

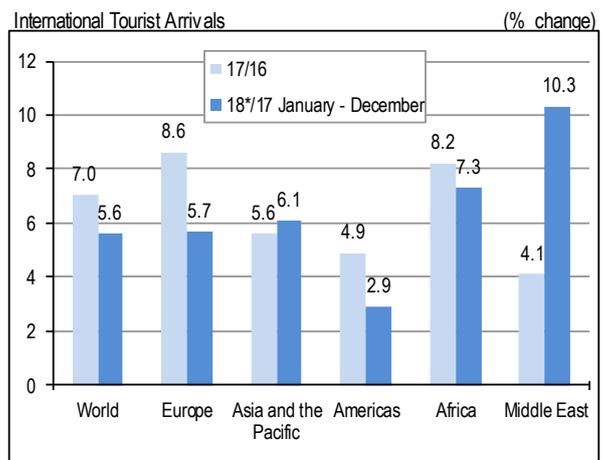


World Tourism Barometer

Volume 17 • Issue 1 • January 2019

2018: International tourist arrivals worldwide reach 1.4 billion two years ahead of forecasts

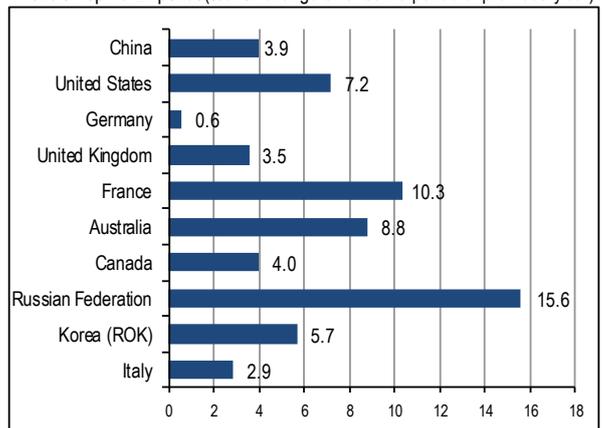
- International tourist arrivals (overnight visitors) worldwide increased 6% in 2018 to 1.4 billion, based on data reported by destinations around the world.
- Given the remarkable growth of international arrivals in recent years, the 1.4 billion mark has been reached two years ahead of UNWTO's long term forecast issued in 2010.
- 2018 consolidates the very strong results of 2017 (+7%) and is the second strongest year since 2010.
- Middle East (+10%) and Africa (+7%) led growth, while arrivals to Asia and the Pacific and Europe (both +6%) increased in line with the world average. The Americas saw growth of 3%.
- Overall results were driven by a favourable economic environment and strong outbound demand from major source markets.
- Among the world's top ten spenders, the Russian Federation (+16%), France (+10%) and Australia (+9%) reported the strongest increase in outbound expenditure in the first nine to eleven months of 2018. The United States (+7%) and the Republic of Korea (+6%) also recorded solid spending figures, all of them fuelling inbound growth in their respective regions and beyond.
- Based on current trends, economic prospects and the UNWTO Confidence Index, UNWTO forecasts a growth of 3% to 4% in international tourist arrivals worldwide in 2019, more in line with the historical growth trends.



Source: World Tourism Organization (UNWTO) © * Provisional data

International Tourism Expenditure, 2018 YTD*

World's Top 10 Expenders (real % change over same period of previous year)



Source: World Tourism Organization (UNWTO) Data for the first 9 to 11 months

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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

We welcome your comments and suggestions at barom@unwto.org.



Data collection for this issue was closed mid-January 2019.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results by country is scheduled to be published on April 2019.

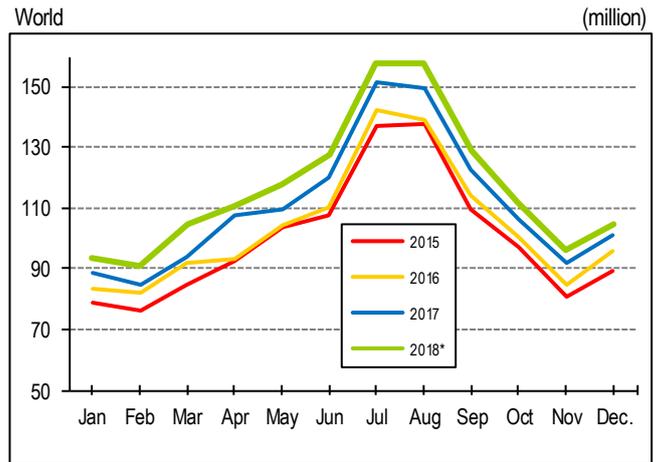
Pages 1-4 of this document constitute the **Excerpt** of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at <http://mkt.unwto.org/barometer>. This release is available in English, while the Statistical Annex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

International tourist arrivals 2018

International arrivals grew 6% in 2018

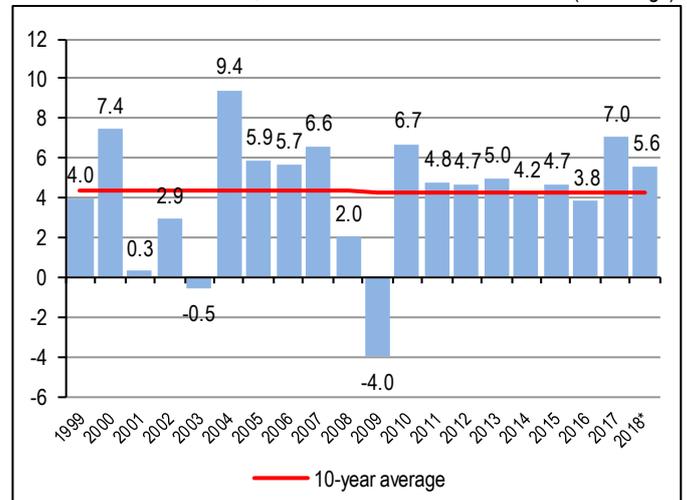
- Based on data reported so far by destinations worldwide, it is estimated that international tourist arrivals (overnight visitors) grew 6% compared to the previous year.
- This represents a consolidation of the strong results of 2017 (+7%) and exceeds the rate of 4% or higher growth recorded every year since 2010.
- Growth also exceeds UNWTO's forecast of 4% to 5% for the year 2018
- UNWTO estimates that 1403 million international tourist arrivals were received by destinations around the world, some 74 million more than in 2017.
- After a strong start of the year, results were comparatively less bullish in the second half of 2018.
- All regions enjoyed an increase in international arrivals, led by the Middle East (+10%) and Africa (+7%). Asia and the Pacific and Europe both went up 6%, while the Americas grew 3%.
- A total of 144 countries have so far reported data on international tourist arrivals for three or more months of 2018 (out of 220). Of these, 84% reported an increase in arrivals (of which 49% in double-digits) while 16% posted a decrease.

International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

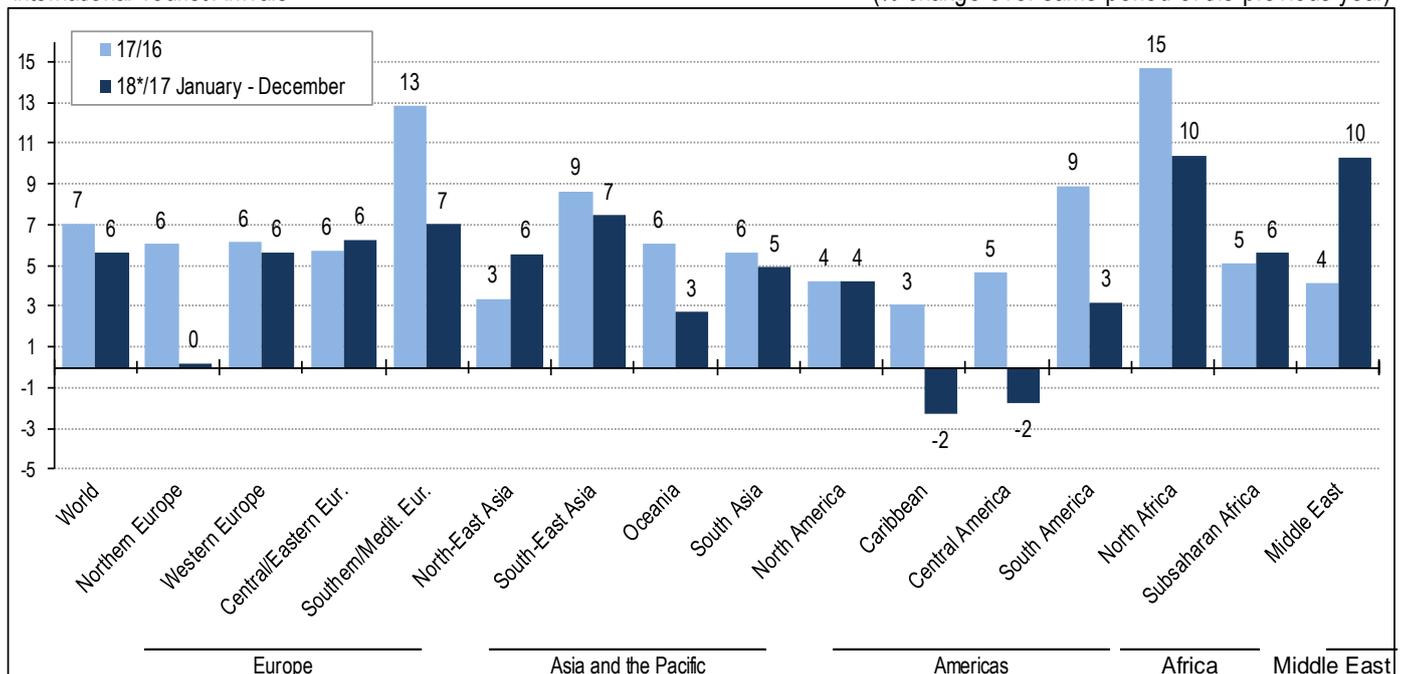
International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) © * Provisional data

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year						Share	Change	Monthly/quarterly data series (percentage change over same period of the previous year)																		
	2000	2005	2010	2015	2017	2018*			2018*	17/16			18*/17			2018*										2017	
	(million)						(%)	(%)	Q1	Q2	Q3	Q4	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4					
World	680	809	951	1,196	1,329	1,403	100	7.0	5.6	8.4	5.5	4.8	4.4	3.9	5.5	5.1	5.2	3.9	3.9	3.9	3.9	9.6	7.2	6.8			
Advanced economies ¹	430	469	515	655	730	761	54.2	6.3	4.3	7.1	3.8	3.5	3.7	3.1	4.6	2.7	5.2	2.7	3.0	4.7	9.1	6.1	5.6				
Emerging economies ¹	250	339	436	541	599	642	45.8	8.0	7.2	9.7	7.8	6.7	5.0	5.2	6.9	8.4	5.2	5.2	4.7	3.1	10.1	8.7	8.1				
<i>By UNWTO regions:</i>																											
<i>Europe</i>	392.6	452.8	487.0	605.7	674.4	712.6	50.8	8.6	5.7	8.7	5.3	5.0	4.9	4.4	5.6	5.1	7.0	3.4	3.5	4.2	11.3	9.2	7.7				
Northern Europe	44.8	54.7	56.6	69.8	78.3	78.4	5.6	6.0	0.2	0.5	-1.7	1.4	0.5	2.1	1.0	0.8	1.1	-0.2	0.4	9.0	10.2	4.7	0.8				
Western Europe	139.7	141.7	154.4	181.5	192.7	203.6	14.5	6.1	5.6	11.4	3.9	5.2	3.5	4.8	6.1	4.7	5.9	1.8	2.0	1.0	10.6	4.9	7.5				
Central/Eastern Eur.	69.2	95.3	97.9	123.1	136.0	144.4	10.3	5.7	6.2	8.0	6.0	6.3	5.0	6.4	6.7	5.6	5.0	5.1	5.0	3.3	5.9	5.5	8.1				
Southern/Medit. Eur.	139.0	161.1	178.1	231.4	267.5	286.2	20.4	12.8	7.0	9.9	8.0	5.2	7.3	4.0	5.8	6.0	10.0	4.8	5.0	6.2	15.0	15.2	9.9				
- of which EU-28	336.8	367.5	383.0	478.6	538.5	562.2	40.1	7.6	4.4	7.5	3.7	3.9	3.7	3.6	4.4	3.8	5.9	2.2	2.2	5.0	11.2	7.7	6.2				
<i>Asia and the Pacific</i>	110.4	154.1	208.2	284.1	323.0	342.6	24.4	5.6	6.1	8.3	6.8	4.9	4.4	4.4	6.8	3.3	4.3	4.6	4.5	5.5	5.8	4.1	7.0				
North-East Asia	58.4	85.9	111.5	142.1	159.5	168.4	12.0	3.4	5.6	5.6	7.1	4.8	4.9	4.0	8.2	1.8	4.8	5.1	5.0	5.7	3.1	0.5	4.5				
South-East Asia	36.3	49.0	70.5	104.2	120.4	129.3	9.2	8.7	7.4	11.3	8.1	5.7	4.7	5.4	5.6	6.2	4.9	4.8	4.5	6.3	10.1	8.3	10.1				
Oceania	9.6	10.9	11.5	14.3	16.6	17.0	1.2	6.0	2.7	6.6	-0.2	2.7	1.4	1.7	4.1	2.2	1.2	0.2	2.4	4.5	11.3	5.1	4.5				
South Asia	6.1	8.3	14.7	23.5	26.6	27.9	2.0	5.6	5.0	11.0	2.3	3.6	2.4	4.1	5.5	0.9	0.3	3.7	2.8	1.0	1.3	7.7	11.1				
<i>Americas</i>	128.2	133.3	150.4	194.1	211.1	217.2	15.5	4.9	2.9	6.4	1.4	1.4	2.4	-0.8	3.1	2.7	2.0	2.5	2.7	2.9	8.8	4.0	3.9				
North America	91.5	89.9	99.5	127.8	137.0	142.8	10.2	4.2	4.2	9.3	3.2	2.8	2.5	0.7	5.0	2.9	2.1	1.7	3.5	1.6	6.7	3.2	5.3				
Caribbean	17.1	18.8	19.5	24.1	26.0	25.4	1.8	3.0	-2.3	-7.2	-7.7	-2.3	11.4	-7.2	-4.6	11.7	12.5	10.8	11.0	2.7	13.6	5.7	-10.8				
Central America	4.3	6.3	7.8	10.2	11.1	10.9	0.8	4.6	-1.8	5.5	-7.0	-3.7	-2.8	-6.0	-0.4	-4.6	-2.4	-1.0	-4.5	3.3	12.6	3.1	0.5				
South America	15.3	18.3	23.6	31.9	37.0	38.1	2.7	8.9	3.2	8.6	4.8	-0.1	-1.3	-0.6	0.8	-0.3	-2.5	1.7	-2.7	6.3	12.9	7.0	9.9				
<i>Africa</i>	26.2	34.8	50.4	53.5	62.6	67.1	4.8	8.2	7.3	9.5	6.4	5.8	8.0	4.0	6.8	7.1	6.3	8.8	8.7	2.9	10.9	9.3	5.3				
North Africa	10.2	13.9	19.7	18.0	21.7	23.9	1.7	14.7	10.4	13.8	12.9	5.6	13.1	3.1	5.8	10.0	11.7	13.5	14.0	17.4	17.3	12.9	14.1				
Subsaharan Africa	16.0	20.9	30.7	35.5	40.9	43.2	3.1	5.1	5.6	7.7	2.9	6.0	5.6	4.8	7.6	5.5	3.6	6.7	6.3	-2.0	7.9	6.7	1.7				
<i>Middle East</i>	22.4	33.7	55.4	58.1	57.6	63.6	4.5	4.1	10.3	11.6	14.4	13.3	2.2	14.7	6.0	17.9	-0.3	4.2	2.1	-2.4	10.4	0.2	9.7				

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, January 2019)

¹ 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.

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

Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018*	Average a year 2008-2018	2019 Projection (issued January) from
	Change											
World	-4.0%	6.7%	4.8%	4.7%	5.0%	4.2%	4.7%	3.8%	7.0%	5.6%	4.2%	+3% to +4%
Europe	-5.4%	3.1%	6.6%	3.9%	5.2%	2.0%	4.7%	2.5%	8.6%	5.7%	3.6%	+3% to +4%
Asia and the Pacific	-1.4%	13.4%	6.5%	7.3%	6.8%	6.1%	5.4%	7.7%	5.6%	6.1%	6.3%	+5% to +6%
Americas	-4.9%	6.7%	3.6%	4.4%	3.7%	8.6%	6.0%	3.7%	4.9%	2.9%	3.9%	+2% to +3%
Africa	4.5%	9.3%	-0.7%	4.6%	4.4%	0.9%	-2.9%	8.0%	8.2%	7.3%	4.3%	+3% to +5%
Middle East	-5.4%	14.6%	-9.3%	2.6%	-1.5%	9.9%	4.0%	-4.7%	4.1%	10.3%	2.2%	+4% to +6%

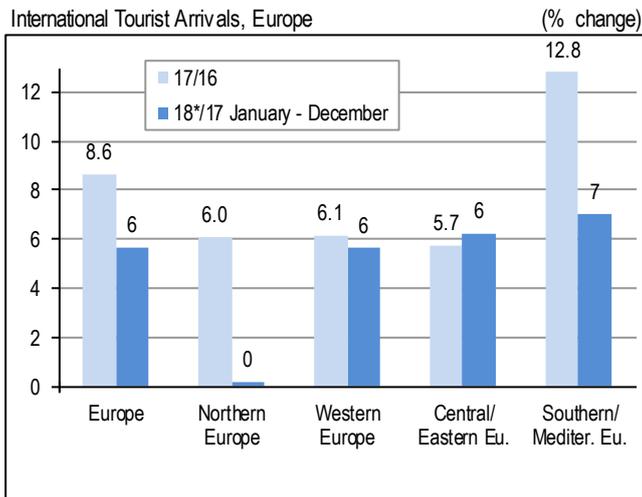
Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, January 2019)

Regional Insights

Europe

- International arrivals in Europe (+6%) continued to show robust growth in 2018, after an already remarkable 9% growth in 2017. Arrivals surpassed the 700 million mark, accounting for more than half of worldwide arrivals (51%).



Source: World Tourism Organization (UNWTO) ©

* Provisional data

- Southern and Mediterranean Europe (+7%)** led results, with most destinations enjoying double-digit growth. Turkey continued its strong ongoing recovery, backed by a favourable exchange rate whereas Greece profited from improved air connectivity during off-season months and an increase in arrivals from the Chinese, Arab and American markets. Tourism in Italy picked up during the summer months after more moderate growth in the first months of the year, also profiting from increased demand from the United States of America.
- Among the subregion's more mature destinations, Portugal and Spain, reported flat growth in arrivals in 2018, though following outstanding results in 2017 and amid a recovery in competing destinations in the Mediterranean. Receipts data, however, shows higher growth, indicating that both destinations have been growing more in terms of value than just in volume.
- Malta and Cyprus recorded robust results, while Israel and virtually all Western Balkan countries recorded double-digit growth in arrivals.
- Arrivals in **Central and Eastern Europe** grew 6%, in line with the region's average, led by Hungary, Georgia and Kazakhstan. 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 restrained growth in

arrivals in the first nine months of 2018 but a staggering 40% increase in receipts in the same period, which includes the period of the FIFA World Cup that took place from 14 June to 15 July.

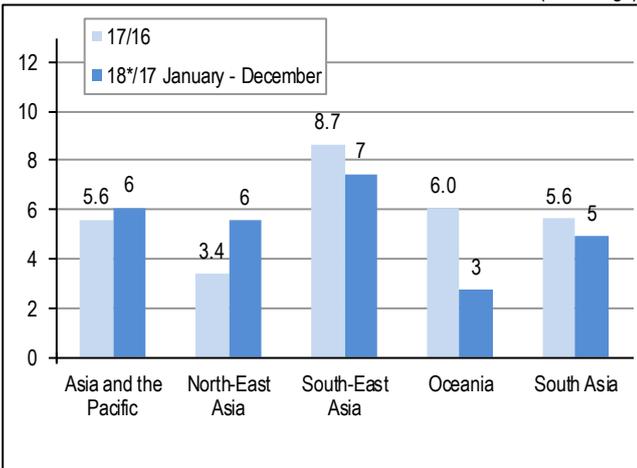
- In **Western Europe** international arrivals increased 6% in 2018, led by Belgium and France which have consolidated their rebound. Favorable weather conditions throughout the summer season encouraged travel within the region, benefitting destinations such as the Netherlands, Austria, Germany and Switzerland.
- Northern Europe (0%)** recorded flat growth with mixed performance 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 5% decline in the first nine months of 2018.

Asia and the Pacific

- Asia and the Pacific recorded 6% growth in 2018, reaching 343 million international tourist arrivals. Arrivals in the region account for almost one-fourth of the worldwide total.
- Results were driven by **South-East Asia (+7%)** 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 the Philippines also recorded strong growth on the back of higher visitor flows from China. Singapore also posted positive growth in 2018 thanks to good performance from several of its 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 positive growth in 2018 despite a slight slowdown due to the impact of the typhoon Jebi and the Hokkaido Eastern Iburi earthquake occurred in early September.
- Macao (China) and Hong Kong (China) also reported solid results. Meanwhile mainland China, the region's largest destination recorded a 2% growth in the first three quarters of 2018. The opening of the Hong-Kong-Zhuhai-Macau Bridge in October 2018 is expected to enhance connectivity and boost tourist flows between the three cities of the Greater Bay Area.

- **South Asia** (+5%) also enjoyed a strong year, with Nepal profiting from higher inbound from India, China and European source markets thanks to a number of promotional campaigns. Sri Lanka, India and the Maldives all reported sound results.
- **Oceania** recorded an increase of 3% in international arrivals in 2018, with growth being driven by Australia, helped by a more favourable Australian dollar. New Zealand showed comparatively more modest growth this year while positive figures were registered across many island destinations in the subregion.

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



Source: World Tourism Organization (UNWTO) © * Provisional data

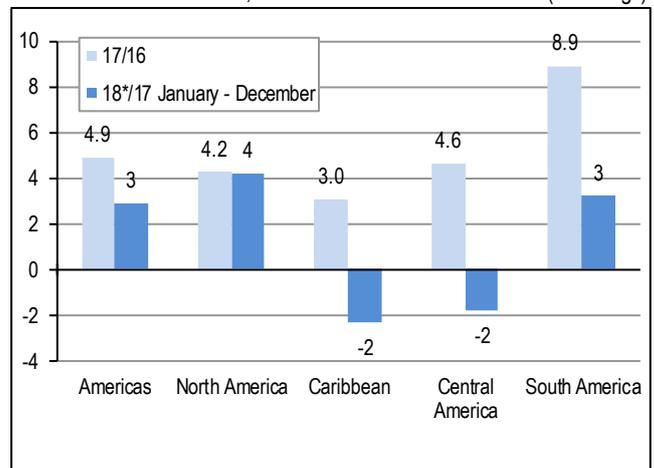
The Americas

- The Americas recorded 3% growth in 2018, reaching 217 million international tourist arrivals, a 15% share of world arrivals.
- In **North America** (+4%), growth picked up in the United States of America (+7% through May) from almost flat results in 2017. However, data is still pending for the remaining seven months of the year. Arrivals in Mexico continued to grow strongly whereas Canada saw more moderate results due to mixed performance among long-haul source markets and weaker growth from the US market.
- In **South America** (+3%), Ecuador and Colombia both reported a strong surge in arrivals thanks to strong outbound demand from neighbouring source markets, following already robust results in 2017.
- Peru's limited data up to April 2018 show remarkable double-digit growth, thanks to an increase in arrivals from neighbouring markets as well as from Asia. Argentina, the most visited destination in South America, recorded a 3% growth through November; however, experts expect a pick-up in the coming months, as the strong devaluation of the Argentinian

peso makes the destination more affordable for international visitors. Conversely, outbound travel from Argentina slowed down significantly in recent months due to the currency devaluation which has negatively affected neighbouring destinations such as Uruguay, Paraguay and Chile. International arrivals data for Brazil is still not available for the year 2018, yet receipts show a slight growth.

- Results in **Central America** (-2%) were rather slow despite positive results in Belize, El Salvador, and Guatemala. Costa Rica, the leading destination in Central America in terms of international arrivals grew more modestly despite a strong increase from overseas tourists whereas arrivals from source markets in the Americas were lower. Panama, the second most visited destination in Central America, posted negative results, as well as Nicaragua.
- The **Caribbean** (-2%) continued to show mixed results during 2018 as 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) © * Provisional data

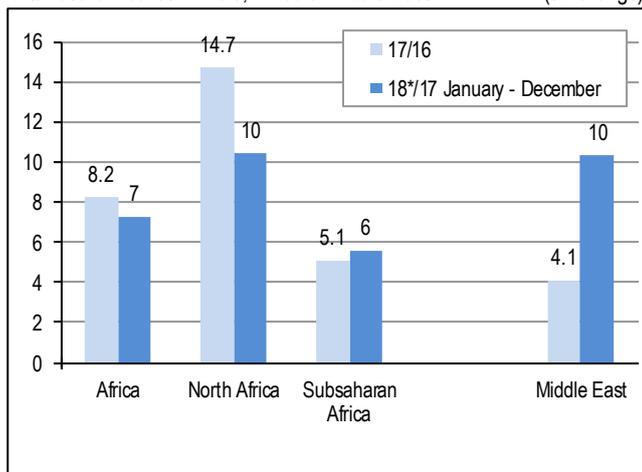
Africa

- Available data from Africa points to a 7% increase in arrivals in 2018, bringing the estimated number of international arrivals to 67 million. This represents 5% of the world's total.
- Growth was led by **North Africa** (+10%). 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 robust rate as well.

- **Subsaharan Africa** grew an estimated 6% according to limited data available, with island destinations Reunion, Cabo Verde and Mauritius posting robust growth. Kenya reported positive growth as well, with a surge in arrivals in July and August thanks to improved air connectivity. The subregion's most visited destination South Africa reported moderate growth, partly due to a strong currency and a drought crisis in Cape Town in 2018.

International Tourist Arrivals, Africa & Middle East (% change)

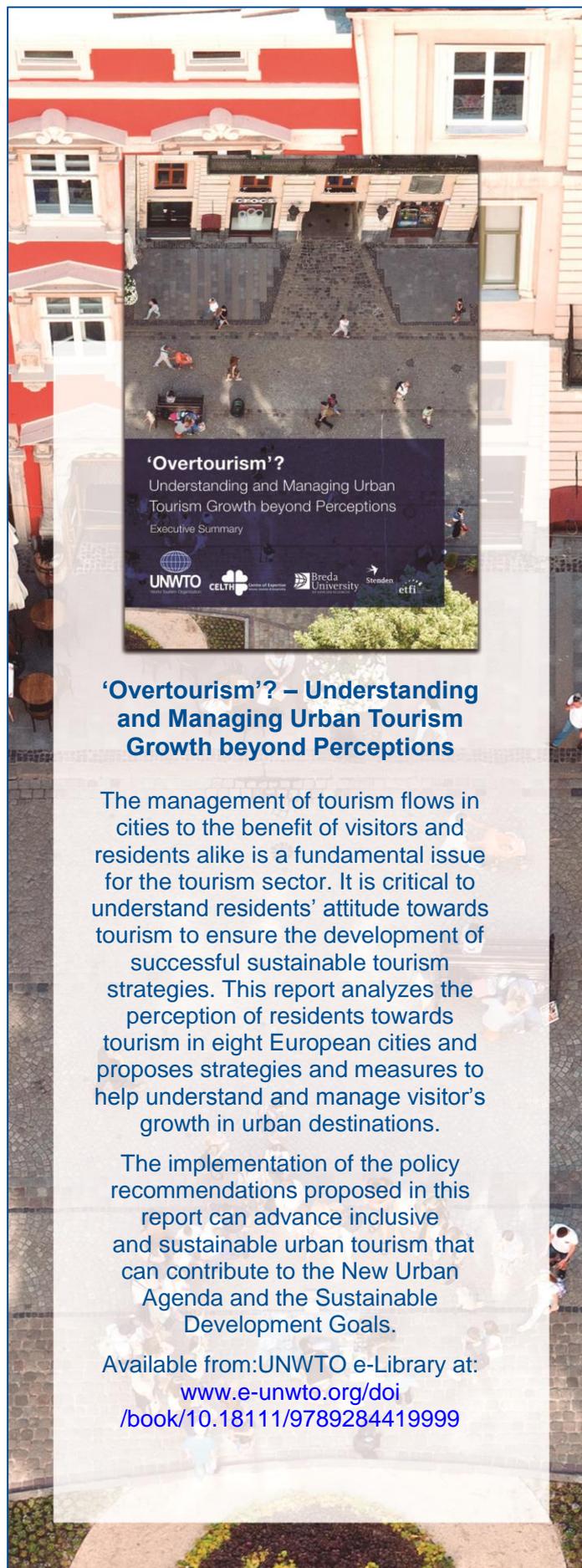


Source: World Tourism Organization (UNWTO) ©

* Provisional data

Middle East

- The Middle East (+10%) showed solid results in 2018, based on data available so far. International tourist arrivals reached a total of 64 million, 5% of the world's total arrivals.
- Saudi Arabia, the largest destination in the region, rebounded with double-digit growth in 2018. Egypt also enjoyed a continued strong rebound, however, with results still pending for the second half of the year.
- Jordan has also seen positive growth in the first nine months of the year, benefiting from the recovery in Egypt, as many tourists book joint tours to Jordan and Egypt.
- Lebanon and Oman posted comparatively more moderate increases, while results were flat in the United Arab Emirates (Dubai).
- 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.

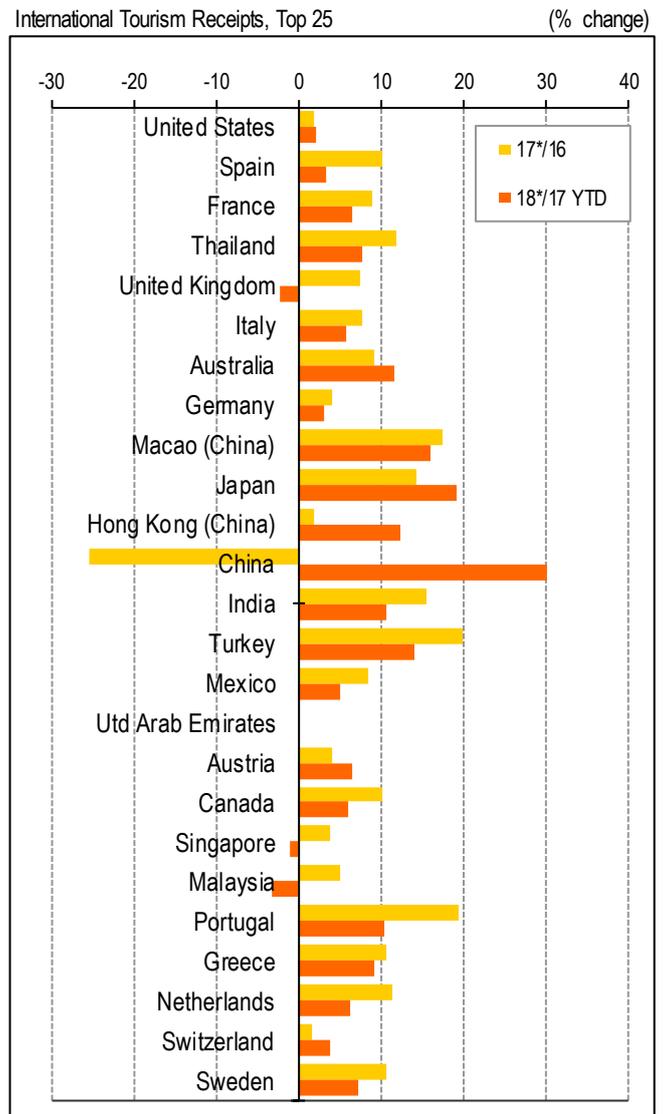
Available from: UNWTO e-Library at:
www.e-unwto.org/doi/book/10.18111/9789284419999

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 2018.
- Preliminary data on international tourism receipts for the first six to twelve months of 2018 have been reported by 131 countries and territories so far.
- Of the reporting destinations, 109 destinations posted growth in tourism 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 30% increase up to September, rebounding strongly from a decline in 2017 as a weaker Yuan has made the destination more affordable.
- Japan and Macao (China) also led results with a 19% and 16% increase in tourism earnings respectively. Thailand recorded an 8% increase, following several years of double-digit figures.
- In Australia, receipts increased by 12% whereas France reported a 7% growth in receipts and Italy 6%, both in line with arrivals. Tourism receipts in the United States of America, the world's top earner, were up 2% through October whereas Spain and Germany went up 3%.
- In the United Kingdom, tourism earnings were negative in the first nine months (-2%), in line with the decrease in arrivals, however, following a strong growth in 2017.
- 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), and Vietnam all posted double-digit figures, benefitting from a strong Chinese and Indian outbound market.
- In Europe, the Russian Federation recorded a 40% 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% as a weaker Lira has made the destination more price-competitive. Portugal (+11%) recorded a much stronger growth in receipts than in arrivals.

- Tourism earnings in Egypt (+59%) continued to grow strongly in the first nine months of 2018, in line with the ongoing solid rebound in demand.



Source: World Tourism Organization (UNWTO) ©

International tourism expenditure

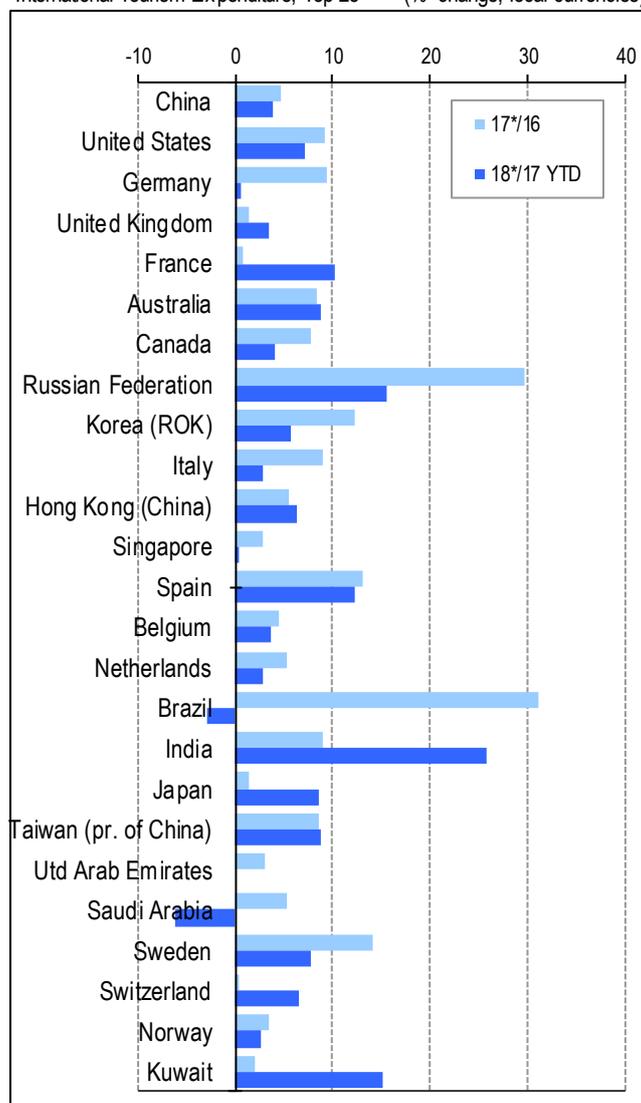
High tourism spending reflects strong outbound demand

- Preliminary data on international tourism expenditure reported by countries for up to the first eleven months of 2018 reflect an increasing demand from major source markets, consistent with the robust 6% 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. However, expenditure growth has started to slow down in the third quarter in a number of destinations.
- So far, 47 out of the top 50 outbound markets have reported preliminary data on international tourism expenditure for the first six to eleven months of 2018.
- Out of the 47 countries with data, only five countries saw declines (in local currencies at current prices), yet with a few exceptions growth seems to be slower than in 2017 among the top source markets.
- China, the world's top source market, has shown a 4% increase in the first nine months of 2018.
- The United States of America, the world's second largest source market, recorded a 7% increase through October, 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 4% growth in spending in the first nine 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 (+16%) 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.

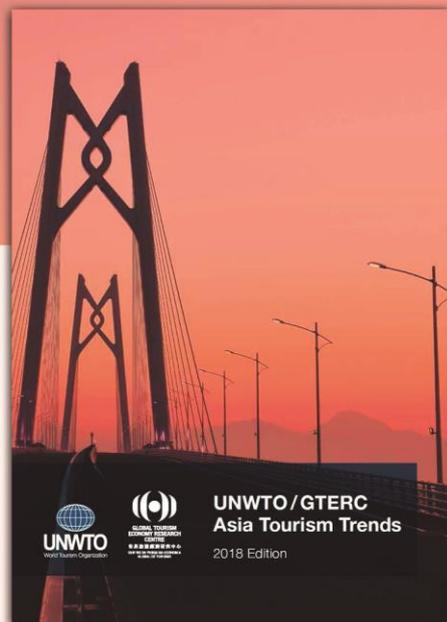
- Australia (+9%) also posted positive growth in the first eleven months. The Republic of Korea recorded 6% increase in spending, Canada 4% and Italy 3%.
- Beyond the top ten markets, double-digit growth was also reported by Spain, India, Kuwait, Thailand, Ukraine, Israel, Ireland, Nigeria, Lebanon, Vietnam and Romania.
- Brazil made a strong start in the first five months of the year though slowed down since June. Argentina, which has become a major source market in South America, showed positive growth in the first half of 2018, but slowed down in the third quarter amid an economic downturn that is affecting outbound travel.

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) ©



UNWTO/GTERC Asia Tourism Trends 2018 Edition

The UNWTO/GTERC Asia Tourism Trends – 2018 Edition, the fifth annual report in the series, highlights the rapidly growing tourism sector in Asia and the Pacific. In recognition of the European Union-China Tourism Year 2018, one chapter examines the international tourism flows between China, the largest Asian economy, and the 28 countries of the European Union. The present edition also features a chapter on the Greater Bay Area, a landmark initiative to merge eleven cities in the Pearl River Delta, and the impact the accompanying infrastructure will have on tourism in the region.

Available from: UNWTO e-Library at:
www.e-unwto.org/doi/book/10.18111/9789284420056



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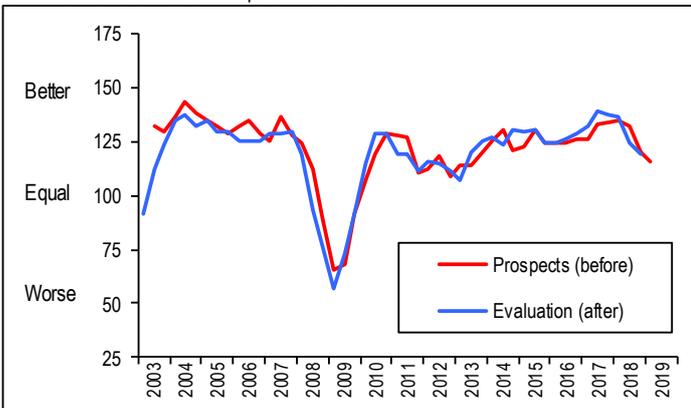
UNWTO Confidence Index

Confidence levels for 2019 slow down but remain rather positive

- After an extremely strong 2018, confidence in global tourism show signs of slowing down according to the latest UNWTO Tourism Confidence Index survey.
- On a scale of 0 to 200, the Panel evaluated tourism performance in 2018 with a score of 141, higher than the expectations expressed at the beginning of the year (137).
- For 2019, experts have become more cautious, rating the prospects with an overall score of 122, one of the lowest in the past decade.

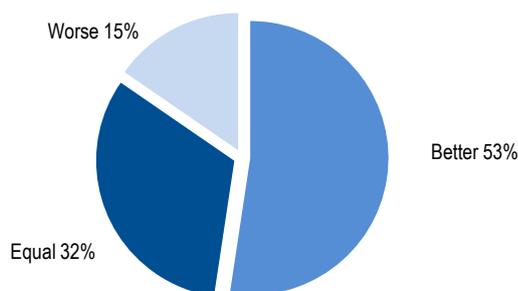
UNWTO Confidence Index: Prospects and Evaluation

UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

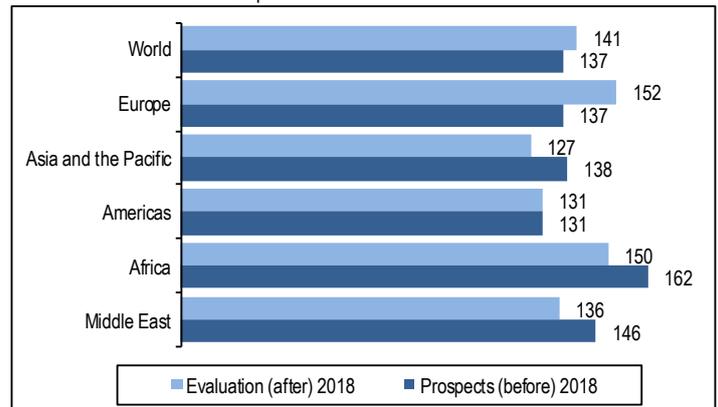
- The majority of respondents (58%) considered tourism performance in 2018 to have been better than what they expected at the beginning the year, though confidence levels showed signs of slowing down in the last months of the year
- For 2019, confidence levels continue to slow down with only half of respondents (53%) expecting a better performance than in 2018.



Evaluation of 2018: Another positive year with yet mixed performances across regions

- UNWTO's Panel of Experts gave tourism performance in 2018 a very positive rating of 141, slightly higher than expected (137).
- Results across regions were however rather mixed. While Europe exceeded its already high expectations for 2018, experts from Asia and the Pacific, Africa and the Middle East evaluated 2018 less favorably than initially expected at the beginning of the year. Experts in the Americas evaluated 2018 performance in line with their expectations.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Regional Insights

- By region, experts in Europe (152) were the most positive about the past year, rating 2018 an astonishing 15 points higher than their prospects expressed at the beginning of the year and making it the highest-rated year since the start of the UNWTO Confidence Index in 2003.
- Experts in Africa (150) were also extremely positive about the past year, yet they rated the performance in the region with a score 12 points lower than their very high prospects at the beginning of the year.
- Experts in the Middle East rated 2018 at 136, 10 points lower than expected at the beginning of the year. While the rebound in the region continues, the pace seems slower than initially anticipated reflecting mixed performances among destinations.
- Meanwhile, experts in the Americas (131) rated the performance of 2018 closely in line with their expectations at the beginning of the year. Ongoing economic and political uncertainty in some markets continues to dampen confidence, according to experts from the region.
- Experts in Asia and the Pacific (127) also evaluated the past year some 11 points lower than initially expected, as a result of mixed performance across markets.

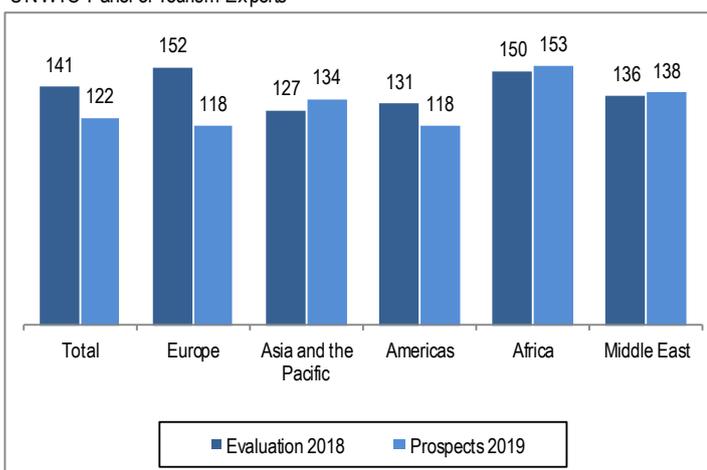
Industry Insights

- The highest scores by activity came from Accommodation and Transportation (both 150), both exceeding expectations expressed in early 2018.
- All other sectors evaluated the past year with a positive score as well: Consultancy, Research and Media (144), Destinations (138), Tour Operators (133) and General Industry Bodies & Other (131).

Outlook 2019: More moderate growth expected

- Experts have become more cautious about 2019, rating the prospects with an overall score of 122, one of the lowest in the past decade.
- Following several periods of upbeat expectations, prospects for this year are much more cautious. This trend is consistent across most regions and activities
- By region, experts from Africa (153) are the most optimistic about 2019, as a number of destinations in the region continue their recovery.
- Experts in the Middle East (138) continue to be optimistic this year, after an already positive performance in 2018.
- In Asia and the Pacific (134), the market sentiment is positive, but more moderate than in previous years. Recent natural disasters in some destinations and the ongoing trade issues between China and the United States have weighed on Asia's prospects.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

- Experts in Europe (118) expect positive growth for 2019, but at a much lower pace compared to the extraordinary growth witnessed across many destinations in the region in recent years.

- Respondents from the Americas (118) are also rather cautious for 2019 as uncertainties in some outbound markets in the region are expected to have an impact on intraregional travel.
- By activity, the ratings all show positive expectations yet with some variation, ranging from a high of 130 and 129 for Destinations and Consultancy, Research & Media, to a low 108 for Transport.
- Accommodation (122), Tour Operators & Travel Agencies (119), and General Industry bodies (110) remain cautiously optimistic for 2019.

The UNWTO Confidence Index

UNWTO conducts a Panel of Experts' survey to track global tourism performance and business sentiment every four months since April 2003. In each survey Panel members are asked to rate both **the performance of the previous 4 months period and outlook for the coming 4 months period** on the following scale: much worse [0]; worse [50], equal [100]; better [150], much better [200]. The number of regular respondents to the Barometer surveys stands currently at close to 300.

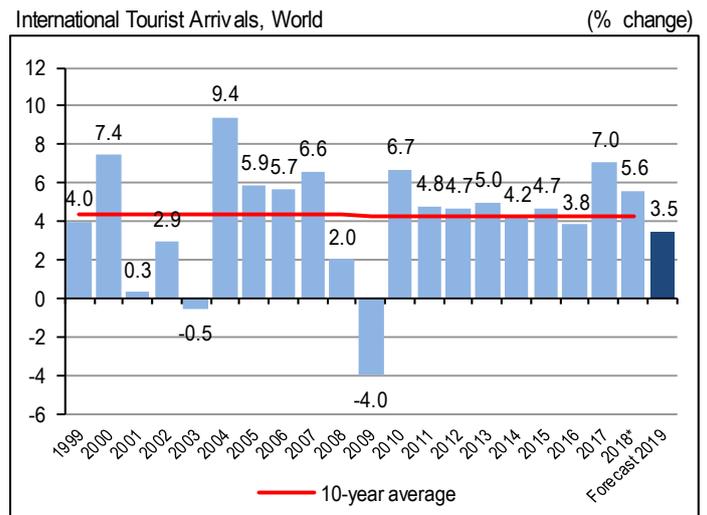
The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey are kindly invited to contact us at unwtopanel@unwto.org.

Outlook for 2019

International tourism expected to grow at a rate closer to historical trends

- Based on current tourism trends, economic prospects and the UNWTO Confidence Index, UNWTO forecasts international tourist arrivals to grow 3% to 4% in 2019. This is comparable to the 2008-2018 average of 4.2% per year, though below the 5.6% increase in 2018.
- The forecast reflects sustained demand for international travel from both emerging and advanced economy source markets in slower but still favourable economic context.
- By regions, Europe is projected to see 3% to 4% more international arrivals in 2019, after 6% growth last year.
- Arrivals in Asia and the Pacific are forecast to grow 5% to 6%, after a 6% increase in 2018, with still considerable growth potential in many emerging source markets and destinations.
- Arrivals in the Americas are forecast to grow 2% to 3% in 2019, in line with the 3% increase in 2018.
- The projection for Africa is 3% to 5% growth in 2019, after 7% last year, as some destinations consolidate their rebound. Prospects for the Middle East point to 4% to 6% growth, following a 10% increase last year. In both cases the projections contain a larger degree of uncertainty due to higher volatility and more limited data availability.
- The latest survey of UNWTO Confidence Index confirms the positive expectations for 2019, with 53% of respondents expecting 'better' or 'much better' tourism results in 2019 than in 2018. However, the Confidence Index shows a drop in expected performance, moving from 141 in 2018 (evaluation) to 122 in 2019 (prospects), indicating more cautious optimism.

- Current economic forecasts support this outlook, with global growth projected at 3.7% in 2019, after a similar rate in 2018, according to the October 2018 issue of the World Economic Outlook (WEO) by IMF. The IMF alerts that the expansion is however less vigorous and balanced and that it may have peaked in some major economies. Downside risks include global trade tensions, monetary tightening, weaker growth in some Asian economies and uncertainty derived from the UK's withdrawal from the EU (Brexit) and global geopolitical tensions.
- On the upside, the economic momentum is still strong in the United States and China, and forecasts are positive for Brazil, Mexico, India and Saudi Arabia, which could drive tourism growth in their respective subregions. Growing middle classes with higher purchasing power in many emerging markets is expanding the base of international travellers, while increasing connectivity, more affordable travel and innovation in tourism services will continue to fuel growth in international travel.



Source: World Tourism Organization (UNWTO) ©

* Provisional data

Outlook for International Tourist Arrivals

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018*	Average a year 2008-2018	2019 Projection (issued January) from
	Change											
World	-4.0%	6.7%	4.8%	4.7%	5.0%	4.2%	4.7%	3.8%	7.0%	5.6%	4.2%	+3% to +4%
Europe	-5.4%	3.1%	6.6%	3.9%	5.2%	2.0%	4.7%	2.5%	8.6%	5.7%	3.6%	+3% to +4%
Asia and the Pacific	-1.4%	13.4%	6.5%	7.3%	6.8%	6.1%	5.4%	7.7%	5.6%	6.1%	6.3%	+5% to +6%
Americas	-4.9%	6.7%	3.6%	4.4%	3.7%	8.6%	6.0%	3.7%	4.9%	2.9%	3.9%	+2% to +3%
Africa	4.5%	9.3%	-0.7%	4.6%	4.4%	0.9%	-2.9%	8.0%	8.2%	7.3%	4.3%	+3% to +5%
Middle East	-5.4%	14.6%	-9.3%	2.6%	-1.5%	9.9%	4.0%	-4.7%	4.1%	10.3%	2.2%	+4% to +6%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, January 2019)



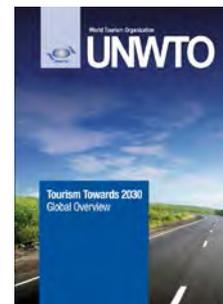
UNWTO World Tourism Barometer



EU Short-Term Tourism Trends



Compendium of Tourism Statistics
Yearbook of Tourism Statistics



Tourism Towards 2030
Global Overview



Marketing Handbooks:

- Marketing Transnational Tourism Themes and Routes
- Key Performance Indicators for Tourism Marketing Evaluation
- E-Marketing for Tourism Destinations
- Tourism Product Development
- Tourism Destination Branding



Outbound Travel Market studies:

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



European Union Tourism Trends



UNWTO/GTERC Asia Tourism Trends,
2018 Edition



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



New Platform Tourism Services
(or the so-called Sharing Economy)
– Understand, rethink and adapt –