



# Tourism Highlights

## 2007 Edition



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# Overview International Tourism, 2006

With 846 million international tourist arrivals, corresponding to an increase of 5.4% over the previous year, 2006 exceeded expectations. The tourism sector continued to enjoy above average results and recorded a third year of sustained growth. One notable feature of 2006 was the continuing healthy performance of emerging destinations, backed up by one of the longest periods of sustained economic expansion. All regions and subregions succeeded in achieving positive growth, although the regional averages mask some fairly mixed performances across different subregions and countries.

The 846 million international arrivals currently estimated represent an additional 43 million over 2005's level – marking a new record year for the industry. Of these 43 million, 22 million were for Europe, 12 million for Asia and the Pacific, and 3 million for each of the remaining regions – the Americas, Africa and the Middle East.

Africa (+9%) was again the star performer in 2006, continuing to record growth at almost twice the global rate. Sub-Saharan Africa (+10%) was the major contributor to this rise, while North Africa (+7%) also ended the year above the world average. Asia and the Pacific (+8%) maintained its positive growth level of the previous year – due in no small part to the full recovery of Thailand and the Maldives from the impact of the December 2004 tsunami, as well as to excellent performances from other emerging destinations in the region. Europe (+5%) performed well above target while, in the Middle East, international tourist arrivals are estimated to have risen by 9%, in spite of the overall geopolitical situation and the Israel-Lebanon crisis, which marked the summer months in the region. The weakest region was the Americas, whose 2% estimated growth was well below target, largely as a result of a stagnation in arrivals in Canada and Mexico – and despite excellent results for Central America and healthy performances from the Caribbean and South America.



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

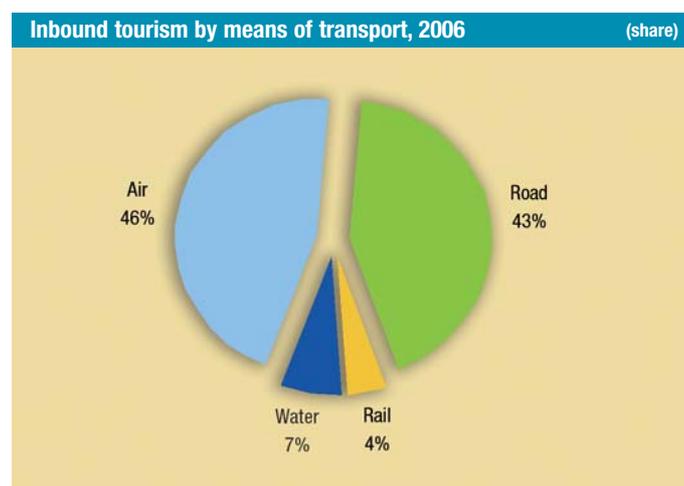
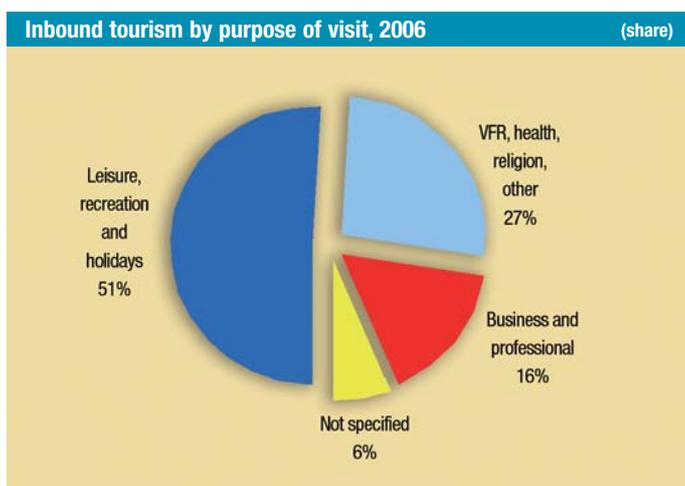
\* = provisional figure or data; .. = figure or data not (yet) available; I = change of series.

Series = International Tourist Arrivals: TF: International tourist arrivals at frontiers (excluding same-day visitors); VF: International visitor arrivals at frontiers (tourists and same-day visitors); THS: International tourist arrivals at hotels and similar establishments; TCE: International tourist arrivals at collective tourism establishments.

## International Tourist Arrivals by (Sub) region

In 2006, just over half of all international tourist arrivals were motivated by leisure, recreation and holidays (51%) – a total of 430 million. Business travel accounted for some 16% (131 million), and 27% represented travel for other purposes, such as visiting friends and relatives (VFR), religious reasons/pilgrimages, health treatment, etc (225 million). The purpose of visit for the remaining 6% of arrivals was not specified.

Air transport (46%) and transport over land – whether by road (43%) or rail (4%) – generate roughly equal shares of all arrivals, while arrivals over water accounted for 7% in 2006. For the past three years, the trend has been for air transport to grow at a faster pace than ground and water transport.



Source: World Tourism Organization (UNWTO) ©

Source: World Tourism Organization (UNWTO) ©

	International Tourist Arrivals (million)					Market share (%) 2006*	Change (%)		Average annual growth (%) '00-'06*
	1990	1995	2000	2005	2006*		05/04	06*/05	
<b>World</b>	<b>436</b>	<b>536</b>	<b>684</b>	<b>803</b>	<b>846</b>	<b>100</b>	<b>5.5</b>	<b>5.4</b>	<b>3.6</b>
<b>Europe</b>	<b>262.3</b>	<b>310.8</b>	<b>392.5</b>	<b>438.7</b>	<b>460.8</b>	<b>54.4</b>	<b>4.3</b>	<b>5.0</b>	<b>2.7</b>
Northern Europe	28.3	35.8	42.6	51.0	54.9	6.5	7.8	7.6	4.3
Western Europe	108.6	112.2	139.7	142.6	149.8	17.7	2.6	5.0	1.2
Central/Eastern Europe	31.5	60.0	69.4	87.8	91.2	10.8	2.2	3.9	4.7
Southern/Mediter. Europe	93.9	102.7	140.8	157.3	164.9	19.5	5.9	4.8	2.7
<b>Asia and the Pacific</b>	<b>56.2</b>	<b>82.5</b>	<b>110.6</b>	<b>155.3</b>	<b>167.2</b>	<b>19.8</b>	<b>7.8</b>	<b>7.7</b>	<b>7.1</b>
North-East Asia	26.4	41.3	58.3	87.5	94.0	11.1	10.3	7.4	8.3
South-East Asia	21.5	28.8	36.9	49.3	53.9	6.4	4.9	9.3	6.5
Oceania	5.2	8.1	9.2	10.5	10.5	1.2	3.7	0.4	2.2
South Asia	3.2	4.2	6.1	8.0	8.8	1.0	4.7	11.0	6.4
<b>Americas</b>	<b>92.8</b>	<b>109.0</b>	<b>128.2</b>	<b>133.2</b>	<b>135.9</b>	<b>16.1</b>	<b>5.9</b>	<b>2.0</b>	<b>1.0</b>
North America	71.7	80.7	91.5	89.9	90.7	10.7	4.7	0.9	-0.2
Caribbean	11.4	14.0	17.1	18.8	19.4	2.3	3.7	3.5	2.2
Central America	1.9	2.6	4.3	6.3	7.0	0.8	13.2	10.8	8.2
South America	7.7	11.7	15.3	18.2	18.8	2.2	11.9	3.0	3.5
<b>Africa</b>	<b>15.2</b>	<b>20.1</b>	<b>27.9</b>	<b>37.3</b>	<b>40.7</b>	<b>4.8</b>	<b>8.8</b>	<b>9.2</b>	<b>6.5</b>
North Africa	8.4	7.3	10.2	13.9	14.9	1.8	8.9	7.4	6.5
Subsaharan Africa	6.8	12.8	17.7	23.3	25.8	3.0	8.8	10.4	6.5
<b>Middle East</b>	<b>9.6</b>	<b>13.7</b>	<b>24.5</b>	<b>38.3</b>	<b>41.8</b>	<b>4.9</b>	<b>5.9</b>	<b>8.9</b>	<b>9.3</b>

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

## International

### Tourism

### Receipts

#### by (Sub) region

## US\$ 57 billion more in receipts from international tourism worldwide

For many destinations, visitor expenditure on accommodation, food and drink, local transport, entertainment, shopping, etc. is an important pillar of their economies, creating much needed employment and opportunities for development. Some 75 countries earned more than US\$ 1 billion from international tourism in 2006.

UNWTO estimates that worldwide receipts from international tourism reached US\$ 733 billion (584 billion euros) in 2006. In absolute terms, international tourism receipts increased by US\$ 57 billion (40 billion euros) in 2006 – an amount well above the receipts of the world's second biggest tourism earner, Spain, or the combined receipts of the Middle East and Africa.

Asia and the Pacific improved results by US\$ 18 billion to US\$ 153 billion, while the Americas recorded an absolute increase of US\$ 9 billion to US\$ 154 billion. In 2002, Asia and the Pacific surpassed the Americas in terms of international tourist arrivals, becoming the second most visited region in the world after Europe. As international tourism in Asia and the Pacific tends to grow at a faster pace than it does in the Americas – both in terms of arrivals and receipts – the region is firmly on track to overtake the Americas in terms of tourism receipts as well in the coming year(s).

In absolute volume of receipts, the biggest winner last year was still Europe, which gained an additional US\$ 26 billion, lifting its total to US\$ 374 billion, or 298 billion euros (51% of the world total). Africa added US\$ 3 billion, raising to US\$ 24 billion (3% share). Meanwhile, estimates based on available data point to an increase of US\$ 1 billion to US\$ 27 billion for the Middle East (4% share).

	International Tourism Receipts (billion)					Change current prices (%)		Change constant prices (%)	
	1990	1995	2000	2005	2006*	05/04	06*/05	05/04	06*/05
	Local currencies								
US\$	264	405	474	676	733	6.5	7.7	3.2	4.3
Euro	207	310	513	544	584	7.5	8.3	4.0	5.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

International Tourism Receipts	Change local currencies, constant prices (%)				Share (%) 2006*	US\$			Euro		
	03/02	04/03	05/04	06*/05		(billion)		Receipts per arrival	Receipts (billion)		Receipts per arrival
						2005	2006*	2006*	2005	2006*	2006
<b>World</b>	<b>-1.5</b>	<b>9.8</b>	<b>3.2</b>	<b>4.3</b>	<b>100</b>	<b>676</b>	<b>733</b>	<b>870</b>	<b>544</b>	<b>584</b>	<b>690</b>
<b>Europe</b>	<b>-1.5</b>	<b>3.1</b>	<b>2.5</b>	<b>3.7</b>	<b>51.1</b>	<b>348.8</b>	<b>374.5</b>	<b>810</b>	<b>280.4</b>	<b>298.3</b>	<b>650</b>
Northern Europe	-2.2	6.0	7.8	7.6	8.2	53.9	59.9	1,090	43.3	47.7	870
Western Europe	-3.3	2.0	1.7	3.9	17.9	122.5	130.8	870	98.4	104.2	700
Central/Eastern Europe	-2.6	5.3	0.9	6.5	5.1	32.4	37.3	410	26.1	29.7	330
Southern/Mediterranean Europe	0.6	2.7	1.5	1.4	20.0	140.0	146.5	890	112.5	116.7	710
<b>Asia and the Pacific</b>	<b>-8.7</b>	<b>25.1</b>	<b>4.0</b>	<b>8.9</b>	<b>20.8</b>	<b>134.5</b>	<b>152.6</b>	<b>910</b>	<b>108.1</b>	<b>121.5</b>	<b>730</b>
North-East Asia	-10.7	33.3	8.0	10.6	10.1	65.4	74.3	790	52.5	59.1	630
South-East Asia	-16.8	26.1	-0.7	9.5	5.5	33.8	40.6	750	27.2	32.3	600
Oceania	2.9	7.7	0.9	1.7	3.6	25.6	26.3	2,500	20.6	20.9	1,990
South Asia	17.8	20.1	4.3	13.9	1.6	9.6	11.5	1,290	7.7	9.1	1,030
<b>Americas</b>	<b>-2.1</b>	<b>11.6</b>	<b>4.3</b>	<b>1.8</b>	<b>21.0</b>	<b>145.2</b>	<b>154.0</b>	<b>1,130</b>	<b>116.7</b>	<b>122.6</b>	<b>900</b>
North America	-4.7	12.9	4.5	0.8	15.4	107.4	112.5	1,240	86.3	89.6	990
Caribbean	5.5	5.0	3.5	3.9	3.0	20.8	22.1	1,140	16.7	17.6	910
Central America	13.2	10.1	12.3	10.5	0.7	4.6	5.4	770	3.7	4.3	610
South America	5.2	12.9	1.7	3.8	1.9	12.4	14.0	750	10.0	11.1	590
<b>Africa</b>	<b>23.8</b>	<b>6.0</b>	<b>10.5</b>	<b>10.2</b>	<b>3.3</b>	<b>21.7</b>	<b>24.3</b>	<b>600</b>	<b>17.4</b>	<b>19.4</b>	<b>480</b>
North Africa	-2.3	13.4	15.0	17.3	1.2	7.0	8.5	570	5.6	6.8	460
Subsaharan Africa	39.0	2.7	8.4	6.8	2.2	14.7	15.8	610	11.8	12.6	490
<b>Middle East</b>	<b>27.5</b>	<b>25.3</b>	<b>-1.8</b>	<b>-1.4</b>	<b>3.7</b>	<b>26.3</b>	<b>27.3</b>	<b>650</b>	<b>21.1</b>	<b>21.8</b>	<b>520</b>

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

Although all regions and subregions shared in last year's absolute increase, growth rates varied. In relative terms, and as expressed in local currencies at constant prices (i.e. taking out the effect of exchange rates and inflation), international tourism receipts worldwide grew by 4.3% in 2006, following a 3.2% rise in 2005. By comparison, international tourist arrivals worldwide increased by around 5.5% in both 2006 and 2005. As was the case with arrivals, the relative growth in receipts was strongest in Africa (+10%) and Asia and the Pacific (+9%). Europe's receipts increased by 4% – well above the 2.5% growth recorded in 2005 – while growth in the Americas (+2%) fell to less than half its 2005 level. The only region to show a negative growth trend in relative terms in 2006 was the Middle East (-1.4%), since its growth in absolute terms was not sufficient to keep up with inflation. The relative growth reached double-digit rates in a number of subregions, such as North Africa (+17%), South Asia (+14%), North-East Asia (+11%), Central America and South-East Asia (each at around +10%).

For destination countries, receipts from international tourism count as exports and cover transactions generated by same-day as well as overnight visitors. However, these do not include receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category, 'international passenger transport'. Although the availability of comparable international data is somewhat limited, the export value of international passenger transport has in recent years been estimated at around 17% of the combined receipts from international tourism and passenger transport, corresponding in 2006 to some US\$ 148 billion.

This takes receipts from international tourism, including international passenger transport, to over US\$ 880 billion in 2006. In other words, around US\$ 2.4 billion is earned every day by international tourism.

## Germany's tourism boosted by the Football World Cup

Given the fact that the world's leading tourism destinations show marked differences in terms of the type of tourists they attract, as well as their average length of stay and their spending per trip and per night, it is interesting to note that eight of the top ten countries in UNWTO's ranking of international tourist arrivals also appear in the top ten ranking of international tourism receipts.

In terms of arrivals, France is in number one position ahead of Spain and the USA while, in the ranking for receipts, the same three countries appear in the top three places, but with the USA ranking first and France third, while Spain maintains its second place. This highlights the fact that the USA attracts a greater share of higher-spending, long-haul tourists than its European competitors, which rely much more on short-haul tourism. China, fourth in arrivals, is still fifth in terms of receipts, while the reverse is true for Italy. The UK and Germany rank sixth and seventh, in that order, in terms of both arrivals and receipts, and Austria attracts the ninth highest number of arrivals and the tenth largest volume of receipts. But, while Mexico and the Russian Federation complete the ranking of the top ten destinations in terms of arrivals (in eighth and tenth places respectively), they fall further down in the list of top tourism earners. The remaining two places in the receipts' ranking are taken instead by Australia (eighth position) and Turkey (ninth).

In terms of international tourist arrivals, some slight changes occurred in the top ten ranking in 2006. Germany overtook Mexico as a result of its excellence performance during the year it hosted the FIFA Football World Cup, and both Austria and the Russian Federation climbed one place to ninth and tenth, respectively. By contrast, Turkey, which was ninth position in 2005, dropped two places. In terms of receipts, China ousted the UK from fifth position, while Australia replaced Turkey at number eight.

The top ten tourism earners last year accounted for half of the total estimated US\$ 733 billion of international tourism receipts. Their combined share of international tourist arrivals was slightly lower, at 47%.

## World's Top

### Tourism

### Destinations

International Tourist Arrivals						International Tourism Receipts								
Rank	Series	million		Change (%)		Rank	US\$				Local currencies			
		2005	2006*	05/04	06*/05		billion	Change (%)		Change (%)				
						2005	2006*	05/04	06*/05	05/04	06*/05			
1	France	TF	75.9	79.1	1.0	4.2	1	United States	81.8	85.7	9.7	4.8	9.7	4.8
2	Spain	TF	55.9	58.5	6.6	4.5	2	Spain	48.0	51.1	6.0	6.6	6.0	5.6
3	United States	TF	49.2	51.1	6.8	3.8	3	France	42.3	42.9	3.5	1.5	3.5	0.6
4	China	TF	46.8	49.6	12.1	6.0	4	Italy	35.4	38.1	-0.7	7.7	-0.7	6.7
5	Italy	TF	36.5	41.1	-1.5	12.4	5	China	29.3	33.9	13.8	15.9	13.8	15.9
6	United Kingdom	TF	28.0	30.7	9.2	9.3	6	United Kingdom	30.7	33.7	8.7	9.8	9.5	8.5
7	Germany	TCE	21.5	23.6	6.8	9.6	7	Germany	29.2	32.8	5.4	12.3	5.4	11.3
8	Mexico	TF	21.9	21.4	6.3	-2.6	8	Australia	16.9	17.8	11.0	5.8	6.9	7.3
9	Austria	TCE	20.0	20.3	3.0	1.5	9	Turkey	18.2	16.9	14.2	-7.2	14.2	-7.2
10	Russian Federation	TF	19.9	20.2	0.2	1.3	10	Austria	16.0	16.7	2.8	4.0	2.7	3.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

European tourism was boosted by a whole host of events in 2006, from the Winter Olympic Games in Turin to the FIFA World Football Cup in Germany, the Ryder Cup in Ireland, and numerous cultural events – such as the 400th anniversary of Rembrandt's birth, Mozart's 250th and Picasso's 125th. The continuing expansion and spread of low-cost carriers (LCCs) across the region also contributed to stimulating demand. The estimated 5% growth in international tourist arrivals may seem modest by comparison with other world regions. But the growth, which comes on top of an already very large base (since Europe attracts over half the world's tourist arrivals), represents 22 million additional international tourists in just one year. Moreover, Europe has been one of the regions turning in a steady performance over recent years without large peaks and troughs.

The 5% growth for international tourist arrivals masks some variations from one subregion to another. Both Central and Eastern Europe (+4%) and Western Europe (+5%) recovered in 2006 from their lower-than-average growth of the previous year, while arrivals in Southern and Mediterranean Europe (+5%) averaged one percentage point less than in 2005. Nevertheless, this was still an excellent result for a subregion that receives 165 million tourists annually. But all three subregions lagged behind the star performer of the last three years – Northern Europe (+8% in 2006).

Tourism demand for the traditional sun and sea destinations of Southern and Mediterranean Europe remained buoyant, as is reflected in the results for Italy (+12%), Greece (+9%), Spain (+4%) and Portugal (+6%). Among Europe's main destinations, Italy was by far the best performer in 2006, after a number of weaker years. Arrivals were up 12%, following an excellent winter season at the start of the year, thanks in part to Turin's hosting of the Winter Olympics. Greece (+9%) also performed above average. The post-Olympics effect has reportedly had a very positive impact on city tourism and on the meetings industry, as a result of the improved infrastructure and quality of hotels. By contrast, arrivals fell 7% in Turkey. This can of course be attributed in part to increased political tension as a result of the Israel-Lebanon crisis, although Turkey has also suffered from terrorist attacks and threats.

In Northern Europe, the UK achieved a healthy 9% increase, following its already strong performances of 2004 and 2005, while Ireland (+9%) saw continued healthy growth from all major markets. In Western Europe, Germany's hosting of the FIFA Football World Cup brought significant gains – international arrivals were up 10%. The Netherlands (+7%) had an excellent year with celebrations surrounding the 400th anniversary of Rembrandt making a major contribution to growth. Switzerland (+9%) saw growth from emerging long- and short-haul markets, but LCCs also boosted short-break business. Meanwhile, France (+4%) finally overcame its arrivals stagnation of recent years. In Central and Eastern Europe, Ukraine and Bulgaria (+7% each) did particularly well.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals					International Tourism Receipts		
		(1000)		Change (%)		Share (%)	(US\$ million)		Share (%)
		2005	2006*	05/04	06*/05	2006*	2005	2006*	2006*
<b>Europe</b>		<b>438,743</b>	<b>460,835</b>	<b>4.3</b>	<b>5.0</b>	<b>100</b>	<b>348,803</b>	<b>374,514</b>	<b>100</b>
Austria	TCE	19,952	20,261	3.0	1.5	4.4	16,012	16,658	4.4
Belgium	TCE	6,747	6,995	0.6	3.7	1.5	9,868	11,535	3.1
Bulgaria	TF	4,837	5,158	4.5	6.6	1.1	2,430	2,586	0.7
Croatia	TCE	8,467	8,659	7.0	2.3	1.9	7,463	7,902	2.1
Czech Rep	TCE	6,336	6,435	4.5	1.6	1.4	4,668	5,007	1.3
France	TF	75,908	79,083	1.0	4.2	17.2	42,276	42,910	11.5
Germany	TCE	21,500	23,569	6.8	9.6	5.1	29,173	32,760	8.7
Greece	TF	14,765	16,039	10.9	8.6	3.5	13,731	14,259	3.8
Hungary	TF	9,979	9,259	-18.3	-7.2	2.0	4,271	4,519	1.2
Ireland	TF	7,333	8,001	5.5	9.1	1.7	4,744	5,242	1.4
Italy	TF	36,513	41,058	-1.5	12.4	8.9	35,398	38,129	10.2
Netherlands	TCE	10,012	10,739	3.8	7.3	2.3	10,475	11,516	3.1
Norway	TF	3,824	3,945	5.4	3.2	0.9	3,495	3,760	1.0
Poland	TF	15,200	15,670	6.4	3.1	3.4	6,274	7,239	1.9
Portugal	TF	10,612	11,282	-0.3	6.3	2.4	7,712	8,349	2.2
Russian Federation	TF	19,940	20,199	0.2	1.3	4.4	5,564	7,025	1.9
Spain	TF	55,914	58,451	6.6	4.5	12.7	47,970	51,115	13.6
Switzerland	THS	7,229	7,863	..	8.8	1.7	11,040	11,843	3.2
Turkey	TF	20,273	18,916	20.5	-6.7	4.1	18,152	16,853	4.5
Ukraine	TF	17,631	18,936	12.8	7.4	4.1	3,125	3,485	0.9
United Kingdom	TF	28,039	30,654	9.2	9.3	6.7	30,675	33,695	9.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> See note on the first page

Asia and the Pacific was, after Africa, the second best performing region in the world in 2006, recording an estimated 8% increase in arrivals. Both South Asia (+11%) and South-East Asia (+9%) performed above average. North-East Asia is estimated to have finished the year 7% above 2005's level, while data for Oceania (+0.4%) points to stagnation for the subregion. Asia and the Pacific's healthy performance is all the more remarkable as it reflects sustained growth achieved by the region over the past few years. 2004 was a record year in terms of growth (+27%), but it was followed by another two strong years – +8% in 2005 and 2006 – even after the December 2004 tsunami.

In North-East Asia, Macao (China) (+18%) was the subregion's star performer in 2006, thanks in no small part to the development of new hotels and casinos and to increased LCC access. Japan (+9%) also enjoyed a very good year. Inbound tourism to China (+6%) and Hong Kong (China) (+7%) slowed somewhat in 2006, as demand was comparatively weak from neighbouring Korea (Republic of) and Japan. Nevertheless, growth was still significant, in particular since it followed the extraordinary growth rates of the previous two years. The Republic of Korea's lower than average 2% rise is attributed to its strong won, which has made the destination less competitive. Growth for Taiwan (province of China) (+4%) was also below average.

Meanwhile, in South-East Asia, several destinations recorded 10% or higher growth – Thailand and Cambodia achieved +20% each. Thailand's strong performance is largely attributable to its recovery from the December 2004 tsunami. As for many of its neighbours, LCCs have helped boost tourism demand for Malaysia (+7%), as well as opening up new regional source markets and destinations. 2006 was another good year for tourism to the Philippines (+8%), following its upbeat performance over the previous two years, but also for Singapore, where arrivals were up by 7%. In South Asia, the Maldives (+52%) made a full recovery from the December 2004 tsunami, thanks mainly to increased airline access and enhanced marketing and promotion, and India's tourism (+13%) goes from strength to strength as greater awareness of the country and increased promotion boost demand. Among Oceania's main destinations, a decline from Japan is to blame in part for Australia's disappointing performance (+0.9%). Australia, as well as New Zealand (+1.8%), suffered from increased oil prices and, consequently, higher airfares – a factor contributing to the erosion of both destinations' competitiveness in international markets as they depend heavily on long-haul airline traffic.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals				International Tourism Receipts			
		(1000)		Change (%)		(US\$ million)		Share (%)	
		2005	2006*	05/04	06*/05	2006*	2005	2006*	2006*
<b>Asia and the Pacific</b>		<b>155,272</b>	<b>167,228</b>	<b>7.8</b>	<b>7.7</b>	<b>100</b>	<b>134,473</b>	<b>152,615</b>	<b>100</b>
Australia	TF	5,020	5,064	5.2	0.9	3.0	16,866	17,840	11.7
Cambodia	TF	1,422	1,700	34.7	19.6	1.0	840	963	0.6
China	TF	46,809	49,600	12.1	6.0	29.7	29,296	33,949	22.2
Fiji	TF	550	545	9.4	-0.9	0.3	434	433	0.3
Guam	TF	1,228	1,212	5.8	-1.3	0.7	..	..	..
Hong Kong (China)	TF	14,773	15,821	8.2	7.1	9.5	10,294	11,630	7.6
India	TF	3,919	4,447	13.3	13.5	2.7	7,524	8,885	5.8
Indonesia	TF	5,002	4,871	-6.0	-2.6	2.9	4,521	4,448	2.9
Japan	VF	6,728	7,334	9.6	9.0	4.4	6,630	8,469	5.5
Korea, Republic of	VF	6,023	6,155	3.5	2.2	3.7	5,806	5,323	3.5
Lao P.D.R.	TF	672	..	65.1	..	..	147	..	..
Macao (China)	TF	9,014	10,683	8.3	18.5	6.4	7,980	9,337	6.1
Malaysia	TF	16,431	17,547	4.6	6.8	10.5	8,543	9,630	6.3
New Zealand	VF	2,366	2,409	1.4	1.8	1.4	4,865	4,536	3.0
Philippines	TF	2,623	2,843	14.5	8.4	1.7	2,265	2,543	1.7
Singapore	TF	7,080	7,588	8.0	7.2	4.5	5,908	7,061	4.6
Taiwan (pr. of China)	VF	3,378	3,520	14.5	4.2	2.1	4,977	5,120	3.4
Thailand	TF	11,567	13,882	-1.4	20.0	8.3	9,591	12,423	8.1
Vietnam	VF	3,468	3,583	18.4	3.3	2.1	1,880	3,200	2.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> See note on the first page

## Regional Results

### Americas - Central America's stellar performance

Estimates for the Americas point to an increase of 2% in international tourist arrivals in 2006 – well short of the world average increase of 5.4%. However, this average masks widely differing performances across the four subregions. Central America achieved by far the best result, with an 11% increase, while South America's growth, at 3% – which was well below its 12% increase in 2005 – was still above the regional average, as was the Caribbean's 3% rise. But North America, which accounts for two thirds of the region's total arrivals, dragged the average down with a rise of only 1%.

In North America, international tourist arrivals in the USA reached 51 million in 2006, an increase of 4% over 2005. But this was still below its 2000 peak (51.2 million). Arrivals in Canada fell by nearly 3%, due to the impact of an unfavourable exchange rate, US border regulations and higher fuel prices. Arrivals in Mexico were also down 3%. Repairs and improvements to hotels and other tourism facilities damaged by hurricane Wilma in October 2005 were largely completed by mid-2006. As for the Caribbean islands, results varied sharply in 2006, due to a number of factors – e.g. whether they were damaged by the hurricanes of 2005 and/or whether they were able to attract new airline services. Among the most visited islands, there was very positive growth in arrivals for Jamaica (+13%) and the Dominican Republic (+7%), but not for Cuba (-5%).

Results from Central American countries were on the whole very favourable. El Salvador (+17%), Guatemala (+14%), Honduras (+10%) and Panama (+20%) all reported double-digit increases. Economic growth in South America has shifted up a gear. The remarkable recovery of the Argentine economy continued to fuel intraregional travel in 2006. Chile, Colombia and Peru showed rises of 10% or more in arrivals, while Argentina and Venezuela achieved increases of 9%. By contrast, arrivals in Brazil decreased by 6% – due in part to a significant fall in airline capacity on international routes by Brazilian airlines as a result of the restructuring of Varig – while, in Uruguay, arrivals declined by 3%.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals					International Tourism Receipts		
		(1000)		Change (%)		Share (%)	(US\$ million)		Share (%)
		2005	2006*	05/04	06*/05	2006*	2005	2006*	2006*
<b>Americas</b>		<b>133,210</b>	<b>135,876</b>	<b>5.9</b>	<b>2.0</b>	<b>100</b>	<b>145,177</b>	<b>153,966</b>	<b>100</b>
Argentina	TF	3,823	4,156	10.6	8.7	3.1	2,729	3,349	2.2
Aruba	TF	733	694	0.6	-5.2	0.5	1,094	1,076	0.7
Bahamas	TF	1,608	1,600	3.0	-0.5	1.2	2,069	2,069	1.3
Brazil	TF	5,358	5,019	11.8	-6.3	3.7	3,861	4,316	2.8
Canada	TF	18,771	18,265	-2.0	-2.7	13.4	13,760	14,632	9.5
Chile	TF	2,027	2,276	13.6	12.3	1.7	1,109	1,214	0.8
Colombia	VF	933	1,053	18.0	12.9	0.8	1,218	1,550	1.0
Costa Rica	TF	1,679	1,725	15.6	2.7	1.3	1,570	1,629	1.1
Cuba	TF	2,261	2,150	12.1	-4.9	1.6	2,150	2,138	1.4
Dominican Rp	TF	3,691	3,965	7.0	7.4	2.9	3,518	3,792	2.5
Ecuador	VF	860	841	5.0	-2.2	0.6	486	490	0.3
El Salvador	TF	969	1,138	19.5	17.4	0.8	533	780	0.5
Guatemala	TF	1,316	1,502	11.4	14.2	1.1	869	1,013	0.7
Honduras	TF	673	739	5.0	9.8	0.5	464	488	0.3
Jamaica	TF	1,479	1,679	4.5	13.5	1.2	1,545	1,887	1.2
Mexico	TF	21,915	21,353	6.3	-2.6	15.7	11,803	12,177	7.9
Nicaragua	TF	712	773	15.9	8.6	0.6	206	231	0.1
Panama	TF	702	843	13.0	20.1	0.6	780	960	0.6
Peru	TF	1,486	1,635	16.4	10.0	1.2	1,308	1,381	0.9
Puerto Rico	TF	3,686	3,722	4.1	1.0	2.7	3,239	3,369	2.2
United States	TF	49,206	51,063	6.8	3.8	37.6	81,799	85,694	55.7
Uruguay	TF	1,808	1,749	2.9	-3.2	1.3	594	597	0.4
Venezuela	TF	706	770	45.2	9.0	0.6	650	670	0.4

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> See note on the first page

## Africa - best performing region for the second consecutive year

## Regional Results

In 2006, Africa was the leading region in terms of growth in international tourist arrivals – for the second consecutive year – with the full year at a 9% increase (+7% for North Africa and +10% for Sub-Saharan Africa). North Africa's growth is primarily due to Morocco's stellar performance (+12%), attributable among other factors to dedicated investment in tourism infrastructure and to the liberalisation of air transport and the subsequent entry of low-cost airlines. Tunisia, on the other hand, had a slightly lower than average results (+3%) due to market volatility and problems with air transport. Among the major Sub-Saharan African destinations that have provided data for 2006, Cape Verde (+22%), Kenya (+15% in visitor arrivals), Lesotho (+18%), Madagascar (+13%), South Africa (+14%), Sudan (+33%), Uganda (+15%) and Zimbabwe (+47%) turned in some of the best results.

Major destinations	Series <sup>1</sup>	International Tourist Arrivals				International Tourism Receipts			
		(1000)		Change (%)		(US\$ million)		Share (%)	
		2005	2006*	05/04	06*/05	2006*	2005	2006*	2006*
<b>Africa</b>		<b>37,259</b>	<b>40,699</b>	<b>8.8</b>	<b>9.2</b>	<b>100</b>	<b>21,679</b>	<b>24,329</b>	<b>100</b>
Algeria	VF	1,443	..	17.0	..	..	184	..	..
Botswana	TF	1,675	..	10.0	..	..	562	537	2.2
Cape Verde	TF	198	242	26.0	22.3	0.6	127	228	0.9
Ghana	TF	429	442	-26.6	3.1	1.1	796	..	..
Kenya	TF	1,536	..	28.8	..	..	579	673	2.8
Lesotho	VF	304	357	0.0	17.6	0.9	30	28	0.1
Madagascar	TF	277	312	21.3	12.5	0.8	62	..	..
Mauritius	TF	761	788	5.9	3.6	1.9	871	1,007	4.1
Morocco	TF	5,843	6,558	6.7	12.2	16.1	4,621	5,967	24.5
Namibia	TF	778	..	..	..	..	348	384	1.6
Reunion	TF	409	279	-4.9	-31.8	0.7	442	309	1.3
Senegal	TF	769	..	15.3	..	..	..	..	..
Seychelles	TF	129	141	6.5	9.3	0.3	192	228	0.9
South Africa	TF	7,369	8,396	10.3	13.9	20.6	7,327	7,875	32.4
Sudan	TF	246	328	305.8	33.4	0.8	89	126	0.5
Swaziland	THS	839	873	82.8	4.1	2.1	78	74	0.3
Tanzania	TF	590	..	4.2	..	..	824	914	3.8
Tunisia	TF	6,378	6,550	6.3	2.7	16.1	2,124	2,227	9.2
Uganda	TF	468	539	-8.7	15.2	1.3	381	328	1.3
Zambia	TF	669	..	29.9	..	..	164	..	..
Zimbabwe	VF	1,559	2,287	-15.9	46.7	5.6	99	338	1.4

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> See note on the first page

## Middle East - sustaining the pace of growth despite all the obstacles

In the Middle East, international tourist arrivals have risen by 9% in 2006 in spite of the Israel-Lebanon crisis. For the year as a whole, arrivals in Lebanon were 7% down, but in fact most of the destinations in the region continue to report remarkably good results. Bahrain enjoyed a healthy +16% and Yemen achieved an increase of 14% in arrivals. The statistics point to excellent results for Syria (+31%) – although these were due in large part to the high increased in arrivals from Lebanon – as well as very positive performances for Jordan (+8%), Saudi Arabia (+7%), Egypt (+5%) and Qatar (+5%).

Major destinations	Series <sup>1</sup>	International Tourist Arrivals				International Tourism Receipts			
		(1000)		Change (%)		(US\$ million)		Share (%)	
		2005	2006*	05/04	06*/05	2006*	2005	2006*	2006*
<b>Middle East</b>		<b>38,344</b>	<b>41,752</b>	<b>5.9</b>	<b>8.9</b>	<b>100</b>	<b>26,255</b>	<b>27,330</b>	<b>100</b>
Bahrain	TF	3,914	4,519	11.4	15.5	10.8	920	1,048	3.8
Egypt	TF	8,244	8,646	5.8	4.9	20.7	6,851	7,591	27.8
Jordan	TF	2,987	3,225	4.7	8.0	7.7	1,441	1,642	6.0
Lebanon	TF	1,140	1,063	-10.9	-6.7	2.5	5,432	5,015	18.3
Qatar	TF	913	962	24.6	5.4	2.3	760	374	1.4
Saudi Arabia	TF	8,037	8,620	-6.5	7.3	20.6	5,185	4,961	18.2
Syrian Arab Republic	TCE/TF	3,368	4,422	11.0	31.3	10.6	2,175	..	..
Untd Arab Emirates	THS	..	..	..	..	..	2,200	..	..
Yemen	THS	336	382	22.8	13.8	0.9	262	309	1.1

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> See note on the first page

## Demand for long-haul travel keeps growing

While as much as 80% of international travel takes place within the same region, travel between different regions tends to grow at a faster rate than intraregional travel. This was not the case between 2001 and 2003, due to events such as SARS, terrorism and the Iraq war – in fact, long-haul travel demand declined over the three years. However, and since 2004, interregional travel has been growing faster than intraregional travel again. In 2006, interregional travel increased by 8% as against a growth of 5% for intraregional traffic. In terms of source markets, international tourism is still largely concentrated in the industrialised countries of Europe, the Americas and Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth over recent years, in particular markets in North-East and South-East Asia, Central and Eastern Europe, the Middle East and Southern Africa. In 2006, most markets maintained the growth levels regained in 2004, when they rebounded from the depressed results of the preceding years. By region, Africa recorded the biggest gain in relative terms in 2006 (+12%), followed by the Middle East (+9%) and Asia and the Pacific (+8%). The Americas continued its recovery (+4%), while arrivals originating from Europe (+5%) grew in line with their performance of the previous two years. Most interestingly, the Middle East was the fastest growing source region over the last six years, recording an average annual increase of 10%, followed by Africa (+7%) and Asia and the Pacific (+6%).

	International Tourist Arrivals (millions)					Change (%)		Share (%)	Average annual growth
	1990	1995	2000	2005	2006*	2005/04	2006*/05	2006*	'00-'06*
<b>World</b>	<b>436</b>	<b>536</b>	<b>684</b>	<b>803</b>	<b>846</b>	<b>5.5</b>	<b>5.4</b>	<b>100</b>	<b>3.6</b>
From:									
Europe	252.3	310.9	398.3	452.3	473.7	4.3	4.7	56.3	2.9
Asia and the Pacific	59.2	86.8	114.8	154.7	166.5	6.8	7.7	19.3	6.4
Americas	99.8	108.5	131.0	137.1	142.2	5.8	3.7	17.1	1.4
Middle East	8.2	9.6	13.8	22.8	24.8	11.5	8.9	2.8	10.3
Africa	9.9	12.8	16.3	21.8	24.5	7.0	12.1	2.7	7.1
Origin not specified <sup>1</sup>	6.6	7.5	9.4	14.1	14.7	16.0	4.3	1.8	7.7
Same region	349.9	431.4	541.0	638.0	668.9	4.8	4.9	79.5	3.6
Other regions	79.5	97.2	133.1	150.7	162.7	7.5	7.9	18.8	3.4

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2007)

<sup>1</sup> Countries that could not be allocated to a specific region of origin. As information is derived from inbound tourism data this occurs when data on the country of origin is missing or when a category such as 'other countries of the world' is used grouping countries together that are not separately specified.

## International Tourism Top Spenders

In 2006, there were almost no changes in the leaders' ranking of the world's biggest spenders on international tourism. Two major exceptions – China continued to rise up the ranking, overtaking Italy to take sixth place, and the Netherlands was ousted from the top ten by the Republic of Korea, thanks to an 18% increase in spending on tourism abroad by Koreans in 2006. Among the top ten world source markets, which accounted for over half of all international tourism spending worldwide, the best performers in 2006, apart from the Republic of Korea, were China (+12%), Canada and the Russian Federation (+6% each). Among the top five major source markets, it is worth noting the 4% to 5% increase for the USA, the UK and Japan, as well as the stagnation in expenditure by German travellers abroad (-0.3%) and France's more modest rise (+2%) compared with its 9% growth in 2005.

Rank		International Tourism Expenditure (US\$ billion)		Local currencies change (%)		Market share (%)	Population 2006	Expenditure per capita
		2005	2006*	2005/2004	2006/2005	2006*	(million)	(US\$)
	<b>World</b>	<b>676</b>	<b>733</b>			<b>100</b>	<b>6,526</b>	<b>112</b>
1	Germany	74.4	74.8	3.9	-0.3	10.2	82	908
2	United States	69.0	72.0	4.9	4.4	9.8	298	241
3	United Kingdom	59.6	63.1	6.2	4.6	8.6	61	1,037
4	France	31.2	32.2	8.9	2.2	4.4	61	529
5	Japan	27.3	26.9	..	3.8	3.7	127	211
6	China	21.8	24.3	13.6	11.8	3.3	1,314	19
7	Italy	22.4	23.1	9.0	2.2	3.2	58	397
8	Canada	18.2	20.5	6.3	5.7	2.8	33	621
9	Russian Federation	17.8	18.8	13.2	5.6	2.6	142	132
10	Korea, Republic of	15.4	18.2	24.7	18.4	2.5	49	1,373

Source: World Tourism Organization (UNWTO) ©

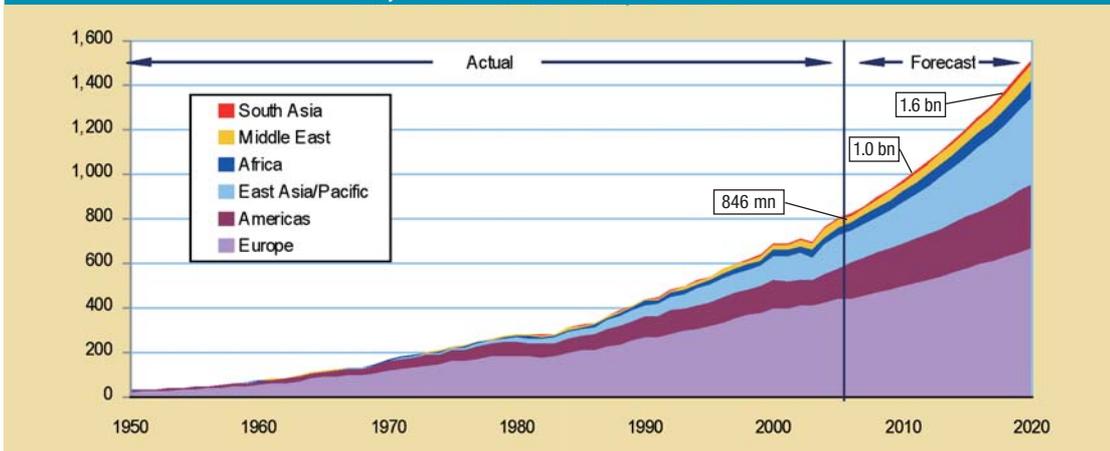
(Data as collected by UNWTO, 2007)

## Long-term prospects

*Tourism 2020 Vision* is the World Tourism Organization's long-term forecast and assessment of the development of tourism up to the first 20 years of the new millennium. An essential outcome of the *Tourism 2020 Vision* are quantitative forecasts covering a 25 years period, with 1995 as base year and forecasts for 2010 and 2020.

Although the evolution of tourism in the last years has been irregular, UNWTO maintains its long-term forecast for the moment. The underlying structural trends of the forecast are believed not to have significantly changed. Experience shows that in the short-term, periods of faster growth (1995, 1996, 2000, 2004 to 2006) alternate with periods of slow growth (2001 to 2003). And, the actual pace of growth is in reality in line with the *Tourism 2020 Vision* forecast as international tourist arrivals show an average growth of 4.2% between 1995 and 2006.

### International Tourist Arrivals, 1950-2020



Source: World Tourism Organization (UNWTO) ©

UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travellers.

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5% per year, compared to the world average of 4.1%. The more mature regions, Europe and Americas, are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60% in 1995 to 46% in 2020.

### International Tourist Arrivals by Region (millions)

	Base Year	Forecasts		Average annual	Share	
	1995	2010	2020	growth rate (%)	1995	2020
				1995-2020		
<b>Total</b>	<b>565</b>	<b>1,006</b>	<b>1,561</b>	<b>4.1</b>	<b>100</b>	<b>100</b>
Africa	20	47	77	5.5	3.6	5.0
Americas	109	190	282	3.9	19.3	18.1
East Asia/Pacific	81	195	397	6.5	14.4	25.4
Europe	338	527	717	3.0	59.8	45.9
Middle East	12	36	69	7.1	2.2	4.4
South Asia	4	11	19	6.2	0.7	1.2
Intraregional (a)	464	791	1,183	3.8	82.1	75.8
Long-haul (b)	101	216	378	5.4	17.9	24.2

Source: World Tourism Organization (UNWTO) ©

Notes: (a) Intraregional includes arrivals where country of origin is not specified  
(b) Long-haul is defined as everything except intraregional travel.

Long-haul travel worldwide will grow faster, at 5.4% per year over the period 1995-2020, than intraregional travel, at 3.8%. Consequently the ratio between intraregional and long-haul travel will shift from around 82:18 in 1995 to close to 76:24 in 2020.



## UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends, updated three times a year. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on

major routes; a retrospective and prospective evaluation of current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The UNWTO World Tourism Barometer is published in January, June and October.

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



## Tourism Market Trends, 2006 Edition

*Tourism Market Trends* is UNWTO's regular series of reports with a comprehensive and timely analysis of international tourism trends in the world and the various regions, subregions and countries. The series examines short- and medium-term tourism development and analyzes statistical information on a set of indicators including international tourist arrivals, international tourism receipts, arrivals by region of origin, purpose of visit and means of transport, volume of trips abroad, international tourism expenditure, etc.

The full series consists of one volume providing an overview of the tourism trends in the world, *World Overview & Tourism Topics*, and five volumes highlighting the regional and subregional trends presenting for each country a digest of statistical data as well as a qualitative evaluation of the past year with respect to tourism products, access, markets, marketing and promotion, tourism policy, etc.

Available in:

*World Overview & Tourism Topics*: English, French and Spanish

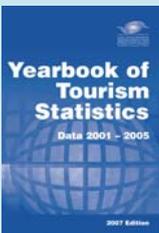
*Africa*: English and French

*Americas*: English and Spanish

*Asia*: English

*Europe*: English and French

*Middle East*: English



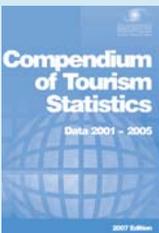
## Yearbook of Tourism Statistics, Data 2001 - 2005

The 2007 edition of the Yearbook of Tourism Statistics provides for 206 countries and territories data on total arrivals and overnight stays associated to inbound tourism with breakdown by country of origin for the period 2001-2005.

The titles of the tables are in English only. Notes are given in English, French and Spanish. Names of countries, regions and sub-regions as well as the classification included on the tables are in English only. Countries are classified in accordance with

English alphabetical order.

Trilingual (English, French and Spanish)



## Compendium of Tourism Statistics, Data 2001 - 2005

The Compendium is designed to provide a condensed and quick-reference guide on the major tourism statistical indicators in each country. The 2007 edition provides statistical information on tourism in 208 countries and territories around the world for the period 2001 - 2005. It is edited in English only, with countries classified according to English alphabetical order. For easy reference in Arabic,

French, German, Russian and Spanish, the text of the basic indicators and the basic references has been printed in a separate pasteboard.

Multilingual (English, French, Russian, Spanish, Arabic, German)



## Handbook on Tourism Market Segmentation - Maximising Market Effectiveness

Market segmentation is crucial for National Tourism Organizations (NTO) and Destination Marketing Organizations (DMO) in making sure that their resources are used in the most effective way. This new UNWTO/ETC manual, aimed ultimately at helping destinations improving their marketing effectiveness, is divided into four distinct sections. The first sets out the theory and rationale for segmentation.

Other areas look at the current methods and practices, detailing some of the main methodologies; at practical steps to introducing or developing further segmentation-based marketing activities, and finally at best practices in the area of tourism market segmentation, including the analyses of a number of case studies.

Available in English



## Structures and Budgets of National Tourism Organizations, 2004 - 2005

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

on the NTOs structure and functioning, including a benchmarking analysis. The second part presents an overall view of NTO budgets for around 50 countries, including data on overall and promotional budgets, funding sources, budget allocation by source markets, products and promotional instruments, among other areas.

Available in English

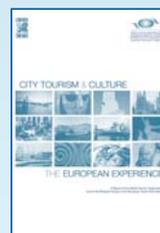


## The Impact of Rising Oil Prices on International Tourism

Oil prices reached historic levels in 2005 and forecasts underline this upward trend. In view of this, questions have been raised about the current and future effects of very high oil prices on international tourism and on one of its major components, air transport. The purpose of this study is to analyze the observed or possible impact of the recent rise in oil prices on international tourism. Therefore, the study focuses in

particular on: Statistical analysis of oil price increases in nominal and real terms; Comparisons with earlier oil shocks in 1974, 1979 and 1990; Analysis of the short-term effect of rising oil prices since 2002; Evaluation of the impact on air transport; Analysis of medium-term scenarios, by region, in terms of positive, negative, or neutral impact and The development of proposals and recommendations.

Available in English, French and Spanish



## City Tourism & Culture - The European Experience

*City Tourism & Culture - The European Experience*, is a new report commissioned jointly by the World Tourism Organization (UNWTO) and European Travel Commission (ETC), which presents a new insight into the expansion of European cities as cultural tourism destinations. Besides, defining a conceptual framework for the analysis of city tourism with a cultural motivation, the study aims to contribute to the marketing and product development of city tourism by throwing more light on the evolution of cultural

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