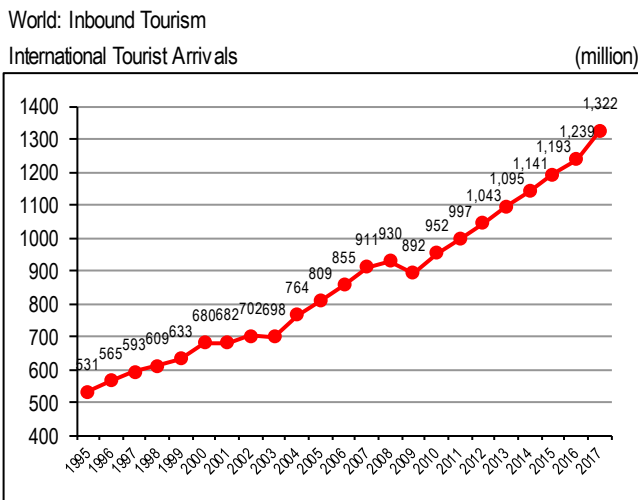




2017 International Tourism Results: the highest in seven years

International tourist arrivals grew by a remarkable 7% in 2017 to reach a total of 1,322 million, according to the preliminary full-year results reported in this issue of the *UNWTO World Tourism Barometer*. This strong momentum is expected to continue in 2018 at a rate of 4%-5%.



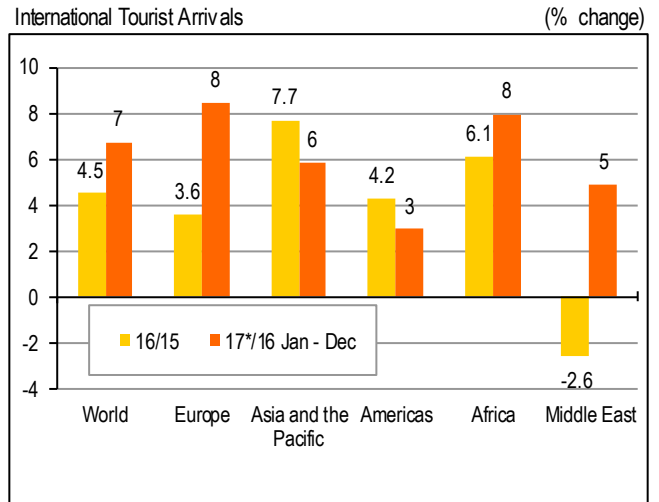
Source: World Tourism Organization (UNWTO) ©

Based on data reported by destinations around the world, it is estimated that international tourist arrivals (overnight visitors) worldwide increased 7% in 2017. This is well above the sustained and consistent trend of 4% or higher growth since 2010 and represents the strongest results in seven years.

Led by Mediterranean destinations, Europe recorded extraordinary results for such a large and rather mature region, with 8% more international arrivals than in 2016. Africa consolidated its 2016 rebound with an 8% increase. Asia and the Pacific recorded 6% growth, the Middle East 5% and the Americas 3%.

2017 was characterised by sustained growth in many destinations and a firm recovery in those that suffered decreases in previous years. Results were partly shaped by the global economic upswing and the robust outbound demand from many traditional and emerging source markets, particularly a rebound in tourism spending from Brazil and the Russian Federation after a few years of declines.

“International travel continues to grow strongly, consolidating the tourism sector as a key driver in economic development. As the third export sector in the world, tourism is essential for job creation and the prosperity of communities around the world.” said UNWTO Secretary-General Zurab Pololikashvili. “Yet as we continue to grow we must work closer together to ensure this growth benefits every member of every host community, and is in line with the Sustainable Development Goals”.



Source: World Tourism Organization (UNWTO) ©

[to be continued on page 4]

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This Advance Release and the accompanying Statistical Annex of the *UNWTO World Tourism Barometer* present preliminary full year results for international tourism in 2017 based on data for international overnight visitors reported by destinations around the world. In addition, this issue includes an outlook for 2018 based on current trends and the assessment by the UNWTO Panel of Tourism Experts. Furthermore, it presents an overview of booking trends for the first four months of 2018 based on business intelligence tool ForwardKeys.

This release is available only in electronic format. The full document can be downloaded free of charge for members and subscribed institutions through the UNWTO elibrary at www.e-unwto.org/toc/wtobarometereng/current. The release is available in English only, while the Statistical Annex is provided in four languages through the UNWTO elibrary at: English version: www.e-unwto.org/content/w83v37 French version: www.e-unwto.org/content/t73863 Spanish version: www.e-unwto.org/content/rn1422 Russian version: www.e-unwto.org/content/j62835

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO). By monitoring short-term tourism trends on a regular basis, UNWTO aims to provide all those involved, directly or indirectly, in tourism with adequate up-to-date statistics and analysis in a timely fashion.

The *UNWTO World Tourism Barometer* is periodically updated. Issues contain as regular sections: an overview of short-term tourism data from destinations, generating countries and air transport; the results of the latest survey among the UNWTO Panel of Tourism Experts, providing an evaluation of and prospects for short-term tourism performance; and selected economic data relevant for tourism. The objective for future editions of the *UNWTO World Tourism Barometer* will be to broaden its scope and improve coverage gradually over time.

The *UNWTO World Tourism Barometer* is prepared by UNWTO's Tourism Market Trends Programme. The UNWTO Secretariat wishes to express its sincere gratitude to all those who have participated in the elaboration of the *UNWTO World Tourism Barometer*, in particular all institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable contribution.

For more information on the *UNWTO World Tourism Barometer*, including copies of previous issues, please refer to the Facts & Figures section on the UNWTO website at mkt.unwto.org.

We welcome your comments and suggestions at barom@unwto.org, tel.: +34 915678198 / fax: +34 915713733.



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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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World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain
Tel (34) 91 567 81 00 / Fax (34) 91 571 37 33
barom@unwto.org

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Data collection for this issue was closed mid-January 2018.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results by country is scheduled for March.



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The UNWTO World Tourism Barometer is developed as a service for UNWTO Members and published six times a year in English with a Statistical Annex also in French, Spanish and Russian. Member States, Associate and Affiliate Members receive copies of the Barometer as part of our Member services.

If you are interested in receiving the UNWTO World Tourism Barometer and you are not a UNWTO Member, you can subscribe to the six issues in electronic version (€ 120), printed version (€ 140) or both (€ 150). You can also have your single copy at € 35.

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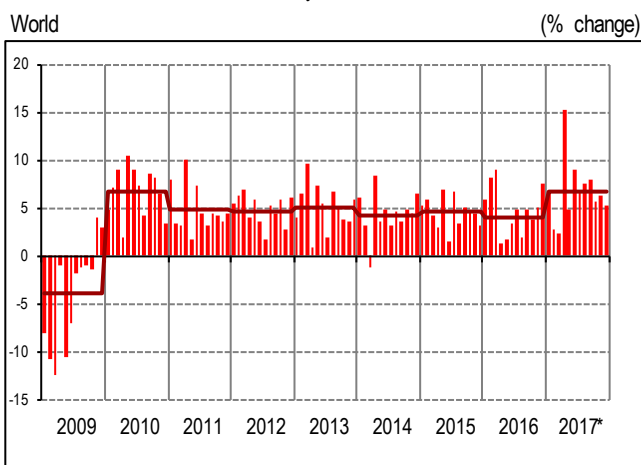


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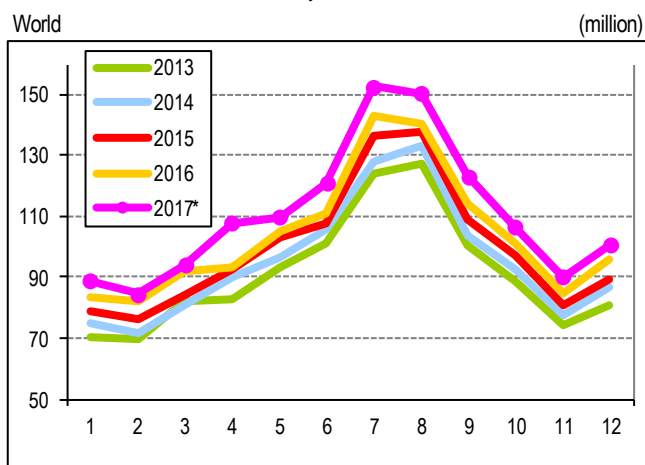
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International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Full year						Share	Change Monthly/quarterly data series															
								(percentage change over same period of the previous year)															
	2000	2005	2010	2015	2016	2017*		2017*	16/15	17*/16	2017*				2016								
	(million)					(%)	(%)	(%)	Q1	Q2	Q3	Q4	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	
World	680	809	952	1,193	1,239	1,322	100	3.9	6.7	3.8	9.4	7.3	5.7	6.7	7.4	7.9	5.7	6.2	5.2	7.7	2.1	3.7	5.4
Advanced economies ¹	430	469	515	654	686	724	54.8	4.8	5.7	4.2	8.5	5.7	3.6	4.4	5.5	7.5	3.5	4.1	3.2	9.2	3.9	5.1	7.4
Emerging economies ¹	250	339	437	539	554	597	45.2	2.7	7.9	3.5	10.6	9.7	8.0	10.3	10.3	8.3	8.6	8.3	7.1	6.2	-0.2	1.7	3.3
<i>By UNWTO regions:</i>																							
<i>Europe</i>	392.9	452.7	487.5	604.9	619.3	671.1	50.8	2.4	8.4	4.5	11.7	9.6	5.3	8.8	9.1	11.3	5.7	5.1	4.8	8.1	1.1	2.2	5.8
Northern Europe	44.8	54.7	56.6	69.8	73.8	77.6	5.9	5.8	5.1	7.8	8.6	3.0	2.0	3.0	3.2	2.8	2.2	2.0	1.8	10.3	2.4	5.1	7.5
Western Europe	139.7	141.7	154.4	181.5	181.5	193.4	14.6	0.0	6.6	2.1	12.3	6.6	3.2	4.8	7.3	8.4	3.5	3.1	3.0	6.3	-3.0	-1.6	5.3
Central/Eastern Eur.	69.6	95.3	98.5	122.2	126.9	133.3	10.1	3.9	5.0	3.9	6.3	5.5	4.1	5.5	5.9	5.2	3.8	4.1	4.4	5.0	3.6	3.8	1.0
Southern/Medit. Eur.	139.0	161.1	178.1	231.4	237.1	266.8	20.2	2.4	12.6	5.9	14.8	15.2	8.7	14.9	13.3	18.1	8.9	8.8	8.3	11.2	2.7	3.5	8.8
- of which EU-28	336.8	367.5	382.8	478.3	500.1	537.8	40.7	4.5	7.5	5.1	11.4	7.9	3.8	6.8	7.4	9.9	3.9	3.9	3.6	10.0	3.6	4.7	8.4
<i>Asia and the Pacific</i>	110.4	154.1	208.2	284.0	305.8	323.7	24.5	7.7	5.8	5.8	6.1	4.1	7.3	3.2	4.8	4.4	6.9	8.4	6.6	8.8	7.9	8.9	5.4
North-East Asia	58.3	85.9	111.5	142.1	154.3	159.3	12.0	8.6	3.2	5.3	2.3	0.9	4.6	0.2	0.9	1.5	3.6	6.5	3.9	8.9	8.6	10.3	6.8
South-East Asia	36.3	49.0	70.5	104.2	110.8	120.1	9.1	6.3	8.3	5.7	9.5	8.1	10.2	7.0	9.5	7.9	11.1	10.8	9.0	8.1	6.6	7.8	2.9
Oceania	9.6	10.9	11.5	14.3	15.6	16.6	1.3	9.4	6.5	4.8	11.7	5.3	5.4	5.3	8.7	1.8	5.0	5.5	5.6	9.9	9.3	10.6	8.0
South Asia	6.1	8.3	14.7	23.4	25.1	27.7	2.1	7.0	10.4	9.7	13.4	6.6	11.9	3.4	6.8	9.9	13.0	11.1	11.8	10.3	9.0	3.5	5.5
<i>Americas</i>	128.2	133.3	150.4	193.7	200.8	206.6	15.6	3.7	2.9	1.0	5.9	2.0	3.1	1.9	2.3	1.8	1.6	4.1	3.5	7.9	1.0	4.6	3.5
North America	91.5	89.9	99.5	127.5	130.9	133.0	10.1	2.7	1.6	-0.4	4.0	0.8	1.9	0.1	1.0	1.4	0.1	3.1	2.6	5.3	0.0	2.4	3.4
Caribbean	17.1	18.8	19.5	24.1	25.2	26.3	2.0	4.7	4.1	0.8	7.8	3.5	4.8	5.9	6.2	-4.5	5.9	5.1	3.9	7.2	3.2	5.0	2.3
Central America	4.3	6.3	7.8	10.2	10.7	11.1	0.8	4.9	3.7	0.8	10.3	1.8	2.6	0.7	0.6	5.3	-0.3	2.7	4.5	9.6	2.9	6.4	0.6
South America	15.3	18.3	23.6	31.9	33.9	36.2	2.7	6.4	6.7	4.5	11.4	6.7	6.2	7.5	6.0	6.4	5.6	7.5	5.6	15.1	3.3	15.3	5.6
<i>Africa</i>	26.2	34.8	50.4	53.5	57.6	62.1	4.7	7.6	7.8	4.6	10.0	8.6	8.4	8.5	10.1	7.0	8.7	8.1	8.3	6.7	-0.7	8.8	8.9
North Africa	10.2	13.9	19.7	18.0	18.9	21.4	1.6	5.0	13.4	14.2	14.0	11.9	14.6	9.8	17.3	7.3	15.5	13.4	14.7	-4.8	-7.9	13.2	15.9
Subsaharan Africa	16.0	20.9	30.7	35.5	38.7	40.7	3.1	8.9	5.1	1.0	7.9	6.1	5.7	7.2	4.4	6.9	5.6	6.0	5.4	11.6	3.4	5.7	6.1
<i>Middle East</i>	22.4	33.7	55.4	57.0	55.6	58.3	4.4	-2.4	4.8	-1.7	10.9	4.8	6.5	7.1	8.1	0.4	10.5	7.3	3.7	0.4	-8.2	-6.9	5.3

Source: World Tourism Organization (UNWTO) ©

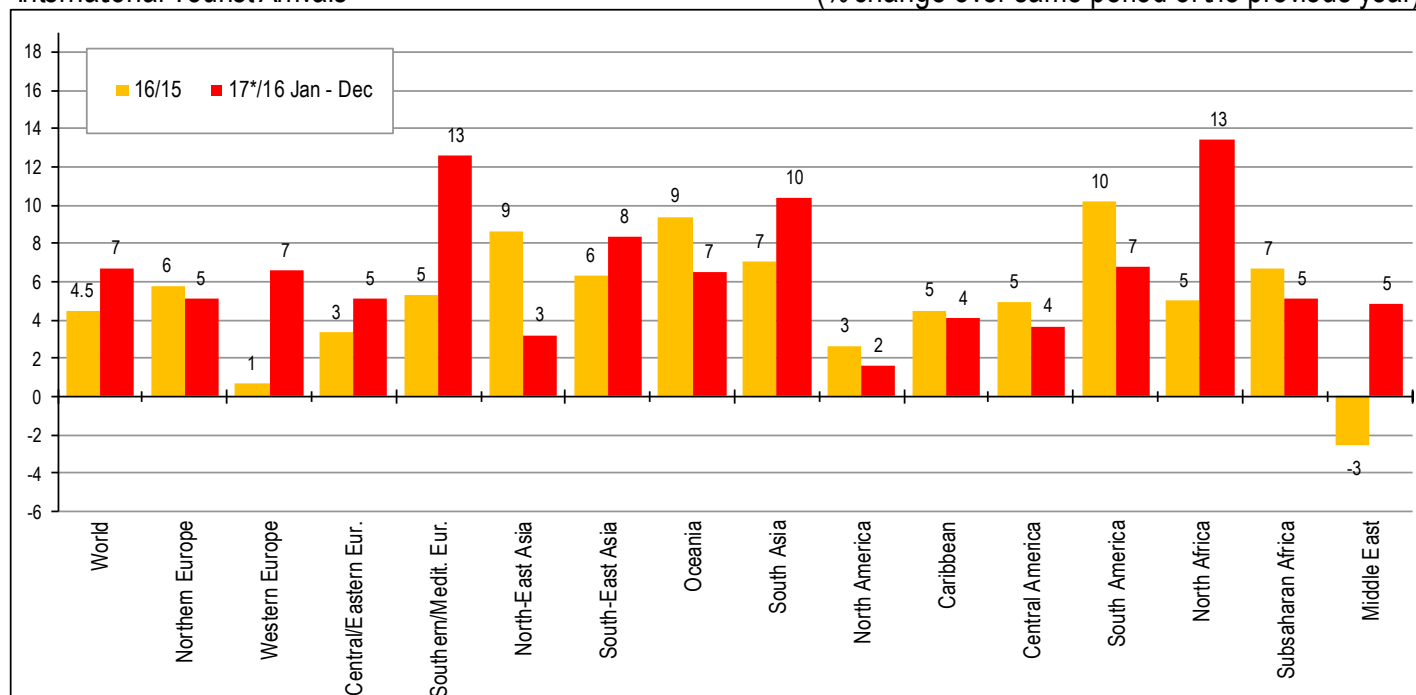
(Data as collected by UNWTO January 2018)

¹ 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.

See box at page 'Annex-1' for explanation of abbreviations and signs used

International Tourist Arrivals (% change over same period of the previous year)



Source: World Tourism Organization (UNWTO) ©

Outlook for International Tourist Arrivals

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017*	average	projection 2018*
	real, change										a year	(issued January)
	full year					Jan.-Dec.					2005-2016	between
World	2.0%	-4.0%	6.7%	4.7%	4.7%	4.9%	4.3%	4.6%	3.9%	6.7%	4.0%	+4% and +5%
Europe	0.4%	-5.3%	3.0%	6.4%	3.8%	5.1%	2.0%	4.7%	2.4%	8.4%	2.9%	+3.5% and +4.5%
Asia and the Pacific	1.4%	-1.4%	13.4%	6.5%	7.3%	6.8%	6.0%	5.4%	7.7%	5.8%	6.4%	+5% and +6%
Americas	2.7%	-4.9%	6.7%	3.6%	4.4%	3.6%	8.5%	5.9%	3.7%	2.9%	3.8%	+3.5% and +4.5%
Africa	2.9%	4.5%	9.3%	-0.7%	4.6%	4.5%	0.9%	-3.1%	7.6%	7.9%	4.7%	+5% and +7%
Middle East	20.0%	-5.4%	14.6%	-9.3%	2.6%	-1.5%	9.9%	2.0%	-2.4%	4.9%	4.7%	+4% and +6%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2018)

[Continuation from page 1]

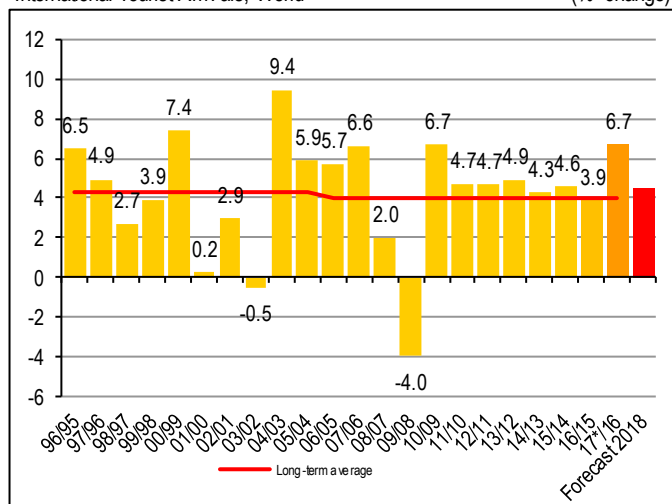
Growth expected to continue in 2018

The current strong momentum is expected to continue in 2018, though at a more sustainable pace after eight years of steady expansion following the 2009 economic and financial crisis. Based on current trends, economic prospects and the outlook by the UNWTO Panel of Experts, UNWTO projects international tourist arrivals worldwide to grow at a rate of 4%-5% in 2018. This is somewhat above the 3.8% average increase projected for the period 2010-2020 by UNWTO in its Tourism Towards 2030 long-term forecast. Europe and the Americas are both expected to grow by 3.5%-4.5%, Asia and the Pacific by 5%-6%, Africa by 5%-7% and the Middle East by 4%-6%.

2017 results by UNWTO region

International tourist arrivals in Europe reached 671 million in 2017, a remarkable 8% increase following a comparatively weaker 2016. Growth was driven by the extraordinary results in Southern and Mediterranean Europe (+13%). Western Europe

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

(+7%), Northern Europe and Central and Eastern Europe (both +5%) also recorded robust growth.

Asia and the Pacific (+6%) recorded 324 million international tourist arrivals in 2017. Arrivals in South Asia grew 10%, in South-East Asia 8% and in Oceania 7%. Arrivals to North-East Asia increased by 3%.

The Americas (+3%) welcomed 207 million international tourist arrivals in 2017, with most destinations enjoying positive results. South America (+7%) led growth, followed by Central America and the Caribbean (both +4%), with the latter showing clear signs of recovery in the aftermath of hurricanes Irma and Maria. In North America (+2%), robust results in Mexico and Canada contrasted with a decrease in the United States, the region's largest destination.

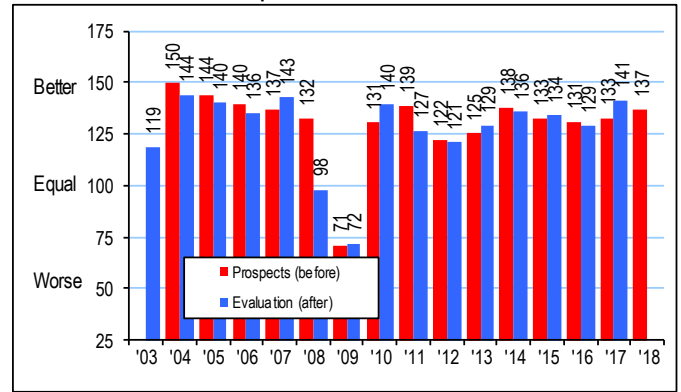
Based on available data for Africa, growth in 2017 is estimated at 8%. The region consolidated its 2016 rebound and reached a record 62 million international arrivals. North Africa enjoyed a strong recovery with arrivals growing by 13%, while in Sub-Saharan Africa arrivals increased by 5%.

The Middle East (+5%) received 58 million international tourist arrivals in 2017 with sustained growth in some destinations and a strong recovery in others.

Note: All results in this release are based on preliminary data, as reported by the various destinations around the world, and on estimates by UNWTO of still-missing data. UNWTO will continue to collect data and will present more comprehensive data by country in the April issue of the *UNWTO World Tourism Barometer*. Results for both Africa and the Middle East should be read with caution as they are based on limited available data.

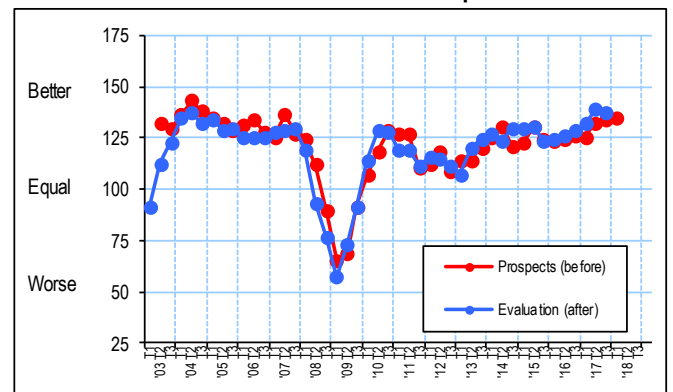
[See also on pages 7-18 and the Statistical Annex for data tables and graphs]

UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

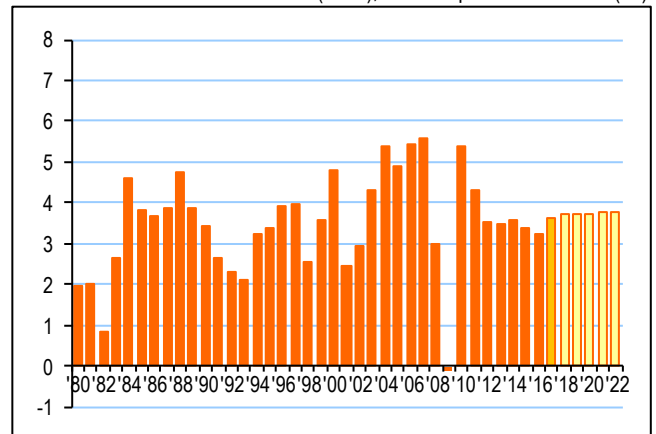
UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

World

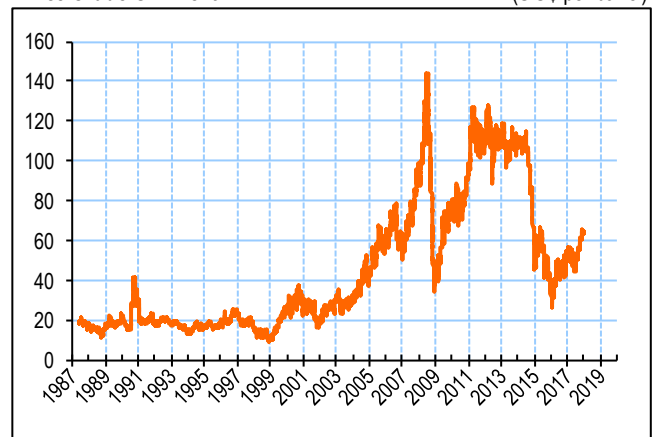
Growth of Gross Domestic Product (GDP), constant prices (%)



Source: International Monetary Fund

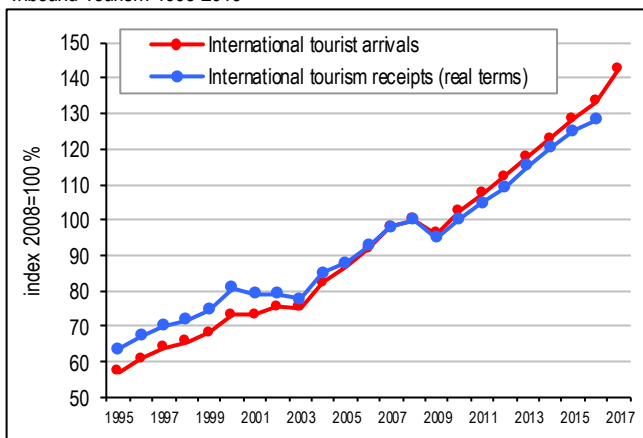
Price Crude Oil Brent

(US\$ per barrel)



Source: US Department of Energy, Energy Information Administration

Inbound Tourism 1995-2016



Source: World Tourism Organization (UNWTO) ©

The detailed information in the continuation of the *UNWTO World Tourism Barometer* and its Statistical Annex is not included in the complimentary excerpt of this document.

The full document is available in electronic format for sale and free of charge for UNWTO members and subscribed institutions through the UNWTO elibrary at www.e-unwto.org/content/w83v37.

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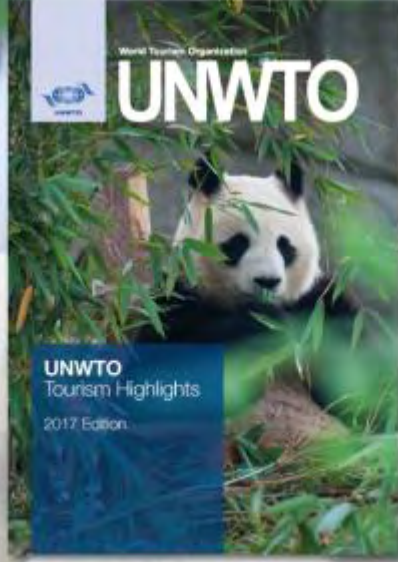

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UNWTO Elibrary
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UNWTO Tourism Highlights 2017 Edition

UNWTO has released its *UNWTO Tourism Highlights, 2017 Edition*, presenting a concise overview of international tourism in the world based on the results of the year 2016.

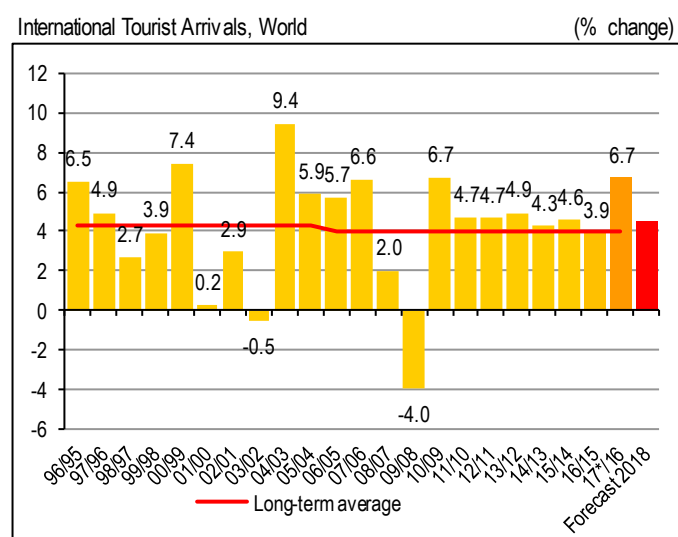
UNWTO Tourism Highlights aims to provide a consolidated set of key figures and trends for international tourism in the year prior to its date of publication. The 2017 Edition presents in 16 pages a snapshot of international tourism in the world for 2016 based on the latest available information collected from national sources. Trends and results are analysed for the world, regions and major regional destinations, with statistics included on international tourist arrivals and international tourism receipts. Furthermore, it provides the ranking of top tourism destinations by arrivals and receipts, as well as information on outbound tourism generating regions and a list of top source markets in terms of spending.

Electronic copies can be downloaded in English, Spanish, French and Japanese free of charge from mkt.unwto.org/highlights.

Inbound tourism: short-term trends 2017

Fastest growth in seven years

Based on data reported so far by destinations around the world, it is estimated that international overnight visitors worldwide grew close to 7% in 2017 compared to the same period last year. This is well above the sustained and consistent trend of 4% or higher growth since 2010 and represents the strongest results in seven years. 2017 is characterised by sustained growth in many destinations and a firm recovery in those that suffered declines in previous years, such as Turkey, Egypt, Tunisia, France and Belgium. This trend reflects robust demand for international tourism from most source markets reinforced by the improved world economy. The rebound of the outbound markets of Brazil and the Russian Federation after two years of decline also contributed to results.



Source: World Tourism Organization (UNWTO) ©

A total of 145 countries and territories (out of 220) have so far reported data on international tourist arrivals (overnight visitors) for at least three and up to all twelve months of 2017. Of these, 124 countries (86%) reported an increase in arrivals, with 64 (44%) reporting double-digit growth, while 21 countries (14%) posted a decrease. 122 countries have reported results for at least the first three quarters of 2016, of which 16 for the full year.

Based on this sample of destinations that reported data, it is estimated that destinations worldwide recorded 1322 million international tourist arrivals in 2017, some 83 million more than the 1239 million recorded in 2016. This corresponds to a robust 6.7% increase compared to 2016, well above the growth of 4% to 5% in previous years.

International arrivals have grown at a pace of 4% a year or higher for the eighth year in a row since post-crisis year 2010. In 2012, international tourist arrivals exceeded the 1 billion mark in a year for the first time. In 2017, this

number exceeded 1.3 billion and 392 million additional international tourist arrivals were counted compared to the 930 million of pre-crisis year 2008.

Growth led by Southern and Mediterranean Europe, North Africa and various destinations in the Middle East

Sustained and continuous growth in many destinations combined with the recovery of those suffering from security challenges in recent years boosted results in 2017. Growth in arrivals this year was also driven by the economic upswing, resulting in strong outbound demand from major source markets, in particular China, the United States, Australia, Canada, the Republic of Korea, Italy and Spain. The strong recovery in demand from Brazil and the Russian Federation after a few years of decline in terms of expenditure abroad also contributed to results.

By UNWTO regions, growth was strongest in Europe and Africa (both +8%), followed by Asia and the Pacific (+6%), the Middle East (+5%) and the Americas (+3%).

In particular, destinations in Southern and Mediterranean Europe and North Africa (both +13%), and various destinations in the Middle East (+5%) showed extraordinary strength. Growth in international arrivals exceeded 6% in all destinations of Southern and Mediterranean Europe, with a rapid recovery seen in Turkey and double-digit increases for most of the region's destinations. In North Africa and the Middle East, Egypt, Tunisia and Palestine rebounded strongly from previous years' declines, while Morocco, Bahrain, Jordan, Lebanon, Oman and the United Arab Emirate of Dubai all continued to report sustained growth.

Furthermore, European destinations in Western Europe (+7%), Northern Europe (+5%) and Central and Eastern Europe (+5%) also recorded solid results in 2017. Within Africa (+8%), Sub-Saharan Africa recorded 5% more arrivals.

South Asia (+10%) led growth in Asia and the Pacific (+6%), with South-East Asia (+8%) and Oceania (+7%) also growing firmly. Results in North-East Asia (+3%) were comparatively more mixed.

The Americas (+3%) continued to enjoy positive results across most destinations. South America (+7%), Central America and the Caribbean (both +4%) all showed solid results, while in North America (+2%), robust growth in Mexico and Canada was offset by a decrease in the United States, the region's largest destination.

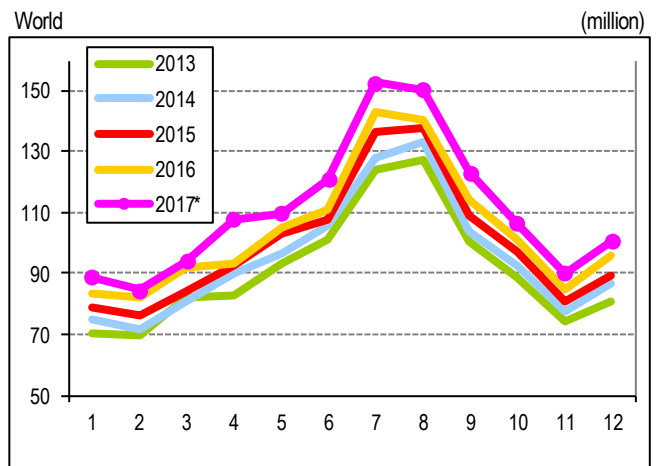
Continuous sustained growth throughout the year

The strong tourism demand was maintained throughout the year. In relative terms, growth was highest in April (+15%) and weakest in March (+2%) as the Easter period shifted from March in 2016 to April in 2017. February (+3%) was also comparatively weak, but had one day less than leap year 2016. In all remaining months, growth was between

5% (May) and 9% (June) compared to the same months of the previous year. The Northern Hemisphere summer peak season months of July and August are traditionally the busiest, with around 150 million visitors each for the first time ever this year.

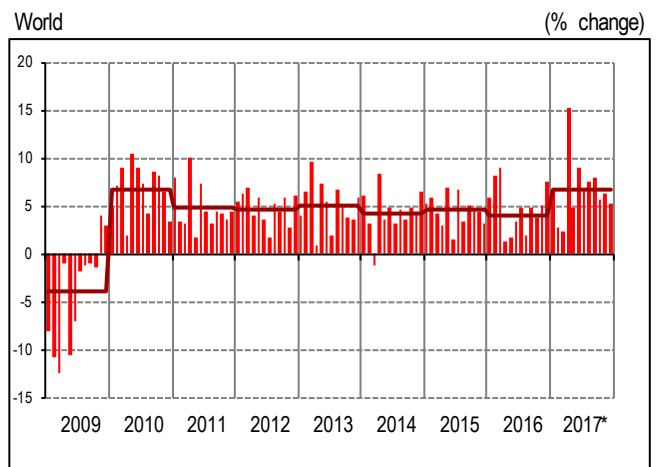
Note: All results presented in this issue are based on preliminary data as reported by the various destinations around the world and UNWTO estimates of still missing data. Updated information with more countries having reported full year results will be included in the next issue of the *UNWTO World Tourism Barometer* scheduled for March.

International Tourist Arrivals, monthly evolution



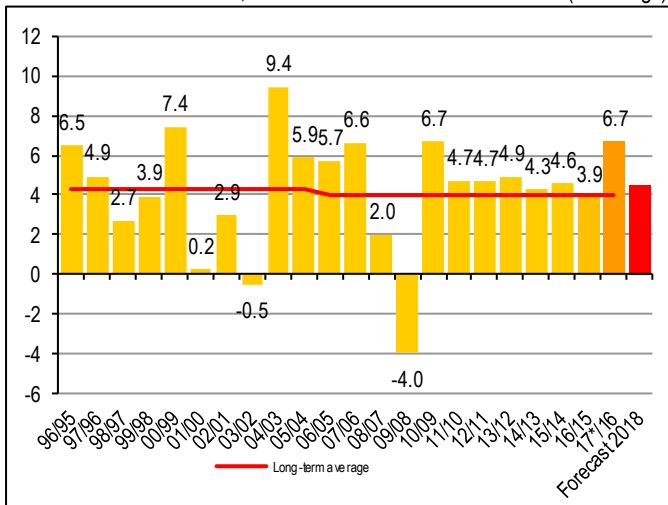
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, World (% change)



Source: World Tourism Organization (UNWTO) ©

Committee on Statistics and the Tourism Satellite Account

Eighteenth meeting

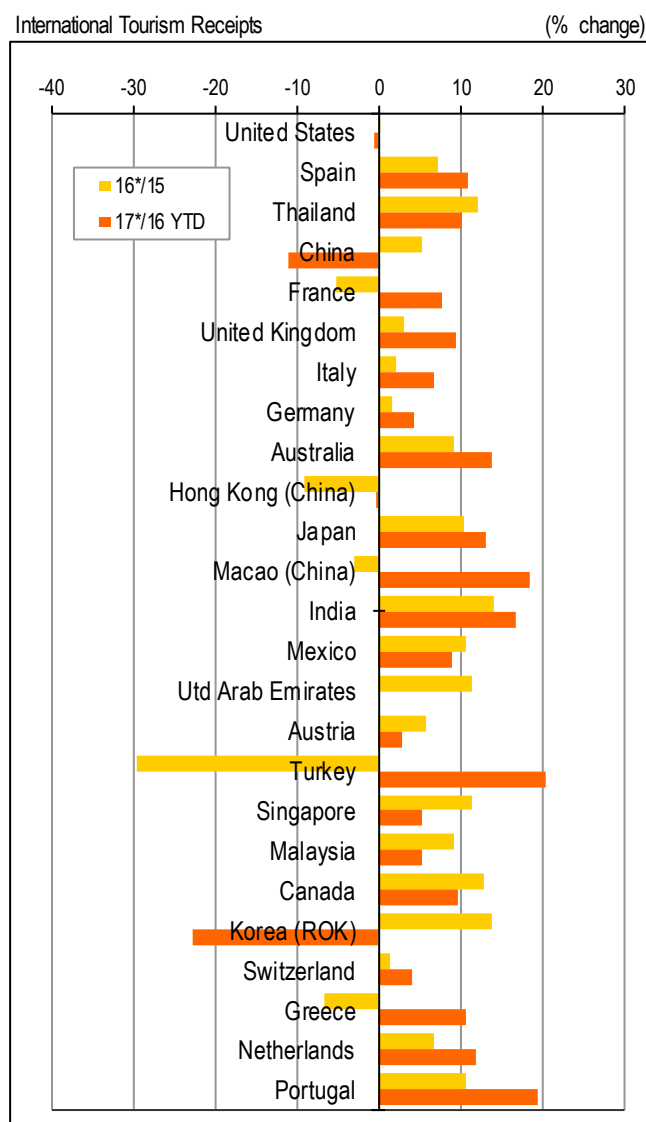
UNWTO Headquarters, Madrid, Spain. 27 - 28 February 2018

SAVE THE DATE!

International tourism receipts

Strong tourism receipts across world destinations

With the large majority of destinations having reported data on international tourism receipts for the first three quarters of 2017, year to date figures confirm the predominantly positive trend recorded in arrivals.



Source: World Tourism Organization (UNWTO) ©

- Preliminary monthly or quarterly international tourism receipts data for 2017 have been reported by 138 countries and territories so far, of which 106 at least for the first three quarters. Of these 138 destinations with data, a total of 114 recorded growth in earnings (83%), compared to the same period last year (in local currencies at current prices), of which 62 in double digits (45%), while 24 (17%) posted declines.
- Only one country (Vietnam) so far has reported preliminary results for the full year, as the majority of countries compile receipts data on a quarterly basis and reporting tends to lag about two months behind

arrivals data. Most destinations will have reported full year data by April and UNWTO will analyse and release comprehensive 2017 results on international receipts in the corresponding issue of the *UNWTO World Tourism Barometer*.

- Overall, data reported indicates that earnings followed the solid trend seen in international arrivals. The median increase was 8%.
- Most of the world's top 10 tourism earners reported strong results this part of 2017, led by Australia (the world's 9th largest earner) which recorded 14% growth in receipts through November compared to the same period of 2016. Spain (the world's second largest earner) posted 11% growth through October, while Thailand (3rd largest earner) and the United Kingdom (6th) both reported a 10% increase in the first three quarters of the year.
- France (5th largest earner) rebounded after two years of declines, with an increase of 8%, while Italy (7th) enjoyed 7% growth and Germany (8th) 4%. The United States and Hong Kong (China), the world's top and 10th largest earners respectively, both recorded flat results. The remaining destination in the top 10, China (4th) reported an 11% decline this period.
- Many destinations beyond the top 10 enjoyed solid growth in receipts in the first three to twelve months of 2017, mostly in line with the trend in arrivals. The Philippines reported a strong 24% increase after weaker results in 2016. Turkey (+20%) and the Russian Federation (+19%) also rebounded strongly after some years of declines, as did Macao (China) with an 18% increase in tourism earnings. Portugal (+19%) enjoyed its fourth straight year of double-digit growth and India (+17%) its eighth. Israel and Indonesia both reported 15% growth in earnings, Sweden and Qatar both 14%, Japan 13% and the Netherlands 12%. Poland and Greece both posted 11% growth, while Croatia and Canada both recorded 10% growth in earnings. Other top performers this period were Mexico (+9%), Colombia and the Dominican Republic (both +8%), Vietnam and Morocco (both +7%).

Note that some of this data is likely to be revised later in the year.

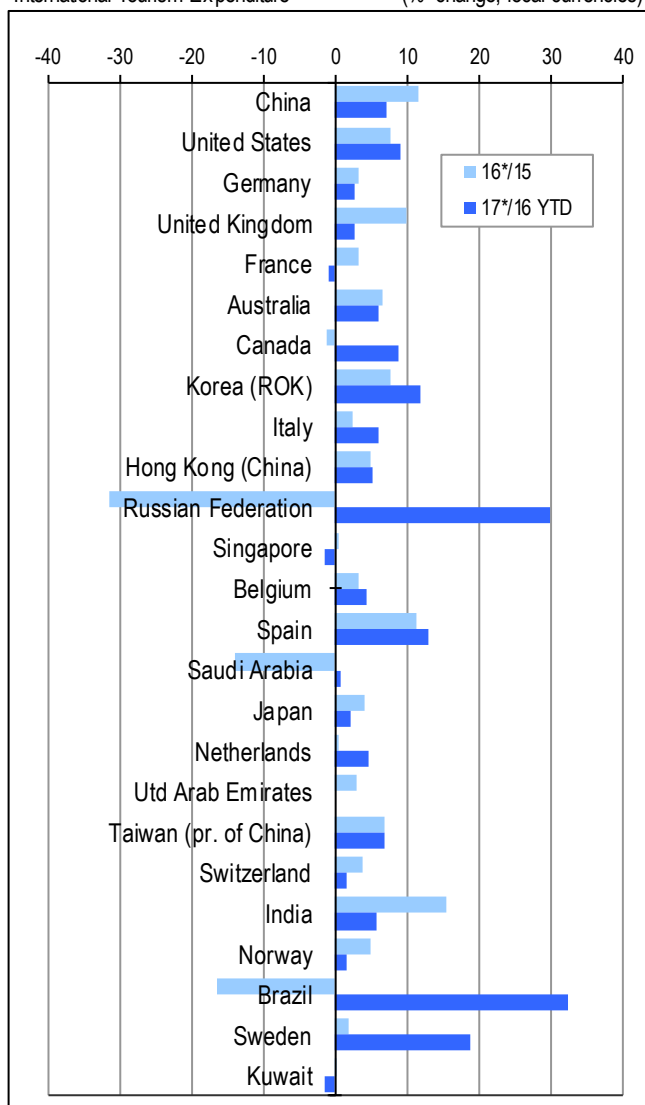
For a full list of the 50 top spenders see tables on pages 11-12 of the Statistical Annex. For other countries and territories with available data see the tables on the regions on pages 16-24.

International tourism expenditure

Growing tourism expenditure reflects strong tourism demand

Preliminary year-to-date results on international tourism expenditure, covering in most cases the first three quarters of the year, reflect growing demand for outbound travel from the world's major source markets in 2017. Spending data is largely consistent with the robust 7% increase in international arrivals so far last year. Results were partly shaped by the global economic upswing and the robust outbound demand from many traditional and emerging source markets, particularly a rebound in tourism spending from Brazil and the Russian Federation after a few years of declines.

International Tourism Expenditure (% change, local currencies)



Source: World Tourism Organization (UNWTO) ©

- A total of 48 of the top 50 outbound markets have so far reported preliminary data on international tourism expenditure for the first three to twelve months of 2017, of which 46 for at least the first nine months. Of the 48 reporting countries, 42 (88%) recorded an

increase in tourism spending (in local currencies, at current prices), 15 of which in double digits (31%), while 6 (13%) posted declines. The median increase was 6%.

- China, the world's top source market, reported 7% growth in tourism spending in the first nine months of 2017, compared to the same period in 2016. A strong increase through June contrasts with a decline in the third quarter, amid tighter capital controls, concerns about stability in some destinations and the promotion of domestic tourism.
- The United States, the world's second largest market, recorded 9% growth in international tourism spending through November 2017, fuelling much inbound growth in the Americas and beyond. Germany (3rd largest market) and the United Kingdom (4th largest) both reported 3% growth, while France (5th largest) posted a small decline (-1%).
- Of the remaining markets in the top 10, the Republic of Korea recorded 12% growth in expenditure through November, the highest in the group. Canada reported a 9% increase, rebounding after flat growth in 2016. Italy and Australia both recorded 6% growth, and Hong Kong (China) 5%.
- Beyond the top 10, spending returned to notable growth in Brazil (+33%) and the Russian Federation (+30%) after some years of declines. The come-back of Russian visitors is expected to have benefited many of their preferred destinations, but has in particular fuelled this year's recovery of Turkey, Egypt and Tunisia.
- Double-digit growth in spending was also reported by Iraq (+37% in Q1), Sweden (+19%), Argentina (+18%), Spain, Vietnam and Ukraine (all 13%), Portugal, the Czech Republic, Indonesia and Israel (all +12%), as well as Colombia and New Zealand (+11%).
- Other markets that showed robust demand for outbound travel this period were Lebanon (+8% through June), Taiwan (pr. of China), Finland and Ireland, which all reported 7% growth in international tourism expenditure.

As in the case of receipts, some of this expenditure data is likely to be revised.

For a full list of 50 top spenders see tables on pages 13-14 of the Statistical Annex.

Regional results

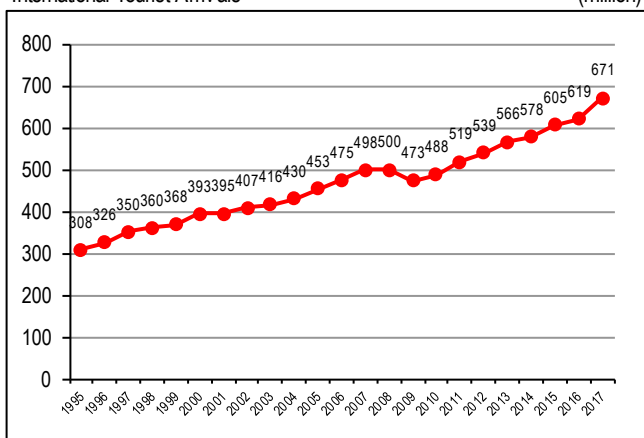
Remarkable growth in Europe, led by Southern and Mediterranean destinations

Europe recorded 671 million international tourist arrivals in 2017, just over half the world's total and 52 million more than in 2016. This represents an increase of 8%, a remarkable result for the world's most visited region, comprising many large and mature destinations. Growth was driven by a strong rebound in destinations that faced security incidents in 2016, such as Turkey, France and Belgium, as well as the sustained strength of many destinations. Southern and Mediterranean Europe, the world's most visited subregion, led this notable increase, welcoming 30 million additional arrivals (+13%) and reaching a total of 267 million. Western Europe (+7%) also recorded robust growth, while arrivals in both Northern Europe and Central and Eastern Europe grew by 5%. Virtually all major source markets showed strong demand for European destinations in 2017, both inside and outside the region. The recovery of the Russian outbound market also benefitted many European destinations.

Growth in 2017 was led by Southern and Mediterranean Europe with an extraordinary 13% increase in arrivals and all destinations reporting growth rates at least above 6%. Results were driven by the recovery of Turkey (+29%) and the continued strong growth of other major and emerging destinations. The subregion's largest destination Spain (+9%) reported 82 million arrivals in the full year 2017, about 7 million more than in 2016, an outstanding result for such a large base volume and following already sustained growth in previous years. Virtually all other destinations posted double-digit growth last year, including Israel (+25%), Portugal (+11%), Italy and Greece (both +10%), Balkan destinations FYR Macedonia (+23%), Bosnia and Herzegovina and Montenegro (both +19%), Serbia (+18%), Slovenia (+17%) and Croatia (+14%) and island destinations Malta (+16%) and Cyprus (+15%).

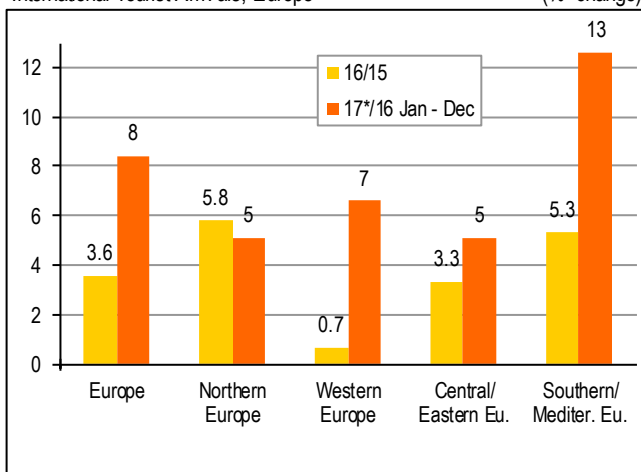
Europe: Inbound Tourism

International Tourist Arrivals (million)



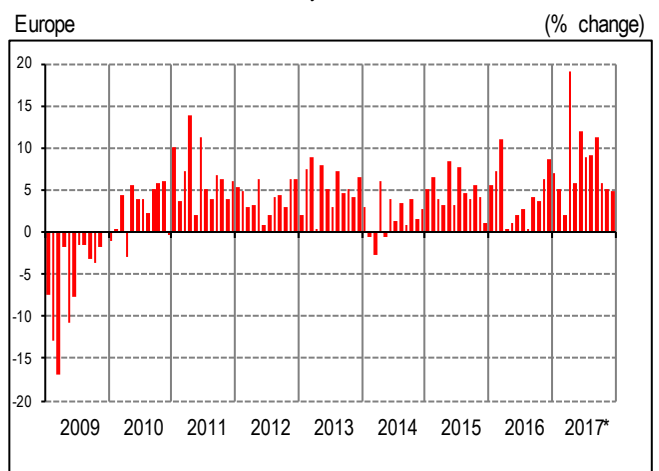
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, Europe (% change)



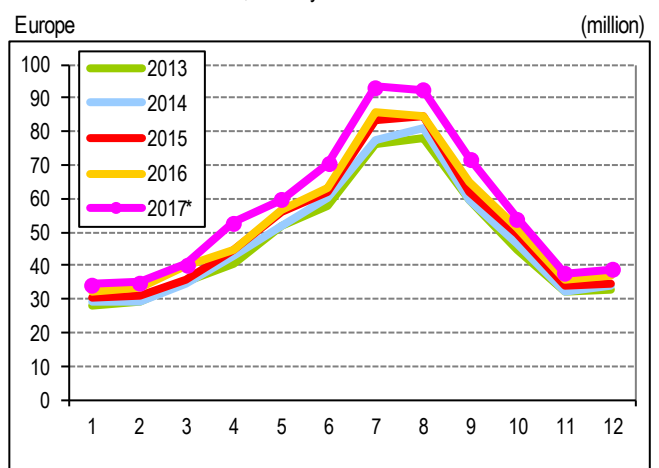
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Western Europe (+7%) also recorded robust growth, following flat results the previous year, led by Belgium (+12%) and top destination France (+8%) recovering from security threats in previous years. The Netherlands (+13%) enjoyed the fastest relative increase in arrivals, particularly thanks to increasing demand from China and other emerging markets. Switzerland (+7%), Germany (+5%) and Austria (+4%) also reported solid growth.

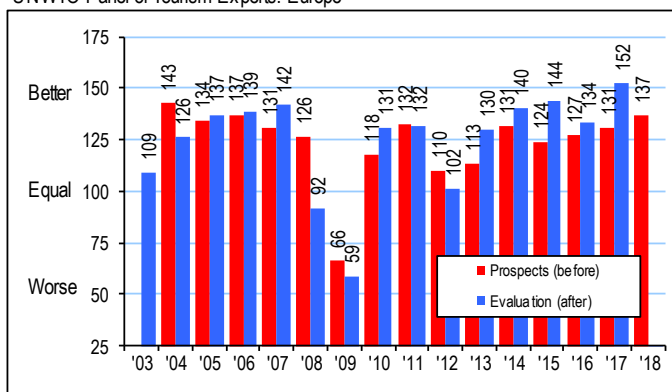
All destinations in Northern Europe (+5%) reported positive growth. Iceland (+16%) led results once more, enjoying its seventh consecutive year of double-digit growth, supported by increased air connectivity and accommodation capacity. Finland (+13%) has consolidated its recovery after the slowdown in 2015. The United Kingdom, the subregion’s largest destination, recorded 7% growth in arrivals despite the terrorist attacks in London and Manchester last year. The decline of the British pound following the vote to leave the European Union (Brexit) in June 2016 continues to contribute to the UK’s results. Sweden, Denmark (both +5%) and Ireland (+4%) also reported positive results.

In Central and Eastern Europe (+5%) results were rather mixed, though most destinations posted solid growth in arrivals. Armenia (+21%), Azerbaijan and the Republic of Moldova (both +20%), Georgia (+19%), Kazakhstan (+18%), Latvia (+12%), Romania (+11%) and the Czech Republic (+10%) all enjoyed double-digit growth in 2017. Bulgaria (+9%), Slovakia (+7%), Poland and Estonia (both +5%) also reported sound results, while Lithuania recorded a 3% increase and Hungary 2%. By contrast, the Russian Federation, the subregion’s largest destination reported a 3% decline in arrivals (through September). Data for Ukraine is still pending, but data on receipts point to a rebound in arrivals after a few years of declines.

UNWTO Panel Experts from Europe evaluated 2017 results very positively, rating tourism performance with an impressive score of 152, thus exceeding by 21 points their own expectations at the beginning of the year (131). This is Europe’s highest evaluation since the start of the series in 2003 and the highest across UNWTO regions for 2017. Prospects for 2018 remain very positive, though at a comparatively more modest but still high level of 137.

UNWTO Panel of Tourism Experts

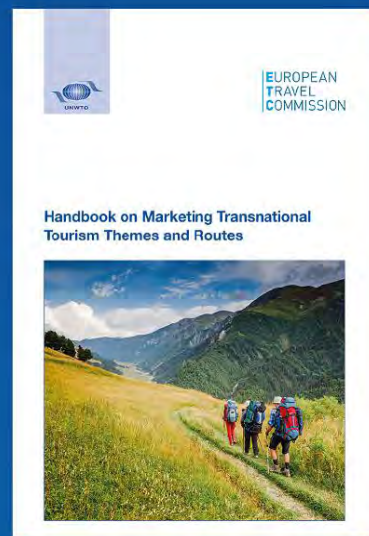
UNWTO Panel of Tourism Experts: Europe



Source: World Tourism Organization (UNWTO) ©



EUROPEAN TRAVEL COMMISSION



Handbook on Marketing Transnational Tourism Themes and Routes

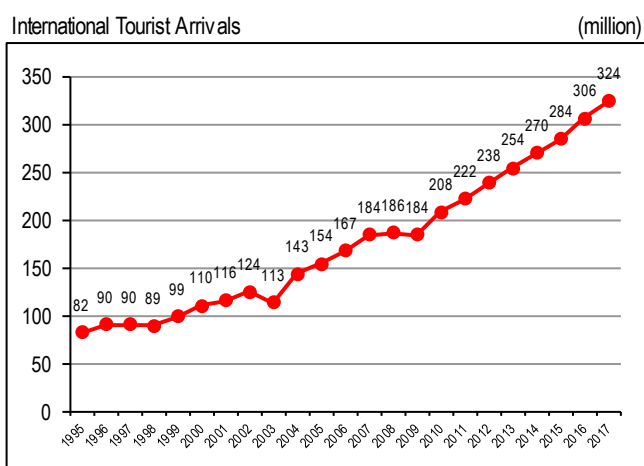
This ETC and UNWTO Handbook on Marketing Transnational Tourism Themes and Routes aims at acquiring a deeper understanding of the transnational tourism themes and routes that are already proposed to travellers. Through illustrative case studies it furthermore provides practical guidance – especially for NTAa and NTOs – on the creation and implementation of tourism routes, on marketing thematic tourism, including its development, management and promotion. The handbook will enrich UNWTO’s tools for innovation, and feed into the ETC’s ‘Destination Europe 2020’ strategy, contributing also to the development and promotion of its VisitEurope.com Internet portal.

Asian growth led by South Asia and South-East Asia

Asia and the Pacific welcomed 324 million international tourists in 2017, close to a quarter of the world’s total and 18 million more than in 2016. This is equivalent to 6% growth in arrivals, after an 8% increase in 2016. South Asia (+10%) enjoyed the strongest results by subregion, followed by South-East Asia (+8%) and Oceania (+7%), while North-East Asia recorded 3% growth in international arrivals. Growth was fuelled by solid intraregional demand, particularly from China and the Republic of Korea.

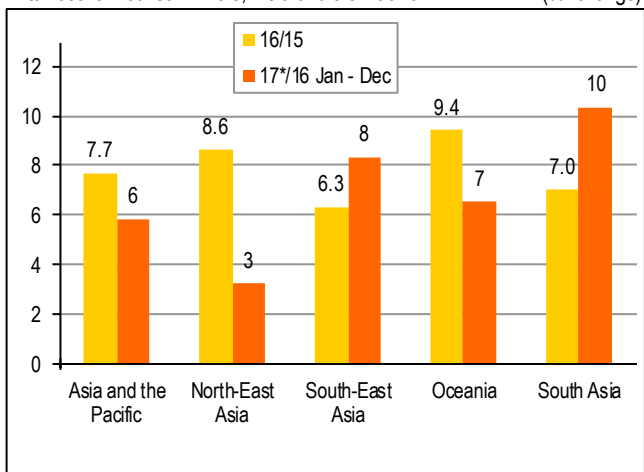
rienced a 23% decline in international arrivals, largely as a result of fewer arrivals from China. UNWTO Panel Experts however, expect a solid recovery in 2018, driven partly by the PyeongChang 2018 Winter Olympic Games. Data for China, the region’s largest destination, is still pending.

Asia and the Pacific: Inbound Tourism



Source: World Tourism Organization (UNWTO) ©

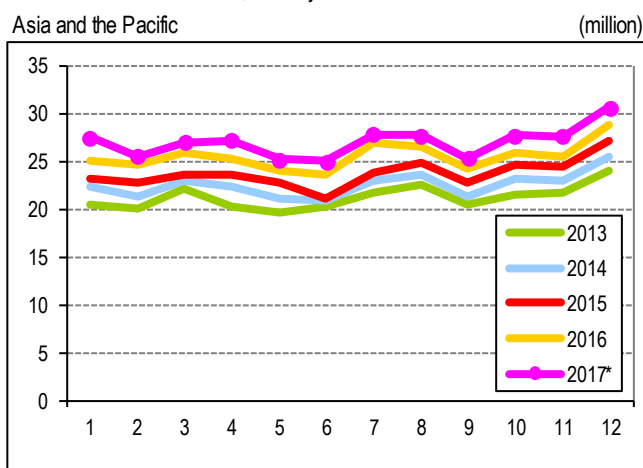
International Tourist Arrivals, Asia and the Pacific (% change)



Source: World Tourism Organization (UNWTO) ©

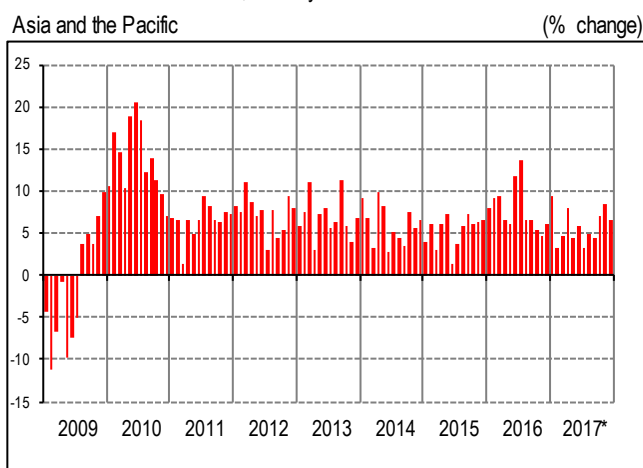
In Asia’s largest subregion, North-East Asia, international arrivals increased 3% in 2017, led by Japan (+19%), which enjoyed its sixth straight year of double-digit growth. Japan welcomed 29 million arrivals in the entire year 2017, about 5 million more than in 2016. Macao (China) reported an increase of 10%, after similar growth in 2016. Both destinations saw strong demand from China and other large markets in the region. Arrivals in Hong Kong (China) grew 5% in 2017, rebounding after two years of declines, while Taiwan (pr. of China) reported flat results. The Republic of Korea by contrast, expe-

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

Growth in South-East Asia (+8%) exceeded the region’s average, driven by strong results in Vietnam (+29%) and Indonesia (+22%) which both continue to enjoy strong demand from North-East Asian source markets. Vietnam reported 13 million arrivals in the full year 2017, a remarkable increase of 3 million from the previous year. Cambodia (+12% through September) and the Philippines (+11%) also posted double-digit growth. The subregion’s largest destination, Thailand recorded 8% growth and Singapore 6%. Malaysia (-2%) received fewer arrivals through August, attributable to weaker demand from Singapore and major long-haul markets.

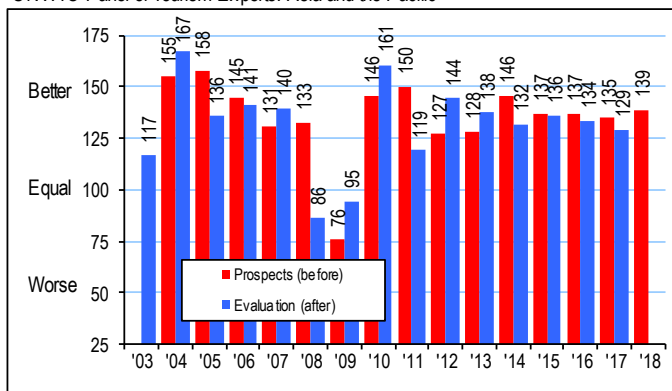
South Asia was the fastest growing subregion in 2017, with an increase of 10% in arrivals, led by the strong performance of India (+15%), the subregion’s largest destination. Robust demand from western source markets and visa facilitation measures contributed to the destination’s strong results. Island destination Maldives recorded 7% growth and Sri Lanka 3%, the latter after

seven years growing in double digits. Among the smaller destinations, Nepal reported a remarkable 25% increase last year, while Bhutan enjoyed 10% more arrivals, in its eighth straight year of double-digit growth.

Oceania (+7%) enjoyed sustained growth in 2017, with major destinations Australia and New Zealand both welcoming 7% more international tourists. Results in these destinations were fuelled by solid demand from China, Hong Kong (China), Malaysia, the United States and the United Kingdom. Fiji saw a 7% increase, while Guam (+1%) posted more modest results, after solid growth in 2016. Among the smaller island destinations, the Northern Mariana Islands boasted 28% growth, fuelled by increased flight connectivity and strong demand from North-East Asia. New Caledonia's arrivals increased 4% (through September).

UNWTO Panel of Tourism Experts

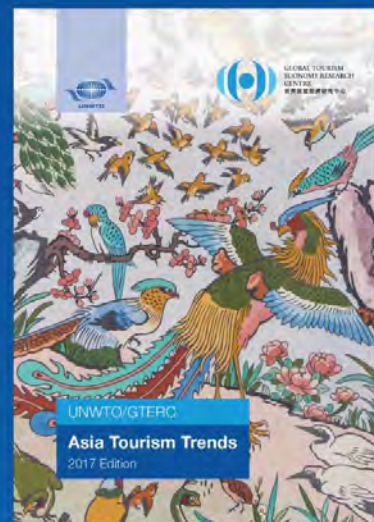
UNWTO Panel of Tourism Experts: Asia and the Pacific



Source: World Tourism Organization (UNWTO) ©



GLOBAL TOURISM
ECONOMY RESEARCH
CENTRE
世界旅遊經濟研究中心



**UNWTO/GTERC
Asia Tourism Trends 2017 Edition**

The UNWTO/GTERC Annual Report on Asia Tourism Trends, 2017 Edition, the fourth annual report in the series, highlights the rapidly growing tourism sector of Asia and the Pacific. This growth has been influenced by technological developments and the digital revolution. Regional collaboration with its many challenges and opportunities is also highlighted as one of factors shaping tourism development in Asia and the Pacific

See further:

<http://asiapacific.unwto.org/publications>

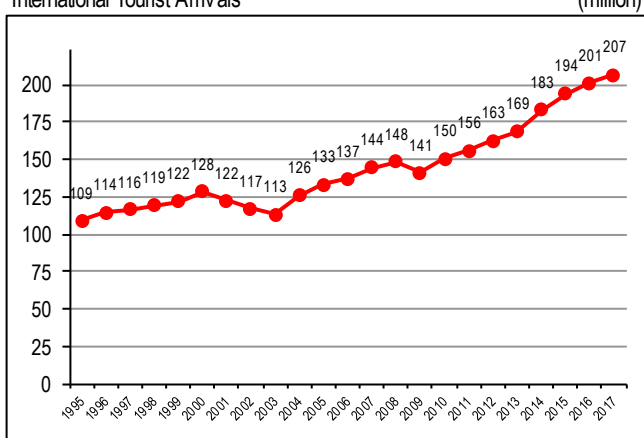
Sustained growth in most destinations in the Americas

The Americas (+3%) welcomed 207 million international tourists in 2017, with most destinations enjoying solid results, led by South America (+7%). Central America and the Caribbean both grew 4%, with the latter showing clear signs of recovery in the aftermath of hurricanes Irma and Maria. In North America (+2%), robust results in Mexico and Canada contrast with a decrease in the United States, the region's largest destination. The decline in arrivals to the United States also weighed down the region's average. By contrast, strong demand from the United States and Canada, as well as long-haul source markets, continued to benefit many destinations in the region.

Peru, international arrivals increased 6%, while Guyana received 3% more arrivals through July. Argentina reported flat growth in 2017, with a weak start of the year, though results improved from the second quarter onwards. Arrivals data for Brazil, the subregion's largest destination, is still pending. However, receipts data point to a decrease.

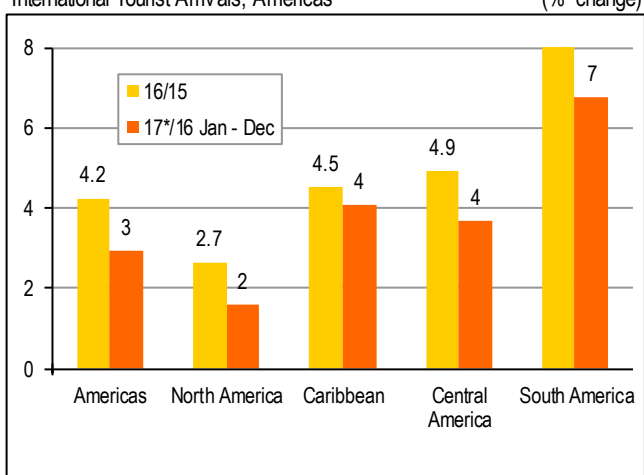
Americas: Inbound Tourism

International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

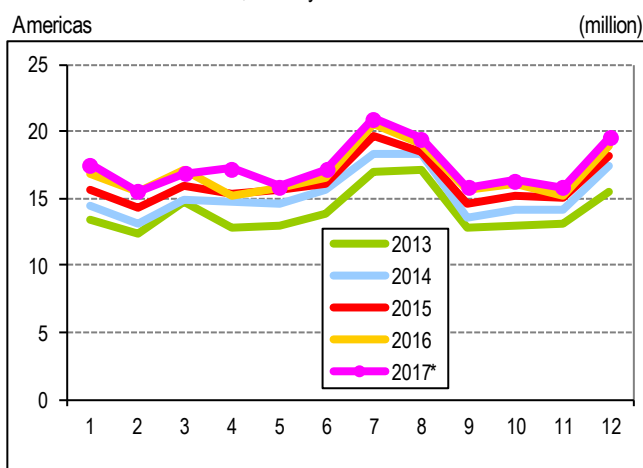
International Tourist Arrivals, Americas (% change)



Source: World Tourism Organization (UNWTO) ©

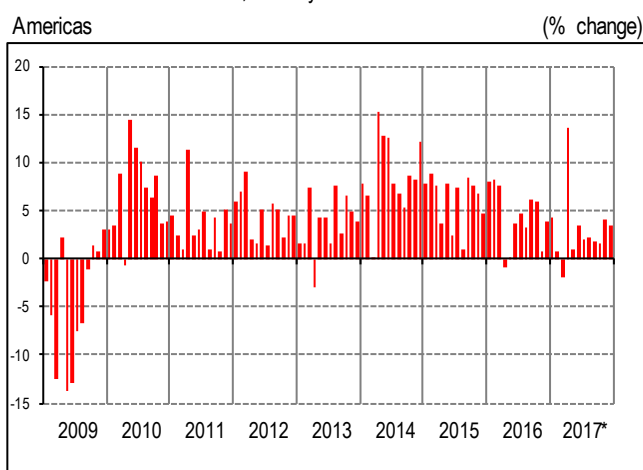
In South America (+7%), the growth momentum continued in 2017, led by Paraguay (+25% through September) and Colombia (+23%), the latter boasting its fourth straight year of double-digit growth. Uruguay (+21%) continued to benefit from promotional actions in bordering source markets and tax-free benefits for tourists. Chile and Ecuador both recorded 14% growth in arrivals last year. Ecuador rebounded from weak results in 2016 due to the earthquake that hit the country's central coast. In

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



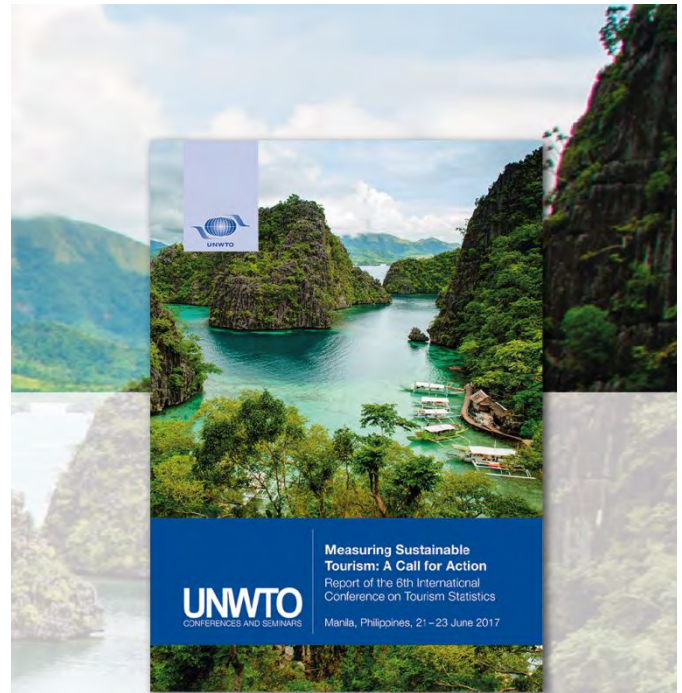
Source: World Tourism Organization (UNWTO) ©

Central America recorded a 4% increase in arrivals in 2017, led by Nicaragua (+22%), which is enjoying strong demand from regional markets. Guatemala (+9%), Belize and El Salvador (both +8%) also posted solid growth. Honduras recorded 3% more arrivals, a similar increase as in 2016. Results in top destination Costa Rica (+1%) were more modest due to a decline in visitors from the United States, while Panama reported 12% fewer arrivals.

In the Caribbean (+4%), results were rather mixed across destinations, with some islands recording robust growth and others declines. Many were impacted by the strong hurricanes from mid-August through September, most notably Irma and Maria. Among the larger destinations, tourist arrivals were up 8% in Jamaica and 4% in the subregion's top destination the Dominican Republic. Inbound data for Cuba, the subregion's second largest destination, is still pending. Puerto Rico recorded a 5% increase through September. Among the smaller

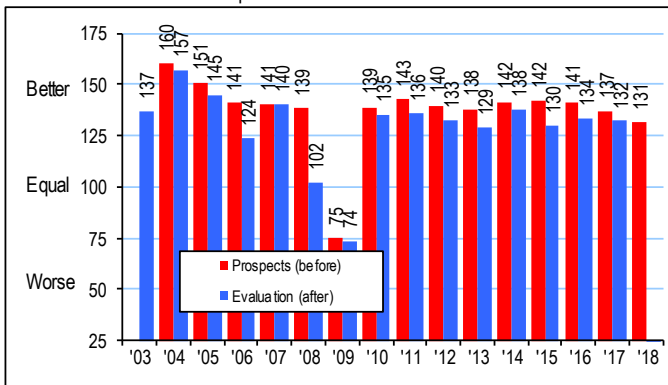
destinations, Bermuda and Saint Lucia (both +10%), the Cayman Islands (+9%) and Dominica (+8%), Grenada (+7%), Barbados (+6%), and Martinique (+3%) all enjoyed an increase in arrivals. By contrast, mostly due to the powerful hurricanes that swept the Caribbean last year, Curaçao, Antigua and Barbuda, Aruba, Saint Vincent and the Grenadines, Trinidad and Tobago, Montserrat, Saint Kitts and Nevis and Turks and Caicos all reported negative figures according to available data, while data for Saint Maarten is pending.

International tourist arrivals in North America grew by an estimated 2%, somewhat below the performance in 2016 (+3%). Mexico (+12%) led results in the subregion, while Canada reported 4% growth, both driven by solid demand from the United States and other major source markets. By contrast, international arrivals to the United States declined by 4% through July. Travel to the US from Canada, the Republic of Korea and a few European markets still grew, but insufficiently to offset the declines from Mexico and overseas markets in Latin America, the Middle East and Africa, and other markets in Europe and Asia and the Pacific.



UNWTO Panel of Tourism Experts

UNWTO Panel of Tourism Experts: Americas



Source: World Tourism Organization (UNWTO) ©

Measuring Sustainable Tourism: A Call for Action

Report of the 6th International Conference on Tourism Statistics
Manila, Philippines, June 2017

Over 1000 leaders and practitioners from 88 countries convened in Manila, Philippines, at the 6th International Conference on Tourism Statistics: Measuring Sustainable Tourism. They united to lay the groundwork for an expanded statistical framework for Measuring Sustainable Tourism in its economic, social and environmental dimensions. The outcome *Manila Call for Action on Measuring Sustainable Tourism* represents a global commitment to sustainable tourism and the need to measure it through a consistent statistical approach, recognizing that effective sustainable tourism policies require an integrated, coherent and robust information base.

Electronic copies can be downloaded in English free of charge from:
www.e-unwto.org/doi/book/10.18111/9789284418954

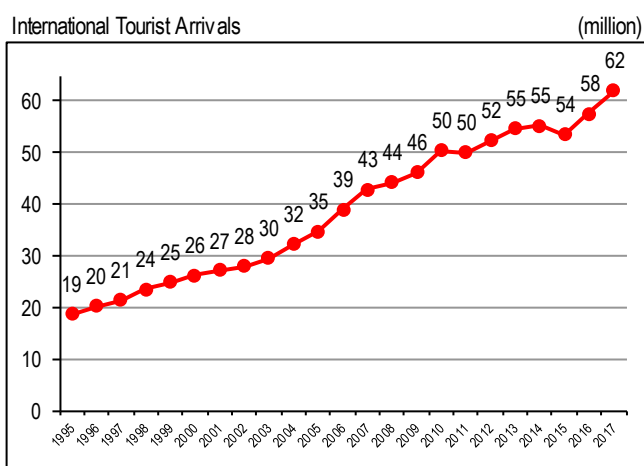
For more information on Measuring Sustainable Tourism please see <http://statistics.unwto.org/mst>

Strong recovery in North Africa drives region's results

International tourist arrivals in Africa increased an estimated 8% in 2017 to reach 62 million, according to comparatively limited data so far. The strong recovery of North Africa (+13%) and solid growth across many destinations in Sub-Saharan Africa (+5%) drove the region's results.

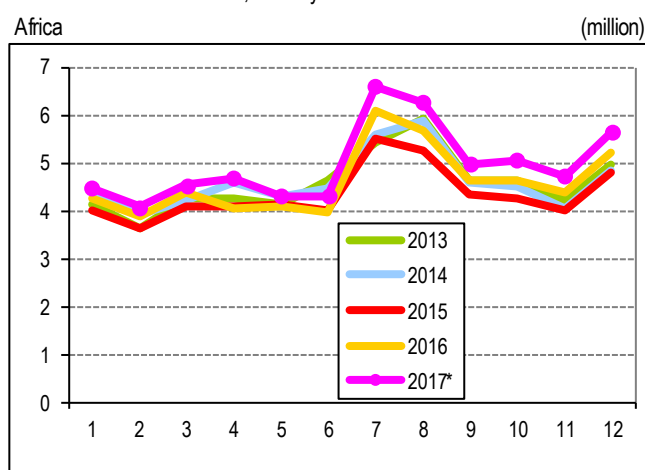
6% more international arrivals in the first quarter. Madagascar reported 9% growth in the first nine months of 2017, but international arrivals declined in the month of September following a plague outbreak. Public health response measures have been taken to contain the epidemic and no new cases have been notified since mid-November 2017. The then UNWTO Secretary General Taleb Rifai visited the country in November and expressed confidence in its tourism and echoed the advice of the World Health Organization (WHO) against any travel or trade restrictions for Madagascar.

Africa: Inbound Tourism



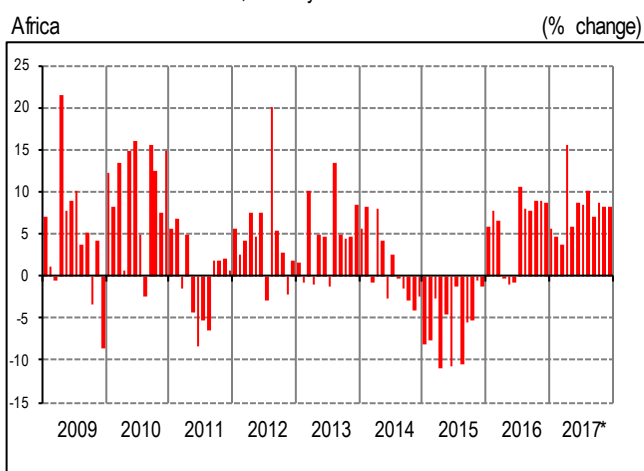
Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution



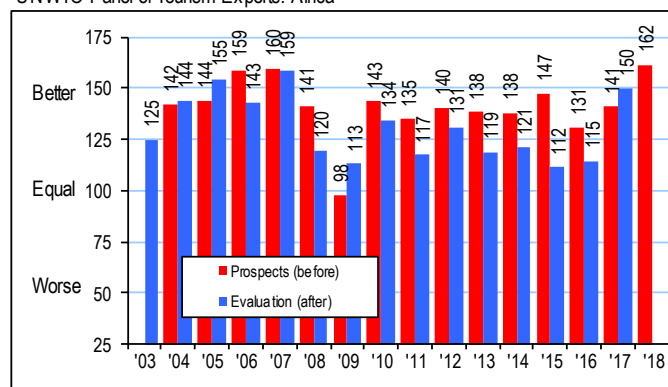
Source: World Tourism Organization (UNWTO) ©

In North Africa, Tunisia (+23%) continued to rebound strongly in 2017, boasting the strongest increase in the region, to reach 7 million arrivals. Morocco (+9%) also enjoyed more robust growth, after a modest increase in 2016. Growing demand from European source markets and a more stable environment contributed to the positive results in the subregion. Results for Africa should be read with caution, as they are based on currently limited data.

Growth in Sub-Saharan Africa (+5%) was led by island destinations Seychelles and Reunion (both +15%) as well as Cabo Verde (+11%). Kenya reported 10% growth in arrivals through September compared to the same period in 2016. Swaziland and Mauritius both posted 5% growth, while the subregion's top destination South Africa reported a 2% increase in international tourists. Zimbabwe recorded

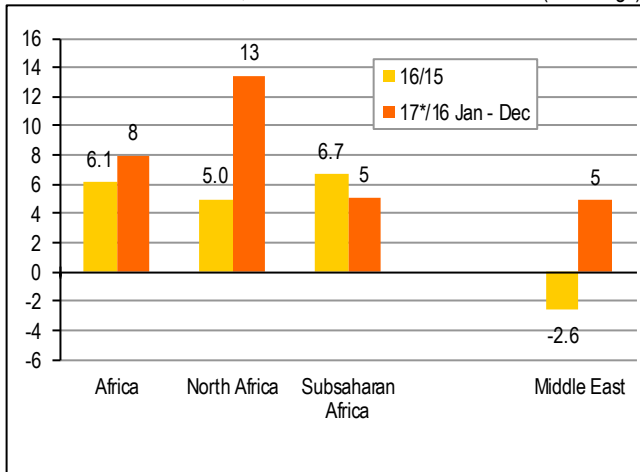
UNWTO Panel of Tourism Experts

UNWTO Panel of Tourism Experts: Africa



Source: World Tourism Organization (UNWTO) ©

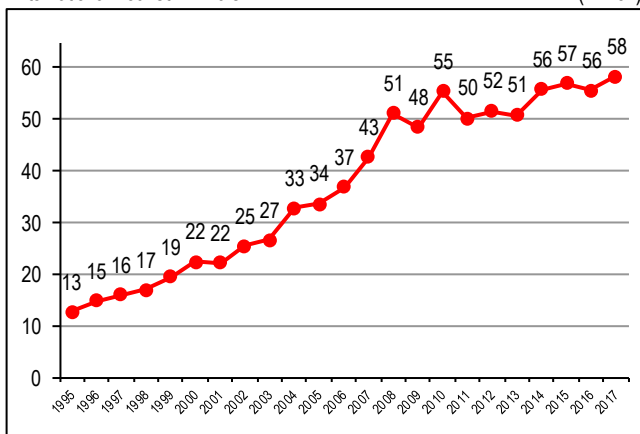
International Tourist Arrivals, Africa & Middle East (% change)



Source: World Tourism Organization (UNWTO) ©

Middle East Inbound Tourism

International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

Sustained demand in the Middle East with few declines

The Middle East welcomed an estimated 58 million international arrivals in 2017, representing an increase of 5% following a small decline in 2016. Results were fairly mixed across the region, with a strong rebound in some destinations and sustained growth in others, partly offset by a few destinations reporting declines.

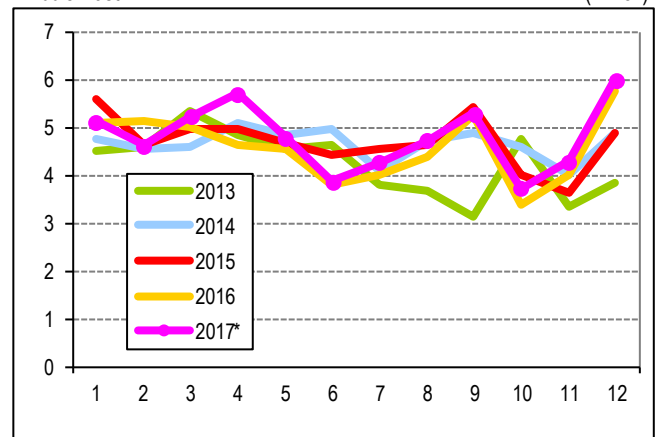
Egypt (+55%) led growth in the region, both in absolute and relative terms, recovering from the decline it suffered in previous years. Visitor numbers rebounded both from traditional markets in Western Europe and newer markets in Central and Eastern Europe, the Middle East and Asia. Promotional efforts and a return of stability and confidence contributed to this recovery. Palestine (+32%) also rebounded strongly, though from a more modest base. Bahrain and Oman (both 13%), Lebanon and Jordan (both +11%) reported double-digit growth, following positive growth in previous years. The United Arab Emirate of Dubai continued to grow at a sustained pace with international arrivals increasing by 7% year-to-date. By contrast, Saudi Arabia, the largest destination in the Middle East, reported a decline of 16% in the first half of 2017. Qatar (-21%) also reported a decline in arrivals, with nega-

tive figures starting in May, following the diplomatic crisis with various countries in the region.

Note: All results presented in this issue are based on preliminary data as reported by the various destinations around the world and UNWTO estimates of still missing data. Updated information will be included in the next issue of the *UNWTO World Tourism Barometer* scheduled for March 2018.

International Tourist Arrivals, monthly evolution

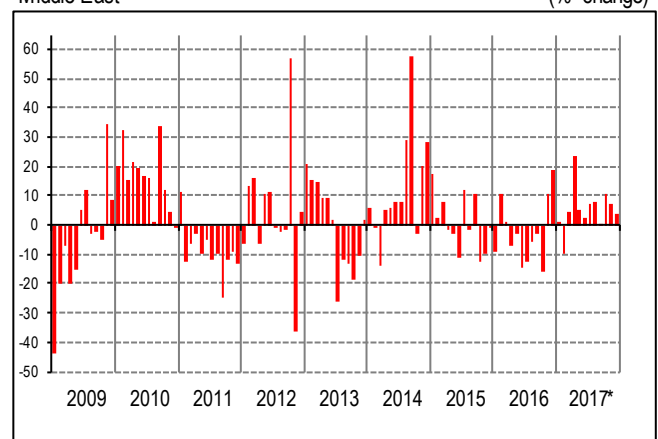
Middle East (million)



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

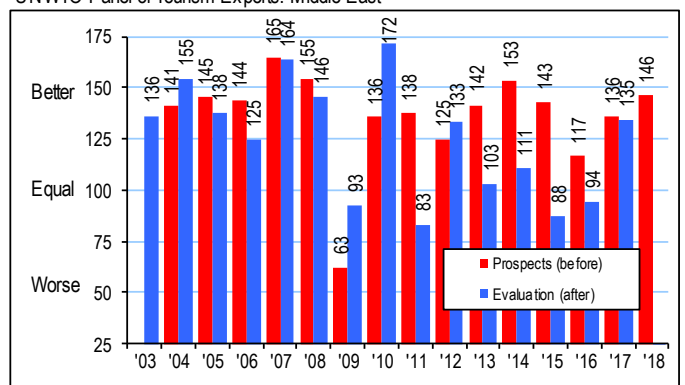
Middle East (% change)



Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts

UNWTO Panel of Tourism Experts: Middle East



Source: World Tourism Organization (UNWTO) ©

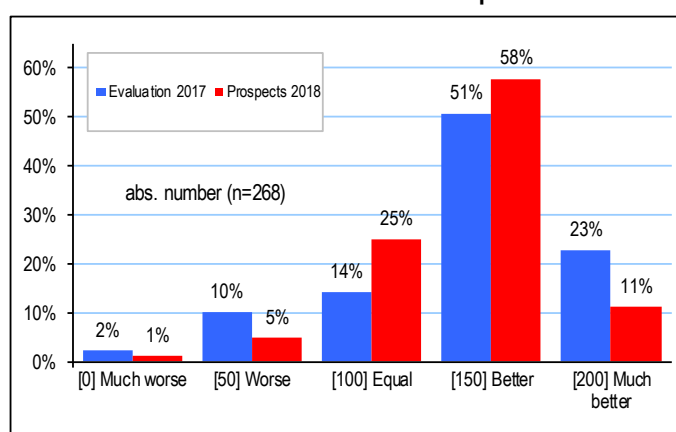
Evaluation by UNWTO's Panel of Tourism Experts

Evaluation of 2017 highest since 2007 and prospects remain upbeat for 2018

The UNWTO Confidence Index – based this time on responses from around 270 tourism experts in over 80 destinations around the world – points to a continuation of growth in tourism in the year 2018. Prospects expressed by experts are positive across all regions and sectors and above those of recent years. The average score for ‘prospects’ for 2018 is 137, the highest since 2014 and 4 points above the score for 2017 given at the beginning of last year (133).

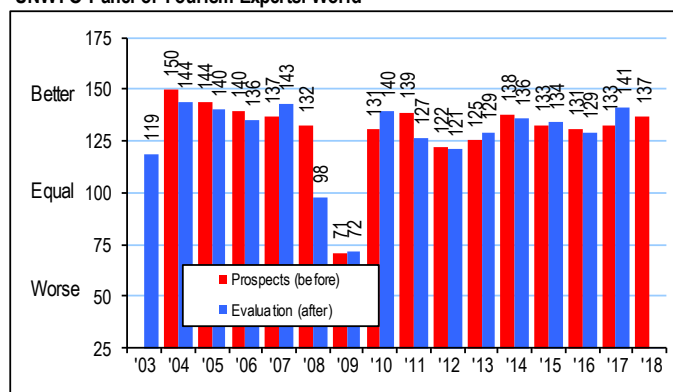
UNWTO has conducted its Panel of Expert survey to track short-term tourism performance and business sentiment every four months since April 2003. In each survey Panel members are asked to rate both the evaluation of the previous period and the outlook for the coming period on the following scale: much worse [0]; worse [50], equal [100]; better [150], much better [200]. The number of regular respondents to the Barometer surveys stands currently at just under 300.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

UNWTO Panel of Tourism Experts: World



Source: World Tourism Organization (UNWTO) ©

In their evaluation of 2017, almost two thirds of the 268 members of UNWTO's Panel of Experts who responded to this edition's survey, judged tourism performance to have been ‘better’ or ‘much better’ (64%)

than what they would reasonably expect for this time of the year, against 14% who indicated ‘equal’ performance and 12% ‘worse’ or ‘much worse’.

Averaging these responses on a scale of 0 to 200, the Panel evaluated tourism performance in 2017 with a score of 141, well above the evaluation of 2016 (129) and the highest since the year 2007. The Panel also evaluated 2017 as significantly better than their prospects expressed at the beginning of the period, with the evaluation score 8 points higher than their prospects in January 2017 (133). An average value above 100 means that the number of participants who evaluate the situation as ‘better’ or ‘much better’ outnumber those who perceive it as ‘worse’ or ‘much worse’.

Experts are also very confident about tourism in 2018, with prospects for the year rated at 137, 4 points higher than the prospects this time last year for 2017 (133). Interestingly, prospects responses are rather more concentrated around ‘better’ and less spread out over the five categories than in the Panel's evaluation of 2017.

Evaluation of 2017 reaches highest level since 2007

Participants in the UNWTO Panel of Experts survey were buoyant about tourism performance in 2017, evaluating the year with an average score of 141. This is higher than their prospects for the year expressed at the beginning of 2017 (133) and well above the ‘neutral’ 100. The upbeat evaluation is in line with the actual preliminary tourism results for the year, which show 7% growth in international tourist arrivals. The evaluation was 12 points higher than the evaluation of 2016 and the highest since 2007. Likewise, 2017 was the eighth year in a row with a positive evaluation, reflecting the solid trend of 4% or higher growth in international arrivals every year since 2009. This represents an upbeat appraisal, especially given the various geopolitical, economic, natural and security challenges that have affected the sector over the past years.

The public and private sectors (both 141) were equally positive about tourism in 2017. There was a gap between the perceptions of experts from advanced economies (144) and those from emerging markets (135). The high average score of the former is broadly a reflection of the exceptionally good tourism results in advanced economy destinations, particularly in Europe, where almost all destinations recorded solid growth in arrivals in 2017.

As is generally the case, the global average masks significant differences across world regions and tourism activities. Even so, experts in all regions evaluated 2017 favourably, with scores well above 100.

Of all world regions, experts from Europe gave tourism performance the highest score in 2017 (152), in line with the region's remarkable results last year. This is

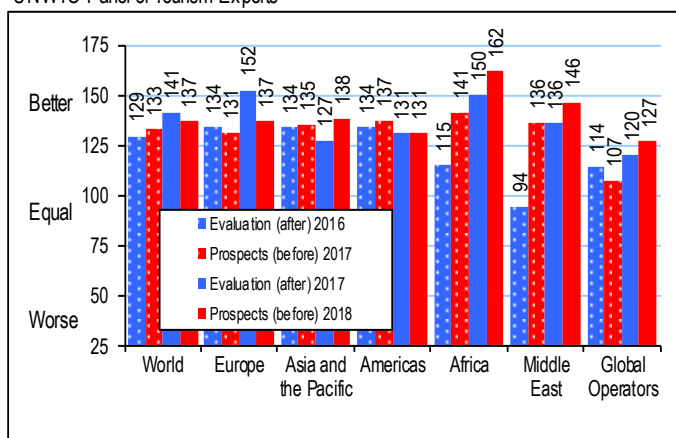
not only 21 points higher than the experts' outlook at the beginning of the year (131), but also the highest yearly evaluation by experts in Europe since the first survey in 2003.

Experts in Africa also rated the year with a positive score of 150, 9 points above their prospects expressed at the beginning of the year (141) and in line with the positive results recorded in many destinations in both North Africa and Sub-Saharan Africa. Ratings for the Middle East have fluctuated in recent years due to the volatility of the region, but reached 136 in 2017, their highest since 2010, in line with the prospects at the beginning of the year. This is a reflection of the sustained growth in most destinations and a strong recovery in others. Experts from the Americas rated tourism performance in 2017 with a score of 131, somewhat below their prospects at the beginning of 2017 (137), partly a reflection of mixed results across individual destinations. In Asia and the Pacific, experts rated the year at 127, also a few points below their expectations at the beginning of 2017 (135).

The score given by global tourism operators – those with business interests in different world regions – was 120 for the year 2017. This was above the somewhat low expectations at the beginning of the year (107), due to the global safety and security challenges perceived at the time, which affect interregional travel particularly.

By tourism activity, experts from all sectors were satisfied with results in 2017, especially those from Transportation and Accommodation, both rating the year at 150, and experts from Destinations (138). General industry bodies as well as Tour operators & travel agencies also rated the year positively (133), while Consultants, Research and the Media rated it at 129.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Prospects for 2018

The Panel's outlook for 2018 is positive across all world regions and tourism activities. The global score for expected performance in 2018 is 137, above the prospects for 2017 expressed a year ago (133), reflecting increased confidence in the tourism sector.

The UNWTO Tourism Confidence Index

The UNWTO *Tourism Confidence Index* is based on the results of an email survey conducted by the UNWTO Secretariat among selected representatives of public and private sector organisations participating in the UNWTO *Panel of Tourism Experts*. The survey has been repeated every four months since May 2003 in order to keep track of actual performance, as well as perceived short-term prospects, of the tourism sector. This allows performance and prospects to be compared over time, as well as providing a comparison of the actual performance of the past four months with prospects forecast for the same period four months earlier. Results are also broken down by region and by sector of activity. These breakdowns should, however, be interpreted with caution as they may in some cases be based only on a relatively small number of responses.

The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey, in particular from countries still not included in the listing below, are kindly invited to send an email to barom@unwto.org.

How to read this data

For the UNWTO *Tourism Confidence Index* members of the UNWTO Panel of Tourism Experts are asked once every four months by email to answer the following two simple questions:

- What is your assessment of tourism performance in your destination or business for the four months just ended (or about to end) as against what you would reasonably expect for this time of year?
- What are the tourism prospects of your destination or business in the coming four months compared with what you would reasonably expect for this time of year?

Participants should select one of the following five options: much worse [0]; worse [50], equal [100]; better [150], much better [200]. Results are averaged and broken down by region and by activity. A value above 100 means that the number of participants who evaluate the situation as "better" or "much better", outnumber the participants who reply "worse" or "much worse".

In addition, participants are also invited to include a qualitative assessment in their own words. The analysis contained in the *UNWTO World Tourism Barometer* is in large part based on their comments.

Public sector experts continue to be more optimistic than those from the private sector when responding to the UNWTO Panel of Experts' survey, with average scores of 140 against 135 respectively. Experts from advanced economies (136) are almost as optimistic about 2018 as those from emerging economies (137).

By region, experts from Africa (162) have the highest expectations for 2018, as international tourism recovered further in 2017 after subdued growth in earlier years. Experts in the Middle East (146) also remain optimistic, after a return to growth in 2017. Respondents from Asia and the Pacific (138) are comparably upbeat, expecting better performance than in 2017 (127). Experts from Europe (137) are also very confident about tourism in 2018, with the highest score for prospects in over a decade. Upbeat expectations reflect the dynamic nature and resilience of the European tourism sector, as well as its further growth potential, in spite of the maturity of many

destinations. In the Americas (131), experts are also optimistic, in line with the perceived performance of 2017.

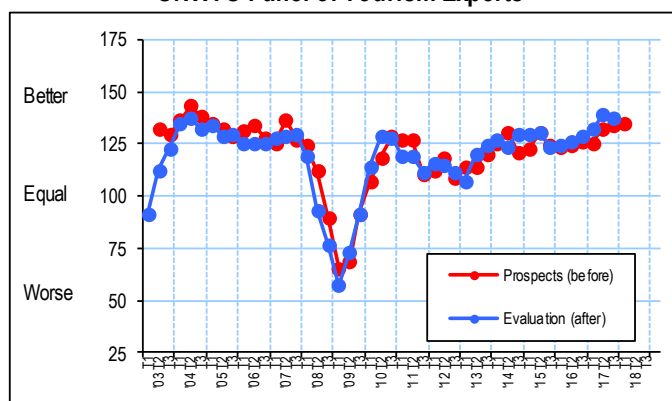
Global operators (127) expect improved performance of the tourism sector in 2018, compared to their evaluation of 2017 (120), though they are somewhat cautious relative to the upbeat prospects overall (137).

Prospects for 2018 are positive across all tourism activities. Destinations are the most optimistic (140), followed by Tour Operators, the Accommodation sector and Transportation (all 138). Consultancy, Research and Media (129) and General Industry Bodies (127) are also quite optimistic, though scores from these activities are somewhat below the average.

(136) are the most upbeat about the January-April 2018 period while the Accommodation sector (131) and Tour operators (130) also expect better results, but somewhat below the average.

See corresponding graphs by region and activity in the Statistical Annex.

UNWTO Panel of Tourism Experts



Source: World Tourism Organization (UNWTO) ©

Evaluation of the four-month period September-December 2017

The September-December 2017 period was evaluated at 137 by the Panel of Experts, similar to the previous period. Experts from advanced economies (140) gave a higher score to the period September-December 2017, than those from emerging economies (133).

By region, the highest four-month scores came from experts in Africa (150), followed by Europe (143) and the Middle East (138). In the Americas (132) and Asia and the Pacific (131) experts were also positive but below the total average. Global tourism operators evaluated these four months at 123.

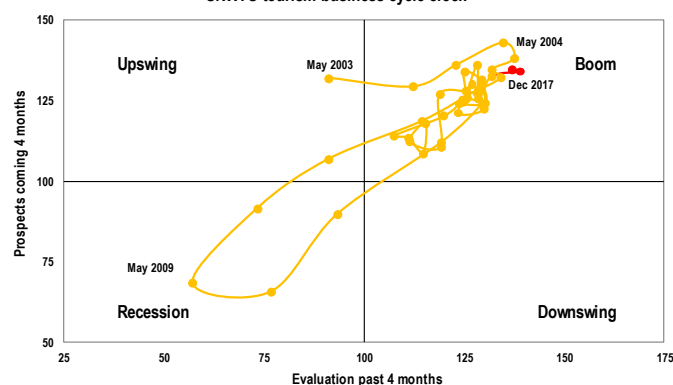
Outlook for the four-month period January-April 2018



Overall prospects for January-April 2018 are positive at 135 – pointing towards continued strong growth in tourism in the coming months.

By region, experts from Africa (162) are by far the most optimistic, while in the Middle East (142), Europe (135), Asia and the Pacific (134) and the Americas (131) expectations are also high.

By tourism activity, Transport sector (138), Consultants, Research and the Media (137) and Destinations

UNWTO tourism business-cycle clock





ETC/UNWTO Handbook on Key Performance Indicators for Tourism Marketing Evaluation

The ETC/UNWTO Handbook on Key Performance Indicators for Tourism Marketing Evaluation presents a comprehensive overview of performance indicators for tourism marketing evaluation. This handbook aims to be a user-friendly and accessible guide that provides a methodological framework and practical guidance on how to use performance indicators. Complemented with a number of case studies and best practice examples, the handbook offers both a theoretical and practical approach to guide national and destination management organizations towards better digital marketing evaluation.

UNWTO outlook for 2018

Momentum to continue in 2018

The current strong momentum is expected to continue in 2018, though at a more sustainable pace after eight years of steady expansion following the 2009 economic and financial crisis. UNWTO projects international tourist arrivals worldwide to grow at a rate of 4%-5% in 2018, after the remarkable 7% increase in 2017. The projection reflects sustained growth in an increasingly diversified global tourism market.

Based on current trends, economic prospects and the outlook by the UNWTO Panel of Experts, international tourist arrivals are forecast to grow between 4.0% and 5.0% in 2018, following an increase of 6.7% in 2017. This year's projection is still somewhat above the 3.8% average increase projected for the period 2010-2020 by UNWTO in its *Tourism Towards 2030* long-term forecast.

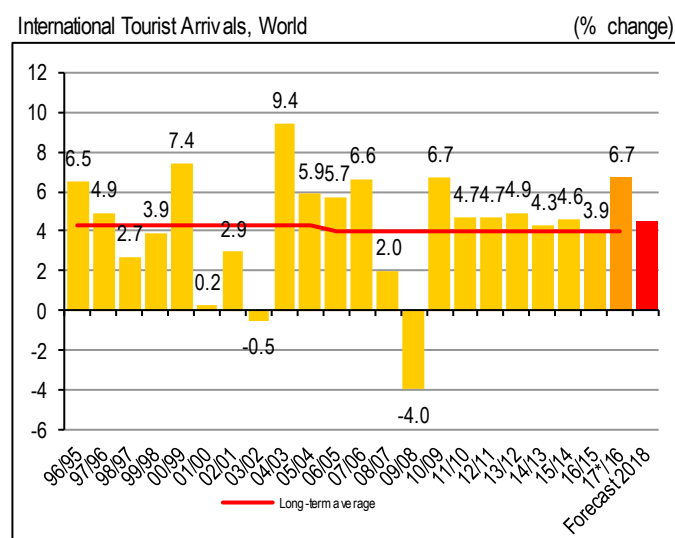
By UNWTO regions, international tourists arrivals in Europe are expected to grow 3.5% to 4.5% this year. Growth in the world's most visited region is expected to return to a more sustainable level after the extraordinary 8% increase in 2017. Growth in the Americas is also projected at 3.5% to 4.5% in 2018, after a 3% increase in 2017. In Asia and the Pacific arrivals are projected to grow 5% to 6%, after 5% in 2017, with still considerable growth potential in emerging destinations. International arrivals in Africa are forecast to increase 5% to 7% in 2017, after 8% growth in 2017, as the region regains a more stable pattern of expansion. Prospects for the Middle East point to 4% to 6% growth in 2018, with a certain degree of uncertainty due to the region's volatility.

The latest survey by the UNWTO Panel of Experts confirms these positive expectations, with a large 69% majority of the some 270 respondents expecting 'better' or 'much better' tourism results in 2018 than in 2017. The Panel rated expected performance in 2018 with a score of 137, above their prospects for 2017 at the start of last year (133), suggesting another year of robust growth in 2018.

Current economic forecasts support this outlook, with the recent upswing in the global economy expected to

continue in 2018. In its January 2018 Update of the *World Economic Outlook* (WEO), the International Monetary Fund (IMF) projects global output to accelerate further to 3.9% in 2018, after growing at 3.2% in 2016 and 3.7% in 2017. The pickup has been broad based, with notable upside surprises in Europe and Asia. The revision reflects improved prospects for the United States (+2.7% in 2018). Stronger growth is also projected for the group of emerging market and developing economies (+4.9% in 2018), including Latin America, the Middle East and Africa. For the detailed projections of the IMF WEO January update see: www.imf.org/en/publications/weo.

Solid economic conditions contribute to stronger demand for both business and leisure travel, which is reflected in international tourist arrivals and receipts in destination countries. Growth in international tourism this year is expected to come from both advanced and emerging source markets, reflecting the improving economic prospects for both groups in 2018. Rising middle classes with higher purchasing power in many emerging markets will continue to expand the base of international travellers. The ongoing recovery of Brazil and the Russian Federation will continue to fuel growth in their respective regions and beyond. Increased air connectivity, generally more affordable travel and growing tourism services through digital platforms are all expected to continue driving tourism growth this year.



Source: World Tourism Organization (UNWTO) ©

Outlook for International Tourist Arrivals

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017*	average	projection 2018*
	real, change										a year	(issued January)
	full year					Jan.-Dec.					2005-2016	between
World	2.0%	-4.0%	6.7%	4.7%	4.7%	4.9%	4.3%	4.6%	3.9%	6.7%	4.0%	+4% and +5%
Europe	0.4%	-5.3%	3.0%	6.4%	3.8%	5.1%	2.0%	4.7%	2.4%	8.4%	2.9%	+3.5% and +4.5%
Asia and the Pacific	1.4%	-1.4%	13.4%	6.5%	7.3%	6.8%	6.0%	5.4%	7.7%	5.8%	6.4%	+5% and +6%
Americas	2.7%	-4.9%	6.7%	3.6%	4.4%	3.6%	8.5%	5.9%	3.7%	2.9%	3.8%	+3.5% and +4.5%
Africa	2.9%	4.5%	9.3%	-0.7%	4.6%	4.5%	0.9%	-3.1%	7.6%	7.9%	4.7%	+5% and +7%
Middle East	20.0%	-5.4%	14.6%	-9.3%	2.6%	-1.5%	9.9%	2.0%	-2.4%	4.9%	4.7%	+4% and +6%

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO January 2018)

Air transport booking trends



Robust growth in air travel reflects strong tourism demand

In this contribution based on air transport booking data from business intelligence tool ForwardKeys, air passenger travel is evaluated for the full year 2017, and trends in reservations are analysed for the first four months of 2018.

The analysis reflects passenger air transport data available in the ForwardKeys database as of 31 December 2017, covering actual departures that took place in 2017 and bookings with a scheduled departure date from 1 January to 30 April 2018. Bookings for the first four months of 2018 are compared with bookings for the same period of 2017, available in the database at the same moment in time a year ago.

The booking trend provides an insight into how bookings are developing, although this does not necessarily indicate the exact number of trips that will be taken, as booking behaviour can vary over time, with lead time between booking and actual travel decreasing or increasing depending on external factors, price development and promotion. The database covers air travel reservations processed through the major Global Distribution Systems (GDS), but only partially includes direct bookings with airlines (such as low-cost carriers) or charter flights.

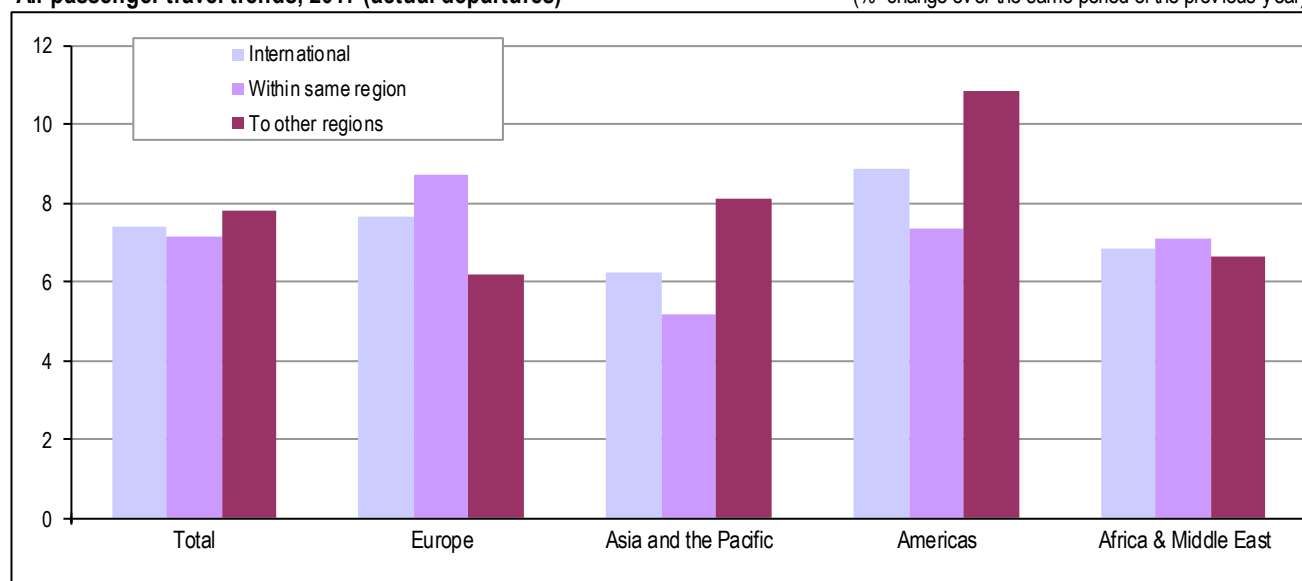
General Trend

International air departures grew by 7% in 2017

- Global outbound travel by air increased by over 7% in 2017, double the just under 4% growth of 2016 and in line with the robust results in international tourist arrivals and an overall stronger global economy.
- Interregional air travel (to other regions) grew 8% and intraregional travel (within the same region) 7%. Growth in interregional travel exceeded that of intraregional travel in both the Americas and Asia and the Pacific, reflecting stronger demand for long-haul destinations, particularly for Europe.
- By world region, Europe recorded the fastest growth in inbound air travel in 2017 (+10%), with double-digit growth in traffic from all regions. Air travel to Africa and the Middle East was also strong (+8%), as several destinations recovered from weaker results the previous years. Inbound air travel increased by 6% to Asia and the Pacific and by 5% to the Americas.
- The growth of outbound air travel was comparatively less spread across regions, with the Americas leading growth with 9% more departures in 2017, followed by Europe (+8%), Africa and the Middle East (+7%) and Asia and the Pacific (+6%).
- Domestic air travel was up 6% in 2017, reflecting strong demand in a few large markets, mostly in Asia and the Pacific (+13%) and Europe (+7%). Though smaller in size, Africa and the Middle East (+17%) also recorded strong growth in domestic travel last year. (Note that domestic air travel is dominated by a small number of large markets, with the United States, China, Brazil, the Russian Federation, Japan, India and Australia together accounting for over 80% of worldwide domestic traffic measured in revenue passenger kilometers (RPKs) according to IATA, see: www.iata.org/pressroom/pr/Pages/2017-02-02-01.aspx.)

Air passenger travel trends, 2017 (actual departures)

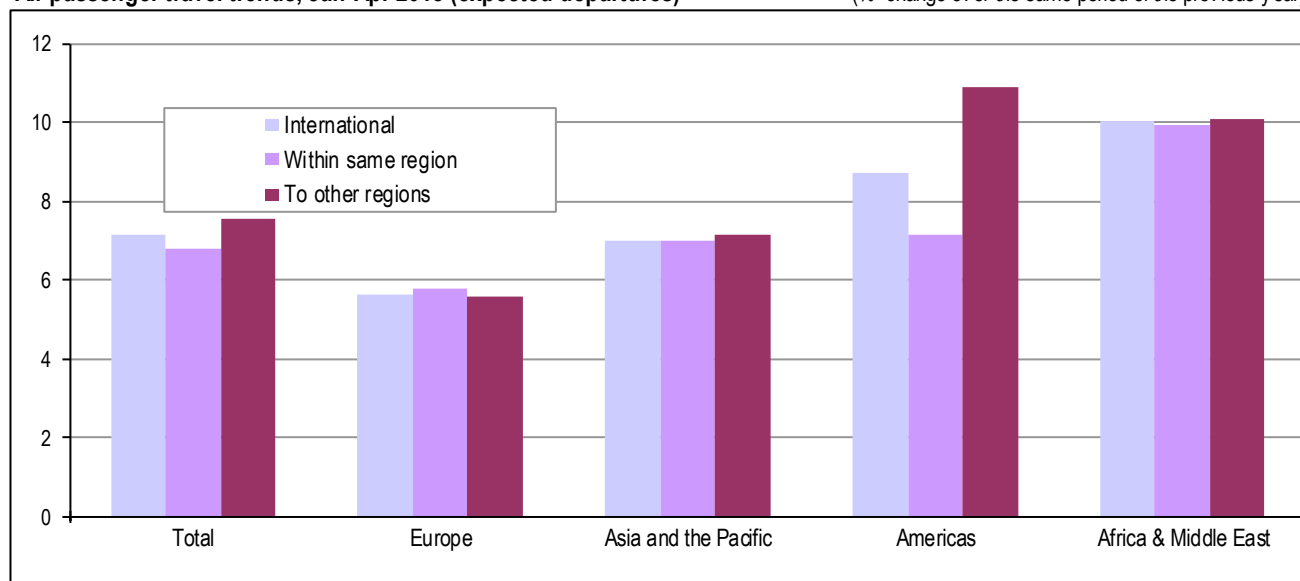
(% change over the same period of the previous year)



Source: ForwardKeys® for UNWTO

Air passenger travel trends, Jan-Apr 2018 (expected departures)

(% change over the same period of the previous year)



Source: ForwardKeys® for UNWTO

Bookings for January-April 2018 up 6%

- Current air travel reservations for the first four months of 2018 point to a continuation of sustained demand for international travel this early part of the year. As of 31 December 2017, international bookings in the reservation systems with scheduled departure dates from 1 January to 30 April 2018 were up 7% compared to the same four-month period in 2017.
- Africa and the Middle East show the highest increase in reservations for January-April 2018, up 10%, followed by the Americas (+9%) and Asia and the Pacific (+7%). Reservations in Europe are 6% higher.
- Demand is slightly stronger for interregional travel (+8%), than for travel within the same region (+7%). Interregional reservations are strongest in the Americas (+11%) and Africa and the Middle East (+10%). Growth in intraregional reservations is highest for travel within Africa and the Middle East (+10%), followed by the Americas and Asia and the Pacific (both +7%) and Europe (+6%).
- Domestic bookings for this period are 9% higher than a year ago, with particularly strong growth in Africa and the Middle East (+31%) and Asia and the Pacific (+15%).

Regional Trends**Europe**

- European outbound air travel grew by 8% in 2017, with intraregional departures (+9%) growing rather faster than departures to other regions (+6%).
- Interregional traffic from Europe saw the fastest growth to Africa and the Middle East (+11%) and to Asia and the Pacific (+8%), while growth in traffic to the Americas was slower (+2%).
- International reservations from Europe are up 6% for January-April 2018 compared to the same period last

year, with similar growth in bookings for flights outside and within the region (both +6%). Growth in interregional reservations from Europe was strongest for travel to Asia and the Pacific (+9%) and Africa and the Middle East (+8%).

Asia & the Pacific

- International departures from Asia and the Pacific grew by 6% in 2017, with a slow start of the year (+3% in January-April), but picking up in the following months (+5% in May-August and +11% in September-December). Travel to destinations outside the region (+8%) grew faster than to destinations within Asia (+5%). Interregional traffic grew considerably to Europe (+14%), after a slight decline in 2016.
- Domestic air travel (mostly corresponding to China, India, Japan and Australia) grew by 13%, putting total departure growth from Asia and the Pacific at 8%.
- Current bookings for the first four months of 2018 are up 7% compared to the same period of 2017, with the same increase in bookings for interregional and intraregional travel (+7%). Reservations for January-April 2018 remain especially strong for flights to Europe (+14%).
- Reservations for domestic air travel in Asia and the Pacific are 15% higher this four-month period, fuelled by India and China.

The Americas

- International air travel from the Americas increased 9% in 2017, boosted by the US market in particular and a generally stronger economic environment.
- Air travel to destinations outside the region (+11%) grew faster than to destinations within the region (+7%), led by travel to Europe (+14%).
- Demand remains solid for January-April 2018, with international reservations up 9% compared to the same four months in 2017. Bookings for interregional travel

(+11%) remain stronger than for travel within the Americas (+7%), with flight reservations to all world regions growing in double digits.

- Domestic reservations (mostly corresponding to the US and Brazil) are 6% higher for the first months of 2018, after growing 4% in the entire year 2017.

Africa & Middle East

- Outbound air travel from Africa and the Middle East grew 7% in 2017, in line with the world average. Intraregional and interregional travel both increased 7%, with stronger growth in traffic to Europe (+13%).
- International bookings for January-April 2018 are 10% higher so far, with Europe (+17%) again recording the highest air travel demand.

For the corresponding table see page 29 of the Statistical Annex.

Air transport booking data

The information on air travel trends contained in this section has been kindly provided by Forward Data SL leveraging exclusively on the ForwardKeys® database.

ForwardKeys® is a business intelligence tool designed to help decision-makers in hotel chains, Destination Management Organizations and other industry professionals. The ForwardKeys.com database is fed daily with Air reservation information (GDS) processed by 200,000 online and off-line travel agencies worldwide, for a total of approximately 14 million daily transactions. The database does not include some direct bookings with airlines (such as Low Cost Carriers) or charter flights.

Methodological note

Figures are based on full journey from the original city of departure to final destination (not intermediate stops or connections). Transit passengers, those returning to their point of departure have been excluded from this analysis.

Figures have been normalised in order to isolate GDS-perimeter changes; periodic revisions of past figures will be carried in order to guarantee stability of the GDS perimeter.

Actual Departures: Air reservations from all source markets to all destinations with effective travel date prior to 31 December 2017.

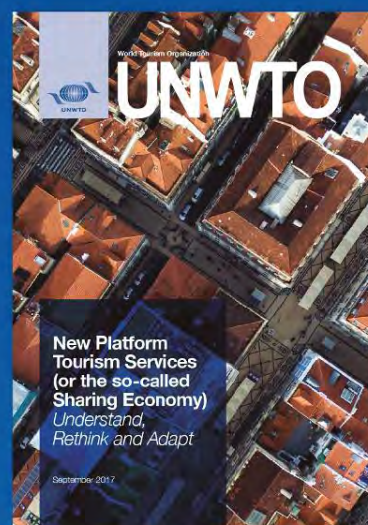
Expected Departures: Accumulated reservations until 31st December 2017 with travelling date between 1 January and 30 April 2018.

For further details see:

www.forwardkeys.com/publication-single/Methodology_UNWTO.html

For more information on ForwardKeys® please visit:

www.forwardkeys.com



New Platform Tourism Services (or the so-called Sharing Economy)

Understand, rethink and adapt

This study aims to gain a better understanding of how the phenomenon of new platform tourism services is shaping the tourism sector. It seeks to identify the opportunities and challenges it poses across destinations, how these are being addressed, and the way forward. Drawing on the responses of a UNWTO survey, this exploratory study offers a global overview of the current situation, impact and future importance of these services in tourism.



World Tourism Organization UNWTO Publications

UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* and accompanying Statistical Annex aim to provide tourism stakeholders with up-to-date statistics and analysis in a timely fashion. The information is updated six times a year and covers short-term tourism trends, including a retrospective and prospective assessment of current tourism performance by the UNWTO Panel of Tourism Experts.

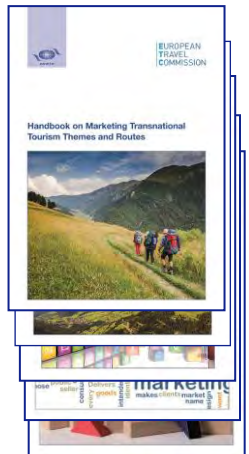
Available in English, with the Statistical Annex also available in French, Spanish and Russian.



Marketing Handbooks:

- Marketing Transnational Tourism Themes and Routes
- Key Performance Indicators for Tourism Marketing Evaluation
- E-Marketing for Tourism Destinations
- Tourism Product Development
- Tourism Destination Branding

This series of Marketing Handbooks developed by UNWTO and the European Travel Commission (ETC) addresses key components of the marketing and promotion of tourism destinations. The handbooks provide a comprehensive overview of current strategies and best practices with regard to, among others, Key Performance Indicators (KPIs), product development, destination branding and e-marketing, complemented with case studies and best practice recommendations.



European Union Short-Term Tourism Trends

The new *European Union Short-Term Tourism Trends* series was created as part of the Enhancing the Understanding of European Tourism project between UNWTO and the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs of the European Commission (DG GROW). It is aimed at monitoring the short-term evolution of tourism trends in the European Union (EU-28) in terms of arrivals, receipts and outbound travel.



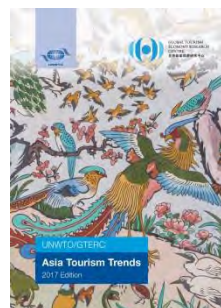
New Platform Tourism Services (or the so-called Sharing Economy) – Understand, rethink and adapt –

This study aims to gain a better understanding of how the phenomenon of new platform tourism services is shaping the tourism sector. It seeks to identify the opportunities and challenges it poses across destinations, how these are being addressed, and the way forward. Drawing on the responses of a UNWTO survey, this exploratory study offers a global overview of the current situation, impact and future importance of these services in tourism.



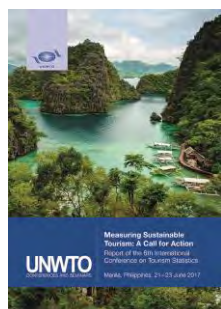
UNWTO/GTERC Asia Tourism Trends

The UNWTO/GTERC Annual Report on Asia Tourism Trends, 2017 Edition, the fourth annual report in the series, highlights the rapidly growing tourism sector of Asia and the Pacific. This growth has been influenced by technological developments and the digital revolution. Regional collaboration with its many challenges and opportunities is also highlighted as one of factors shaping tourism development in Asia and the Pacific.



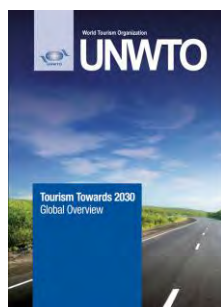
Measuring Sustainable Tourism: A Call for Action

This is the outcome of the 6th International Conference on Tourism Statistics that represents a global commitment to sustainable tourism and the need to measure it through a consistent statistical approach, recognizing that effective sustainable tourism policies require an integrated, coherent and robust information base.



Tourism Towards 2030

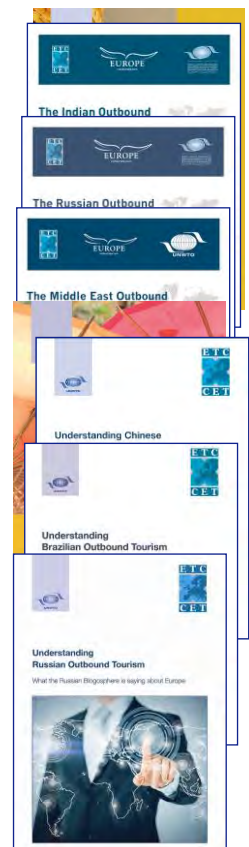
UNWTO Tourism Towards 2030 is UNWTO's long-term outlook and assessment of future tourism trends. Key outputs of the study are quantitative projections for international tourism flows up to 2030, based on data series of international tourist arrivals by subregion of destination, region of origin and mode of transport.



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