



# World Tourism Barometer

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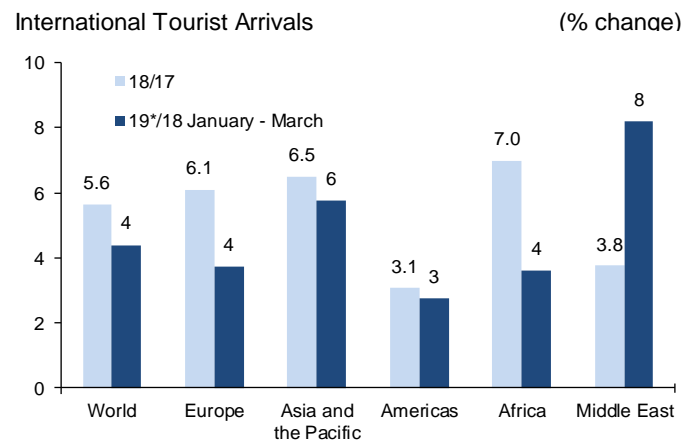
EXCERPT

## 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

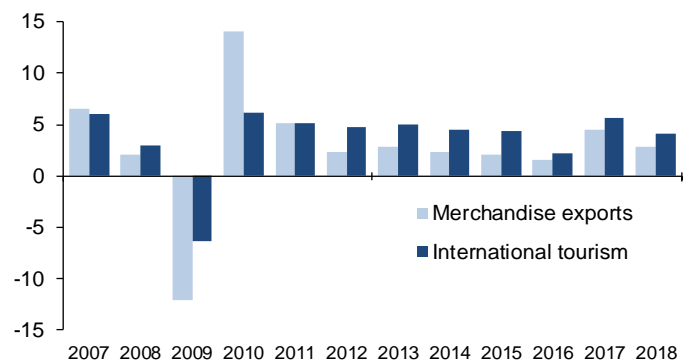
- Total export earnings from international tourism reached USD 1.7 trillion in 2018, or almost USD 5 billion a day on average.
- International tourism (travel and passenger transport) accounts for 29% of the world's services exports and 7% of overall exports of goods and services.
- For the seventh year 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 trade (% 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](mailto:barom@unwto.org).**

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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.

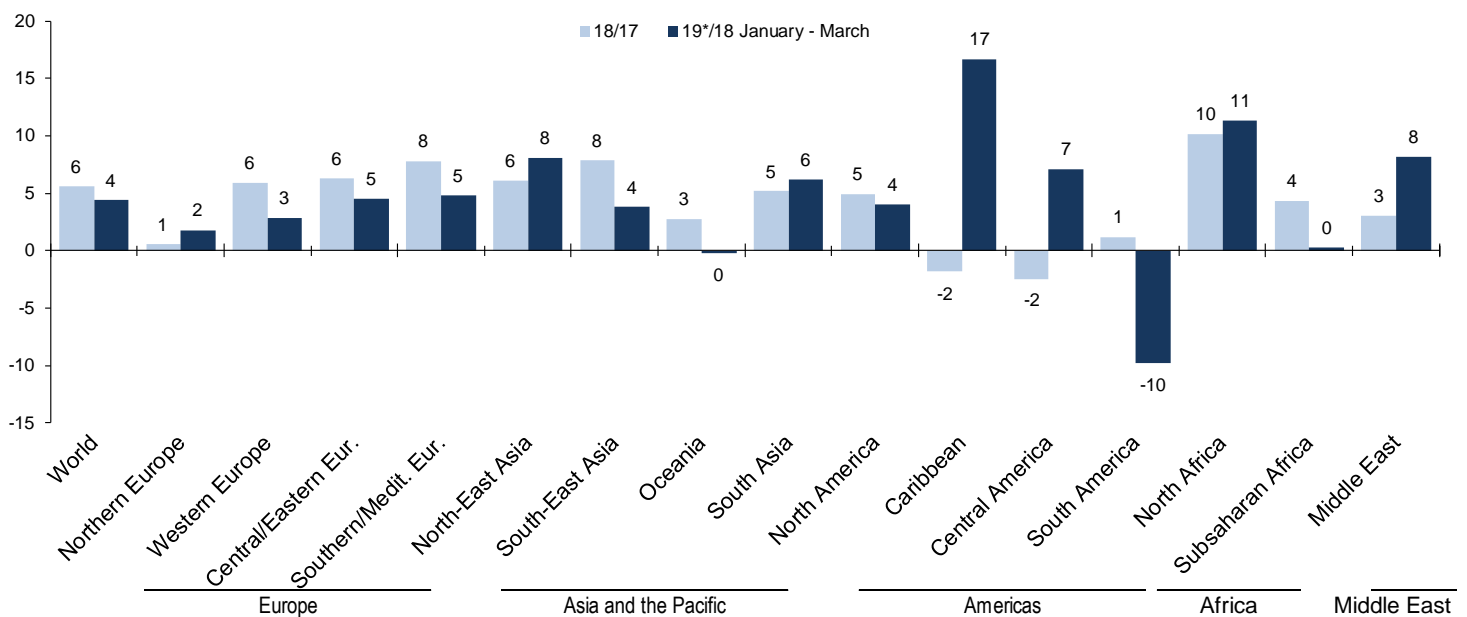
## International tourist arrivals: January-March 2019

### 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.

International Tourist Arrivals

(% change over same period of the previous year)



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
<b>World</b>	<b>3.8%</b>	<b>7.0%</b>	<b>5.6%</b>	<b>4.2%</b>	<b>+3% to +4%</b>
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														
	(million)						Share	Change		% change over same period of previous year					
	2005	2010	2015	2016	2017	2018*	(%)	(%)	2019*	YTD	Q1	Jan	Feb	Mar	
<b>World</b>	<b>809</b>	<b>952</b>	<b>1,195</b>	<b>1,241</b>	<b>1,328</b>	<b>1,403</b>	<b>100</b>	<b>7.0</b>	<b>5.6</b>	<b>4.4</b>	<b>4.4</b>	<b>4.4</b>	<b>4.6</b>	<b>4.2</b>	
Advanced economies <sup>1</sup>	470	515	655	687	730	766	54.6	6.3	5.0	4.5	4.5	4.9	4.4	4.3	
Emerging economies <sup>1</sup>	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>															
<b>Europe</b>	<b>453.1</b>	<b>486.4</b>	<b>604.5</b>	<b>619.7</b>	<b>672.5</b>	<b>713.4</b>	<b>50.9</b>	<b>8.5</b>	<b>6.1</b>	<b>3.8</b>	<b>3.8</b>	<b>3.3</b>	<b>4.0</b>	<b>3.9</b>	
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	
<b>Asia and the Pacific</b>	<b>154.1</b>	<b>208.2</b>	<b>284.6</b>	<b>306.6</b>	<b>324.0</b>	<b>345.1</b>	<b>24.6</b>	<b>5.7</b>	<b>6.5</b>	<b>5.8</b>	<b>5.8</b>	<b>6.4</b>	<b>6.0</b>	<b>4.9</b>	
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	
<b>Americas</b>	<b>133.3</b>	<b>150.4</b>	<b>194.1</b>	<b>201.3</b>	<b>210.8</b>	<b>217.3</b>	<b>15.5</b>	<b>4.7</b>	<b>3.1</b>	<b>2.7</b>	<b>2.7</b>	<b>2.8</b>	<b>1.5</b>	<b>3.8</b>	
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	
<b>Africa</b>	<b>34.8</b>	<b>50.4</b>	<b>53.5</b>	<b>57.8</b>	<b>62.7</b>	<b>67.1</b>	<b>4.8</b>	<b>8.5</b>	<b>7.0</b>	<b>3.6</b>	<b>3.6</b>	<b>2.2</b>	<b>4.5</b>	<b>4.3</b>	
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	
<b>Middle East</b>	<b>34.0</b>	<b>56.1</b>	<b>58.3</b>	<b>55.5</b>	<b>57.7</b>	<b>59.9</b>	<b>4.3</b>	<b>4.1</b>	<b>3.8</b>	<b>8.2</b>	<b>8.2</b>	<b>8.6</b>	<b>12.7</b>	<b>4.1</b>	

Source: World Tourism Organization (UNWTO) ©

\* Provisional data

(Data as collected by UNWTO, May 2019)

<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