



# World Tourism Barometer

Volume 16 • Issue 4 • November 2018

## Continued healthy growth in international tourism in the first nine months of 2018

- International tourist arrivals (overnight visitors) grew 5% in the first nine months of 2018 over the same period last year, reflecting a continued strong economic situation globally.
- The 5% growth consolidated the results of 2017 (+7%), yet growth somewhat slowed down through the third quarter compared to the strong first months of 2018. The same trend is seen in terms of global economic growth softening.
- All world regions enjoyed robust growth in the first nine months of this year, fuelled by strong demand from major source markets.
- Asia and the Pacific led growth in January-September 2018, with arrivals increasing 7%. Europe and the Middle East also recorded sound results with 6% growth, while Africa saw a 5% increase. The Americas grew more modestly at 3% this nine-month period.
- Preliminary data on international tourism receipts confirm the positive trend seen in international tourist arrivals, with particularly strong results in Asian and European destinations.
- Among the top 20 world spenders on outbound tourism, France, the United Kingdom, Australia, the Russian Federation, Spain, and India all posted double-digit growth in expenditure.

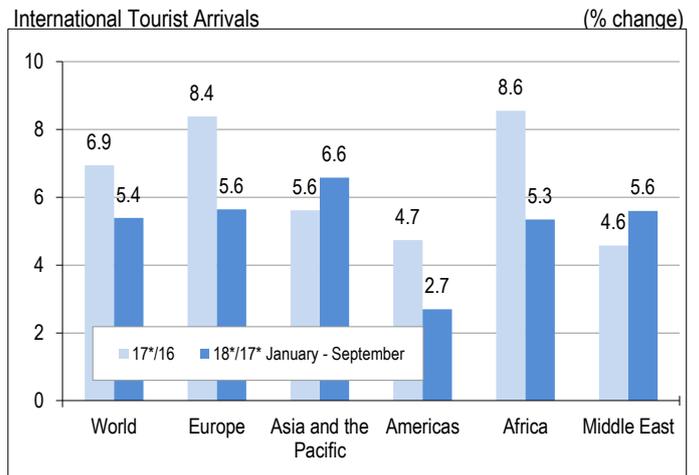
## Key figures

International tourist arrivals	2017	Jan-Sept 2018
World	+6.9%	+5.4%
Europe	+8.4%	+5.6%
Asia and the Pacific	+5.6%	+6.6%
Americas	+4.7%	+2.7%
Africa	+8.6%	+5.3%
Middle East	+4.6%	+5.6%

Source: UNWTO

(Data as collected by UNWTO, November 2018)

Provisional data based on information to date.



Source: World Tourism Organization (UNWTO) ©

## Contents

- International tourist arrivals: January-September 2018	3
- Regional Insights	5
- International tourism receipts and expenditures	8
- UNWTO Confidence Index: Panel of Tourism Experts	9

Statistical Annex

Annex-1 to Annex-25



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 158 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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### About the UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this UNWTO World Tourism Barometer, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

For more information including copies of previous issues, please visit: [mkt.unwto.org/barometer](http://mkt.unwto.org/barometer)

**We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org).**



Data collection for this issue was closed end of November 2018.

The next issue of the UNWTO World Tourism Barometer is scheduled to be published on the occasion of the Spanish tourism fair *Fitur* (23-27 January 2019).

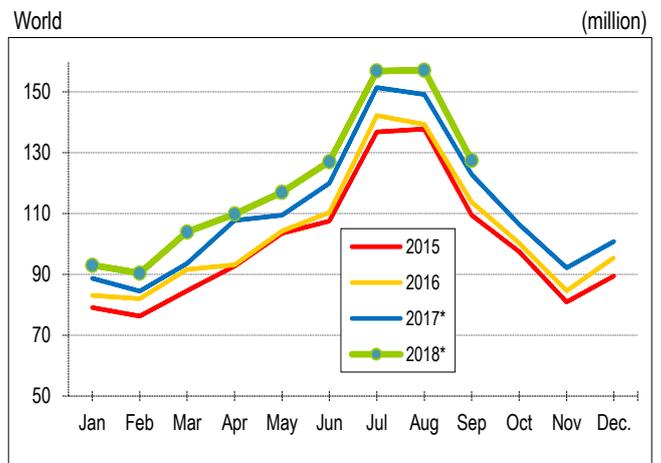
Pages 1-4 of this document constitute the **Excerpt** of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at <http://mkt.unwto.org/barometer>. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

## International tourist arrivals January - September 2018

### International arrivals grew 5% in the first nine months of 2018

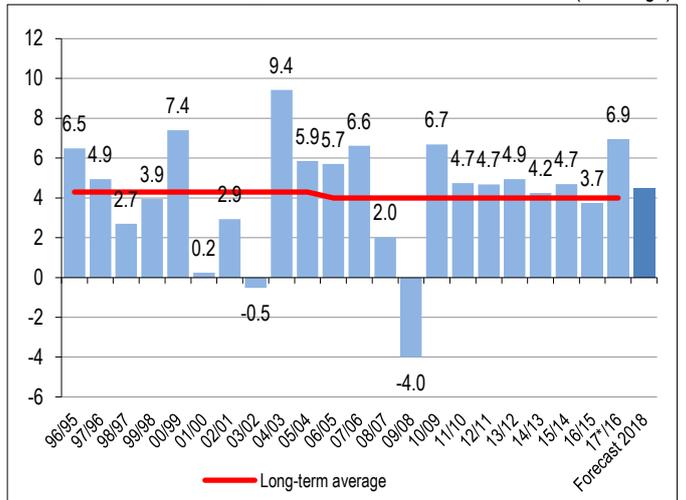
- International tourist arrivals (overnight visitors) increased 5% in January-September 2018 compared to the same period last year, according to available data.
- This represents a continuation of the strong results of recent years, exceeding the rate of 4% or higher growth recorded every year since 2010.
- UNWTO estimates that destinations worldwide received 1,083 million international tourist arrivals between January and September 2018, 56 million more than in the same period of 2017.
- However, growth is returning to more sustainable levels, following the remarkable 7% rate recorded in 2017, the highest increase since 2010.
- Demand remained solid overall in the third quarter of 2018 (July-September), though was comparatively weaker than in the first half of 2018.
- 2018 results are in line with UNWTO's forecast of +4% to +5% for the year 2018, as reported in the January edition of the *UNWTO World Tourism Barometer*.
- All regions enjoyed an increase in international arrivals, led by Asia and the Pacific (+7%) and followed by Europe and the Middle East (both +6%), Africa (+5%) and the Americas (+3%).
- A total of 139 countries have so far reported data on international tourist arrivals for three or more months of 2018 (out of 220). Of these, 83% reported an increase in arrivals while 17% posted a decrease in arrivals.
- The first nine months of the year usually account for about 77% of total annual international arrivals, as it includes the Northern Hemisphere high season months of July and August.

International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year						Share	Change		Monthly/quarterly data series (percentage change over same period of the previous year)												
	2000	2005	2010	2015	2016	2017*		2017*	16/15	17*/16	2018*									2017**		
	(million)						(%)	(%)		YTD	Q1	Q2	Q3	Jul	Aug	Sep	Q1	Q2	Q3	Q4		
<b>World</b>	<b>680</b>	<b>809</b>	<b>952</b>	<b>1,196</b>	<b>1,240</b>	<b>1,326</b>	<b>100</b>	<b>3.7</b>	<b>6.9</b>	<b>5.4</b>	<b>7.7</b>	<b>5.0</b>	<b>4.2</b>	<b>3.6</b>	<b>5.4</b>	<b>3.7</b>	<b>3.9</b>	<b>9.6</b>	<b>7.1</b>	<b>6.8</b>		
Advanced economies <sup>1</sup>	430	469	515	655	686	730	55.0	4.8	6.3	4.6	7.5	4.0	3.4	3.3	4.7	1.8	4.7	9.0	6.0	5.9		
Emerging economies <sup>1</sup>	250	339	437	541	554	597	45.0	2.4	7.7	6.4	7.9	6.2	5.5	4.1	6.3	6.3	3.2	10.3	8.7	7.7		
<i>By UNWTO regions:</i>																						
<i>Europe</i>	392.9	452.7	487.7	605.8	619.8	671.7	50.6	2.3	8.4	5.6	8.7	5.3	4.6	4.2	5.3	4.0	4.2	11.3	9.2	7.7		
Northern Europe	44.8	54.7	56.6	69.8	73.8	78.3	5.9	5.8	6.0	0.1	0.5	-1.7	1.2	2.2	0.9	0.2	9.0	10.2	4.7	0.8		
Western Europe	139.7	141.7	154.4	181.5	181.6	192.7	14.5	0.0	6.1	6.0	11.4	3.9	5.0	4.8	6.1	3.6	1.0	10.6	4.9	7.5		
Central/Eastern Eur.	69.6	95.3	98.6	123.1	127.3	133.2	10.0	3.4	4.6	6.1	8.0	6.1	5.1	5.3	5.6	4.4	3.3	5.9	5.5	8.1		
Southern/Medit. Eur.	139.0	161.1	178.1	231.4	237.1	267.5	20.2	2.4	12.8	6.8	9.9	8.0	4.9	4.0	5.8	4.8	6.2	15.0	15.2	9.9		
- of which EU-28	336.8	367.5	383.0	478.6	500.4	538.6	40.6	4.6	7.6	4.4	7.5	3.7	3.6	3.5	4.3	2.6	5.0	11.2	7.7	6.2		
<i>Asia and the Pacific</i>	110.4	154.1	208.2	284.1	305.9	323.0	24.4	7.7	5.6	6.6	8.3	6.8	4.7	4.3	6.7	2.9	5.5	5.8	4.1	7.0		
North-East Asia	58.4	85.9	111.5	142.1	154.3	159.5	12.0	8.6	3.4	5.7	5.6	7.1	4.4	3.7	7.9	1.5	5.7	3.1	0.5	4.5		
South-East Asia	36.3	49.0	70.5	104.2	110.8	120.4	9.1	6.3	8.7	8.3	11.3	8.1	5.4	5.4	5.6	5.3	6.4	10.1	8.3	10.0		
Oceania	9.6	10.9	11.5	14.3	15.6	16.6	1.3	9.5	6.0	3.2	6.6	-0.2	2.7	1.7	4.1	2.3	4.5	11.3	5.1	4.5		
South Asia	6.1	8.3	14.7	23.5	25.1	26.6	2.0	7.0	5.6	5.9	11.0	2.3	3.6	4.1	5.5	0.9	1.0	1.3	7.7	11.1		
<i>Americas</i>	128.2	133.3	150.4	194.1	201.3	210.9	15.9	3.7	4.7	2.7	6.1	1.0	1.0	-1.1	2.8	2.2	2.9	8.8	4.0	3.8		
North America	91.5	89.9	99.5	127.8	131.5	137.0	10.3	2.8	4.2	4.7	9.3	3.0	2.8	0.7	4.9	2.8	1.6	6.7	3.2	5.3		
Caribbean	17.1	18.8	19.5	24.1	25.4	26.1	2.0	5.2	2.8	-8.3	-9.4	-9.6	-5.5	-9.6	-7.3	5.5	3.1	13.7	5.3	-11.9		
Central America	4.3	6.3	7.8	10.2	10.6	11.1	0.8	3.4	4.6	-1.5	5.5	-7.0	-3.7	-6.0	-0.4	-4.6	3.3	12.6	3.1	0.5		
South America	15.3	18.3	23.6	31.9	33.9	36.7	2.8	6.3	8.1	4.8	8.6	4.8	-0.1	-0.6	0.8	-0.5	6.3	12.9	7.0	10.0		
<i>Africa</i>	26.2	34.8	50.4	53.5	57.7	62.6	4.7	7.7	8.6	5.3	5.4	5.6	5.1	3.2	6.1	6.5	3.7	11.2	8.4	5.9		
North Africa	10.2	13.9	19.7	18.0	18.9	21.7	1.6	5.0	14.7	7.3	2.2	13.6	6.0	3.4	6.2	10.5	17.4	17.3	12.9	14.1		
Subsaharan Africa	16.0	20.9	30.7	35.5	38.8	40.9	3.1	9.1	5.6	4.2	6.7	1.4	4.5	3.1	6.0	4.4	-1.1	8.2	5.2	2.5		
<i>Middle East</i>	22.4	33.7	55.4	58.1	55.5	58.1	4.4	-4.4	4.6	5.6	4.9	4.2	7.8	10.7	8.2	5.5	-2.3	10.5	0.3	9.8		

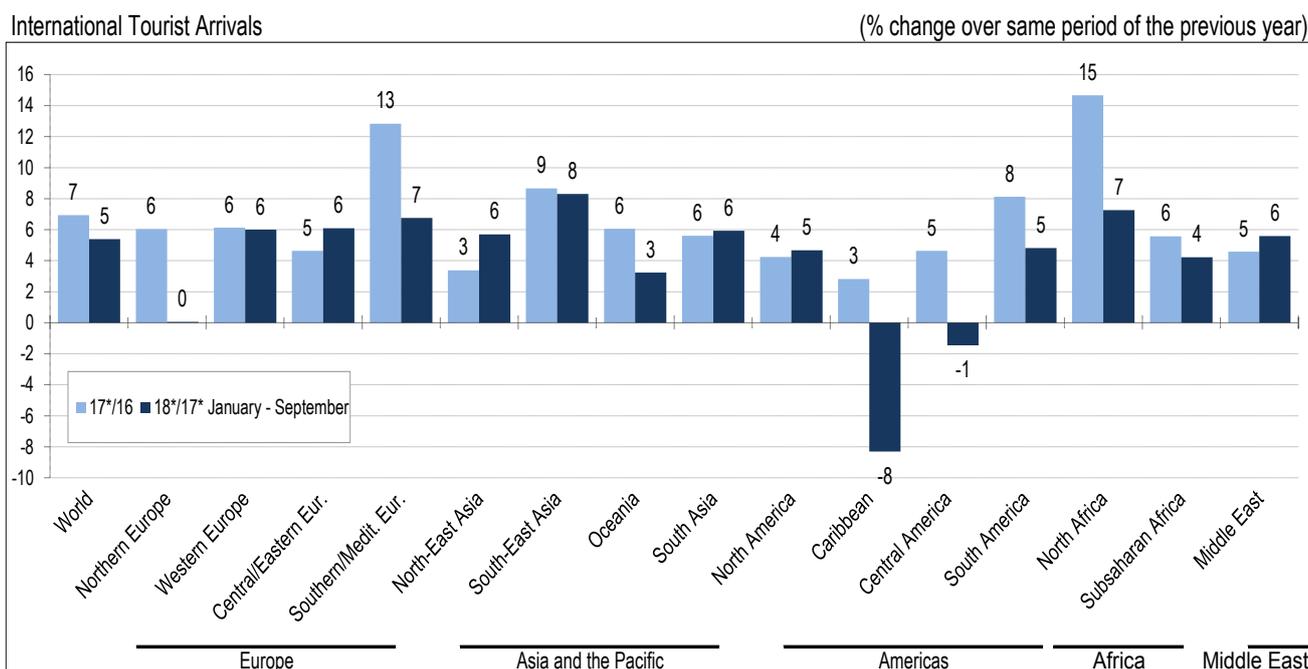
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, November 2018)

<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2016, page 146,

at [www.imf.org/external/ns/cs.aspx?id=29](http://www.imf.org/external/ns/cs.aspx?id=29).

See box in page 'Annex-1' for explanation of abbreviations and symbols used



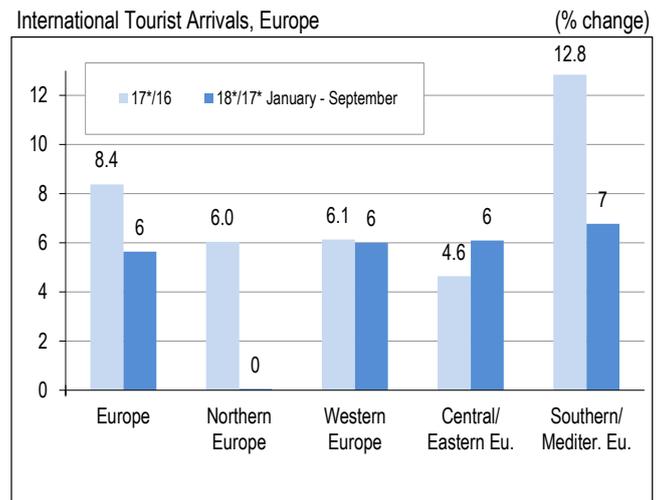
Source: World Tourism Organization (UNWTO) ©

## Regional Insights

### Europe

- International arrivals in Europe (+6%) continued to show robust growth in the first nine months of 2018, compared to the same period last year, after a remarkable 8% increase in 2017.
- **Southern and Mediterranean Europe** (+7%) led results with most destinations enjoying double-digit growth. Turkey continued its strong ongoing recovery, whereas Greece profited from improved air connectivity during off-season months and an increase in arrivals from China and the Russian Federation. Tourism in Italy picked up during the summer months after more moderate growth in the first half of the year.
- The subregion's more mature destinations, Portugal and Spain, reported flat growth in arrivals in the first nine months of 2018, though following very strong results last year and amid a recovery in competing destinations in the Mediterranean. Receipts data, however, shows higher growth, indicating that these two destinations are growing more in terms of value than just in numbers of arrivals.
- Virtually all Western Balkan countries recorded double-digit rates during the first nine months of 2018, following several years of double-digit growth already.
- Island destinations, Malta and Cyprus, recorded robust results as well in the first nine months while Israel recorded double-digit growth in arrivals through October.
- In **Western Europe** international arrivals increased 6% in the first nine months of 2018, led by Belgium and France which have consolidated their rebound. Favorable weather conditions throughout the summer season encouraged travel within the region, benefitting destinations such as the Netherlands, Austria, Germany and Switzerland.
- Arrivals in **Central and Eastern Europe** grew 6%, in line with the region's average, led by Hungary and Georgia. Hungary continues to benefit from improved air connectivity while Georgia has been registering growth from European Union source markets, as well as from emerging markets in Asia and the Middle East. The subregion's largest destination, the Russian Federation, shows flat growth in arrivals in January-June 2018 but a staggering 42% increase in receipts in the first nine months, which includes the period of the FIFA World Cup that took place from 14 June to 15 July.

- **Northern Europe** (0%) recorded flat growth with mixed performances among destinations. While robust growth in arrivals was recorded in Denmark, Iceland, Ireland and Sweden. The United Kingdom, the largest destination in the subregion, posted a 7% decline in the first half of 2018 though compared to a robust first half in 2017.



Source: World Tourism Organization (UNWTO) ©

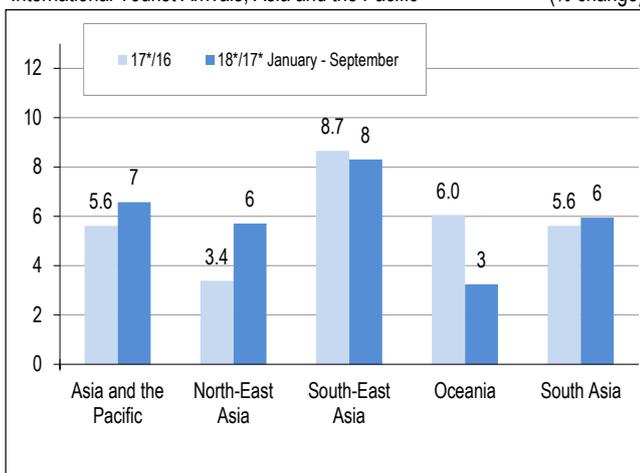
### Asia and the Pacific

- Asia and the Pacific (+7%) recorded the highest growth across world regions during the January-September 2018 period, after a 6% increase in 2017.
- Results were driven by **South-East Asia** (+8%) where most destinations posted strong growth, particularly Vietnam, which has seen a surge in international tourists in recent years from virtually all world regions. Indonesia and Cambodia enjoyed double-digit increases in arrivals, thanks to continued robust demand from China and India. Thailand, the most visited destination in South-East Asia, as well as Philippines also recorded strong growth on the back of higher visitors flows from China.
- **South Asia** (+6%) also enjoyed a strong first nine months of the year, with Nepal profiting from higher inbound from India, China and European source markets thanks to a number of promotional campaigns. Sri Lanka and India led growth while sound results came from the Maldives, which reflects the positive performance from European source markets.
- International arrivals in **North-East Asia** increased 6%, led by the Republic of Korea which continues to rebound from a weaker 2017. Japan, which has become the third most visited destination in Asia

following six straight years of double-digit figures, also showed double-digit growth this period thanks to proactive measures taken by the government to facilitate tourism development.

- Macao (China) and Hong Kong (China) also reported solid results, while mainland China, the region's largest destination recorded a 2% growth in the first half of 2018.
- **Oceania** recorded an increase of 3% in international arrivals in the first nine months of 2018, with growth being driven by Australia. New Zealand showed more modest growth this nine-month period while many other destinations in the subregion recorded positive growth.

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



Source: World Tourism Organization (UNWTO) ©

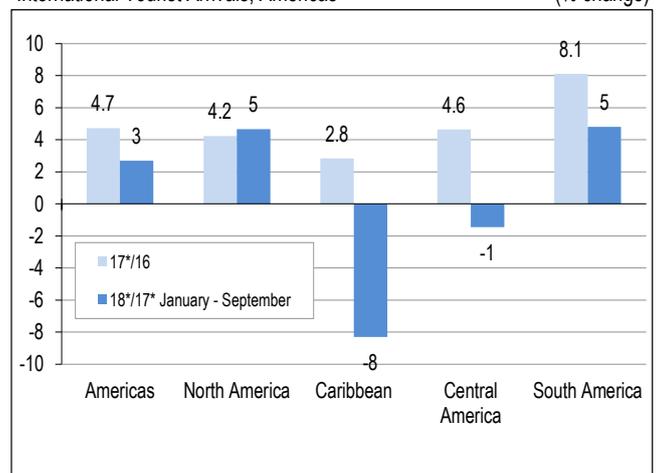
### The Americas

- In the Americas (+3%) growth was led by **North America** and **South America**, where international arrivals increased 5% each these first nine months of 2018.
- In **North America** (+5%), growth picked up in the United States of America (+7%) after modest results in 2017. Arrivals in Mexico continued to grow strongly whereas Canada saw more moderate results due to mixed performance among long-haul source markets.
- In **South America** (+5%), Ecuador and Colombia both reported a surge in arrivals thanks to strong outbound demand from neighboring source markets, building on already robust results in 2017. According to experts the solid performance of Colombia builds on the peace treaty signed last year as well as favorable exchange rate conditions.
- Peru also posted remarkable growth, thanks to an increase in arrivals from its neighboring markets as well as from Asia. Argentina, the most visited destination in South America, recorded a 3% growth; however,

experts expect a pick-up in the coming months as a result of the strong devaluation of the Argentinian peso, making the destination more affordable for international visitors. On the other hand, outbound travel from Argentina has slowed down as a result of the currency devaluation negatively impacting neighboring destinations such as Paraguay and Chile.

- Results in **Central America** (-1%) slowed down increases results in Belize, El Salvador, Guatemala and Honduras. Costa Rica, the leading destination in Central America in terms of international arrivals grew more modestly despite a strong increase from overseas tourists as arrivals from source markets in the Americas were on the lower side. Panama, the second most visited destination in Central America, posted weak results, as well as Nicaragua.
- The **Caribbean** (-8%) continues to show mixed results during this period due to the fact that some island destinations are still struggling with the effects of the strong hurricanes of August and September 2017, particularly Puerto Rico. On the other hand, the Dominican Republic, the subregion's most visited destination, and Jamaica continued to show strong growth in particular from their main source markets in the Americas and Europe.

International Tourist Arrivals, Americas (% change)

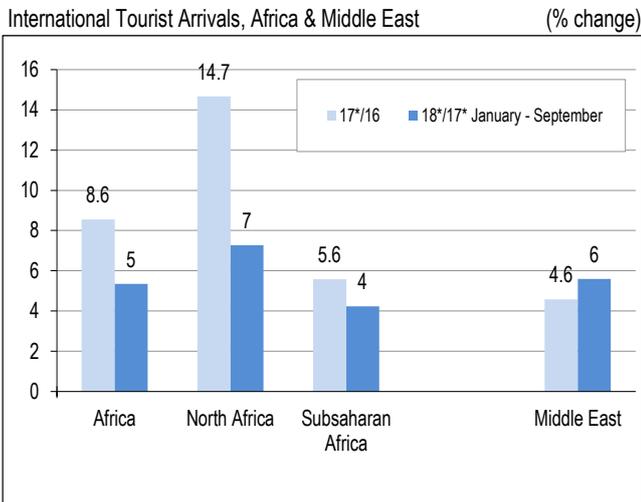


Source: World Tourism Organization (UNWTO) ©

### Africa

- Available data from Africa points to a 5% increase in arrivals in the first nine months of 2018, led by **North Africa** (+7%). Tunisia continues to consolidate recovery with double-digit growth. The lifting of negative travel advice has led to a surge of European visitors to the country in the past months. Arrivals in Morocco, the subregion's largest destination, grew at a comparatively more moderate pace.

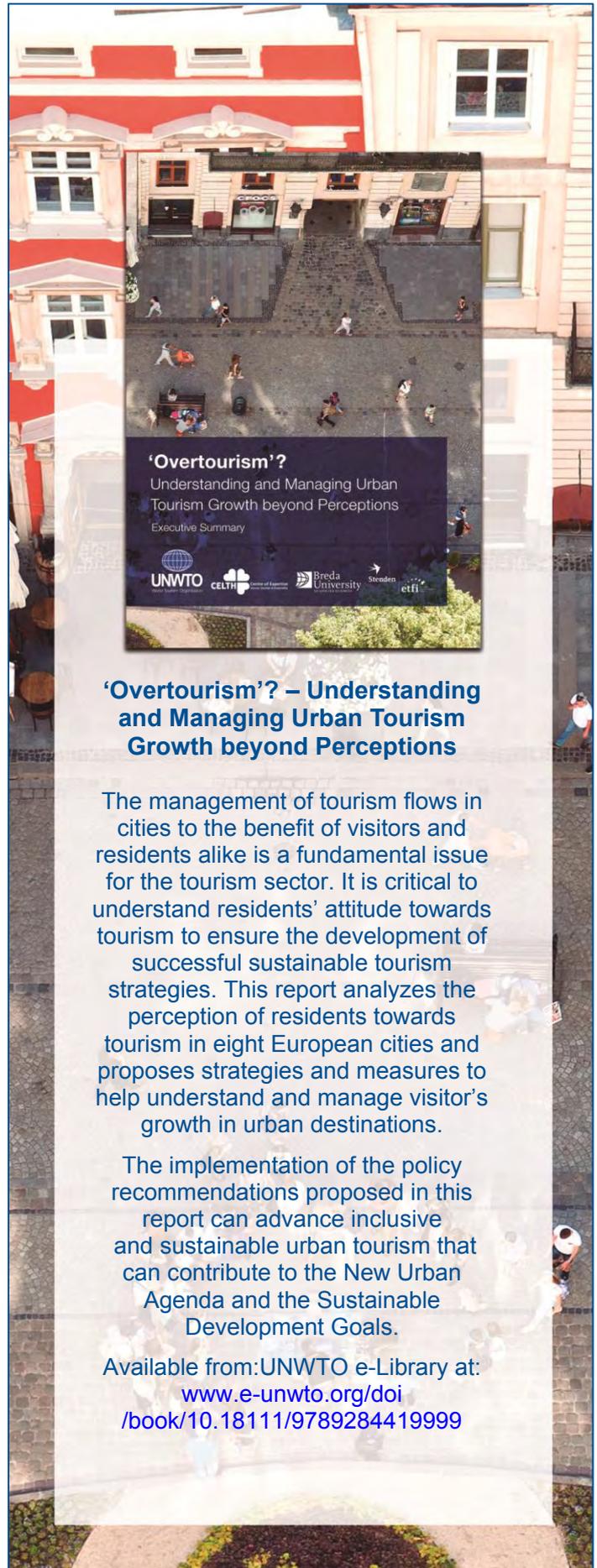
- **Subsaharan Africa** grew an estimated 4% according to limited data available, with island destinations Reunion and Cabo Verde posting robust growth. Kenya reported positive growth as well, with a surge in arrivals in July and August thanks to improved air connectivity. South Africa reported positive results as well as island destination Mauritius.



Source: World Tourism Organization (UNWTO) ©

## Middle East

- The Middle East (+6%) shows solid results overall in January-September 2018, based on data available so far.
- Egypt is enjoying a continued strong rebound, with positive growth expectations for the upcoming peak season in December and January, according to experts.
- Jordan has also seen positive growth in the first six months of the year, benefiting from the recovery in Egypt, as many tourists book joint tours to Jordan and Egypt.
- Lebanon, Oman and the United Arab Emirates (Dubai) posted comparatively more moderate increases.
- Monthly arrivals for 2018 have not yet been reported for the largest destination in the region - Saudi Arabia. Receipts data point to a modest increase (+1%) in the first half of 2018.
- Qatar's results improved in the third quarter from previous declines thanks to an increase in visitors, in particular from the Russian Federation, China and India. Qatar's recent visa facilitation improvements including allowing nationals of 88 countries to enter visa-free and free-of-charge, has made Qatar the most open country in the Middle East.



## 'Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions

The management of tourism flows in cities to the benefit of visitors and residents alike is a fundamental issue for the tourism sector. It is critical to understand residents' attitude towards tourism to ensure the development of successful sustainable tourism strategies. This report analyzes the perception of residents towards tourism in eight European cities and proposes strategies and measures to help understand and manage visitor's growth in urban destinations.

The implementation of the policy recommendations proposed in this report can advance inclusive and sustainable urban tourism that can contribute to the New Urban Agenda and the Sustainable Development Goals.

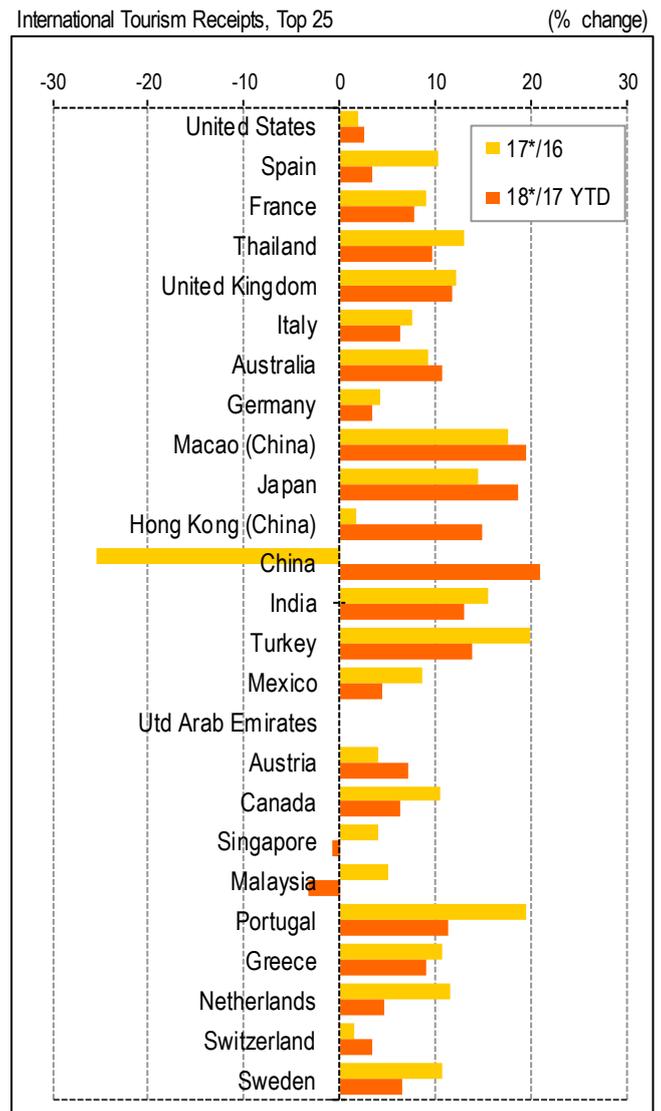
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[www.e-unwto.org/doi/book/10.18111/9789284419999](http://www.e-unwto.org/doi/book/10.18111/9789284419999)

## International tourism receipts

### Positive growth in earnings across most destinations around the world

- With few exceptions, data reported to date on international tourism receipts confirm the positive trend recorded in tourist arrivals in the first nine months of 2018.
- Preliminary data on international tourism receipts for the first six to nine months of 2018 have been reported by 128 countries and territories so far.
- Of the reporting destinations, 106 destinations posted growth in export earnings compared to the same period last year (in local currencies at current prices), whereas 22 reported a decrease.
- Results among the world's top ten tourism earners were solid, in particular for destinations in Asia. China recorded a 21% increase, rebounding strongly from a decline in 2017 as a weaker Yuan has made the destination more affordable.
- Macao (China) and Japan also led results with a 20% and 19% increase in tourism earnings respectively. Thailand recorded a 10% increase, following several years of double-digit figures.
- In the United Kingdom, tourism earnings were up by 12% despite negative growth in arrivals. In Australia, receipts increased by 11% whereas France reported an 8% growth in receipts and Italy 6%, both in line with arrivals. Tourism receipts in the United States of America, the world's top earner, Spain and Germany went up 3%.
- Beyond the top ten tourism earners, some destinations achieved remarkable growth. In Asia, Hong Kong (China), India, Republic of Korea, Indonesia, Taiwan (pr. of China), Vietnam, Cambodia and Philippines all posted double-digit figures, benefitting from a strong Chinese and Indian outbound market.
- In Europe, the Russian Federation recorded a 42% increase in tourism receipts in the first nine months of 2018, coinciding with the celebration of the FIFA World Cup.
- Several destinations in Southern and Mediterranean Europe also reported significant increases in tourism earnings. Tourism receipts in Turkey grew 14% supported by a weaker Lira that made the destination more price-competitive. Portugal (+11%) also recorded a much stronger growth in receipts than in arrivals. Other destinations in the Mediterranean with double-digit figures in the first nine months of 2018 were Greece and Croatia.

- Tourism earnings in Egypt (+73%) continued to grow strongly in the first half of 2018, in line with the ongoing solid rebound in demand and after a close to 200% increase in receipts in 2017.



Source: World Tourism Organization (UNWTO) ©

## International tourism expenditure

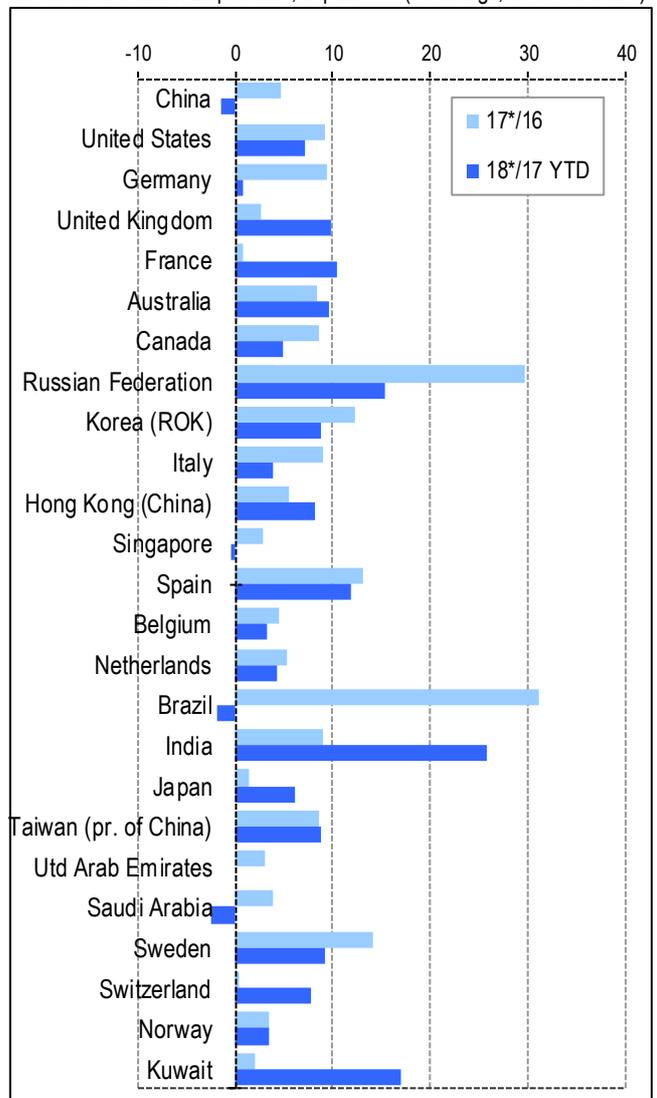
### Robust growth in tourism spending continues in the first nine months of 2018

- Preliminary data on international tourism expenditure for the first nine months of 2018 reflect an increasing demand from major source markets, consistent with the robust 5% growth in international arrivals recorded in the same period.
- The strong performance of major outbound markets around the world continued to drive growth in arrivals.
- So far, 46 out of the top 50 outbound markets have reported preliminary data on international tourism expenditure for the first six to nine months of 2018.
- Out of the 46 countries with data, only five countries saw declines (in local currencies at current prices).
- China, the world's top source market, has shown a minor decrease in the first six months of 2018, as a result of the weaker Yuan. Despite lower spending, the number of arrivals from China was still up in many destinations worldwide.
- The United States of America, the world's second largest source market, recorded a 7% increase through September, much in line with the performance of recent years. Many destinations in virtually all world regions have profited from a robust outbound demand from the United States of America in 2018, with particularly strong growth in Europe, Asia and the Pacific and the Middle East.
- The United Kingdom reported 10% growth in spending in the first six months of the year, despite a weak pound against the euro and US dollar. Outbound travel from the United Kingdom to destinations outside the Euro zone, especially to Egypt and Turkey, increased strongly in 2018.
- Tourism spending from France picked up 10% after some years of rather flat growth.
- Of the remaining top ten source markets, the Russian Federation (+15%) reported the largest increase in spending and continues to recover strongly after some years of decline. Robust demand from the Russian Federation has fuelled arrivals growth to Turkey, among other major destinations for Russian travellers. Australia (+10%) also posted double-digit growth in the first nine months. The Republic of Korea recorded 9% increase in spending, Canada 5% and Italy 4%. Beyond the top ten markets, double-digit growth was also reported by Spain, India, Kuwait, Thailand, Ukraine, Israel, Ireland, Nigeria and Romania.

- Brazil made a strong start in the first five months of the year though slowed down since June. Argentina (+10%), which has become a major source market in South America, showed positive growth in the first half of 2018, amid an economic downturn that could affect outbound travel in the second half of 2018.

Note: As in the case of international tourism receipts, data for international tourism expenditure data is likely to be revised.

International Tourism Expenditure, Top 25 (% change, local currencies)



Source: World Tourism Organization (UNWTO) ©



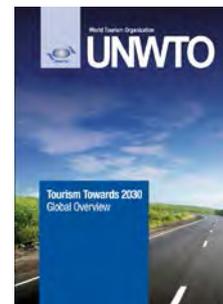
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