

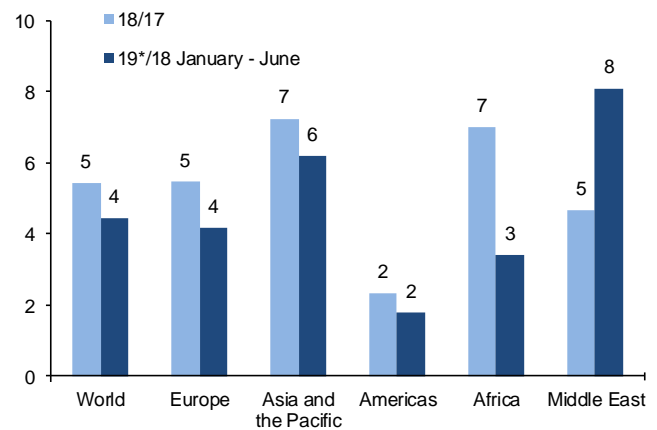


International arrivals grew 4% in the first half of 2019

- International tourist arrivals (overnight visitors) grew 4% in January-June 2019 compared to the same period last year. Results are in line with historical trends.
- Growth was led by the Middle East (+8%) and Asia and the Pacific (+6%), followed by Europe (+4%). Africa (+3%) and the Americas (+2%) enjoyed more moderate growth in the first half of 2019.
- By subregions, the Caribbean (+11%) showed the highest growth, followed by North Africa (+9%), South Asia and North-East Asia (both +7%)
- Confidence in global tourism performance remains positive yet cautious and with signs of moderate growth for the remainder of the year according to the latest UNWTO Confidence Index.
- So far, growth has been driven by a strong economy, affordable air travel, increased air connectivity and visa facilitation. Yet, weaker economic indicators, the prolonged uncertainty about Brexit, trade and technological tensions and rising geopolitical challenges, start to take a toll on business and consumer confidence.

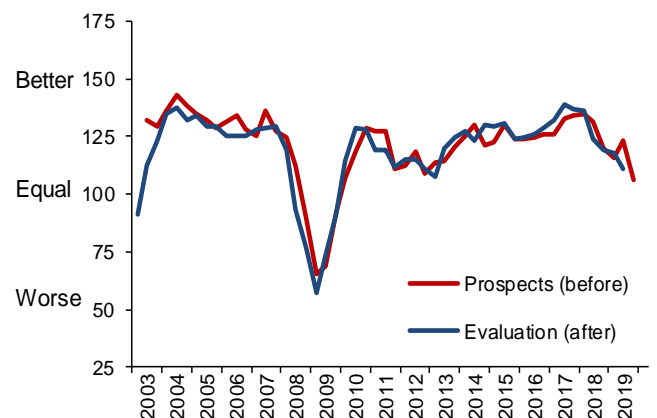
International Tourist Arrivals

(% change)



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

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

Note: The Confidence Index reflects perceived tourism performance in the past 4 months (Evaluation) and expected performance in the next 4 months (Prospects), whether equal (100), better (above 100) or worse performance (below 100).

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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.

This report was prepared by the **UNWTO Tourism Market Intelligence and Competitiveness Department**, under the supervision of Sandra Carvão, Chief of the Department. Contributors include (in alphabetical order): Fernando Alonso, Julia Baunemann, Michel Julian, Lili Kfoury and Javier Ruescas.

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 in early September 2019.

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

Pages 1-5 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-June 2019

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

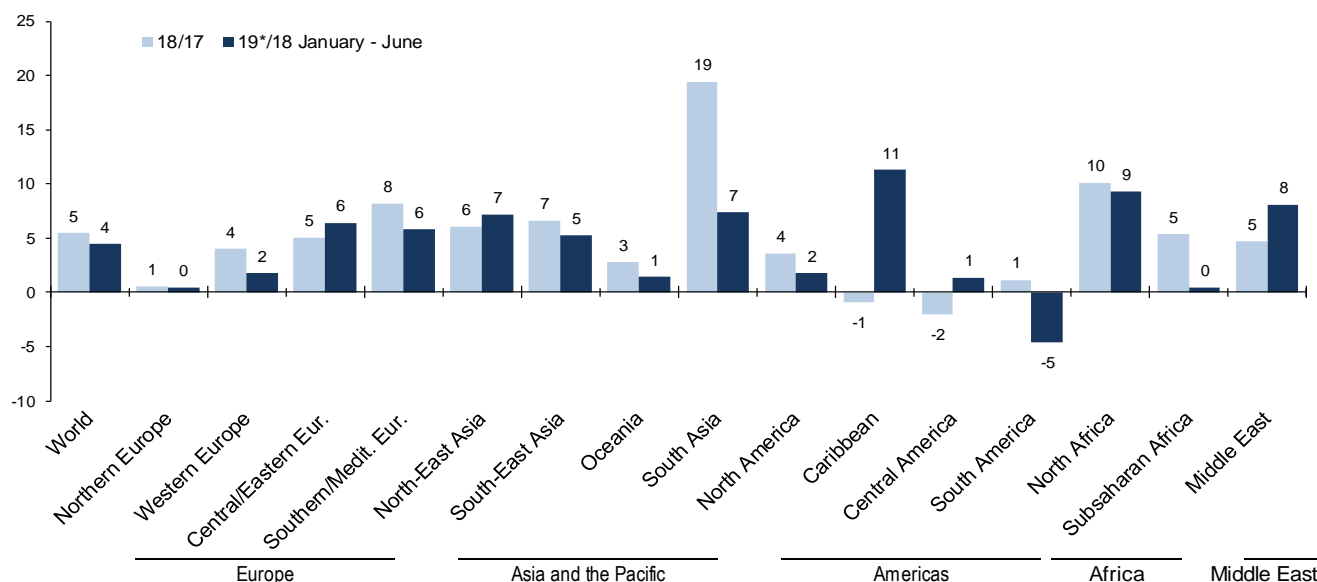
- International tourist arrivals (overnight visitors) grew 4% in January-June 2019 compared to the same period last year, according to available data.
- UNWTO estimates that destinations worldwide received 671 million international tourist arrivals in the first half of 2019, about 29 million more than in the same period of 2018.
- This represents a continuation of the 5% growth recorded in 2018, though more in line with the annual average of 4% of the last ten years (2008-2018).
- Growth was led by the Middle East (+8%) and Asia and the Pacific (+6%). International arrivals in Europe (+4%) grew in line with the world average, while Africa (+3%) and the Americas (+2%) saw more moderate growth.
- The first half of the year accounts for about 45% of total annual volume of international arrivals and includes the winter season in the Northern Hemisphere, the summer season in the Southern Hemisphere, the Chinese New Year, Easter and the start of the summer season in the Northern Hemisphere, among other peak travel periods.
- 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*.

A total of 130 countries have so far reported data on international tourist arrivals for three or more months of 2019. Of these, 72% reported an increase in arrivals and 28% posted a decrease.

International passenger traffic demand grew in line with international arrivals

- International air passenger traffic, measured in revenue passenger kilometres (RPK) saw a similar pattern to that of international tourists, with a 4.7% increase in the first half of 2019, according to the **International Air Transport Association (IATA)**. All regions contributed positively to the first half of 2019 growth rate, most notably Asia and the Pacific, Europe and to a lesser extent North America.
- Data by **ForwardKeys** shows that international departures based on air bookings in January-April 2019 (+4%) and during May-August 2019 (+5%) were also in line with the growth seen in international tourist arrivals. Departures from Asia and the Pacific showed the highest growth among regions in both periods. Expected international departures worldwide for the September to December months remain upbeat (+8%).

International Tourist Arrivals



Source: World Tourism Organization (UNWTO) ©

Downside risks on the horizon

- Confidence in global tourism remains positive yet cautious with signs of more moderate growth for the remainder of the year, according to the latest UNWTO Confidence Index.
- Global economic growth remains subdued, according to the International Monetary Fund's *World Economic Outlook* update of July 2019. Global growth is projected at 3.2% for 2019, improving to 3.5% in 2020 (0.1 percentage point lower for both years than in the April 2019 WEO forecast).
- Growth in advanced economies is projected at 1.9% in 2019, with positive output in the United States but weak growth in the euro area including a potential risk of recession in Germany, the world's third largest tourism spender. Emerging markets are projected to grow at 4.1% in 2019, with slightly slower but still robust growth in China and India, and sluggish performance in major Latin American economies.
- Against this backdrop, oil prices (Brent) have eased back from the most recent high of USD 67 per barrel according to the International Energy Agency (IEA) and oil demand growth estimates have been revised downwards for 2019.
- Prolonged uncertainty about Brexit, intensified trade and technological tensions between the United States and China, and rising geopolitical challenges may take a toll on business and consumer confidence in certain countries or regions.
- Uncertainty derived from Brexit could lead consumers to adopt a wait-and-see attitude, which could affect travel bookings. As an indirect impact, the depreciation of the pound sterling and a slower UK economy could lead to rising demand for more price competitive destinations outside the European Union.
- While the ultimate form of Brexit remains highly uncertain, Brexit extension provides certainty that all existing travel arrangements with EU will continue until at least 31 October, according to the Association of British Travel Agents (ABTA). The European Parliament has confirmed that UK travellers would not need a visa to travel to the EU after Brexit for short-term business or leisure trips, even if the UK leaves without a deal. UK citizens will be able to visit the EU for up to 90 days within a 180-day period without a visa.

Outlook for International Tourist Arrivals

	Change			average	2019 Projection
	2016	2017	2018*	a year	(issued January)
	2016	2017	2018*	2008-2018	from
World	3.8%	7.1%	5.4%	4.2%	+3% to +4%
Europe	2.5%	8.6%	5.5%	3.6%	+3% to +4%
Asia and the Pacific	7.7%	5.7%	7.2%	6.4%	+5% to +6%
Americas	3.7%	4.7%	2.3%	3.8%	+2% to +3%
Africa	8.0%	8.5%	7.0%	4.3%	+3% to +5%
Middle East	-4.8%	4.0%	4.7%	1.6%	+4% to +6%

Source: World Tourism Organization (UNWTO) ©

* Provisional data

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series																
	(million)					Share (%)	Change (%)		% change over same period of previous year								
	2005	2010	2015	2017	2018*	2018*	17/16	18*/17	2019*								
									YTD	Q1	Q2	Jan	Feb	Mar	Apr	May	Jun
World	809	952	1,196	1,329	1,401	100	7.1	5.4	4.4	3.4	5.3	3.9	4.1	2.2	7.3	3.2	5.7
Advanced economies ¹	470	515	655	731	762	54.4	6.4	4.3	3.2	2.2	4.0	3.3	2.3	1.1	6.6	2.2	3.6
Emerging economies ¹	340	437	541	598	639	45.6	7.9	6.8	5.8	4.5	7.1	4.4	5.9	3.4	8.1	4.5	8.5
<i>By UNWTO regions:</i>																	
Europe	453.1	486.4	605.0	673.4	710.1	50.7	8.6	5.5	4.2	2.8	5.0	2.9	3.3	2.2	7.9	2.0	5.6
Northern Europe	54.9	57.0	70.1	78.4	78.9	5.6	6.0	0.5	0.4	1.9	-0.6	5.2	-1.6	2.1	-2.0	-1.8	1.4
Western Europe	141.7	154.4	181.5	192.7	200.4	14.3	6.1	4.0	1.8	-2.0	4.4	-0.4	-0.5	-4.4	12.2	-1.0	3.4
Central/Eastern Eur.	95.5	98.1	122.2	134.7	141.5	10.1	5.7	5.0	6.4	6.4	6.4	5.9	7.6	5.8	5.7	6.7	6.8
Southern/Medit. Eur.	161.1	176.9	231.1	267.5	289.4	20.7	12.9	8.2	5.8	5.1	6.2	3.0	5.8	6.0	9.0	2.7	7.5
- of which EU-28	367.6	382.2	478.6	539.4	563.0	40.2	7.7	4.4	2.8	1.7	3.5	2.4	1.8	1.0	6.7	0.6	3.9
Asia and the Pacific	154.1	208.2	284.6	324.2	347.6	24.8	5.7	7.2	6.2	6.0	6.4	6.5	6.7	4.8	6.8	7.0	5.3
North-East Asia	85.9	111.5	142.1	159.5	169.2	12.1	3.4	6.1	7.2	7.6	6.8	8.0	7.6	7.2	6.5	8.3	5.5
South-East Asia	49.0	70.5	104.2	120.6	128.6	9.2	8.9	6.6	5.2	4.3	6.3	3.6	5.9	3.6	7.2	6.1	5.5
Oceania	10.9	11.5	14.3	16.6	17.0	1.2	6.1	2.8	1.4	-0.3	3.6	3.2	0.1	-3.8	4.6	5.5	0.9
South Asia	8.3	14.7	24.0	27.5	32.8	2.3	6.2	19.4	7.3	8.2	6.2	12.7	9.3	2.6	9.1	3.2	6.1
Americas	133.3	150.4	194.1	210.8	215.7	15.4	4.7	2.3	1.8	-0.4	4.0	0.7	-0.5	-1.3	6.4	2.5	3.2
North America	89.9	99.5	127.8	137.1	142.1	10.1	4.3	3.6	1.8	-0.6	3.9	0.6	-0.3	-2.0	5.9	2.2	3.7
Caribbean	18.8	19.5	24.1	26.0	25.8	1.8	3.1	-0.9	11.3	14.8	7.5	17.5	16.4	11.2	14.6	8.3	0.0
Central America	6.3	7.8	10.2	11.1	10.9	0.8	4.6	-2.0	1.4	-2.1	5.7	5.0	-2.1	-8.8	7.9	0.5	8.2
South America	18.3	23.6	31.9	36.6	37.0	2.6	7.7	1.2	-4.6	-7.9	0.9	-7.8	-9.9	-5.9	1.6	-0.5	1.6
Africa	34.8	50.4	53.5	62.7	67.1	4.8	8.5	7.0	3.4	2.1	4.7	2.9	4.1	-0.3	7.4	-1.0	7.2
North Africa	13.9	19.7	18.0	21.7	23.9	1.7	14.7	10.1	9.3	8.9	9.6	13.7	12.2	2.4	14.4	-2.0	14.8
Subsaharan Africa	20.8	30.7	35.5	41.1	43.3	3.1	5.5	5.4	0.4	-0.8	1.8	-1.1	0.5	-1.7	3.4	-0.4	2.5
Middle East	34.0	56.1	58.3	57.7	60.4	4.3	4.0	4.7	8.1	7.4	8.8	8.3	11.8	2.9	6.2	4.4	17.5

Source: World Tourism Organization (UNWTO) © * Provisional data (Data as collected by UNWTO, September 2019)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/hs/cs.aspx?id=29.

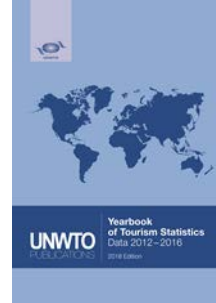
See box in page 'Annex-1' for explanation of abbreviations and symbols used



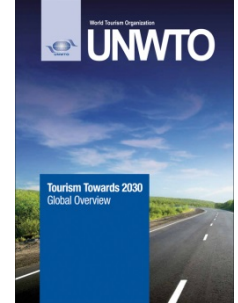
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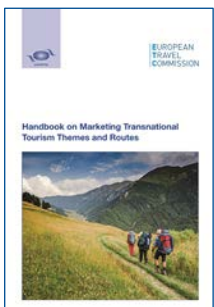
EU Short-Term Tourism Trends



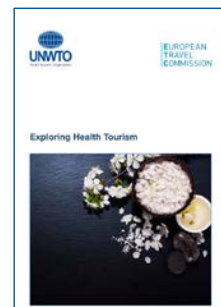
Compendium of Tourism Statistics Yearbook of Tourism Statistics



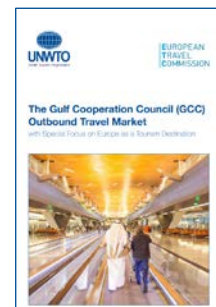
Tourism Towards 2030 Global Overview



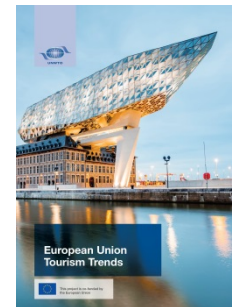
Marketing Transnational Tourism Themes and Routes (2017)



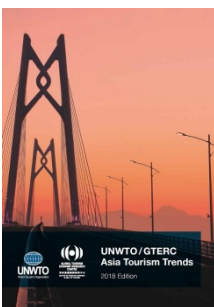
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The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



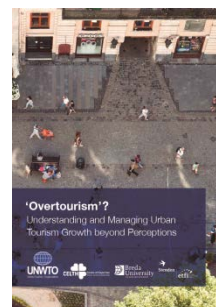
European Union Tourism Trends (2018)



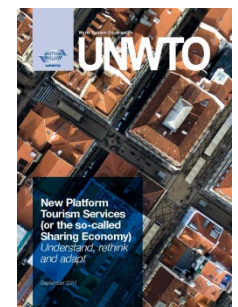
UNWTO/GTERC Asia Tourism Trends, 2018 Edition (2018)



'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions Volume 2: Case Studies (2019)



'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions (2018)



New Platform Tourism Services (or the so-called Sharing Economy) - Understand, rethink and adapt (2017)