



World Tourism Barometer

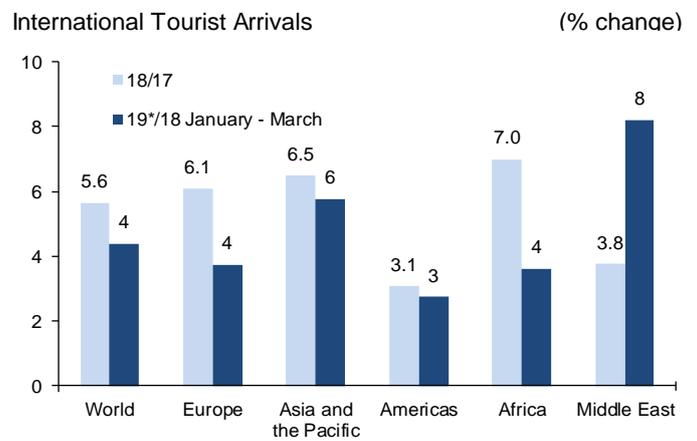
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International arrivals grew 4% in the first quarter of 2019

- International tourist arrivals (overnight visitors) grew 4% in January-March 2019 compared to the same period last year, below the 6% average growth of the past two years.
- Growth was led by the Middle East (+8%) and Asia and the Pacific (+6%). Europe and Africa (both +4%) and the Americas (+3%) also recorded an increase in arrivals in this first quarter of 2019.
- Confidence in global tourism performance has started to pick up again after slowing down at the end of 2018, according to the latest UNWTO Confidence Index survey. The Panel's outlook for the current May-August period is more optimistic than in the past three periods and more than half of respondents are expecting a better performance in the coming four months.

Total exports from international tourism reach USD 1.7 trillion in 2018

- Total export earnings from international tourism reached USD 1.7 trillion in 2018, or almost USD 5 billion a day on average.
- International tourism (travel and passenger transport) accounts for 29% of the world's services exports and 7% of overall exports of goods and services.
- For the seventh year in a row, growth in tourism exports (+4%) was higher than growth in merchandise exports (+3%) in 2018.



Source: World Tourism Organization (UNWTO) ©

* Provisional data

International Tourism (BOP Travel & Passenger transport) and merchandise exports (% change over previous year)



Source: World Tourism Organization (UNWTO) and World Trade Organization (WTO)

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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:

<http://marketintelligence.unwto.org/content/unwto-world-tourism-barometer>

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

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

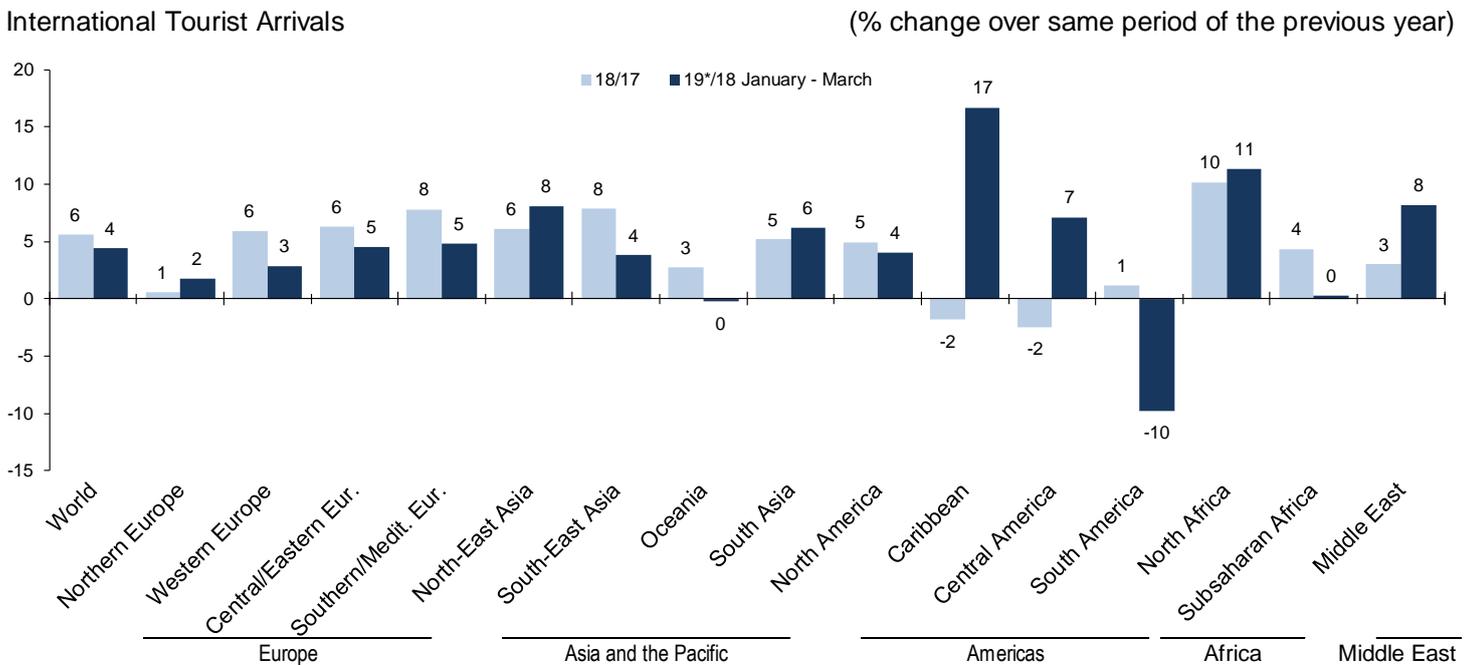
The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results by country is scheduled to be published on September 2019.

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://marketintelligence.unwto.org/content/unwto-world-tourism-barometer>. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

International tourist arrivals: January-March 2019

International arrivals up 4% in the first three months of 2019

- International tourist arrivals (overnight visitors) grew 4% in January-March 2019 compared to the same period last year.
- Growth was led by the Middle East (+8%) and Asia and the Pacific (+6%). Europe and Africa (both +4%) and the Americas (+3%) also recorded an increase in arrivals in this first quarter of 2019.
- The January-March period represents some 20% of the yearly total and includes the winter season in the Northern Hemisphere, the summer season in the Southern Hemisphere and the Chinese New Year, among others.
- Growth to date is in line with UNWTO’s forecast of 3% to 4% for the year 2019, as reported in the January edition of the *UNWTO World Tourism Barometer*.
- International air traffic, measured in revenue passenger kilometres (RPK) saw a similar 4% increase in the first quarter of 2019, according to the International Air Transport Association (IATA).
- Data by **ForwardKeys** shows that airline bookings for international departures in the first four months of 2019 (+4%) were also in line with the growth seen in international tourist arrivals.
- By region, international departures from Asia and the Pacific (+6%) showed the highest growth in the first four months with an even more positive outlook for the coming four months (+8%). China in particular continues to drive outbound travel. An analysis of booking data by **ForwardKeys** shows a 17% increase in air travel bookings from China to the EU for the first four months of 2019 and a 9% increase in bookings to worldwide destinations.
- International departures from Europe and the Americas grew at more moderate rates in the first four months but are expected to see an increase in departures in the next four months, the main holiday season in many source markets.
- Meanwhile, Africa and the Middle East saw a decline in air departures in the January-April period but data for May-August points to a pickup in demand for international trips again.



Source: World Tourism Organization (UNWTO) ©

- As a general backdrop, connectivity continues to improve in many destinations, facilitating the diversification of source markets.
- With the Brexit 'dark clouds' on hold until October, travel prospects for Europe's summer season have improved. Yet, challenges remain including the tense commercial relations between the United States and China and a slowing pace of growth in many advanced economies.
- In its latest *World Economic Outlook* (April 2019), the International Monetary Fund (IMF) revised its forecasts for 2019 to 3.3% (down from 3.7% in October), slightly below the 3.6% rate of 2018.

- Confidence in global tourism has started to pick up again after slowing down at the end of 2018, according to the latest UNWTO Confidence Index survey.

Outlook for International Tourist Arrivals					
	Change			average	2019 Projection
	2016	2017	2018*	a year	(issued January)
				2008-2018	from
World	3.8%	7.0%	5.6%	4.2%	+3% to +4%
Europe	2.5%	8.5%	6.1%	3.7%	+3% to +4%
Asia and the Pacific	7.7%	5.7%	6.5%	6.4%	+5% to +6%
Americas	3.7%	4.7%	3.1%	3.9%	+2% to +3%
Africa	8.0%	8.5%	7.0%	4.3%	+3% to +5%
Middle East	-4.8%	4.1%	3.8%	1.5%	+4% to +6%

Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series															
	Share						Change									
	(million)						%		% change over same period of previous year							
	2005	2010	2015	2016	2017	2018*	2018*	17/16	18*/17	2019*	YTD	Q1	Jan	Feb	Mar	
World	809	952	1,195	1,241	1,328	1,403	100	7.0	5.6	4.4	4.4	4.4	4.6	4.2		
Advanced economies ¹	470	515	655	687	730	766	54.6	6.3	5.0	4.5	4.5	4.9	4.4	4.3		
Emerging economies ¹	340	437	540	554	598	637	45.4	7.9	6.5	4.3	4.3	3.9	4.8	4.1		
<i>By UNWTO regions:</i>																
Europe	453.1	486.4	604.5	619.7	672.5	713.4	50.9	8.5	6.1	3.8	3.8	3.3	4.0	3.9		
Northern Europe	54.9	57.0	70.1	74.0	78.4	78.9	5.6	6.0	0.6	1.8	1.8	4.4	0.6	0.7		
Western Europe	141.7	154.4	181.5	181.6	192.7	204.2	14.6	6.1	5.9	2.9	2.9	2.7	3.1	2.8		
Central/Eastern Eur.	95.5	98.1	121.8	127.2	133.8	141.9	10.1	5.3	6.0	4.5	4.5	4.2	4.7	4.6		
Southern/Medit. Eur.	161.1	176.9	231.1	237.0	267.5	288.4	20.6	12.9	7.8	4.8	4.8	2.8	5.6	5.7		
- of which EU-28	367.6	382.2	478.6	500.7	538.7	565.0	40.3	7.6	4.9	3.1	3.1	3.0	2.9	3.3		
Asia and the Pacific	154.1	208.2	284.6	306.6	324.0	345.1	24.6	5.7	6.5	5.8	5.8	6.4	6.0	4.9		
North-East Asia	85.9	111.5	142.1	154.3	159.5	169.2	12.1	3.4	6.1	8.1	8.1	8.4	8.1	7.8		
South-East Asia	49.0	70.5	104.2	110.8	120.5	129.9	9.3	8.8	7.9	3.8	3.8	4.7	4.7	2.0		
Oceania	10.9	11.5	14.3	15.6	16.6	17.0	1.2	6.1	2.8	-0.3	-0.3	3.2	-0.7	-2.9		
South Asia	8.3	14.7	24.0	25.9	27.5	28.9	2.1	6.2	5.2	6.2	6.2	6.1	5.5	7.0		
Americas	133.3	150.4	194.1	201.3	210.8	217.3	15.5	4.7	3.1	2.7	2.7	2.8	1.5	3.8		
North America	89.9	99.5	127.8	131.5	137.1	143.9	10.3	4.3	4.9	4.0	4.0	4.2	3.2	4.6		
Caribbean	18.8	19.5	24.1	25.3	26.0	25.6	1.8	3.0	-1.8	16.7	16.7	18.3	18.1	14.2		
Central America	6.3	7.8	10.2	10.6	11.1	10.8	0.8	4.6	-2.4	7.1	7.1	10.4	4.8	6.0		
South America	18.3	23.6	31.9	33.9	36.6	37.0	2.6	7.7	1.2	-9.8	-9.8	-9.1	-12.5	-7.5		
Africa	34.8	50.4	53.5	57.8	62.7	67.1	4.8	8.5	7.0	3.6	3.6	2.2	4.5	4.3		
North Africa	13.9	19.7	18.0	18.9	21.7	23.9	1.7	14.7	10.1	11.3	11.3	11.1	10.9	11.9		
Subsaharan Africa	20.9	30.7	35.5	38.9	41.0	43.2	3.1	5.5	5.3	0.2	0.2	-1.1	1.6	0.4		
Middle East	34.0	56.1	58.3	55.5	57.7	59.9	4.3	4.1	3.8	8.2	8.2	8.6	12.7	4.1		

Source: World Tourism Organization (UNWTO) ©

* Provisional data

(Data as collected by UNWTO, May 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/hs/cs.aspx?id=29.

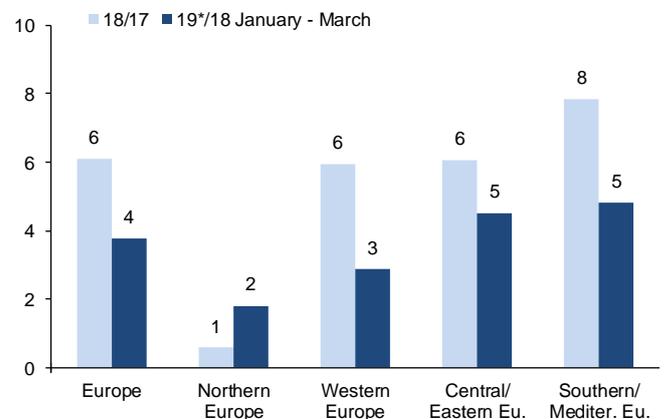
See box in page 'Annex-1 for explanation of abbreviations and symbols used

Regional insights

Europe

- In Europe, results for the first three months showed a 4% increase in international tourist arrivals. Growth was led by Southern Mediterranean Europe and Central and Eastern Europe (both +5%), followed by Western Europe (+3%). Growth in Northern Europe was more moderate (+2%).
- Bookings out of the United Kingdom were slow in view of the Brexit impasse, while the opening of new routes has offset the lower capacity resulting from bankruptcies of Germania, WOW Air and Cobalt airlines.
- According to **STR** hotel market data, Europe's hotel industry reported positive but slow results in the three key performance metrics during Q1 2019. Occupancy remained stable as demand kept up with the supply increase. Average daily rate (ADR) and Revenue per available room (RevPAR) increased by 1.6% and 1.3%, respectively.
- **IATA** data on air passenger markets showed strong growth in revenue passenger kilometers (RPK) for European airlines in the first three months of 2019, yet, March was comparatively slower reflecting lower business confidence in the Eurozone and ongoing uncertainty about Brexit.
- Booking data from **ForwardKeys** shows that international air departures to Europe were up by 5%. Departures within the region were particularly strong, but also from Asia and the Pacific (+8%) and from the Americas (+4%). Departures to Europe from Africa and the Middle East grew were slower (+3%) but Europe was the only destination region that recorded growth from that market. Air bookings in the May-August period shows a continuation of the positive trend with robust growth in departures from all regions towards Europe.

International Tourist Arrivals, Europe (% change)



Source: World Tourism Organization (UNWTO) ©

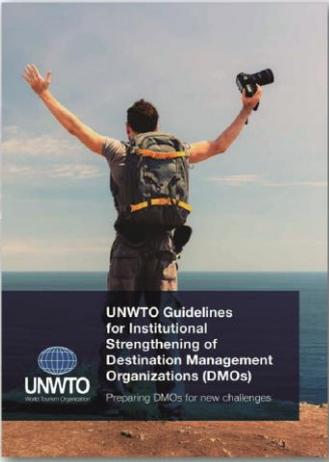
* Provisional data

Subregional analysis

- Growth in international tourist arrivals continues to be very positive in **Southern Mediterranean Europe** (+5%), yet somewhat less bullish than in previous years. With the 'delay' of Brexit until at least October 2019, many destinations in this area saw arrivals from the British market pick up.
- Montenegro recorded outstanding growth of 56% in the first three months of 2019 as the country continues to promote its tourism potential. Other destinations such as Bosnia and Herzegovina and Israel, also recorded double-digit growth as they portray themselves as attractive alternatives to more congested areas.
- The more mature destinations in the Mediterranean reported positive results as well but with more moderate growth rates than in previous years. The opening of new regional and interregional air routes benefitted Greece, Portugal and Malta while other destinations in the region also noted an increase of arrivals from emerging source markets, most of all from Asia and the Pacific. Turkey continues to record robust results.
- In **Central and Eastern Europe** arrivals grew 5% in the first three months, however, results are based on limited available data.
- Results across destinations are quite mixed as outbound travel from Russia has been slowing

down. In Uzbekistan, recent visa facilitation for a number of countries and the government's focus on tourism development translated into growing tourist arrivals. Serbia saw significant growth from China.

- International tourist arrivals in **Western Europe** increased by 3% in the first quarter. Growth was rather modest across all destinations with data available. Data from France is still pending but panel members have noted that while demand is up, there is some uncertainty about the effects of the yellow-vests protest in major French cities. Data from statistics office INSEE shows that in the first three months of 2019, the number of overnight stays in tourist accommodations by non-residents in France fell by 5% from the same period last year, particularly in urban areas of Île-de-France.
- In **Northern Europe** (+2%), growth continues to be modest with mixed results across destinations. While the United Kingdom, Ireland and Sweden reported positive figures for the first months of 2019, other destinations in the region showed more modest growth.
- In the United Kingdom, good weather conditions and a favorable exchange rate benefited inbound tourism, especially from EU markets and from North America.
- Iceland has reported several consecutive months of minor decreases, following years of strong double-digit growth. Increasing prices and lower seat capacity after the bankruptcy of Iceland's WOW Air has slowed growth in arrivals. Experts note a stabilization of tourist arrivals and a return to more sustainable levels of tourism on the island.



UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs)

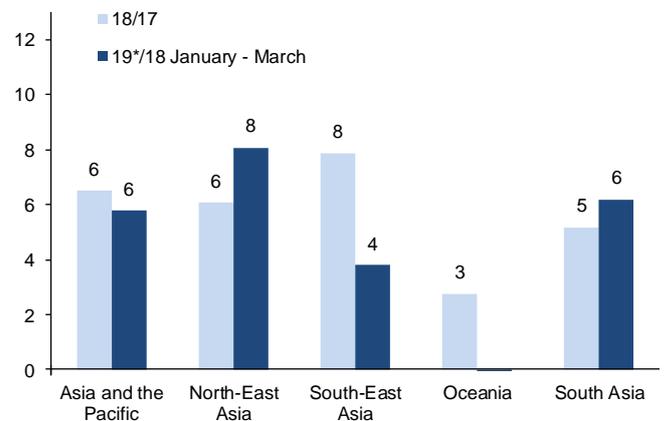
Many factors account for the increased focus on effective destination management, all of them urging destination management organizations (DMOs) to face and adapt to new challenges. These guidelines aim to stress the relevance of having a leading organizational entity at destination level and setting a sound framework of criteria and indicators for DMOs, based on the UNWTO.QUEST Certification; overall, to provide a set of recommendations for DMOs to improve their planning, managing and institutional governance.

This report is available from the UNWTO e-Library at <https://www.e-unwto.org/doi/book/10.18111/9789284420841>

Asia and the Pacific

- In **Asia and the Pacific**, results for the first three months showed a 6% increase in international tourist arrivals. Growth was led by North-East Asia (+8%), followed by South Asia (+6%) and South-East Asia (+4%). Growth in Oceania was rather flat (0%).
- Chinese outbound travel during the Chinese New Year holidays grew 12%, according to Chinese sources, and is expected to end the year at double-digit rates. The high-speed train development, the promotion of the Greater Bay Area and the opening of the Hong-Kong-Zhuhai-Macao bridge last October continued to fuel growth while some destinations saw air travel affected by the grounding of the Boeing 737 Max.
- On the other hand, according to **STR**, the hotel industry in Asia and the Pacific recorded negative results in all three key performance metrics during Q1 2019. Many markets in the region have a substantial number of hotels in development and supply growth outpaced demand in the first quarter of 2019, leading to a decline in occupancy.
- **IATA** data on air passenger markets until March shows positive growth in revenue passenger kilometers (RPK) for airlines in the Asia and the Pacific region though somewhat slower than in previous months. In terms of routes, Asia to Europe, as well as South West Pacific to North and South America have shown the highest growth through February, whereas Asia to Middle East has been rather weak in the last months.
- Booking data from **ForwardKeys** shows that international departures to Asia and the Pacific were up by 4%. However, growth was primarily driven by departures from within the region (+8%), while all other source regions showed slower growth to this region. The trend for expected departures in the May-August period points towards continued growth but predominantly from within Asia and the Pacific.
- The tragic events of Sri Lanka and the holding of elections in major destinations such as India and Malaysia may have an impact over the next months.

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



Source: World Tourism Organization (UNWTO) ©

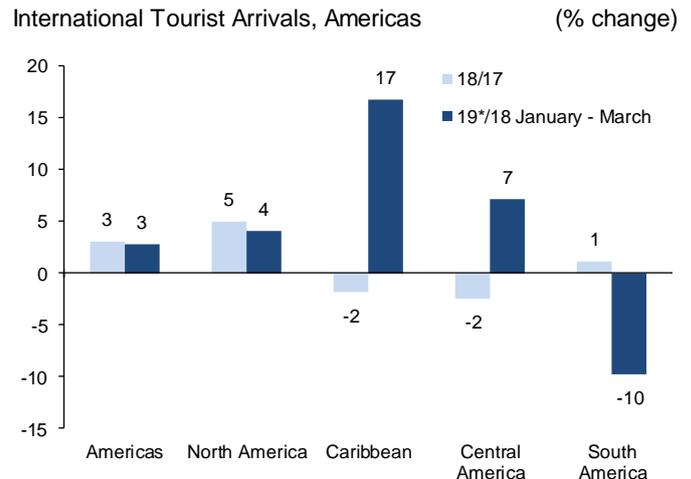
* Provisional data

Subregional analysis

- **North-East Asia (+8%)** saw the strongest growth in international tourist arrivals among Asian subregions in the first three months of 2019. All destinations in the subregion reported robust growth in arrivals, thanks to strong outbound travel from the Chinese and South-East Asian markets. Data for China is still pending.
- Growth in **South Asia (+6%)** was in line with the regional average and similar to previous years. Smaller destinations Bhutan, Nepal and the Maldives all recorded double-digit growth while India and Sri Lanka also showed positive results but at more modest levels.
- **South-East Asia (+4%)** recorded robust growth but somewhat less bullish than in previous years as Chinese outbound to South East Asia has slowed down. However, Indian outbound tourism was up in many destinations. While the larger destinations in the subregion grew at a slower pace, tourist arrivals in Myanmar have picked up in the first two months of 2019 after modest growth in 2018.
- Growth in **Oceania (0%)** was rather flat with mixed results across destinations. Tourist arrivals in Australia and New Zealand have been growing at a slower rate than in previous years partly due to the shift of Chinese travel patterns, amid economic uncertainty derived from ongoing China-US trade tensions and Brexit negotiations.

Americas

- In the **Americas**, results for the first three months showed a 3% increase in international tourist arrivals. The Caribbean (+17%) rebounded strongly from the impact of hurricanes Irma and Maria in late 2017, and also benefiting from strong US demand and in some cases increases from Russia. Growth in Central America (+7%) was also strong and North America posted a 4% increase. In South America, arrivals were down 10% due to a decrease in outbound travel from Argentina which affected the neighboring destinations.
- According to **STR** hotel data, America's hotel industry reported positive results in all three key performance metrics during Q1 2019, however, with more mixed results across subregions. While RevPAR and ADR were up in Central America and the Caribbean, they were down in South America and flat in North America.
- **IATA** data also showed robust growth in international revenue passenger kilometers (RPK) for airlines operating in North America and Latin America. According to IATA, a softening in economic activity and ongoing trade tensions may slow down growth in North America to some extent as a low unemployment rate supports demand for air travel. In Latin America, economic and political uncertainties in a number of countries may restrain demand growth for air transport demand in coming months. Routes from North America to Europe have been increasing in 2019, whereas routes to Asia and to South America have declined recently. Routes from South America to Europe are still growing, however, not as strong as in 2018.
- Booking data from **ForwardKeys** shows that international departures to the Americas grew more modestly at 1%, driven by intraregional demand whereas departures to the Americas from other regions declined in that period. The trend for expected departures in the May-August period shows a small increase, but still mostly driven by departures from within the region and to some extent from Africa and the Middle East.



Source: World Tourism Organization (UNWTO) ©

* Provisional data

Subregional analysis

- In the **Caribbean** (+19%) many smaller island destinations saw tourist arrivals double in the first months of 2019 compared to the same period in 2018 as they rebounded from the impacts of the strong hurricanes at the end of 2017. Among the larger destinations, the Dominican Republic and Jamaica continue to show positive results thanks to increased air connectivity, market diversification and marketing activities. Data available for Puerto Rico points to a strong rebound.
- **Central America** (+7%) also showed growth above the regional average with positive results in all destinations with data available. Panama has seen a pickup in arrivals after some years with negative results. Growth in January was particularly strong thanks to the celebration of World Youth Day 2019.
- **North America** (+4%) showed positive growth with Mexico leading whereas Canada recorded rather flat results with mixed performance of its source markets. Chinese outbound to Canada was up in the first months of 2019 but several European and American markets showed weaker growth as economic uncertainty related to Brexit persisted. Data for the United States is not available yet, but estimates point towards a similar modest growth as in the last months of 2018. Growth from overseas markets is expected to be moderate, but weaker from Canada and Mexico.

- In **South America** (-10%) arrivals were down as many destinations have recorded strong decline in tourist arrivals from Argentina as a result of the economic crisis and the resulting weakening of the Argentinian Peso. Some destinations were able to compensate these declines with increased arrivals from other source markets. Meanwhile, Argentina as a destination is profiting from the weaker Argentinian peso as it favors inbound tourism to the country, along with increased air capacity and the refund of the 21% tax on accommodation for foreign tourists.

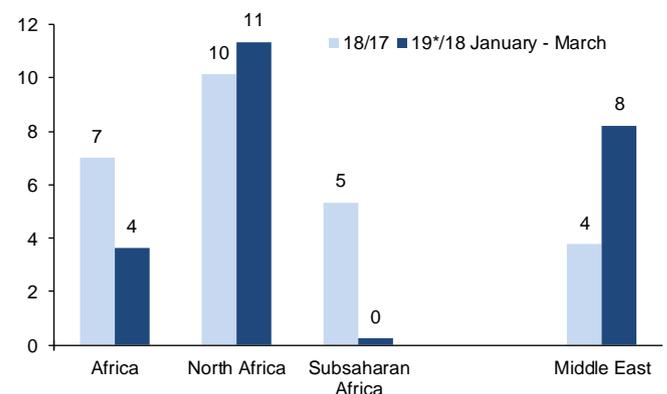
Middle East

- In the **Middle East**, results for the first three months showed an 8% increase in international tourist arrivals, however, with only limited data available so far.
- Saudi Arabia recorded double-digit growth in the first quarter of 2019, pushed by comprehensive tourism development initiatives including entry visa facilitation for some markets, international tourism festivals organized in different cities of the Kingdom, as well as the expansion in tourism infrastructure such as the Haramain high-speed railway.
- Qatar continues to recover after two years of decline as a result of the diplomatic crisis. Visa facilitation, investments in tourism infrastructure, an increase in marketing promotion in a number of source markets as well as the preparations for the World Cup 2022 have contributed to the influx of foreign tourists in the country.
- Other destinations in the region recorded more modest growth as demand has somewhat slowed down and purchasing power has declined. Data for Egypt and Bahrain, two of the larger destinations in the region, is not yet available.
- According to **STR** hotel market data, the hotel industry in the Middle East reported rather negative results in the three key performance metrics during Q1 2019. While occupancy slightly increased, Average daily rate (ADR) and Revenue per available room (RevPAR) decreased in the first quarter of 2019. In terms of hotel development pipeline, the Middle East

reported a 21% year-over-year increase in the number of rooms in construction through January, according to STR. For some countries in the region such as Qatar and Saudi Arabia, the current hotels in construction represent around half of existing supply. Regarding the Egyptian hotel market (STR includes Egypt in North Africa), STR analysts noted that “increased stability and government campaigns to boost tourism have aided hotel performance recovery in Egypt, with further efforts being planned to attract visitors from Asia and Latin America.”

- **IATA** data on passenger markets showed slightly negative growth in international Revenue Passenger Kilometers (RPK) for Middle Eastern airlines for the first three months. While the routes from the Middle East to Europe and to Asia have shown moderate growth in the past months, routes to North America have been down for several months after already modest growth in 2018.
- Booking data from **ForwardKeys** shows that international departures to Africa and the Middle East were up by 2%. Departures from the Americas increased, while all other regions showed more moderate growth. Expected air departures in the May-August period points towards an increase, especially bookings from Asia and the Pacific are up significantly (+23%).

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



Source: World Tourism Organization (UNWTO) ©

* Provisional data

Africa

- In **Africa**, results for the first three months of 2019 showed a 4% increase in international tourist arrivals, however, based on limited amount of data.
- Results continue to be strong in North Africa (+11%), following two years of double-digit growth, while growth was flat in Subsaharan Africa (0%).
- According to **STR** hotel data, all three key performance metrics were up in Africa in Q1 2019, however with clear differences between North Africa (including Egypt according to STR's grouping) which showed strong growth in all metrics, and Subsaharan Africa, which recorded slight decreases. Hotel pipeline data for February shows a 4% increase in hotels in construction and an 82% increase in hotels in the final planning stage.
- **IATA** data showed modest growth in international revenue passenger kilometers (RPK) for African airlines amid challenging business conditions for many airlines in the region as growing concerns around the economic outlook in key countries in the region have somewhat dampened results. Growth from Africa to Europe remains largely positive whereas Africa to Asia was down in February after strong growth throughout 2018.
- Booking data from **ForwardKeys** shows that international departures to Africa and the Middle East were up by 2%. Departures from the Americas increased, while all other regions

showed more moderate growth. Expected departures in the May-August period points towards an increase, especially bookings from Asia and the Pacific are up significantly (+23%).

Subregional analysis

- In **North Africa** (+12%), Tunisia continues to show a strong recovery in international arrivals to pre-crisis levels, especially thanks to the return of its European source markets, in particular the British and the French markets. Morocco also recorded robust growth, in line with growth rates seen in the past two years.
- In **Subsaharan Africa** (+0%), Kenya recorded a double-digit increase in January, after already strong growth in arrivals in 2018. Support to improve security and an increase in air connectivity with major overseas markets, especially China, Italy and the United States, have led to a significant growth in arrivals to Kenya.
- South Africa, the subregion's largest destination recorded a minor decrease. Plans by the Ministry of Tourism to reform the entire visa system, especially for Nigeria, China and India, are expected to have a positive impact on tourist arrivals in the future. Meanwhile the Seychelles recorded double-digit growth in the first quarter, following positive growth in the past few years already as air connectivity and cruise arrivals continue to increase.

International tourism exports 2018

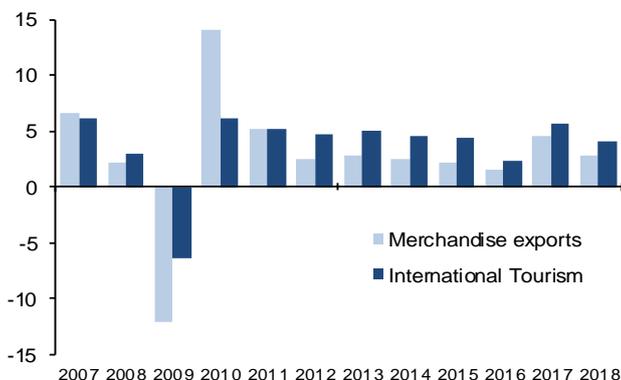
Total exports from international tourism reach USD 1.7 trillion in 2018

- Total export earnings from international tourism reached USD 1.7 trillion in 2018, or almost USD 5 billion a day on average.
- Tourism export revenues consist of USD 1,448 billion from visitor spending in destinations worldwide and another USD 256 billion in international passenger transport services.
- International tourism (travel and passenger transport) accounts for 29% of the world's services exports and 7% of overall exports of goods and services.
- For the seventh year in a row, growth in tourism exports (+4%) was higher than growth in merchandise trade (+3%) in 2018.
- Export revenues from tourism (travel and passenger transport) are an important source of foreign revenues for many destinations around the world, helping to create jobs, promote entrepreneurship and develop local economies. As such, tourism is an important component of export diversification both for emerging and advanced economies, often with a strong capacity to reduce trade deficits and to compensate for weaker export revenues from other goods and services.

International tourism receipts grew 4% in 2018

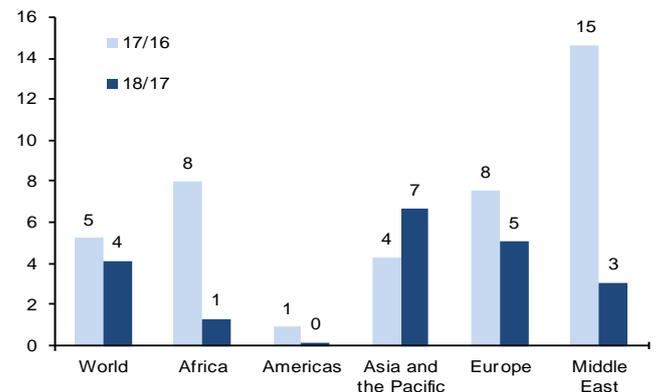
- International tourism receipts (export earnings from visitor spending in destinations) reached USD 1,448 billion in 2018, about USD 100 billion more than in 2017.
- This represents a 4% increase in real terms (adjusting for exchange rate fluctuations and inflation), following a 5% growth the previous year.
- Growth in earnings mirrors the positive trend in international tourist arrivals, which increased 6% in 2018, to reach 1.4 billion globally.
- By regions, Asia and the Pacific (+7%) led growth in receipts in 2018, followed by Europe (+5%) and the Middle East (+3%), while Africa (+1%) and the Americas (+0%) saw much more modest results.
- Central and Eastern Europe and North-East Asia (both +9%) enjoyed the strongest growth in international earnings by subregion, followed by Southern and Mediterranean Europe and Oceania (+both 7%).
- Especially in North-East Asia, Central Eastern Europe and Oceania receipts grew faster than arrivals, whereas in many other subregions, growth in arrivals was somewhat faster, however, with differences across destinations.

International Tourism (BOP Travel & Passenger transport) and merchandise exports (% change over previous year)



Source: World Tourism Organization (UNWTO) and World Trade Organization (WTO)

International Tourism Receipts (% change, real terms)



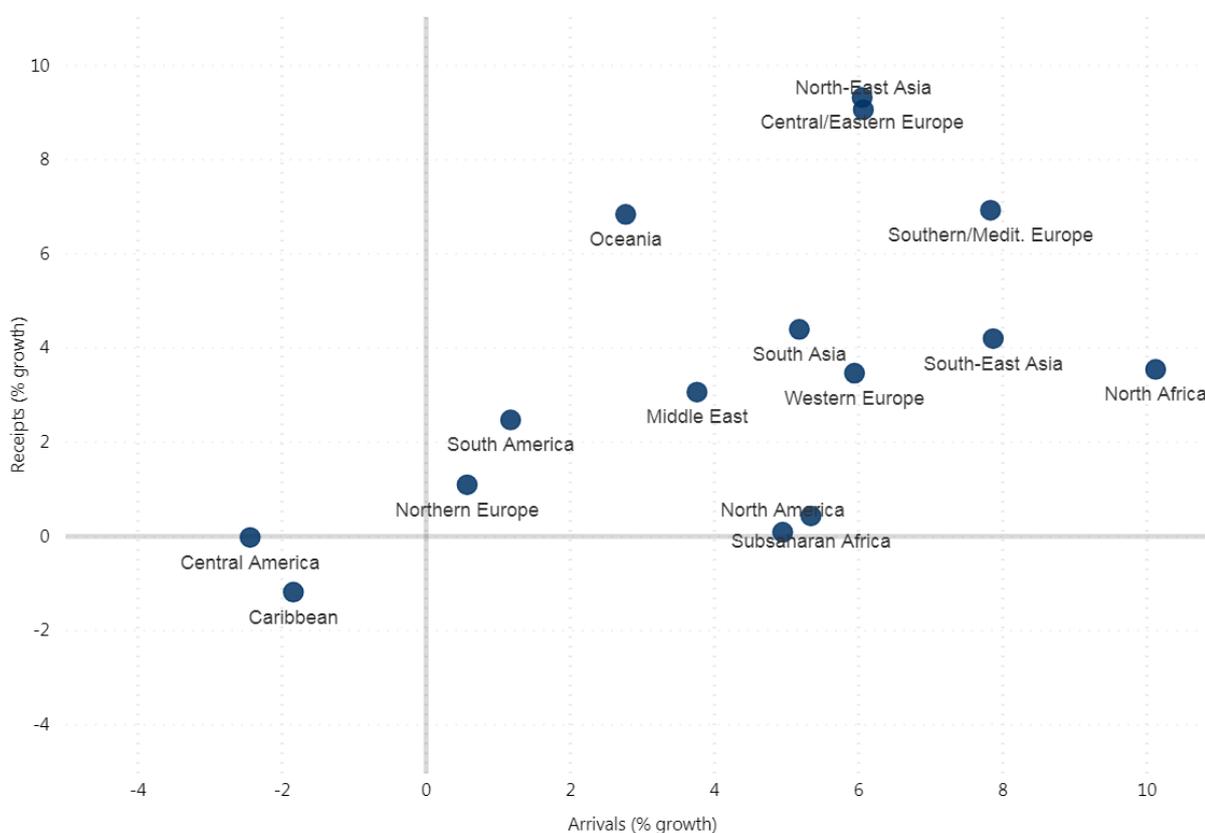
Source: World Tourism Organization (UNWTO) ©

- As of mid-May 2019, a total of 108 countries and territories around the world monitored by UNWTO, including virtually all leading destinations had reported full-year data on international tourism receipts for 2018. Of these, 93 destinations (86%) reported an increase over 2017, of which 38 in double-digits (35%).
- International tourism receipts are the earnings generated in destination countries from expenditure by international visitors, both overnight and same-day, on accommodation,

food and drink, local transport, entertainment, shopping and other goods and services. Receipts are a services export for destinations, reported as 'travel' credit under the 'services' category in the Balance of Payments (BOP) of countries.

- For many economies, receipts represent a vital source of foreign revenues which help reduce trade deficits, promote employment and create opportunities for development.

International tourist arrivals and international tourism receipts growth in 2018, by subregion (in %)



Source: World Tourism Organization (UNWTO)

Asia and the Pacific leads growth in tourism exports in 2018

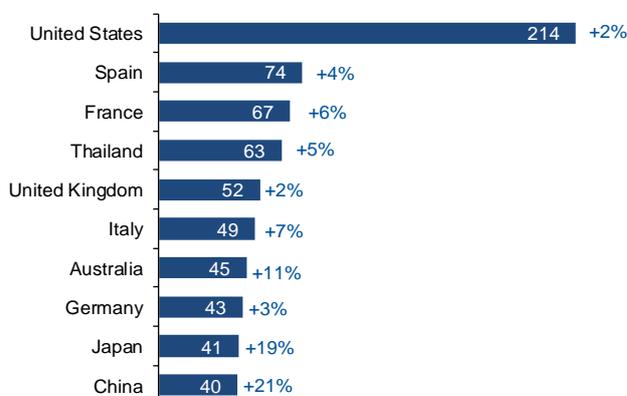
- Asia and the Pacific (+7%) recorded USD 433 billion in international tourism receipts in 2018, about 30% of the world's earnings. Results were led by North-East Asia (+9%) where all destinations reported double-digit growth. Oceania (+7%), South Asia and South-East Asia (both +4%) also recorded solid growth.
- The strongest results in Asia were posted by China (+21%), Cambodia (+20%) and Japan (+19%), followed by Mongolia (+17%), the Republic of Korea (+15%) and Chinese SARs Macao (+14%) and Hong Kong (+11%), as well as Australia (+11%). Asia's top tourism earner and the world's fourth largest, Thailand, saw a 5% increase in receipts in 2018.
- In Europe, the world's largest destination region, receipts increased 5% in real terms to reach USD 571 billion, or 39% of the world total. Results were much in line with growth in arrivals (+6%). The group of 28 countries of the European Union (EU-28) recorded USD 481 billion (EUR 407 bn), a 3% increase from 2017.
- By European subregions growth was led by Central and Eastern Europe (+9%) and Southern and Mediterranean Europe (+7%), followed by Western Europe (+3%) and Northern Europe (+1%).
- Among the region's top earners, the largest growth was reported by the Russian Federation (+32%) and Turkey (+12%), whose currencies depreciated versus the euro and the US dollar, making those destinations generally more affordable. Hungary (+11%), Greece and Portugal (both +10%) also recorded double-digit growth in earnings.
- Smaller destinations Kazakhstan (+27%), Georgia (+19%) and the Republic of Moldova (+18%) also enjoyed remarkable growth, while receipts in Uzbekistan more than doubled.
- The Americas (0%) earned USD 333 billion in 2018, or 23% of global receipts. Growth was flat in real terms partly due to the negative effect of inflation on the computation, as well as low growth in the world's largest destination, the United States (+2%). However, other destinations enjoyed solid results in 2018.
- South America saw 2% growth in earnings, while North America and Central America (both 0%) recorded flat earnings. The Caribbean saw a small decline (-1%) as some destinations struggled in the aftermath of the 2017 hurricanes, while others grew strongly.
- Among the destinations in the region best performers include Ecuador (+46%) which saw strong demand from neighboring source markets, Bahamas (+17%) and El Salvador (+16%). Colombia (+14%) and Jamaica (+10%) also posted double-digit increases. Mexico and Canada, the second and third largest earners in the Americas reported 5% and 8% growth, respectively.
- The Middle East (+3%) recorded USD 73 billion in receipts (5% share) in 2018, with Egypt (+49%) enjoying a strong continued rebound and Jordan a second year of double-digit growth (+13%).
- Destinations in Africa (+1%) earned an estimated USD 38 billion in 2018 according to limited information so far, equivalent to 3% of the world's international receipts. The region's top earners Morocco and South Africa (both +1%) recorded modest growth.

See Annex-6 for full table.

International Tourism Receipts, 2018

World's Top 10 Earners

USD billion and real % change over 2017



Source: World Tourism Organization (UNWTO) ©

World's top tourism spenders 2018

- Growth in receipts reflects strong demand for international travel led by a robust economic environment, with global GDP expanding by 3.6% in 2018, according to the IMF.
- Of the 46 markets (in the top 50) so far reporting expenditure data for 2018, a total of 40 saw an increase in spending.
- Among the top ten source markets in the world, the highest growth in outbound spending in 2018 came from France, the Russian Federation (+11% each) and Australia (+10%).
- China, which remains the world's top spender on international tourism with USD 277 billion in 2018, reports a 5% increase in real terms.
- The United States, the second largest spender, was up 7% despite a small depreciation of the US dollar versus some world currencies, reflecting strong appetite for international travel.
- Among other Asian markets, the spending out of the Republic of Korea was virtually the same as in 2018.
- In Europe, the German market was mostly flat (+1%) in view of its slower economy while spending from the United Kingdom grew 3% and Italy's 4%. By contrast, French spent more 11%

while travelling abroad in 2018. Further down the ranking, Spain's outbound market gained strength with a 12% growth

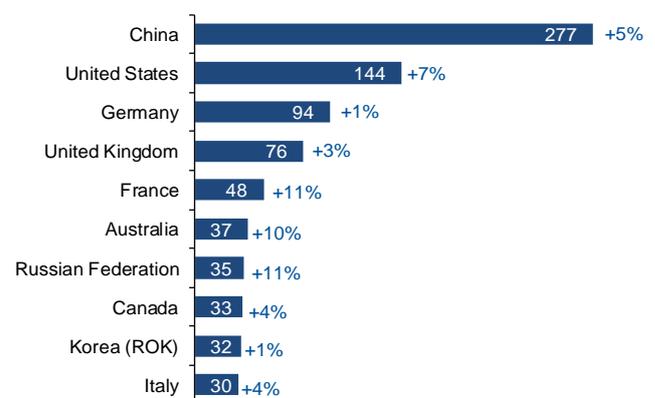
- International tourism expenditure is a services import, reported as 'travel' debit in the 'services' section of the Balance of Payments (BoP) of countries.

See Annex-8 for full table.

International Tourism Expenditure, 2018

World's Top 10 Spenders

USD billion and real % change over 2017



Source: World Tourism Organization (UNWTO) ©

Data revision

Please note that rankings reflect data reported by countries and territories through May 2019 and are therefore subject to revision. The order can still vary as not all countries have reported data, and for many countries and territories data is preliminary at this stage.

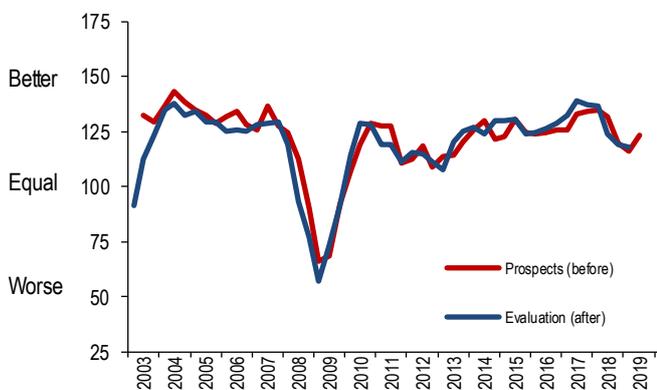
See the Statistical Annex for the Methodological notes on international tourism receipts and expenditure, as well as the tables listing the top 50 earners (international tourism receipts) and the top 50 spenders (international tourism expenditure). For data on other countries and territories with available data, see the tables on the regions.

UNWTO Confidence Index

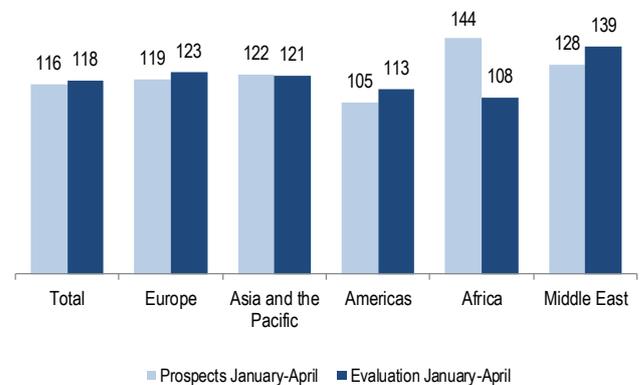
Confidence levels for May-August 2019 up again

- Confidence in global tourism remains cautious but has started to pick up again according to the latest UNWTO confidence index survey.
- On a scale of 0 to 200, the Panel evaluated tourism performance in the period January-April with a score of 118, the same level as the September-December 2018 period and much in line with the expectations expressed at the beginning of that period (116).
- Almost half of respondents (49%) consider tourism performance between January and April 2019 to have been better than what they would reasonably expect for this time of the year. One third of respondents believe it remained the same, while 20% believe it was worse.
- For the coming four months May-August, confidence levels show an improvement with half of respondents (52%) expecting a better performance of their sector or destination.

UNWTO Confidence Index



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

Evaluation of January-April 2019: Positive and in line with expectations

- UNWTO's Panel of Experts gave tourism performance in January-April 2019 an overall positive rating of 118, in line with what was expected (116).
- Most regions evaluated performance more favorably than initially expected four months ago with the exception of Asia and the Pacific and Africa.
- By region, experts in the Middle East (139) were the most positive about the past four months, and they rated the performance in the region with a score 14 points higher than their prospects at the beginning of the period.
- Experts in Europe (123) rated the period positively and 4 points higher than expected, as demand continues to be strong in the region. As the Brexit was delayed until late fall, it has not yet had the expected negative impact and while growth in many mature destinations has slowed down, other emerging destinations have shown strong growth instead.
- Experts in Asia and the Pacific (121) also evaluated the past four months positively and in line with what was expected at the beginning of the period. Many destinations in the region continue to record remarkable growth, especially from the Chinese market, although somewhat less bullish than in previous periods.
- Meanwhile, experts in the Americas (113) rated the performance of this period rather positively and 8 points higher than their rather neutral expectations expressed four months ago. Ongoing economic and political uncertainty in some markets continues to dampen the outlook, according to experts from the region.

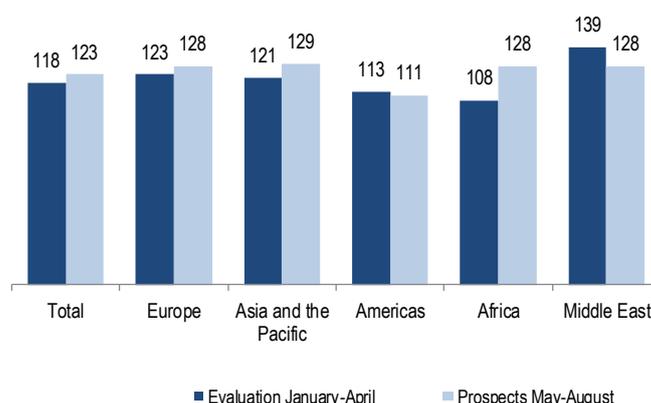
- Experts in Africa rated the period January-April 2019 at 108, much lower than expected four months ago. While the rebound in the region continues, especially in North Africa, in Sub-Saharan Africa growth has not been able to keep up with expectations, reflecting mixed performance among destinations.
- The highest score by activity came from Destinations (128), 8 points higher than their expectations expressed in January 2019.

Outlook: More optimistic prospects for the May-August 2019 period

- Experts have become slightly more optimistic again about the coming May-August 2019 period, rating the prospects with an overall score of 123.
- Following several periods of exceptional growth and expectations, the past year saw some more cautious prospects and evaluations. However, prospects for the next four months are more optimistic again than for previous periods. This trend is consistent across almost all regions and activities.
- By region, experts from Asia and the Pacific (129) are the most optimistic about May-August 2019. Growth in outbound travel from several Asian source markets is expected to continue to fuel tourism within the region.
- Experts in Europe (128) expect continued growth for the May-August period, the peak season for many destinations in the region. Many mature destinations are expected to see a stabilization of tourist arrivals and increases in tourism receipts as emerging destinations can compete with more affordable prices. The Brexit delay until late fall has already led to an increase in bookings for the summer, yet, the uncertainty will continue.
- Experts in Africa (128) are also positive about May-August but less than in previous periods. Political uncertainty in a number of destinations as well as the recent cyclones in some destinations did weigh on the positive outlook of the region.
- In the Middle East (128), the market sentiment is positive, at a similar level as in recent periods. The region continues to see much investment in tourism infrastructure and a focus on tourism policy planning as an alternative economic sector and expectations are optimistic.

- All other sectors evaluated the past four months in line with what they initially expected and with rather similar scores: Accommodation (117), Consultancy, Research and Media (116), Transport (114), Tour Operators (113) and General Industry Bodies & Other (112).

- Respondents from the Americas (111) continue to be rather cautious for May-August, i.e. expecting only some improvement as uncertainties in some outbound markets in the region continue to have an impact on intraregional travel.
- All activity sectors expect an improvement in the coming four months. However, the ratings show some variation, ranging from a high 133 for Destinations to a low 117 for General Industry Bodies.
- Accommodation (129), Tour Operators & Travel Agencies (123), Transport (121) and Consultancy, Research & Media (118) all remain rather optimistic for the coming four months.



Source: World Tourism Organization (UNWTO) ©

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 unwtotpanel@unwto.org.