asia and the Pacific (+7%) and the Americas (+6%).
- Domestic bookings for this period are 11% higher than last year, driven by the large markets of the Americas (+12%) and Asia and the Pacific (+10%).

Air passenger travel trends, Sep-Dec 2015 (expected departures)

(% change over the same period of the previous year)



Source: ForwardKeys® for UNWTO

Regional Trends

Europe

- International departures from Europe increased by 4% in the May-August period, with traffic within the region growing by 6% and to other regions by 1%, the latter mainly due to weak results in travel to the Americas (+0%).
- Reservations for international travel in the coming September-December period increased 6%, with bookings for intraregional travel (+9%) growing faster than for interregional travel (+3%). By region, bookings increased most for Asia and the Pacific (+5%) followed by the Americas (+2%). Domestic reservations for this period are up 6%.

Asia & the Pacific

- International departures from Asia and the Pacific grew by 5% in the May-August period. Intraregional travel showed continued robust growth (+7%), whereas travel to other regions grew at a slower pace of 3%, although with significant growth for travel to Europe (+8%).
- Domestic air travel (mostly corresponding to China, India, Japan and Australia) grew by 17%, bringing the total departures from Asia and the Pacific up to 8%.
- Current bookings for September to December suggest that international departures (+10%) will see rapid growth this last part of the year, with even stronger growth in travel within Asia and the Pacific (+12%) than to other regions (+7%). Growth in bookings was particularly strong for Europe (+12%) and Africa and the Middle East (+10%), but sluggish for the Americas (-1%). Reservations for domestic air travel in the region increased 10% for this period.

The Americas

- International air travel from the Americas was up 3% in the May-August period. Travel to other regions (+4%) increased slightly faster than intraregional travel (+3%), with strongest growth in flows to Asia and the Pacific (+6%) followed by Europe (+3%).
- International reservations for September-December 2015 increased 6% compared to the same period last year, with equal growth expected in intraregional and interregional air travel (both +6%). Bookings are strongest for destinations in Asia and the Pacific (+10%). Domestic reservations (mostly corresponding to the US and Brazil) are 6% higher this period.

Africa and the Middle East

- International departures from Africa and the Middle East decreased by 1% during the May- August period.
- While intraregional travel was down by 5%, travel to other regions was up by 1%, boosted by significant growth in travel to Europe (+5%).
- Booking data available for the September-December 2015 period points towards a significant recovery in

international departures (+5%), with stronger growth in travel within the region (+7%) than travel to other regions (+4%).

Air transport booking data

The information on air travel trends contained in this section has been kindly provided by Forward Data SL leveraging exclusively on the ForwardKeys® database.

ForwardKeys® is a business intelligence tool designed to help decision-makers in hotel chains, Destination Management Organizations and other industry professionals. The ForwardKeys.com database is fed daily with Air reservation information (GDS) processed by 180.000 online and off-line Travel agencies worldwide, for a total of approximately 25 billion transactions until 2014. The database does not include some direct bookings with airlines (such as Low Cost Carriers) or charter flights.

Methodological Note

Figures are based on full journey from the original city of departure to final destination (not intermediate stops or connections).

Transit passengers, those returning to their point of departure have been excluded from this analysis.

Figures have been reviewed versus previous collaborations due to the incorporation of a new GDS to ForwardKeys database particularly impacting departures from Asia Pacific region. Figures have been normalised in order to isolate GDS-perimeter changes; periodic revisions of past figures will be carried in order to guarantee stability of the GDS perimeter

Actual Departures: Air reservations from all source markets to all destinations with effective travel date prior to 30 April 2015.

Expected Departures: Accumulated reservations until 30 April 2015 with travelling date between 1 May and 31 August 2015.

For further details see:

www.forwardkeys.com/unwto/MethodologySep2015.html

For more information on ForwardKeys® please visit:

www.forwardkeys.com

Air passenger travel trends, region of destination by region of origin (% change over the same period of the previous year)

		2014	2015		2015	
		Actual departures				Expected departures
		Jan-Dec	Jan-Apr	May-Aug	Sep-Dec	
Total		3.4	2.9	4.9	7.7	
to: Domestic (same country)		1.7	4.6	7.3	10.6	
International		4.5	1.8	3.5	6.7	
Within same region		3.8	2.5	4.5	8.8	
Other regions		5.4	0.9	2.2	4.7	
Africa & Middle East		6.1	-4.1	-3.1	4.4	
Europe		4.4	1.9	5.7	7.9	
Asia and the Pacific		3.5	5.3	5.3	9.0	
Americas		5.0	0.9	1.7	3.5	
from	Africa & Middle East	1.8	-3.2	-1.2	4.1	
to: Domestic (same country)		-6.0	-6.2	-0.3	-2.4	
International		3.4	-2.5	-1.3	5.1	
Within same region		2.0	-7.4	-5.1	6.7	
Other regions		4.5	1.4	1.3	4.3	
Europe		4.8	-0.2	4.5	8.3	
Asia and the Pacific		4.4	3.2	0.1	2.6	
Americas		4.1	-4.6	-5.4	-1.8	
from	Europe	2.7	0.3	3.6	5.5	
to: Domestic (same country)		0.7	0.6	1.7	5.6	
International		3.2	0.2	4.1	5.5	
Within same region		3.8	1.6	6.1	8.5	
Other regions		2.5	-1.3	1.0	3.0	
Africa & Middle East		2.3	-4.0	-0.8	0.7	
Asia and the Pacific		2.2	0.6	4.2	5.2	
Americas		2.8	-1.5	-0.1	2.1	
from	Asia and the Pacific	4.5	7.9	8.0	10.1	
to: Domestic (same country)		-1.6	14.0	17.0	10.3	
International		6.8	5.7	5.3	10.0	
Within same region		3.5	7.4	6.9	11.9	
Other regions		12.6	2.8	3.2	7.4	
Africa & Middle East		18.4	-0.5	-3.3	10.2	
Europe		9.3	7.9	8.0	12.3	
Americas		10.3	2.6	2.7	-0.6	
from	Americas	3.8	3.3	5.6	8.9	
to: Domestic (same country)		3.4	4.0	7.1	12.3	
International		4.6	2.1	3.1	5.8	
Within same region		4.9	1.8	2.9	5.9	
Other regions		4.1	2.6	3.5	5.7	
Africa & Middle East		5.8	-1.3	-0.3	2.3	
Europe		3.7	0.6	3.1	4.0	
Asia and the Pacific		4.4	6.2	5.7	9.9	

Source: ForwardKeys® for UNWTO



World Tourism Organization UNWTO Publications

UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* and accompanying *Statistical Annex* provides tourism stakeholders with up-to-date statistics and analysis in a timely fashion. The information is updated six times a year, covering short-term tourism trends, a retrospective and prospective evaluation by the UNWTO Panel of Experts of current tourism performance, and a summary of economic data relevant for tourism.

Available in English, with the *Statistical Annex* also in French, Spanish and Russian.



Outbound Travel Market studies:

- Key Outbound Tourism Markets in South-East Asia
- The Indian Outbound Travel Market
- The Russian Outbound Travel Market
- The Middle East Outbound Travel Market
- The Chinese Outbound Travel Market

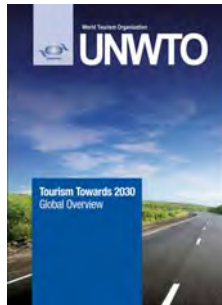
The outbound travel market series offers a unique insight into trends and travel behaviour in fast-growing source markets in the world. UNWTO jointly with the European Travel Commission (ETC) have covered the key outbound markets of China, Brazil, the Russian Federation, India and the Middle East, and with Tourism Australia key South-East Asian markets Indonesia, Malaysia, Singapore, Thailand and Vietnam.

Available in English



Tourism Towards 2030

UNWTO Tourism Towards 2030 is UNWTO's long-term outlook and assessment of future tourism trends from 2010 to 2030. It is a broad research project building on UNWTO's on-going work in the field of long-term forecasting, initiated in the 1990s. Key outputs of the study are quantitative projections for international tourism flows up until 2030, based on data series on international tourist arrivals by subregion of destination, region of origin and mode of transport for the period 1980-2010. Available in English



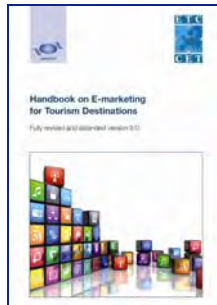
- Understanding Russian Outbound Tourism
- Understanding Brazilian Outbound Tourism
- Understanding Chinese Outbound Tourism

The innovative UNWTO/ETC *Understanding Outbound Tourism ethnographic* series explores the behaviour and mind-set of outbound travellers based on internet and social media activity.

Available in English

Handbook on E-Marketing for Tourism Destinations

This UNWTO/ETC fully revised and extended version 3.0 covers all essential aspects of an e-marketing strategy including strategic planning, branding measures, content-building, search engine optimization, e-commerce and email marketing. It also provides practical information on latest trends and developments in mobile marketing and social media, as well as detailed insight into the measurement of effective e-marketing strategies using the latest technologies. 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 French and Spanish



Compendium of Tourism Statistics, 2015 Edition. Data 2009–2013

The *Compendium* provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on tourism industries, employment and macroeconomic indicators related to international tourism. The 2015 edition presents data for 203 countries with methodological notes in English, French and Spanish.

Yearbook of Tourism Statistics, 2015 Edition. Data 2009–2013

Deriving from the most comprehensive statistical database available on the tourism sector, the *Yearbook of Tourism Statistics* focuses on data related to inbound tourism (total arrivals and overnight stays), broken down by country of origin. The 2015 edition presents data for 198 countries with methodological notes in English, French and Spanish.



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 French and Spanish



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