Tourism Trends in Asia and the Pacific
International Tourist Arrivals 2018

- **Americas**: 217 million (+3%)
- **Europe**: 713 million (+6%)
- **Asia and the Pacific**: 343 million (+6%)
- **Africa**: 67 million (+7%)
- **Middle East**: 64 million (+10%)

Total International Tourist Arrivals (2018): 1.4 billion (+6%)

Source: World Tourism Organization (UNWTO), January 2019
2018 second best year since 2010

International tourist arrivals, growth (in %)

Source: World Tourism Organization (UNWTO), January 2019
1.4 billion arrivals in 2018, two years ahead of forecast

Source: World Tourism Organization (UNWTO), January 2019
Middle East, Africa & Asia Pacific lead

International tourist arrivals, growth (in %)

Source: World Tourism Organization (UNWTO), January 2019
Drivers of Growth

- Favorable economic environment,
- Strong outbound demand from major source markets,
- Consolidation of the recovery in key destinations affected by previous crises,
- Enhanced air connectivity and
- Increased visa facilitation.
Favourable economy
Strong outbound from main markets
Stable fuel prices = affordable air travel
Consolidating recovery in key destinations
Better air connectivity
Visa facilitation
Digital transformation & new business models
2019 growth closer to historical trends

Full-year projection 2019 - International tourist arrivals, growth (%)

<table>
<thead>
<tr>
<th>Region</th>
<th>Growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Americas</td>
<td>+2% to +3%</td>
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<tr>
<td>Asia and the Pacific</td>
<td>+5% to +6%</td>
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Source: World Tourism Organization (UNWTO), January 2019
2019 Outlook

+ Positive drivers

• fuel prices stable = affordable air travel
• better air connectivity
• strong outbound from emerging markets

- Downside Risks

• Economic slowdown
• Brexit uncertainty
• Geopolitical and trade tensions
• "wait and see" attitude among investors and travellers.
Asia and the Pacific: 343 million in 2018 .. also exceeding the forecast

Source: World Tourism Organization (UNWTO), January 2019
Asia: fastest regional growth in arrivals 2000 - 2018

International tourist arrivals, average annual growth (%), 2000-2018

- Asia Pacific: +6.5%
- Middle East: +6.0%
- Africa: +5.4%
- Americas: +3.0%
- Europe: +3.4%

Source: World Tourism Organization (UNWTO), January 2019
Asia is home to over half the world’s population

World Population, by region (%)

- Asia and the Pacific: 56%
- Americas: 13%
- Africa: 15%
- Europe: 12%
- Middle East: 3%

Source: World Tourism Organization (UNWTO), January 2019
...and the world’s largest region in economic terms

Source: World Tourism Organization (UNWTO), January 2019
Asia: from 16% of world arrivals in 2000

International tourist arrivals, by region (%) 2000

- Asia and the Pacific: 16%
- Europe: 58%
- Americas: 19%
- Middle East: 3%
- Africa: 4%

Source: World Tourism Organization (UNWTO), January 2019
... to almost one fourth of world arrivals in 2018

International tourist arrivals, by region (%) 2018

- Asia and the Pacific: 24%
- Europe: 51%
- Americas: 15%
- Middle East: 5%
- Africa: 5%

From 16% in 2000 to 24% in 2018

Source: World Tourism Organization (UNWTO), January 2019
Asia: from 17% of the world’s tourism receipts in 2000

International tourism receipts (%), 2000

- Asia and the Pacific: 17%
- Europe: 47%
- Americas: 30%
- Middle East: 3%
- Africa: 2%

From 17% in 2000

Source: World Tourism Organization (UNWTO), January 2019
...to nearly 30% of the world’s receipts in 2018

International tourism receipts (%), 2017

- Americas: 24%
- Europe: 39%
- Asia and the Pacific: 29%
- Middle East: 3%
- Africa: 5%

From 17% in 2000
To 29% in 2018

Source: World Tourism Organization (UNWTO), January 2019
South Asia saw the highest growth
80% of Asia Pacific arrivals originate within the region

Source regions of Asian arrivals (%), 2017

- Intraregional: 80%
- Other regions: 20%
- Americas: 6%
- Middle East: 1.3%
- Africa: 0.5%
- Origin not specified: 2%

Source: World Tourism Organization (UNWTO)
China is Asia’s and the world’s top source market.
13% of Asian outbound travel is to Europe

Source: World Tourism Organization (UNWTO), January 2019
13% of Asian outbound travel is to Europe

Asian outbound: regions of destination (%)

To Asia 76%
To Europe 13%
Western Europe 5.3%
Southern / Medit Eu 3.7%
Central/ East. Europe 2.2%
Northern Europe 1.9%
Americas 6%
Middle East 4%
Africa 1%

Source: World Tourism Organization (UNWTO), January 2019
Italy, France, Germany, Spain: over 4 million Asian arrivals each

Note: Country grouping by Eurostat differs from UNWTO’s

Source: World Tourism Organization (UNWTO), January 2019
.. much of which from China

Asian arrivals in European accommodation establishments (million), 2017

Note: Country grouping by Eurostat differs from UNWTO’s

Source: World Tourism Organization (UNWTO), January 2019
Asia Tourism Trends report 5th edition

Analysis of trends in Asia and the Pacific:

- **Socio-economic** environment
- **Inbound**: arrivals & receipts
- **Outbound**: trips & expenditure
- **Specific subjects**:
  - China and Europe in Focus (EU – China tourism)
  - The Greater Bay Area