Actual Trend vs. Tourism Towards 2030 projection

World

International Tourist Arrivals (million)

Source: World Tourism Organization (UNWTO)
Actual Trend vs. Tourism Towards 2030 projection
Asia and the Pacific

Source: World Tourism Organization (UNWTO)
Asia and the Pacific towards 2030

17 million additional international tourist arrivals on average a year of the 43 million worldwide
Key results 2015

International tourist arrivals
1186 million
+4.6%

International tourism receipts (BOP Travel)
US$ 1260 billion (euro 1136 bn)
+4.4% (real terms)

International passenger transport (BOP Transport, passenger)
US$ 211 billion (euro 191 bn)

7% of world’s exports

http://mkt.unwto.org/highlights

www.unwto.org/facts
International tourist arrivals up 4% in the first half of 2016

International tourist arrivals worldwide grew by 4% between January and June 2016 compared to the same period last year. The UNWTO received 561 million international tourist arrivals (overnight visitors), 21 million more than in 2015, according to the latest UNWTO World Tourism Barometer.

Asia and the Pacific demonstrated renewed strength this first half of 2016, receiving 9% more international arrivals, the highest growth across world regions. In the Americas, international arrivals increased by 8%, led by Central America and South America. Europe (+3%) showed mixed results, with solid growth in many destinations offset by weaker performance in others. In Africa (+5%), Sub-Saharan destinations rebounded strongly, while North Africa continued to report weak results. Limited data for the Middle East points to an estimated decrease of 9% in international arrivals this six-month period, though results vary from destination to destination.

"Tourism has proven to be one of the most resilient economic sectors worldwide. It is creating jobs for millions, at a time when providing perspectives for a better future to people of all regions is one of our biggest challenges. But tourism is also creating bonds among people of all nations and backgrounds, bringing down stereotypes and fighting fear and distrust," said UNWTO Secretary-General, Taleb Rifai.

"Safety and security are key pillars of tourism development and we need to strengthen our common action to build a safe, secure and seamless travel framework. This is not to build walls or point fingers; it is to build an alliance based on a shared vision and a joint responsibility," he added.

2016

[To be continued on page 3]
Tourist arrivals through June point towards 7th consecutive year with above-average growth.

International Tourist Arrivals, monthly evolution

World (% change)

<table>
<thead>
<tr>
<th>Year</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>-3.9%</td>
</tr>
<tr>
<td>2010</td>
<td>+6.5%</td>
</tr>
<tr>
<td>2011</td>
<td>+4.6%</td>
</tr>
<tr>
<td>2012</td>
<td>+4.7%</td>
</tr>
<tr>
<td>2013</td>
<td>+4.6%</td>
</tr>
<tr>
<td>2014</td>
<td>+4.2%</td>
</tr>
<tr>
<td>2015</td>
<td>+4.6%</td>
</tr>
<tr>
<td>2016*</td>
<td>+4.0%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) ©
561 million intnl tourist arrivals through June, 21 million more than in the same period of 2015

Source: World Tourism Organization (UNWTO) ©
2016: Subsaharan Africa, South-East Asia and Oceania with highest growth

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

Source: World Tourism Organization (UNWTO) ©
AP: growth picking up in first half of the year

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

Source: World Tourism Organization (UNWTO) ©
146 million intnl tourist arrivals through June, 12 million more than in the same period of 2015.

International Tourist Arrivals, monthly evolution
Asia and the Pacific (million)

Source: World Tourism Organization (UNWTO) ©
Asia and the Pacific: strong growth in all subregions through June

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

Source: World Tourism Organization (UNWTO) ©
Lower price of oil and other commodities

Price Crude Oil Brent (US$ per barrel)

Source: US Department of Energy, Energy Information Administration
Unusual strong exchange rate fluctuations

Source: World Tourism Organization (UNWTO)
Unusual strong exchange rate fluctuations

Source: World Tourism Organization (UNWTO)
Confidence remains positive on a global level

Source: World Tourism Organization (UNWTO) ©
World: confidence remains positive

UNWTO Panel of Tourism Experts

Prospects (before)
Evaluation (after)

Source: World Tourism Organization (UNWTO) ©
Asia and the Pacific: confidence picking up

UNWTO Panel of Tourism Experts: Asia and the Pacific

Prospects (before)
Evaluation (after)

Source: World Tourism Organization (UNWTO) ©
Looking back – Looking ahead
Tourism Prospects

Short-term forecast
- Focus on current situation and cyclical trends
  - political and economic climate (‘coyuntura’)
- Use: operational / tactical, i.e.:
  - marketing and promotion activities
  - capacity management, pricing, etc.

Long-term forecast
- Focus on structural, underlying trends
  - demographic, social, political, economic and technological developments
- Use: strategic, i.e.:
  - planning of infrastructure, product development, legislation, competitive framework
  - master plans, strategic marketing planning, HR
Outlook: World

International Tourist Arrivals, World (% change)

Forecast 2016: 3.5% to 4.5% (issued January)

Source: World Tourism Organization (UNWTO) ©
<table>
<thead>
<tr>
<th>Region</th>
<th>Actual data</th>
<th>Projection 2016 (issued January)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015</td>
<td>Jan-June 2016</td>
</tr>
<tr>
<td><strong>World</strong></td>
<td>4.6%</td>
<td>4.0%</td>
</tr>
<tr>
<td><strong>Europe</strong></td>
<td>4.7%</td>
<td>2.6%</td>
</tr>
<tr>
<td><strong>Asia and the Pacific</strong></td>
<td>5.6%</td>
<td>8.8%</td>
</tr>
<tr>
<td><strong>Americas</strong></td>
<td>5.9%</td>
<td>4.2%</td>
</tr>
<tr>
<td><strong>Africa</strong></td>
<td>-3.1%</td>
<td>5.4%</td>
</tr>
<tr>
<td><strong>Middle East</strong></td>
<td>1.7%</td>
<td>-8.6%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)
Aging of Asian population

Asia and the Pacific: population by age group, 1950-2100

Maximum population by 2055
By 2050 more population of 40 years and over, than under 40

Source: compiled by UNWTO based on World Population Prospects, the 2015 Revision, 2015-2100 medium-fertility variant, United Nations, Population Division (http://esa.un.org/unpd/wpp/)
... and tomorrow’s seniors are not today’s ones
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‘The only thing that is constant is change’
Heraclitus, c. 535 - 475 BC

Thank you very much for your attention!
John G.C. Kester
Tourism Market Trends Programme
World Tourism Organization (UNWTO)
www.unwto.org