Communications and External Outreach
Delegation of the Ministry of Tourism and Culture of Gambia - Working visit to UNWTO
2019 International Tourism Results and Outlook
It’s the economy

Weakening growth

GDP = +3.6% in 2018 vs +3.3% in 2019 (IMF)
Advanced economies: 2.2% in 2018 vs 1.8% in 2019
Emerging economies: 4.5% in 2018 vs 4.4% in 2109

Exchange rates

USD ↑ € ↑ YEN ↑ USD

Monetary expansion

Low interest rates
Risks

Brexit
Trade tensions
Economic slowdown in advanced economies
Rising oil prices
Man-made and natural crises
**Global Tourism Trends**

**Air Transport**
- More capacity: +4.6% YTD April 2019 (IATA)
- Slower demand (+5% vs +7% in 2018)
- Lower fares (-61% vs 1998)
- Weakening ROIC (fuel bill 25% of operating costs)

**Visa facilitation**
- UNWTO’s global visa openness index: from 31 in 2014 to 37 in 2018
- India, Uzbekistan, Saudi Arabia, Qatar, Argentina…

**FDI in Tourism**
- Up in all regions but Asia in 2017 (FT)

**Distribution**
- Consolidation and emergence of digital giants
To Watch

International tourist arrivals & spending continue to outpace economy

Desire for unique experiences & ‘transformation’
Gastronomy, wellness, adventure, ‘solo travel’, ‘new luxury’

Urban tourism keeps growing
Up in 19 out of the 20 major city destinations (Mastercard)

Cruises on the rise
+7% = 28.2 million passengers – 30 million for 2019
(Top USA + China + Germany) (CLIA)
Changing patterns

Rising awareness (zero plastics)

Climate change

Tourism emissions: air travel ‘shaming’

Managing growth and impacts in cities

UNWTO Baseline Report
1.4 billion (+6%)  
International Tourist Arrivals  
2 Years ahead of forecast

USD 1.7 trillion in Exports (+4%)  
USD 5 billion a day
Outpacing the world economy

Growth in international tourism receipts and world GDP (%)

Source: World Tourism Organization (UNWTO) and International Monetary Fund (IMF)
Middle East and Asia Pacific lead

International Tourist Arrivals (% change)

Source: World Tourism Organization (UNWTO) ©
*Provisional data
### World's Top 10 Spenders

<table>
<thead>
<tr>
<th>Country</th>
<th>Spend (USD billion)</th>
<th>% Change over 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>277</td>
<td>+5%</td>
</tr>
<tr>
<td>United States</td>
<td>144</td>
<td>+7%</td>
</tr>
<tr>
<td>Germany</td>
<td>94</td>
<td>+1%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>76</td>
<td>+3%</td>
</tr>
<tr>
<td>France</td>
<td>48</td>
<td>+11%</td>
</tr>
<tr>
<td>Australia</td>
<td>37</td>
<td>+10%</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>35</td>
<td>+11%</td>
</tr>
<tr>
<td>Canada</td>
<td>33</td>
<td>+4%</td>
</tr>
<tr>
<td>Korea (ROK)</td>
<td>32</td>
<td>+1%</td>
</tr>
<tr>
<td>Italy</td>
<td>30</td>
<td>+4%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) ©
Europe:
Southern Mediterranean leads

- Positive results in all subregions led by Southern Mediterranean & Central / Eastern Europe
- UK bookings slow due to Brexit, but many Mediterranean destinations saw British arrivals pick up
- New routes offset bankruptcy of several airlines; air bookings up 5%
- Visa facilitation = growth of Chinese tourists in some Central and Eastern European destinations
- Record hotel pipeline in 2018
Asia Pacific: strong start of the year

- Growth led by North-East Asia, followed by South Asia and South-East Asia vs flat results in Oceania
- Chinese outbound up 12% during Chinese New Year
- High-speed train development and the promotion of the Greater Bay Area continued to fuel growth
- G20 and Rugby World Cup in Japan

+6% Q1 2019
Caribbean rebounded strongly (+17%) from the impact of hurricanes Irma and Maria (2017)

Strong growth in Central America and North America, but down in South America partly due to weaker outbound from Argentina

Strong US outbound (+7% spending Q1) fuelling arrivals growth in many destinations

Q1 2019

+3%
Africa: North Africa solid growth

- Strong results in North Africa led by Tunisia (+17%) and Morocco (+8%)
- Double-digit growth recorded by Kenya (+16%), thanks to improve security and more air connectivity, and Seychelles (+11%)
- Strong hotel pipeline in the final planning stage
Middle East: fastest growing region

• Saudi Arabia with double-digit growth (+13%), due to visa facilitation and the expansion of infrastructure

• Qatar, among the top 10 most visa open countries in the world, continues to recover thanks to visa facilitation, investments and marketing in a number of source markets

+8% Q1 2019
UNWTO Experts: more optimistic outlook for May-August 2019
<table>
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<tr>
<th>Region</th>
<th>Forecast</th>
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<tbody>
<tr>
<td>World</td>
<td>+3% to +4%</td>
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<tr>
<td>Europe</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Americas</td>
<td>+2% to +3%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+5% to +6%</td>
</tr>
<tr>
<td>Africa</td>
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</tr>
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<td>Middle East</td>
<td>+4% to +6%</td>
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110th Executive Council Session
Baku, Azerbaijan, 16-18 June 2019