

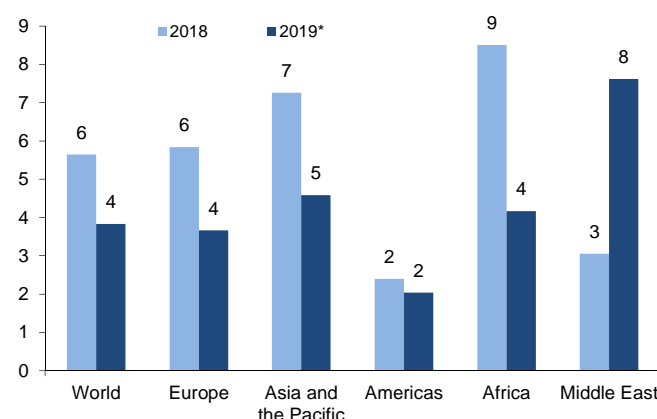


Growth in international tourist arrivals continues to outpace the economy

- International tourist arrivals (overnight visitors) worldwide grew 4% in 2019 to reach 1.5 billion, based on data reported by destinations around the world.
- 2019 was another year of strong growth, although slower compared to the exceptional rates of 2017 (+7%) and 2018 (+6%). Demand was slower mainly in advanced economies and particularly in Europe.
- Uncertainty surrounding Brexit, geopolitical and trade tensions, and the global economic slowdown, weighed on growth. 2019 was also the year of major shifts in the sector with the collapse of Thomas Cook and of several low-cost airlines in Europe.
- All regions enjoyed an increase in arrivals. The Middle East (+8%) led growth, followed by Asia and the Pacific (+5%). International arrivals in Europe and Africa (both +4%) increased in line with the world average, while the Americas saw growth of 2%.
- As per the main source markets, France reported the strongest increase in international tourism expenditure among the top ten markets, while the United States led growth in absolute terms.
- 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 2020.

International Tourist Arrivals

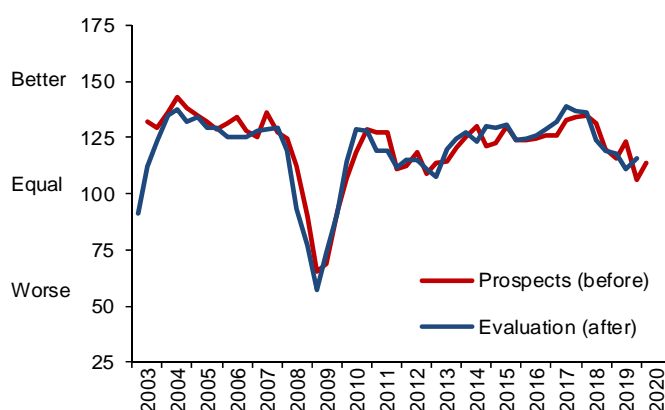
(% change)



Source: World Tourism Organization (UNWTO) ©

* Provisional data

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

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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 159 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: www.e-unwto.org/loi/wtobarometereng

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

Data collection for this issue was closed mid-January 2020.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published on May 2020.

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 www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

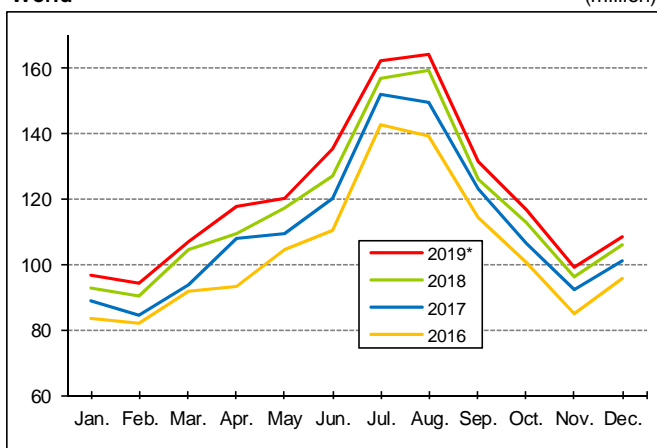
International tourist arrivals 2019

International arrivals up 4% in 2019

- International tourist arrivals (overnight visitors) grew 3.8% in 2019 compared to the previous year, according to data reported by destinations. 2019 was the tenth consecutive year of sustained growth since 2009.
- UNWTO estimates that destinations worldwide received around 1.5 billion arrivals in 2019, about 54 million more than in the previous year.

International Tourist Arrivals by month

World (million)



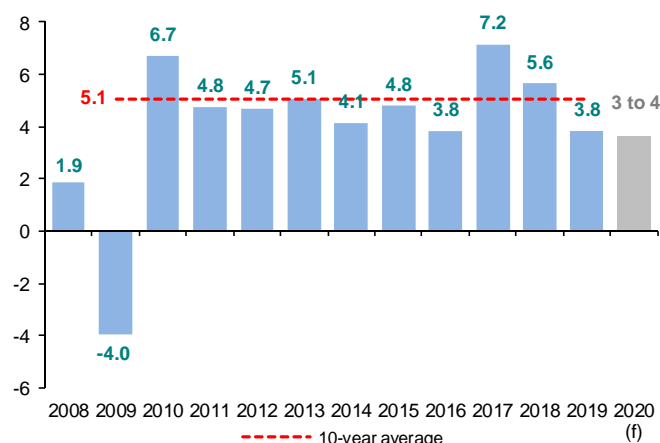
Source: World Tourism Organization (UNWTO) ©

- This represents a consolidation of the 6% growth recorded in 2018, though at a slower pace and below the annual average of 5% of the last ten years (2009-2019).
- Growth in international tourist arrivals continued to outpace the world economy (+3.8% vs +3.0%).
- The Middle East (+8%) and Asia and the Pacific (+5%) led growth. International arrivals in Africa and Europe (both +4%) grew in line with the world average, while the Americas (+2%) saw more moderate increase.
- By subregions, North Africa (+9%), South-East Asia and South Asia (both +8%) showed the highest growth, followed by Southern and Mediterranean Europe and the Caribbean (both +5%).
- The 3.8% increase in international arrivals was fully in line with UNWTO's forecast of 3% to 4% for the

year 2019. Growth by region was also in line with the projections, except the Middle East which grew above what was forecasted.

International Tourist Arrivals, World

(% change)



Source: World Tourism Organization (UNWTO) ©

(f) Forecast

International air traffic grew in line with international arrivals

- International air passenger traffic, measured in revenue passenger kilometres (RPK) saw a similar pattern to that of international arrivals, with a 4.0% increase through November 2019, according to the International Air Transport Association (IATA). All regions contributed positively to this result. However, the growth pace, as in the case of arrivals, is below the long-term average of 5.5%.
- Data by **ForwardKeys** show that international departures based on air bookings in 2019 grew by 5%, with departures from Asia and the Pacific and Africa showing the highest growth among world regions.
- Expected international departures worldwide for the period January 2020-April 2020 remain particularly strong (+10%).

Outlook for 2020 – Positive but cautious

- Economic growth is projected to pick up to 3.4% in 2020 from 3.0% in 2019 according to the International Monetary Fund's World Economic Outlook update of October 2019, reflecting primarily an improvement in a number of emerging markets in Latin America, the Middle East, and Europe. Yet, with uncertainty about prospects for several of these countries, projected slowdown in China and the United States, and prominent downside risks, a much more subdued pace of global activity could well materialize.
- The latest UNWTO Confidence Index shows a cautious optimism for 2020: 47% of UNWTO Panel Experts believe tourism will perform better and 46% at the same level of 2019.
- 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 2020, keeping the same positive pace of 2019
- However, prospects may be affected by a worsening of the economic scenario as well as of current trade and geopolitical tensions. Brexit's impact on Europe could affect euro area countries and benefit destinations outside the Eurozone, as was the case already in 2019. Trade, social and geopolitical tensions may affect prospects for Latin America, Asia and the Pacific and the Middle East.
- As in previous occasions external shocks happening in specific countries may lead to a redistribution of travel to other destinations.
- On a more favourable scenario, the exit transition of the Brexit, the first phase of the US-China trade deal and the gradual improvement of the social environment, could give more clearer signs to the economy as tensions unwind.
- Also on a positive note, a number of major sports and cultural events taking place in 2020, including the Tokyo Summer Olympics, the Dubai Expo 2020 and the Beethoven 2020 Year in Germany, are expected to drive demand.

Outlook for International Tourist Arrivals

	Change				average a year	2020 Projection (issued January)
	2016	2017	2018	2019*	2009-2019*	from
World	3.8%	7.2%	5.6%	3.8%	5.1%	+3% to +4%
Europe	2.5%	8.8%	5.8%	3.7%	4.6%	+3% to +4%
Asia and the Pacific	7.7%	5.7%	7.3%	4.6%	7.1%	+5% to +6%
Americas	3.7%	4.7%	2.4%	2.0%	4.6%	+2% to +3%
Africa	7.8%	8.5%	8.5%	4.2%	4.4%	+3% to +5%
Middle East	-4.7%	4.1%	3.0%	7.6%	2.7%	+4% to +6%

Source: World Tourism Organization (UNWTO) ©

* Provisional data

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series																
					Share	Change		% change over same period of previous year									
	(million)				(%)	(%)		2019*									
	2010	2017	2018	2019*	2019*	18/17	19*/18	Q1	Q2	Q3	Q4	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
World	952	1,332	1,407	1,461	100	5.6	3.8	3.3	5.4	3.5	2.8	3.5	3.1	4.2	3.2	2.9	2.3
Advanced economies ¹	515	732	761	776	53.1	4.1	1.9	2.0	4.0	2.0	-1.0	1.8	0.9	3.7	-0.4	-1.1	-1.6
Emerging economies ¹	437	600	646	685	46.9	7.6	6.1	4.7	7.3	5.7	6.8	5.9	6.1	4.8	7.6	6.8	6.1
<i>By UNWTO regions:</i>																	
Europe	487.0	676.6	716.1	742.3	50.8	5.8	3.7	2.3	4.8	3.7	3.3	2.5	3.6	5.2	3.8	3.5	2.3
Northern Europe	57.0	79.1	78.7	79.6	5.4	-0.6	1.1	0.4	0.6	2.6	0.2	1.6	4.0	2.1	1.0	-0.8	0.2
Western Europe	154.4	192.7	200.2	203.8	14.0	3.9	1.8	-1.7	4.7	2.5	0.1	-0.5	0.0	10.4	0.6	1.9	-2.1
Central/Eastern Eur.	98.6	136.9	148.5	154.3	10.6	8.5	3.9	4.9	4.5	2.5	4.7	2.1	3.3	2.2	4.7	4.3	5.0
Southern/Medit. Eur.	177.1	267.9	288.8	304.6	20.8	7.8	5.5	5.1	6.1	5.1	5.7	5.0	6.0	4.2	5.8	5.9	5.2
- of which EU-28	382.4	540.5	562.4	577.2	39.5	4.1	2.6	1.6	3.6	2.7	2.1	1.1	2.5	4.9	2.4	2.6	1.1
Asia and the Pacific	208.2	324.1	347.7	363.6	24.9	7.3	4.6	6.3	7.4	3.2	1.7	6.3	0.7	2.7	2.1	1.7	1.3
North-East Asia	111.5	159.5	169.2	172.2	11.8	6.1	1.8	8.2	8.1	-1.0	-7.3	5.5	-5.9	-2.6	-5.7	-8.4	-7.7
South-East Asia	70.5	120.6	128.6	138.6	9.5	6.7	7.8	4.3	6.3	8.5	12.1	7.3	8.8	9.4	12.4	12.7	11.3
Oceania	11.5	16.6	17.1	17.5	1.2	2.9	2.6	-0.3	3.6	3.0	4.2	2.1	4.6	2.3	2.7	3.1	6.0
South Asia	14.7	27.5	32.8	35.3	2.4	19.4	7.7	9.6	10.1	4.8	7.2	8.4	2.2	4.1	7.3	11.0	3.6
Americas	150.3	210.7	215.7	220.1	15.1	2.4	2.0	-0.6	4.0	2.3	2.5	2.8	2.3	1.6	1.9	2.4	3.0
North America	99.5	137.1	142.2	146.2	10.0	3.7	2.8	-1.1	3.5	3.6	4.9	4.3	2.9	3.7	5.0	4.8	4.8
Caribbean	19.5	26.0	25.8	27.1	1.9	-0.9	4.9	15.1	8.1	-3.9	-0.7	-3.5	-2.4	-6.7	-3.6	0.1	0.6
Central America	7.8	11.1	10.9	11.1	0.8	-2.0	2.2	-2.1	5.5	3.5	3.0	5.2	2.2	3.0	1.2	3.1	4.2
South America	23.5	36.4	36.9	35.7	2.4	1.2	-3.1	-7.8	2.9	-0.2	-4.4	0.3	2.9	-3.9	-7.7	-5.0	-1.6
Africa	50.4	63.0	68.4	71.2	4.9	8.5	4.2	2.9	6.2	4.0	3.5	5.5	3.7	2.6	3.3	3.9	3.4
North Africa	19.7	21.7	24.1	26.3	1.8	11.1	9.1	9.0	11.8	8.7	7.0	12.4	4.0	10.2	8.5	6.9	5.6
Subsaharan Africa	30.7	41.3	44.3	44.9	3.1	7.1	1.5	0.2	3.0	0.4	1.8	-0.8	3.4	-1.7	0.5	2.6	2.3
Middle East	56.1	57.7	59.4	63.9	4.4	3.0	7.6	8.2	7.3	7.1	5.6	5.2	8.1	7.5	7.1	5.2	4.6

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, January 2020)

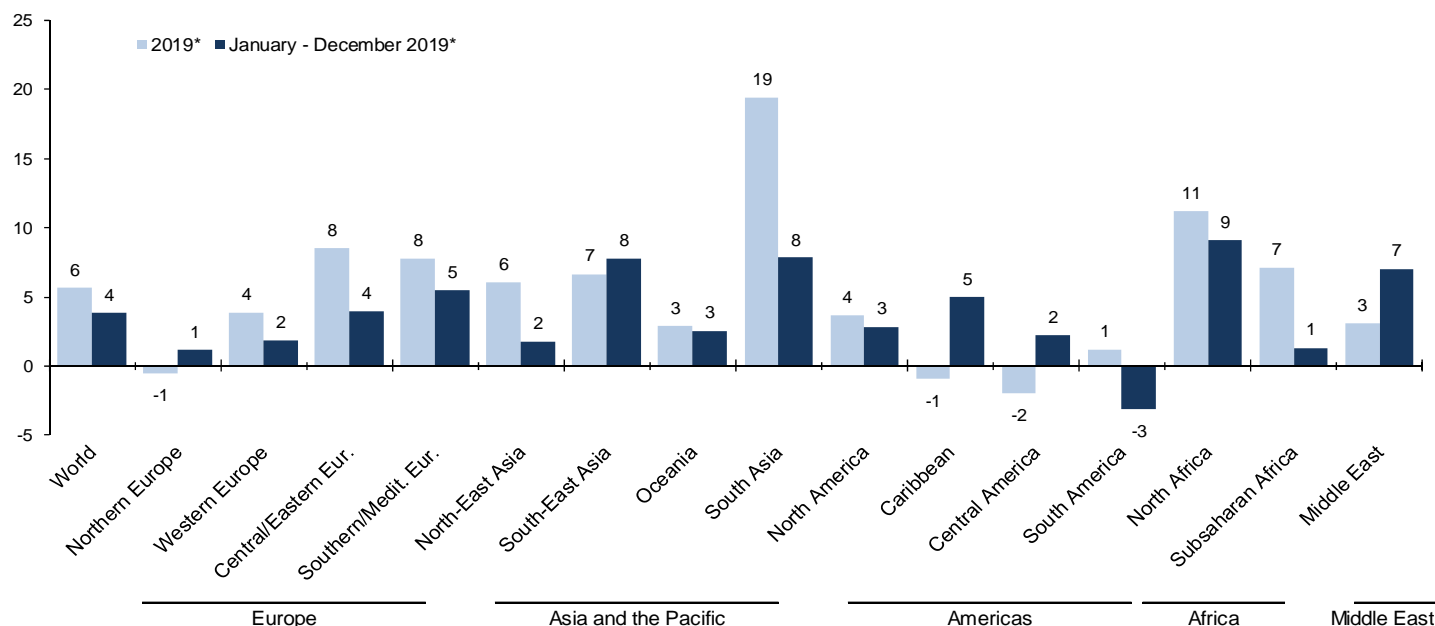
* Provisional data

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/ns/cs.aspx?id=29.

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

International Tourist Arrivals

(% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©