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UNWTO / GTERC Asia Tourism Trends Executive Summary

2019 Edition



UNWTO/GTERC

Asia Tourism Trends

Executive Summary

2019 Edition



Foreword

Zurab Pololikashvili
Secretary-General,
World Tourism Organization (UNWTO)

2018 marked another strong year for tourism with international tourist arrivals reaching 1.4 billion two years ahead of UNWTO's long-term forecasts. In addition, tourism generated USD 1.7 trillion in export earnings, or almost USD 5 billion a day. For the seventh consecutive year, tourism exports (+4%) grew faster than merchandise exports (+3%), consolidating the sector as one of the pillars of our economies.

Asia and the Pacific has maintained its position as the fastest-growing tourism region in the world. As economies across the region continued to perform strongly, the number of tourists from Asia and the Pacific making international journeys tripled between 2000 and 2018, while worldwide, total numbers doubled over the same period. In total, the region accounted for 348 million arrivals in 2018, or one-fourth of the worldwide total.

Much of this growth continued to be fueled by China, the top source market in the world, both in terms of number of trips abroad taken and on the amount of money spent by tourists from the country. The number of outbound trips by Chinese citizens showed an average growth rate of 16% each year between 2000 and 2018, reaching a total of 150 million last year.

Such potential is yet to be fully maximized, however, particularly among destinations in other regions such as South America. This report, with its special emphasis on Brazil and Argentina, shows that though the numbers are still relatively small compared to other destinations,

inhibited by distance and cost, the yield of Chinese tourists is much greater as tours usually cater to an affluent class of travellers mainly from the first-tier cities of Beijing, Shanghai and Guangzhou.

The report concludes with an overview of the growing segments of health and sports tourism, both driven by the growing pursuit of wellbeing of travellers in the region. While Asian countries have been pioneers in medical and wellness tourism, sports tourism, though more recent, is gaining immense traction.

Ranging from mega events such as the Olympic Games (Japan will host the Summer Olympics in 2020 and China the Winter Olympics in 2022), to E-sport, that brings together leisure and technology and caters to a wide and aspiring clientele of Asian enthusiasts or to simple events like marathons, walking tourism and cycling tourism, sports tourism represents a growing value to destinations across Asia.

I trust that this 2019 *Asia Tourism Trends* report, like the preceding editions, will provide key insights to better understand tourism in the region and to benefit from its immense development potential.

I take this opportunity to thank the Global Tourism Economy Research Centre (GTERC), and in particular its Chairman, Pansy Ho, for their continuous partnership with UNWTO and their commitment to advancing tourism research in the region for the benefit of all.

Foreword

Pansy Ho

Chairman, Global Tourism
Economy Research Centre (GTERC)



This *Asia Tourism Trends, 2019 Edition* is the sixth year of collaboration between the Global Tourism Economy Research Centre and the UNWTO. Each year, this project gives us a new opportunity to reflect on and celebrate the great strides made in tourism, both in Asia and around the world.

With a new record of 1.4 billion international tourist arrivals, tourism continues to maintain its position as one of the fastest-growing economic sectors in the world. As this report highlights, Asia is a hotbed of tourism growth. In just under two decades, Asia's share of international tourist arrivals went from 16% of the world total (in 2000) to 25% (in 2018), with a record 348 million arrivals to the region in 2018.

As the landscape of global tourism and leisure continues to evolve, travellers' demand for diverse and authentic experiences is on the rise. This has stimulated the emergence and expansion of tourism segments focused on areas such as health, wellness and sports. Asia's rich cultural and natural-healing traditions and resources, state-of-the-art facilities and services from both the private and public sectors translate into a booming wellness tourism industry for the region. Sports tourism, which ranges from spectating at mega-events to participating in physical activities, opens up opportunities to attract new consumer segments and investments in respective infrastructure. Moreover, the technological innovations involved in events such as e-sports, reminds us that tourism is ever evolving and has created new opportunities

for destinations to expand their tourism offerings that are beyond the realms of traditional tourism products.

In terms of outbound tourism, 2018 was the ninth consecutive year of robust growth, with Asian travellers, particularly Chinese, contributing greatly to this global phenomenon. Between 2010 and 2018, Asian outbound travel increased by an astounding 75% on aggregate. As Chinese travellers continue to explore the world, South America has emerged as an appealing destination. Two countries that have stood out, especially in terms of their policies designed to welcome more visitors, are Argentina and Brazil. The new flow of tourism between China and these countries will certainly be the foundation of international collaboration.

This report, like past editions, showcases the exciting tourism trends in Asia and puts them into a context that highlights tourism as a global transformative force that empowers communities and improves livelihoods. Behind the charts and numbers are real people and communities feeling the positive ripple effects of tourism.

Once again, I would like to express my gratitude to the Secretary-General of the UNWTO, Mr. Zurab Pololikashvili, and his team for their steadfast and valuable support in this project.



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From the Tourism Market Intelligence and Competitiveness Department, Mr. Javier Ruescas led the research work of chapter 1 on *Tourism trends and outlook*, while Mr. Shuichi Kameyama undertook the study on chapter 4 on *Sports tourism in Asia*. Mr. Michel Julian and Mr. Javier Ruescas oversaw the drafting, editing and revision of the various components of the report coming under their purview.

From the Regional Department for Asia and the Pacific, Mr. Omar Nawaz and Ms. Hyeon-Jin Lee contributed to drafting, editing and revision of the overall report.

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Executive summary

In the 6th year of publication the *UNWTO/GTERC Asia Tourism Trends, 2019 Edition* comprises four specific chapters. As in the past editions, chapter 1 is dedicated to international tourism trends in Asia and the Pacific in their global and regional dimensions, with an overview of the region's socioeconomic environment.

Chapter 2 highlights the potential of the Chinese outbound tourism market, the largest in terms of numbers and expenditure in the world, to South America with special emphasis on Argentina and Brazil.

The third chapter focusses on health tourism in Asia, including both wellness and medical tourism that are of current interest and also form lucrative markets for both Asians, as well as international visitors.

The final chapter is related to sports tourism in Asia. While Asia has the potential to organize mega events to match those of the rest of the world such as the Summer Olympic Games which was held in China in 2008 with the 2020 event scheduled to be hosted by Japan, the chapter examines the role of sports tourism and its impact on Asian society especially in relation to the SDGs.

Tourism trends and outlook

International tourism grew by 5% in 2018 to reach 1.4 billion international tourist arrivals. This is two years ahead of UNWTO's long term forecast issued in 2010, which projected the 1.4 billion mark for the year 2020. Sustained growth of 4% or more for the past nine years explains this early milestone. Results were driven by a favourable economic environment, strong outbound demand from major source markets and increasing air connectivity. Asian markets fuelled much of this growth with over half a trillion US dollars spent on international tourism in 2018, over one-third of the world total.

Role of Asia and the Pacific

Asia and the Pacific plays a central role in global tourism, both as a destination region and an outbound market. In 2018 Asia recorded 7% growth in international tourist arrivals to reach a total of 348 million, one-fourth of the world's total. This share has increased from 16% in 2000 to 25% in 2018.

The region also earned USD 435 billion in international tourism receipts in 2018, accounting for 30% of the world total. Overall export revenues from international tourism (including passenger transport) reached USD 480 billion in Asia. This represents 32% of the region's services exports and 6% of its overall exports of goods and services.

Outbound travel from Asia and the Pacific, measured as arrivals in destinations, reached 359 million in 2018, increasing by 7% from 2017. It was the ninth consecutive year of robust growth in outbound tourism, since the 2009 global economic crisis. Asian travellers spent USD 524 billion on international tourism in 2018, some 36% of the world total, up from 24% in 2010, following several years of double-digit growth.

This expansion is attributable to the strong economic conditions prevailing in most of the region, combined with the rapid urbanization, large infrastructure development, growing air connectivity and rise of an affluent middle class in large emerging economies.

Socioeconomic environment

Asia boasts the largest economy in the world

- Asia and the Pacific is the world's largest region in economic terms, with a combined GDP of nearly USD 30 trillion, or 35% of the world's economic output.
- The region's economy has seen the fastest growth of all world regions between 2000 and 2018, enjoying 5% or higher GDP growth almost every year since 2000, largely driven by China.
- China is the largest economy in Asia and the second largest in the world, accounting for 45% of Asia's economic output and 16% of the world's.
- In 2016 the combined GDP of Asia surpassed that of the Americas (in US dollar terms) for the first time in the historical series.
- Income levels have surged in Asia and the Pacific since the turn of the century, with the region's GDP per capita more than doubling, from USD 2,700 in 2000 to USD 7,000 in 2018, an increase of 160%.
- Asia and the Pacific is also the world's most populous region, with 4.2 billion inhabitants, or 56% of the population on the planet.
- Rapid economic growth in a region with over half the world's population, coupled with rising air connectivity, infrastructure development, travel facilitation and promotion have boosted international travel within Asia, as well as to and from other world regions.

Inbound tourism

Asia and the Pacific enjoyed 7% growth in international arrivals in 2018

- International tourist arrivals (overnight visitors) increased 5% in 2018 to reach 1.4 billion globally. This is two years ahead of UNWTO's long term forecast issued in 2010, which projected the 1.4 billion mark for the year 2020.
- International arrivals in Asia and the Pacific increased 7% to reach a total of 348 million in 2018, one-fourth of the world's total.
- Asia and the Pacific is the second most visited region in the world after Europe and has seen the fastest growth in recent years. Between 2010 and 2018 arrivals in Asia increased an average 7% per year, compared to the world average of 5%, outperforming all world regions.
- Almost half of Asia's international tourist arrivals in 2018 were recorded in North-East Asia (49%), while 37% were recorded in South-East Asia, 9% in South Asia and 5% in Oceania.
- Between 2010 and 2018, South Asia and South-East Asia were the fastest-growing subregions in the world, with 10% and 8% average annual growth respectively.
- The world's top ten ranking by international arrivals features two Asian destinations: China (4th) with 63 million arrivals and Thailand (9th) with 38 million.

Asia and the Pacific accounts for 30% of the world's international tourism receipts

- Asian destinations earned USD 435 billion in tourism receipts in 2018, or 30% of the world total, a share that has almost doubled since 2000 (17%).
- In 2018, international tourism receipts in Asia increased by 7% in real terms, with growth led by South Asia (+10%) and North-East Asia (+9%).
- North-East Asia represents 43% of the region's international tourism receipts, South-East Asia 33%, Oceania 14% and South Asia 10%.
- The largest tourism earners in Asia are Thailand, Australia, Japan, China and Macao (China).

- Asian destinations earn an average USD 1,250 from every international tourist (arrival), above the world average of USD 1,040.

Top destinations in Asia and the Pacific

- China is the top destination in Asia and the Pacific with 63 million international arrivals in 2018, followed by Thailand (2nd) with 38 million and Japan (3rd) with 31 million. China and Thailand are also featured in the world's top ten ranking in fourth and ninth place respectively.
- The next largest Asian destinations are Hong Kong (China), Malaysia, Macao (China) and India.
- Ranked by international tourism receipts, Thailand is the top earner in Asia with USD 63 billion recorded in 2018, Australia is second with USD 45 billion and Japan third with USD 41 billion. These destinations are respectively fourth, seventh and ninth in the world ranking of tourism earners.

Inbound tourism by region of origin

Nearly 80% of international arrivals in Asia originate in the region.

- Intraregional tourism predominates in Asia and the Pacific, with 79% of the region's international tourist arrivals originating in Asia itself, while 18% originates in other world regions (interregional), mostly in Europe (11%) and the Americas (6%). (For a small percentage of arrivals the origin is not specified.)
- In 2018 intraregional tourism was highest in North-East Asia, where 88% of arrivals originated in Asian source markets. This share was 81% in South-East Asia and 72% in Oceania. This proportion is lowest in South Asia, where only 33% of international arrivals originate in Asia. About 44% of arrivals in South Asia come from other regions, mostly Europe (26%).
- Europe remains the largest source of interregional tourism for Asia and the Pacific, accounting for 11% of all arrivals and 57% of arrivals from outside the region. This is explained by the surging popularity of Asia Pacific destinations among European travellers, as well as growing trade and investment between both regions.

Outbound tourism

- Outbound travel from Asia and the Pacific – measured in arrivals recorded in destinations worldwide – reached 359 million in 2018, a 6% increase from 2017.
- It was the ninth consecutive year of robust growth in outbound tourism, since the 2009 global economic crisis. Asian outbound tourism has grown an average 7% per year between 2010 and 2018, or 75% on aggregate.
- Intraregional travel (within the region) accounts for 76% of all Asian outbound travel, while interregional travel (to other regions) represents the remaining 24%.
- North-East Asian destinations account for 41% of all intraregional arrivals (originating in Asia), much of which is generated by the subregion itself. A large part of this travel takes place between mainland China and Hong Kong (China) and Macao (China).
- Interregional travel (to other regions) represents 24% of all arrivals generated in Asia, and grew by 7% increase last year, reflecting solid demand for long-haul travel, particularly to the Middle East.
- Between 2010 and 2018 Asian outbound travel increased by 75% overall. Travel to destinations outside Asia (+97%) exceeding growth in travel to destinations within Asia (+69%).

Asia and the Pacific travellers spent USD 524 billion in 2018

- Travellers from Asia and the Pacific (both overnight and same-day) spent USD 524 billion on international tourism in 2018, about 36% of the world total. This proportion has increased from 24% in 2010 as a result of several years of rapid growth.
- China is the world's top source market after double-digit growth in spending every year between 2004 and 2015. Chinese expenditure reached USD 277 billion in 2018, based on travel export data from the balance of payments.
- Spending by Chinese travellers grew by 5% (in real terms) in 2018, an increase of nearly USD 20 billion from the previous year. China now accounts for more than half of Asia's tourism expenditure and generates

almost one-fifth of the world's international tourism receipts.

- Australia is the 2nd largest tourism spender in the region, with USD 37 billion reported in 2018. The Republic of Korea, Hong Kong (China) and Singapore are the next largest spenders. These four markets combined represent 23% of international tourism expenditure in Asia and the Pacific.
- Chinese travellers made 150 million trips abroad in 2018 (total departures including same-day trips), much of which to Hong Kong (China), Macao (China) and other destinations in Asia and the Pacific.
- Relative to the region's population, tourism expenditure in Asia is still low, with an average USD 125 per inhabitant (travellers and non-travellers), compared with a worldwide average of USD 193 in 2018. This figure reflects the region's huge population, but also the great potential for growth in international travel.
- There are however, large differences in spending per capita across Asian subregions. Oceania has the highest average spending per inhabitant (USD 1,000) partly due to the remoteness of Australia, New Zealand and other island nations, while the average is USD 230 in North-East Asia, USD 120 in South-East Asia and only USD 14 in South Asia.
- Results from Asian destinations are so far strong this first half of 2019, with solid growth in international arrivals reported by the Republic of Korea, Viet Nam, Macao (China) and Malaysia among others.
- From an outbound point of view results are mixed so far, with robust growth in international tourism expenditure from Japan, Thailand, Singapore and Australia among others, and declines from the Republic of Korea and China.
- International arrivals in Asia and the Pacific are forecast to grow by 5% to 6% in 2019, one of the highest growth rates across world regions.
- Confidence in global tourism remains positive yet cautious overall, with signs of moderate growth in the remainder of the year, according to the latest UNWTO Confidence Index survey.

Tourism prospects

International tourist arrivals up 4% in the first half of 2019

- International tourist arrivals (overnight visitors) grew 4% in January–June 2019 compared to the same period last year. This is slightly below the 5% increase in 2018, though in line with the ten-year average of 4% per year in 2008–2018.
- Growth in the first half of 2019 was led by the Middle East (+8%) and Asia and the Pacific (+6%), followed by Europe (+4%) and Africa (+3%). The Americas (+2%) saw more moderate growth this period.
- By subregions, the Caribbean (+11%) enjoyed the highest growth, followed by North Africa (+9%), South Asia and North-East Asia (both +7%).



Chinese outbound tourism to South America

China currently is the number one source market in the world in terms of both trips abroad and international tourism expenditure. The number of outbound trips by Chinese citizens showed an average growth rate of 16% each year between 2000 and 2018. The market is described as mature and diverse. Fully independent travellers (FITs), in a majority composed of millennials, dominate the Chinese outbound market which is greatly influenced by technological progress: China had a volume of 817 million internet users in 2018 and programmes such as Weibo and WeChat are extremely influential in tourism decision making today. While the bulk of the outbound market has been to neighbouring destinations, the sheer volume and potential of the Chinese outbound tourism market has not been lost on other destinations and this includes countries in South America. The chapter draws attention to the continent as a whole with specific references to Argentina and Brazil.

The South American market for China outbound visitors is inhibited by a lack of direct flights. Due to the distances and consequently time involved in flying from China to South America, surpassing 24 hours, most tours are either with one connection (68%) or two connections (32%). The package tours or even the tailor made ones, include multi-destinations are of a duration of 14 to 19 days. These tours cater to a specialized clientele of upper middle-class travellers and retirees originating from the first-tier cities in China (Shanghai, Beijing and Guangzhou)

who have the time and means to travel. They are also seasoned travellers having visited other destinations in the past. The average cost of a trip to South American destinations ranges from USD 5,700 to USD 7,200 which is twice that of regular tour products to Europe and North America. However, despite these hurdles, the demand by Chinese outbound tourists for travel to South America is growing rapidly with an increase of 13% for Argentina, receiving 60,000 visitors in 2017 compared to 54,000 in 2016, and Brazil that showed a 7.1% growth in 2017 with 61,250 visitors. Another striking feature is the demand by Chinese tourists to visit the Antarctic: the number of Chinese tourists to Antarctica has been increasing year by year, with China becoming the second largest source of tourists in the world. Ctrip has predicted that the number of Chinese tourists visiting Antarctica during the 2018/2019 Antarctic tourism season will exceed 10,000.

The South American market is characterized by its novelty and exoticism. Sports in general and football in particular have been a great image builder, with Brazil and Argentina being the biggest beneficiaries. Natural and cultural assets of not only the two destinations but also of neighbouring countries that make up the multi-destination packages add value to the product. From the point of view of policy and promotion Argentina and Brazil have been extremely proactive with easing of visa procedures and innovative marketing of their respective destinations in China. From a small base compared to traditional markets that provide larger numbers, Argentina and Brazil have opted for greater yields by targeting the high-end Chinese travellers.



Health tourism in Asia

Travelling for health purposes is a global tourism trend. Numerous countries have identified health, medical, and wellness tourism as a key development area for the near or distant future. The wellness movement has become mainstream both at the individual and the corporate levels, and the health-care industry is considered now to be of strategic interest and priority. Various social, political, economic factors, as well as technological innovations shape the demand as well as the supply of wellness and medical services. In this report, the term *health tourism* is the umbrella term for the subtypes: wellness tourism and medical tourism.

Health tourism is not a new phenomenon or tourism product to many Asian countries. Both in medical and wellness tourism certain Asian providers have been the pioneers of the global health tourism movement. The Global Wellness Institute estimated that the top five wellness tourism markets in terms of international and domestic trips were China, India, Japan, the Republic of Korea and Thailand. China itself was estimated to have over 70 million arrivals/trips a year, whereas in the case of Thailand this number was 12.4 million. There is a high demand for complementary and alternative therapies and holistic treatments in Asia, which is a reflection of the rich spiritual resources and traditions of the region.

The vast majority of international medical tourism services in Asia are operated by private businesses. However, the role of governmental bodies as well as

cooperation between the public and private sector play a significant role in a country's position, competitiveness and performance in medical tourism. Asia has also been known as a world leader in medical tourism for more than ten years, especially Singapore, Thailand, India, the Republic of Korea and Malaysia. The market has been growing quickly and now includes several other aspiring countries, such as the Philippines and Viet Nam. One of the fastest growing medical tourism destinations at present in Asia is the Republic of Korea, which is rooted in medical technologies, the relatively competitive prices for highly skilled surgeries and the strong government support. It is still considered that medical tourism is the most profitable segment of the health tourism industry in Asia.

Asia is at least as much well-known and as attractive for wellness tourism as it is for medical tourism. India, especially Kerala has long been the key destination for those interested in holistic services such as meditation or yoga. Bali has become a must visit destination for spiritual travellers as well as luxury spa resort enthusiasts. Australia's Byron Bay has long been a favoured hideaway for travellers looking for small-scale holistic experiences. China has significant resources, as well as plans for developing health tourism. Most of these plans are part of the China's Belt and Road Initiative (BRI). This initiative supports the development of new hospitals in the Belt and Road Health Corridor, many with international patient centres. The BRI has plans for creating 30 centres by 2020 to provide Traditional Chinese Medicine medical services and education, and to spread its influence.

It is clear that Asian countries are now considered as generating countries, as well as receiving destinations both in medical and wellness tourism. This is certainly a change to the former one directional industry development and guest flow. The rich cultural and natural healing traditions and resources, the state-of-the-art health care, as well as IT technology solutions combined with sound support by governmental bodies can mean a bright future in international health tourism and health care in many Asian countries.

Sports tourism in Asia

Tourism and sports are interrelated and complementary. Sports tourism is a vast field and is one of the most dynamic sectors in tourism. Democratization of travel, lifestyle evolution and greater media exposure have led to more and more tourists taking an active interest in sport activities during their trips either as participants or as avid spectators of sporting events. As demand grows, an increasing number of destinations in Asia are developing sports-based tourism as a means to attract new segments, tackle seasonality, boost infrastructure or reinforce their image. Technology is changing the way in which sports is experienced.

In Asia, three consecutive Olympic and Paralympic Games were or will be held:

1. The PyeongChang Winter Games 2018;
2. The Tokyo Summer Games 2020; and
3. The Beijing Winter Games 2022.

Mega sport events such as the Olympic and Paralympic Games bring various positive impacts on tourism of the host city or nation. An increase in visitor arrivals and spending during the event is expected in the first place. However, the benefits of a mega sport event are not limited to one-off, short-term impacts. They can and should also have mid- to long-term effects as a catalyst for development and change.

Mega sport events are a golden opportunity for tourism development, but not all destinations can afford or want to host one. Therefore, local sport events such as walking activities, marathons, cycling races, surfing competitions and school sport events are a good means for tourism development and a more beneficial tool for smaller destinations.

Another type of large-scale event is e-sport (electronic sport) and involves competitions in computer and video games. Hosting an e-sport event brings the same benefits as other events. International e-sport events are broadcasted worldwide to a wide audience and high exposure of the destination can be expected: they draw media attention, can raise awareness of the destination and position it in association with e-sport's values such as fun, youth, technology and innovation, thus attracting new segments.

As travellers demand more diversified, new, unique, authentic sport experiences during their trips, destinations and tour operators need to offer products that meet these demands to remain competitive. Examples of diverse tourism products include marathon events, cycling tourism and walking tourism. Additionally, innovation and technology are key to enhance the customer journey before, during and after travel. Sports tourism is no exception and there are many possibilities to utilize technology such as information and communication technology, mobile applications, Internet of things, virtual reality, augmented reality, and artificial intelligence, including facial recognition, chatbots and robots to increase the competitive edge of sports tourism.

Finally, sports and tourism complement one another, and create new synergies in the attainment of the United Nations Sustainable Development Goals (SDGs). Sports tourism development opens opportunities to any destination not only through the organization of mega sport events but also thanks to the increasing global consumer demand for active holidays. Today's travellers desire to experience a destination in an authentic way coupled with the growing popularity of active tourism means that sports tourism is more relevant than ever for both destinations and travellers.

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The *UNWTO/GTERC Asia Tourism Trends – 2019 Edition*, the sixth annual report in the series, highlights in its first chapter the rapidly growing tourism sector in Asia and the Pacific. The 2nd chapter examines the potential of the Chinese outbound tourism market, the world's largest in both numbers and expenditure, to South America, with particular emphasis on Argentina and Brazil. The third chapter focusses on Health Tourism in Asia. Encompassing both wellness and medical tourism, Asian destinations have long been pioneers in embracing this sector. The final chapter is related to Sports Tourism in Asia, ranging from mega events to the rise of e-sports, as well as marathons, walking tourism and cycle tourism. The chapter shows how all of these can drive community development and therefore help meet several key Sustainable Development Goals.

The **World Tourism Organization (UNWTO)**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 158 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.

The **Global Tourism Economy Research Centre (GTERC)** is a permanent, independent, non-profit international research organization based in Macau, China, with a special purview on tourism and travel development in Asia as it relates and contributes to positive and sustainable global economic growth; GTERC also functions as the Secretariat of the Global Tourism Economy Forum.



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