

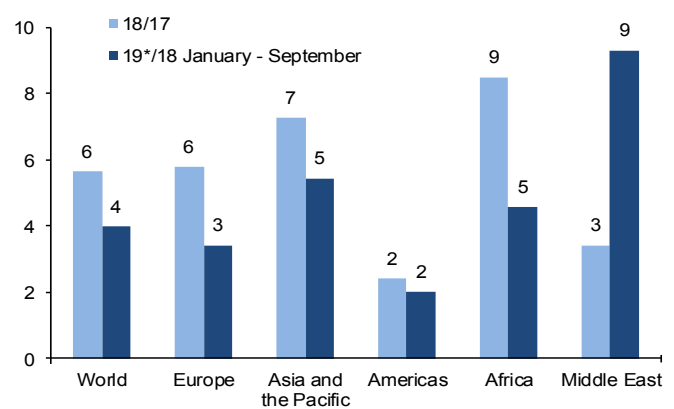


## Solid growth in international arrivals in January-September 2019, though uneven across regions

- International tourist arrivals (overnight visitors) grew 4% in January-September 2019 compared to the same period last year, with mixed performance among world regions.
- The Middle East (+9%) led growth followed by Asia and the Pacific and Africa (both +5%). Europe (+3%) and the Americas (+2%) enjoyed a more moderate increase.
- The global economic slowdown, trade tensions and rising geopolitical challenges, social unrest, prolonged uncertainty about Brexit and lower business confidence have weighed on growth in international tourism.
- The collapse of major travel group Thomas Cook and some small European airlines temporarily affected some key tourism destinations, particularly in Europe and the Americas.
- As per the main source markets, the United States led growth in international tourism expenditure in absolute terms, supported by a strong dollar. France reported the strongest increase among the top ten markets, reflecting for the second consecutive year a surging demand while China, the world's top source market saw outbound trips increased by 14% in the first half of 2019, though expenditure fell 4% compared to the same period last year.

### International Tourist Arrivals

(% change)

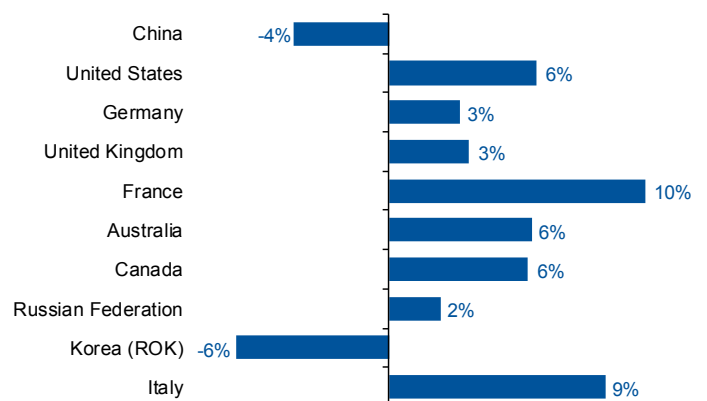


Source: World Tourism Organization (UNWTO) © \* Provisional data

### International Tourism Expenditure, 2019 YTD\*

#### World's Top 10 Spenders

(real % change over same period of 2018)



Source: UNWTO \*Provisional data for first 9 months of 2019 (China and UK: 6 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 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](http://www.e-unwto.org/loi/wtobarometereng)

**We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org).**

Data collection for this issue was closed end of November 2019.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published on the occasion of the Spanish tourism fair Fitur (22-26 January 2020).

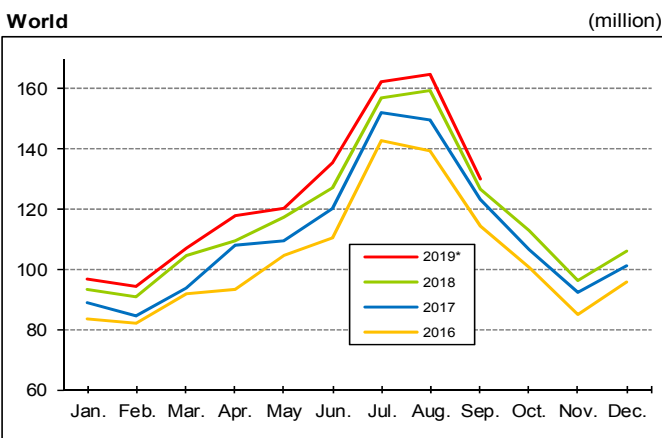
Pages 1-5 of this document constitute the **Excerpt** of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at [www.e-unwto.org](http://www.e-unwto.org). This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

## International tourist arrivals: January-September 2019

### International arrivals up 4% in the first nine months of 2019

- International tourist arrivals (overnight visitors) grew 4% in January-September 2019 compared to the same period last year, according to available data.
- UNWTO estimates that destinations worldwide received around 1.1 billion international tourist arrivals in the first nine months of 2019, about 43 million more than in the same period of 2018.
- This represents a continuation of the 6% growth recorded in 2018, though at a more moderate pace and in line with the annual average of 4% of the last ten years (2008-2018).
- Growth was led by the Middle East (+9%), Asia and the Pacific and Africa (both +5%). International arrivals in Europe (+3%) grew slightly below the world average, while the Americas (+2%) saw moderate growth.
- By subregions, North Africa (+10%) showed the highest growth, followed by the Caribbean and South Asia (both +8%) and South-East Asia (+6%).
- The first nine months of the year usually account for about 77% of total annual volume of international arrivals and includes the Northern Hemisphere high summer season months

International Tourist Arrivals by month

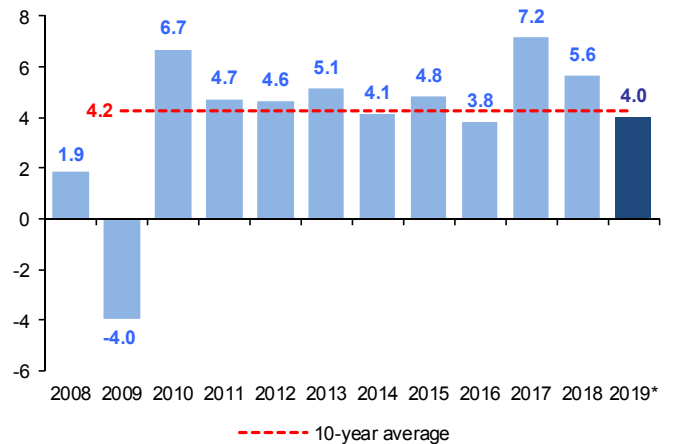


Source: World Tourism Organization (UNWTO) © \*Provisional data

- 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*.

- The latest UNWTO Confidence Index published in September already pointed to a positive but cautious outlook for the September-December period, with signs of more moderate growth.

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) © \* Forecast

### International air traffic also up 4%, but growth remains below average

- International air passenger traffic, measured in revenue passenger kilometres (RPK) saw a similar pattern to that of international arrivals, with a 4.3% increase through September 2019, according to the **International Air Transport Association (IATA)**. All regions contributed positively to this result.
- However, the growth pace is below the long-term average of 5.5% and reflects a weaker global economy, a lower business confidence, a declining world trade activity and various political and geopolitical tensions.
- Data by **ForwardKeys** shows that international departures based on air bookings in January-October 2019 held up well (+5%), with departures from Asia and the Pacific and Africa showing the highest growth among world regions.
- Expected international departures worldwide for the period November 2019-January 2020 remain particularly strong (+10%).



### More moderate growth in tourism demand amid uncertainties

- The global economy is slowing down sharply according to the International Monetary Fund's *World Economic Outlook* update of October 2019. Economic growth is expected to be at 3% in 2019, its lowest level since 2008-09 (0.3% down from the April 2019 WEO forecast).
- Among advanced economies, the weakening has been broad based, affecting major economies (the United States and especially the euro area) and smaller Asian advanced economies. The slowdown in activity has been even more pronounced across emerging market and developing economies, including Brazil, China, India, Mexico, and Russia.
- Uncertainty from Brexit and the slight depreciation of the pound sterling are prompting a wait-and-see attitude from British tourists which is affecting travel bookings to some EU destinations. While the ultimate form of Brexit remains uncertain, Brexit extension provides certainty that all existing travel arrangements with EU will continue until at least 31 January 2020, according to the Association of British Travel Agents (ABTA) latest update.
- The collapse of major British travel group Thomas Cook and of several small European airlines has disrupted some tourism flows, though other travel service providers have moved in to absorb the current demand and offset, at least partly, the decline in capacity.
- The failure of Thomas Cook on 26 September 2019 left stranded 600,000 travelers around the world, including 150,000 Britons. According to data provided by Mabrian Technologies, 38 countries were affected, particularly in Europe and the

Americas, and more than 8.6 million flight seats would be cancelled from September 2019 until the end of August 2020, according to the inbound flight seats scheduled by Thomas Cook. By countries, the United Kingdom, Spain, Turkey, Greece, the United States and Tunisia would be the most affected by the failure of the world's oldest travel firm.

- Many of the affected countries introduced emergency measures to support business and workers affected by the demise of the company, including tax waivers and credit lines.



#### Outlook for International Tourist Arrivals

|                      | Change      |             | 2018*       | average     | 2019 Projection   |
|----------------------|-------------|-------------|-------------|-------------|-------------------|
|                      | 2016        | 2017        |             | a year      | (issued January)  |
|                      | 2016        | 2017        | 2018*       | 2008-2018   | from              |
| <b>World</b>         | <b>3.8%</b> | <b>7.2%</b> | <b>5.6%</b> | <b>4.2%</b> | <b>+3% to +4%</b> |
| Europe               | 2.5%        | 8.8%        | 5.8%        | 3.7%        | +3% to +4%        |
| Asia and the Pacific | 7.7%        | 5.7%        | 7.3%        | 6.5%        | +5% to +6%        |
| Americas             | 3.7%        | 4.7%        | 2.4%        | 3.8%        | +2% to +3%        |
| Africa               | 7.8%        | 8.5%        | 8.5%        | 4.5%        | +3% to +5%        |
| Middle East          | -4.8%       | 3.9%        | 3.4%        | 1.4%        | +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*                                      |            |            |            |            |            |            |            |
|                                 | 2005                          | 2010         | 2015         | 2017         | 2018*        | 2018*       | 17/16      | 18*/17     | YTD  | Q1         | Q2         | Q3         | Jun.       | Jul.       | Aug.       | Sep.       |
| <b>World</b>                    | <b>809</b>                    | <b>952</b>   | <b>1,197</b> | <b>1,332</b> | <b>1,407</b> | <b>100</b>  | <b>7.2</b> | <b>5.6</b> | <b>4.0</b>                                 | <b>3.3</b> | <b>5.5</b> | <b>3.2</b> | <b>6.5</b> | <b>3.5</b> | <b>3.4</b> | <b>2.7</b> |
| Advanced economies <sup>1</sup> | 470                           | 515          | 655          | 732          | 762          | 54.1        | 6.5        | 4.1        | 2.3  | 2.0        | 4.0        | 1.2        | 4.7        | 1.8        | 1.0        | 0.8        |
| Emerging economies <sup>1</sup> | 340                           | 437          | 542          | 600          | 645          | 45.9        | 8.0        | 7.5        | 6.0  | 4.6        | 7.4        | 6.0        | 9.1        | 5.9        | 6.7        | 5.2        |
| <i>By UNWTO regions:</i>        |                               |              |              |              |              |             |            |            |  |            |            |            |            |            |            |            |
| <b>Europe</b>                   | <b>452.9</b>                  | <b>487.0</b> | <b>606.6</b> | <b>676.6</b> | <b>715.7</b> | <b>50.9</b> | <b>8.8</b> | <b>5.8</b> | <b>3.4</b>                                 | 2.3        | 4.8        | 2.9        | 6.4        | 2.6        | 3.7        | 2.5        |
| Northern Europe                 | 54.9                          | 57.0         | 70.1         | 79.1         | 79.1         | 5.6         | 6.9        | -0.1       | 1.3  | 0.4        | 0.6        | 2.2        | 5.5        | 1.6        | 4.0        | 0.5        |
| Western Europe                  | 141.7                         | 154.4        | 181.5        | 192.7        | 200.2        | 14.2        | 6.1        | 3.9        | 1.0  | -1.8       | 4.7        | -0.3       | 6.5        | -0.5       | 0.1        | -0.6       |
| Central/Eastern Eur.            | 95.3                          | 98.6         | 123.5        | 136.9        | 147.7        | 10.5        | 6.2        | 7.9        | 3.8  | 4.9        | 4.5        | 2.8        | 4.9        | 2.3        | 3.4        | 2.6        |
| Southern/Medit. Eur.            | 161.1                         | 177.1        | 231.4        | 267.9        | 288.8        | 20.5        | 12.9       | 7.8        | 5.5  | 5.1        | 6.1        | 5.2        | 7.1        | 5.0        | 6.0        | 4.6        |
| - of which EU-28                | 367.6                         | 382.4        | 478.9        | 540.5        | 562.4        | 40.0        | 7.9        | 4.1        | 2.4  | 1.6        | 3.6        | 1.9        | 5.2        | 1.3        | 2.7        | 1.5        |
| <b>Asia and the Pacific</b>     | <b>154.1</b>                  | <b>208.2</b> | <b>284.6</b> | <b>324.1</b> | <b>347.7</b> | <b>24.7</b> | <b>5.7</b> | <b>7.3</b> | <b>5.4</b>                                 | 6.2        | 7.4        | 2.8        | 6.9        | 5.4        | 0.6        | 2.3        |
| North-East Asia                 | 85.9                          | 111.5        | 142.1        | 159.5        | 169.2        | 12.0        | 3.4        | 6.1        | 4.7  | 8.2        | 8.1        | -1.9       | 8.0        | 4.8        | -6.8       | -3.8       |
| South-East Asia                 | 49.0                          | 70.5         | 104.2        | 120.6        | 128.6        | 9.1         | 8.8        | 6.7        | 6.3  | 4.3        | 6.3        | 8.5        | 5.5        | 7.3        | 8.8        | 9.4        |
| Oceania                         | 10.9                          | 11.5         | 14.3         | 16.6         | 17.1         | 1.2         | 6.1        | 3.1        | 1.9  | -0.3       | 3.6        | 3.0        | 0.9        | 2.1        | 4.6        | 2.3        |
| South Asia                      | 8.3                           | 14.7         | 24.0         | 27.5         | 32.8         | 2.3         | 6.2        | 19.4       | 7.5  | 8.2        | 10.2       | 4.8        | 10.2       | 2.1        | 5.6        | 6.6        |
| <b>Americas</b>                 | <b>133.3</b>                  | <b>150.3</b> | <b>194.0</b> | <b>210.7</b> | <b>215.7</b> | <b>15.3</b> | <b>4.7</b> | <b>2.4</b> | <b>2.0</b>                                 | -0.6       | 4.1        | 2.6        | 3.5        | 3.0        | 2.7        | 1.9        |
| North America                   | 89.9                          | 99.5         | 127.8        | 137.1        | 142.2        | 10.1        | 4.3        | 3.7        | 2.2  | -1.1       | 3.5        | 3.6        | 3.4        | 4.3        | 2.9        | 3.7        |
| Caribbean                       | 18.8                          | 19.5         | 24.1         | 26.0         | 25.8         | 1.8         | 3.1        | -0.9       | 7.6  | 15.0       | 8.2        | -1.3       | 0.1        | -2.3       | 1.0        | -3.2       |
| Central America                 | 6.3                           | 7.8          | 10.2         | 11.1         | 10.9         | 0.8         | 4.6        | -2.0       | 2.0  | -2.1       | 5.5        | 3.5        | 7.5        | 5.2        | 2.2        | 3.0        |
| South America                   | 18.3                          | 23.5         | 31.8         | 36.4         | 36.9         | 2.6         | 7.7        | 1.2        | -2.7                                       | -7.8       | 2.9        | -0.1       | 5.6        | 0.3        | 3.1        | -3.8       |
| <b>Africa</b>                   | <b>34.8</b>                   | <b>50.4</b>  | <b>53.9</b>  | <b>63.0</b>  | <b>68.4</b>  | <b>4.9</b>  | <b>8.5</b> | <b>8.5</b> | <b>4.6</b>                                 | 3.2        | 6.5        | 4.1        | 10.4       | 5.2        | 4.0        | 2.8        |
| North Africa                    | 13.9                          | 19.7         | 18.0         | 21.7         | 23.9         | 1.7         | 14.7       | 10.1       | 9.8  | 9.0        | 11.8       | 9.0        | 20.0       | 12.4       | 4.4        | 10.9       |
| Subsaharan Africa               | 20.8                          | 30.7         | 35.9         | 41.3         | 44.5         | 3.2         | 5.5        | 7.7        | 1.4  | 0.7        | 3.5        | 0.3        | 4.4        | -1.2       | 3.6        | -1.7       |
| <b>Middle East</b>              | <b>34.0</b>                   | <b>56.1</b>  | <b>58.3</b>  | <b>57.6</b>  | <b>59.6</b>  | <b>4.2</b>  | <b>3.9</b> | <b>3.4</b> | <b>9.3</b>                                 | 7.8        | 8.6        | 11.6       | 15.4       | 9.4        | 12.9       | 11.7       |

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(Data as collected by UNWTO, November 2019)

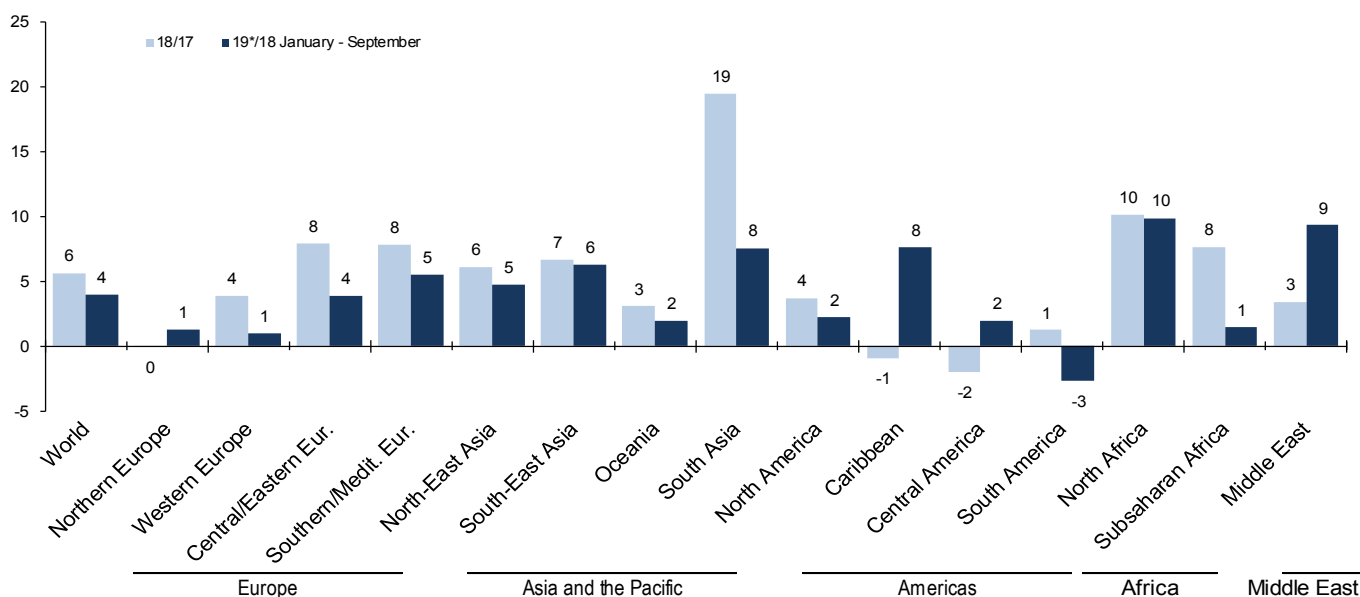
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<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at [www.imf.org/external/ns/cs.aspx?id=29](http://www.imf.org/external/ns/cs.aspx?id=29).

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

International Tourist Arrivals

(% change over same period of the previous year)



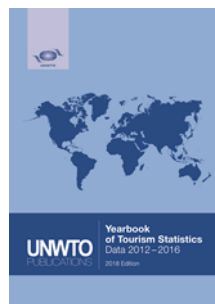
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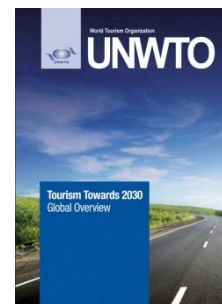
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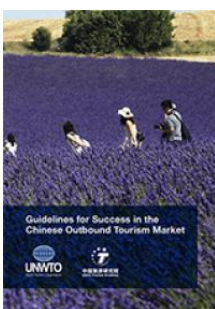
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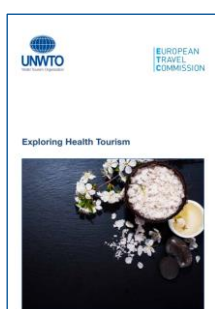
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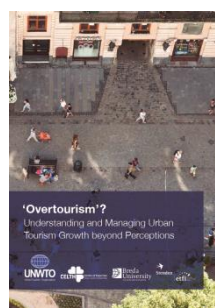
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