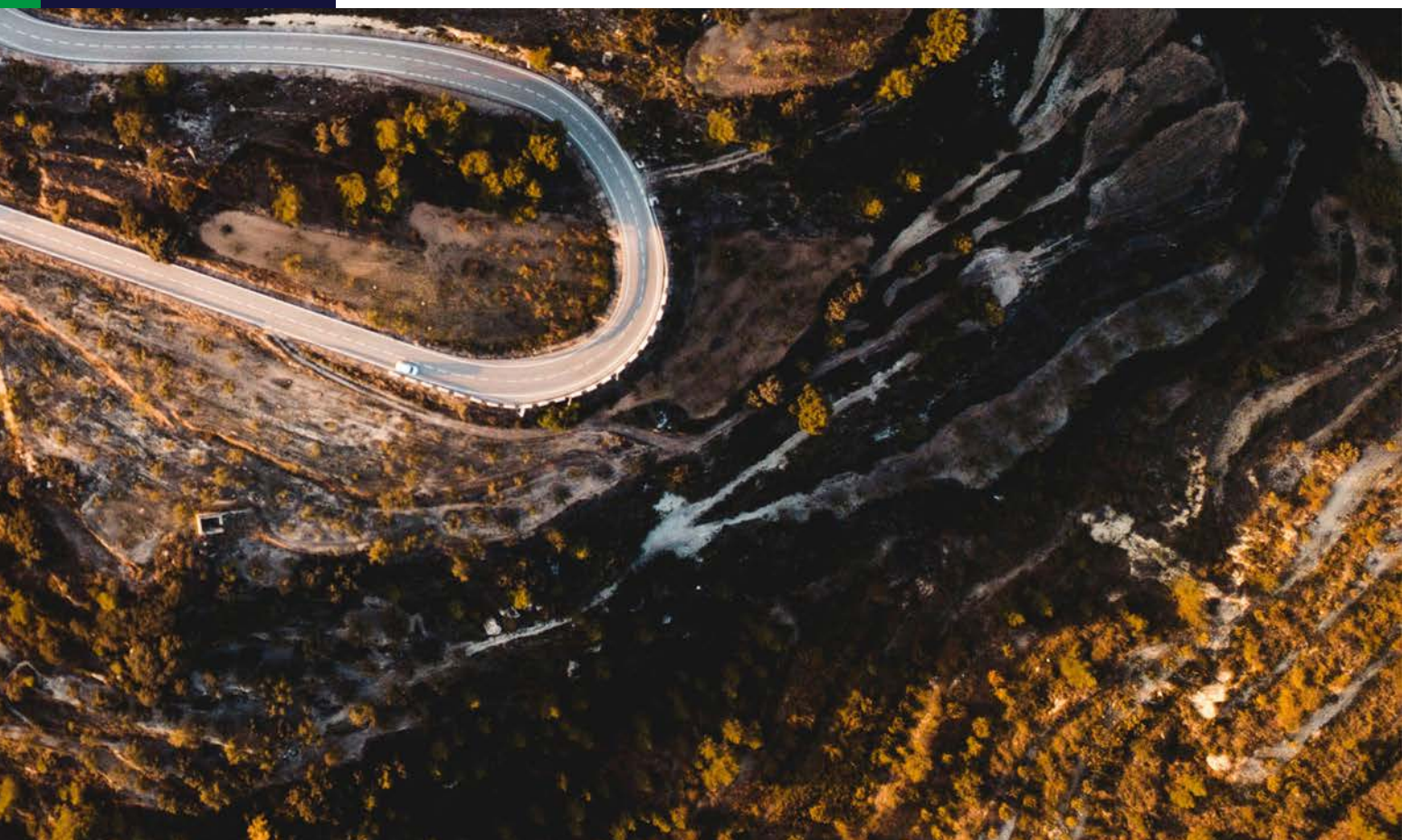




WORLD
TRAVEL &
TOURISM
COUNCIL

TRAVEL & TOURISM
ECONOMIC IMPACT 2018
UGANDA



ECONOMIC IMPACT 2018

“Inclusive growth and ensuring a future with quality jobs are the concerns of governments everywhere. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity.”

Gloria Guevara Manzo, President & CEO
World Travel & Tourism Council

For more information, please contact:

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THE ECONOMIC IMPACT OF GLOBAL TRAVEL & TOURISM

10.4%

Travel & Tourism GDP as a percentage of global GDP.

4.6%

Direct Travel & Tourism GDP growth in 2017.

1/10

jobs are supported by Travel & Tourism. This is 9.9% of global employment.

1/5

of all global net jobs created in last decade have been within the Travel & Tourism sector.

As one of the world's largest economic sectors, Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. In our annual analysis of the global economic impact of Travel & Tourism, the sector is shown to account for 10.4% of global GDP and 313 million jobs, or 9.9% of total employment, in 2017.

The right policy and investment decisions are only made with empirical evidence. For over 25 years, the World Travel & Tourism Council (WTTC) has been providing this evidence, quantifying the economic and employment impact of Travel & Tourism. Our 2018 Annual Economic Reports cover 185 countries and 25 regions of the world, providing the necessary data on 2017 performance as well as unique 10-year forecasts on the sector's potential.

2017 was one of the strongest years of GDP growth in a decade with robust consumer spending worldwide. This global growth transferred again into Travel & Tourism with the sector's direct growth of 4.6% outpacing the global economy for the seventh successive year. As in recent years, performance was particularly strong across Asia, but proving the sector's resilience, 2017 also saw countries such as Tunisia, Turkey and Egypt that had previously been devastated by the impacts of terrorist activity, recover strongly.

This power of resilience in Travel & Tourism will be much needed for the many established Travel & Tourism destinations that were severely impacted by natural disasters in 2017. While our data shows the extent of these impacts and rates of recovery over the decade ahead, beyond just numbers, WTTC and its Members are working hard to support local communities as they rebuild and recover.

Inclusive growth and ensuring a future with quality jobs are the concerns of governments everywhere. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity. Over the past ten years, one in five of all jobs created across the world has been in the sector and, with the right regulatory conditions and government support, nearly 100 million new jobs could be created over the decade ahead.

Over the longer term, forecast growth of the Travel & Tourism sector will continue to be robust as millions more people are moved to travel to see the wonders of the world. Strong growth also requires strong management, and WTTC will also continue to take a leadership role with destinations to ensure that they are planning effectively and strategically for growth, accounting for the needs of all stakeholders and using the most advanced technologies in the process.

WTTC is proud to continue to provide the evidence base required in order to help both public and private bodies make the right decisions for the future growth of a sustainable Travel & Tourism sector, and for the millions of people who depend on it.



Gloria Guevara Manzo
President & CEO



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THE ECONOMIC IMPACT OF TRAVEL & TOURISM

MARCH 2018

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UGANDA

2018 ANNUAL RESEARCH: KEY FACTS¹

2018 FORECAST

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was UGX2,699.1bn (USD749.9mn), 2.9% of total GDP in 2017 and is forecast to rise by 6.5% in 2018, and to rise by 5.9% pa, from 2018-2028, to UGX5,084.8bn (USD1,412.8mn), 2.8% of total GDP in 2028.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was UGX6,888.5bn (USD1,913.9mn), 7.3% of GDP in 2017, and is forecast to rise by 6.0% in 2018, and to rise by 5.7% pa to UGX12,654.9bn (USD3,516.1mn), 7.1% of GDP in 2028.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2017 Travel & Tourism directly supported 229,000 jobs (2.4% of total employment). This is expected to rise by 4.2% in 2018 and rise by 3.9% pa to 349,000 jobs (2.4% of total employment) in 2028.

EMPLOYMENT: TOTAL CONTRIBUTION

In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 6.3% of total employment (605,500 jobs). This is expected to rise by 3.8% in 2018 to 628,000 jobs and rise by 3.6% pa to 898,000 jobs in 2028 (6.2% of total).

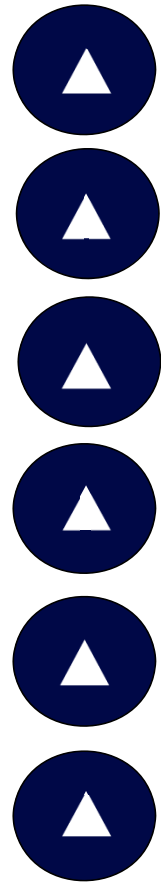
VISITOR EXPORTS

Visitor exports generated UGX3,060.1bn (USD850.2mn), 17.9% of total exports in 2017. This is forecast to grow by 7.8% in 2018, and grow by 6.0% pa, from 2018-2028, to UGX5,908.6bn (USD1,641.7mn) in 2028, 18.0% of total.

INVESTMENT

Travel & Tourism investment in 2017 was UGX1,168.3bn, 4.9% of total investment (USD324.6mn). It should rise by 3.6% in 2018, and rise by 4.5% pa over the next ten years to UGX1,872.3bn (USD520.2mn) in 2028, 4.1% of total.

¹All values are in constant 2017 prices & exchange rates

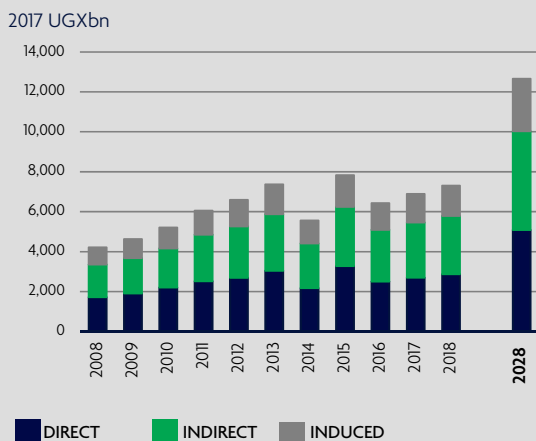


WORLD RANKING (OUT OF 185 COUNTRIES):

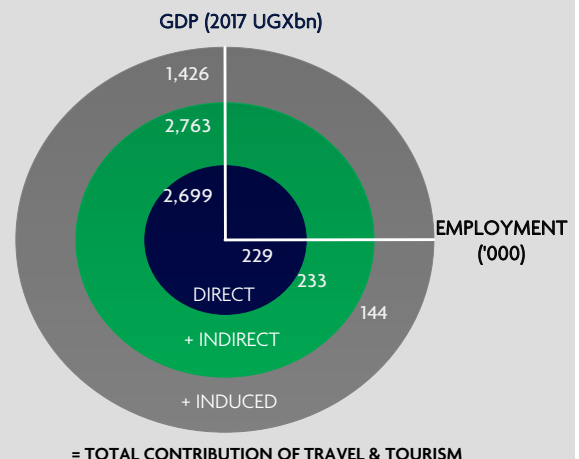
Relative importance of Travel & Tourism's total contribution to GDP



TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP

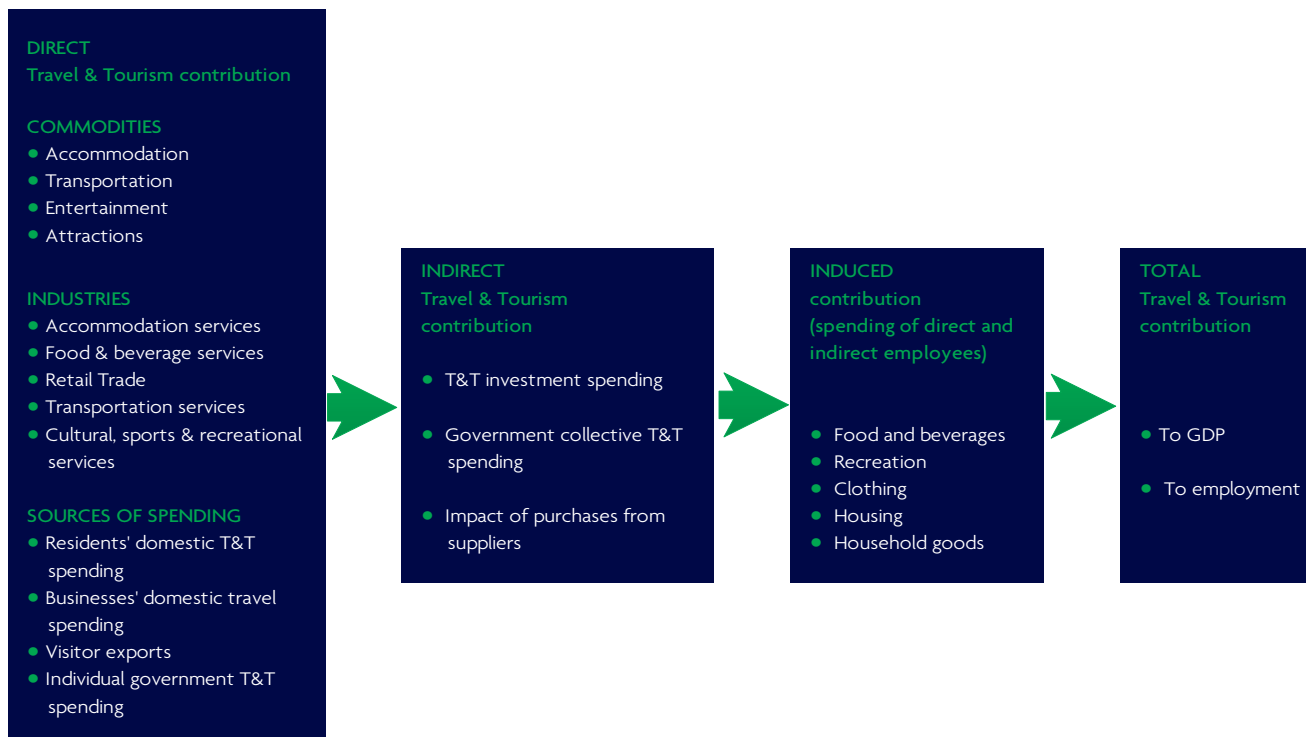


BREAKDOWN OF TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP AND EMPLOYMENT 2017



DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the industry has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. But WTTC recognises that Travel & Tourism's total contribution is much greater, and aims to capture its indirect and induced impacts through its annual research.



DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.

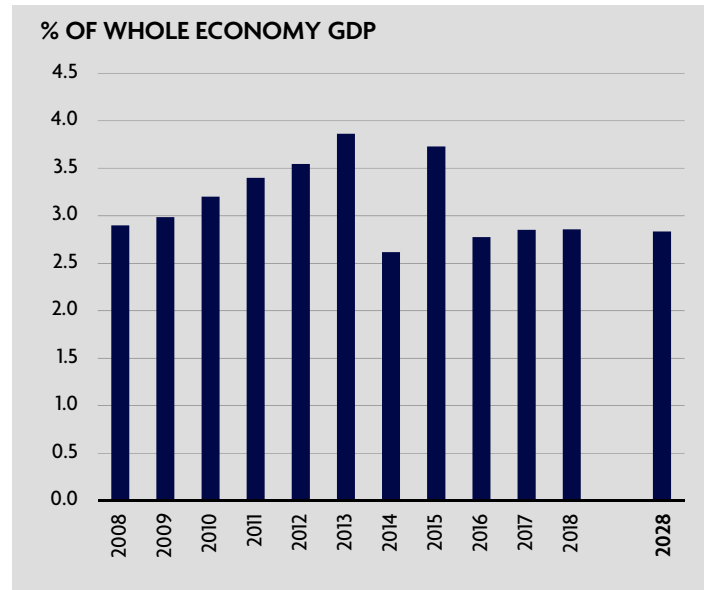
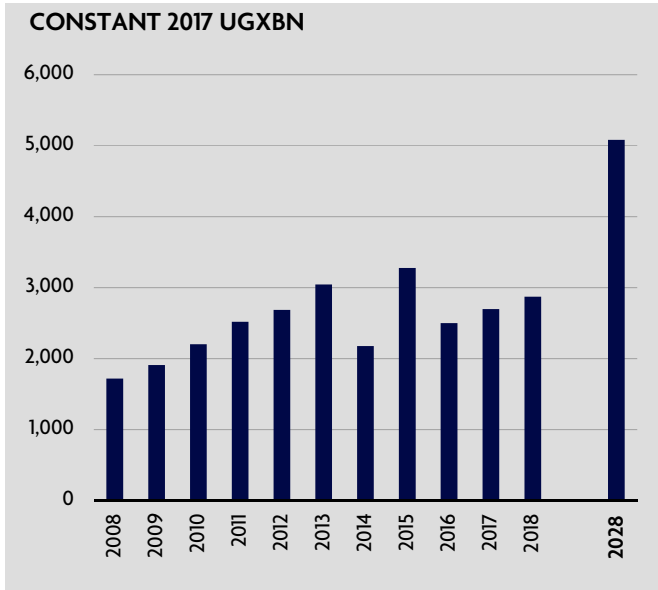
PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.

TRAVEL & TOURISM'S CONTRIBUTION TO GDP¹

The direct contribution of Travel & Tourism to GDP in 2017 was UGX2,699.1bn (2.9% of GDP). This is forecast to rise by 6.5% to UGX2,874.4bn in 2018. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 5.9% pa to UGX5,084.8bn (2.8% of GDP) by 2028.

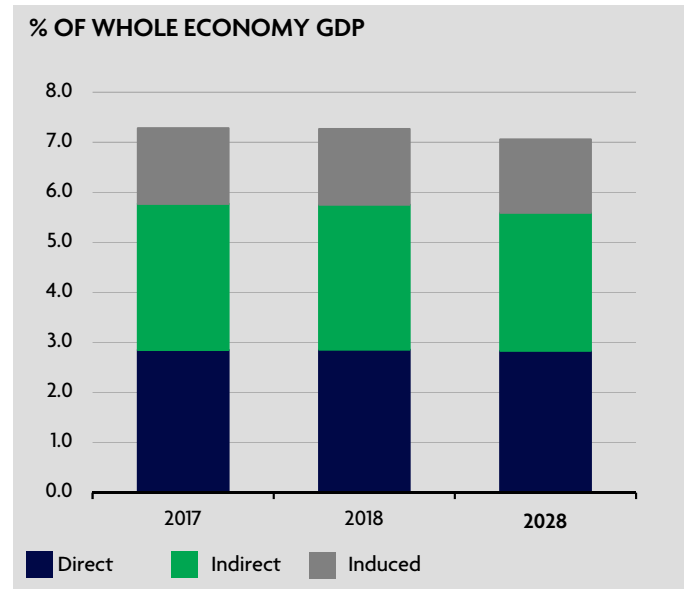
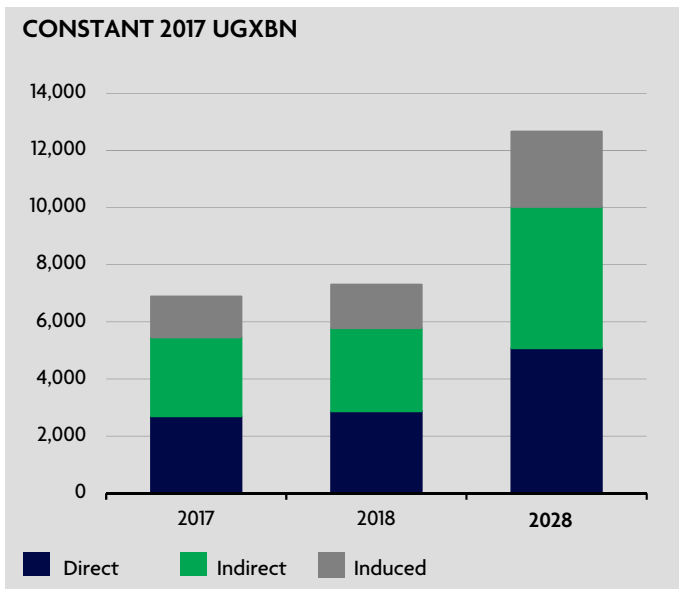
UGANDA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was UGX6,888.5bn in 2017 (7.3% of GDP) and is expected to grow by 6.0% to UGX7,303.6bn (7.3% of GDP) in 2018.

It is forecast to rise by 5.7% pa to UGX12,654.9bn by 2028 (7.1% of GDP).

UGANDA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



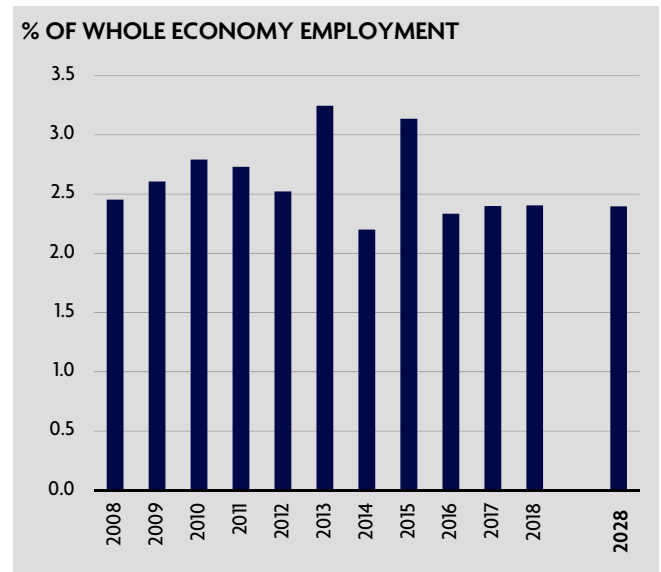
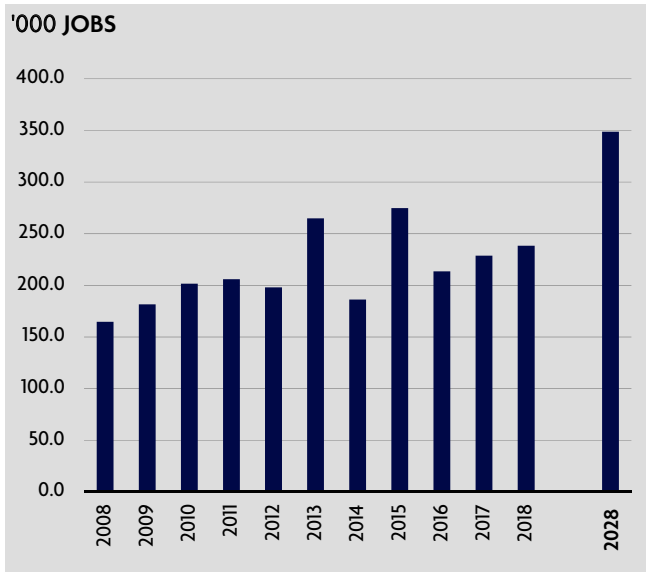
¹ All values are in constant 2017 prices & exchange rates

TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT

Travel & Tourism generated 229,000 jobs directly in 2017 (2.4% of total employment) and this is forecast to grow by 4.2% in 2018 to 238,500 (2.4% of total employment). This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2028, Travel & Tourism will account for 349,000 jobs directly, an increase of 3.9% pa over the next ten years.

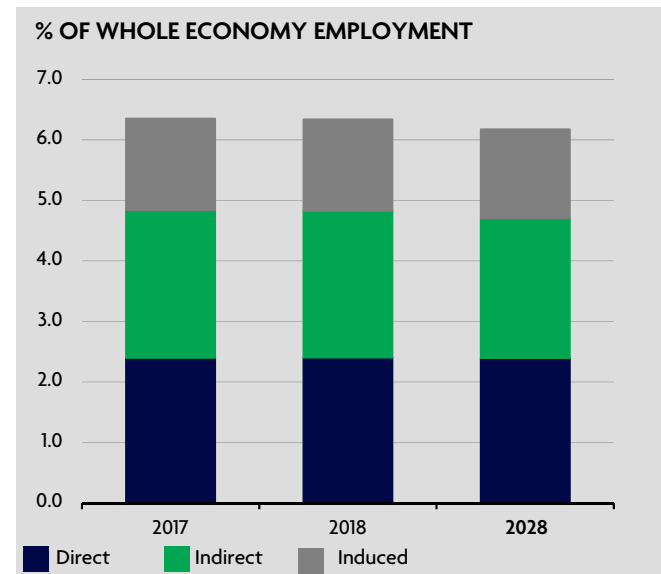
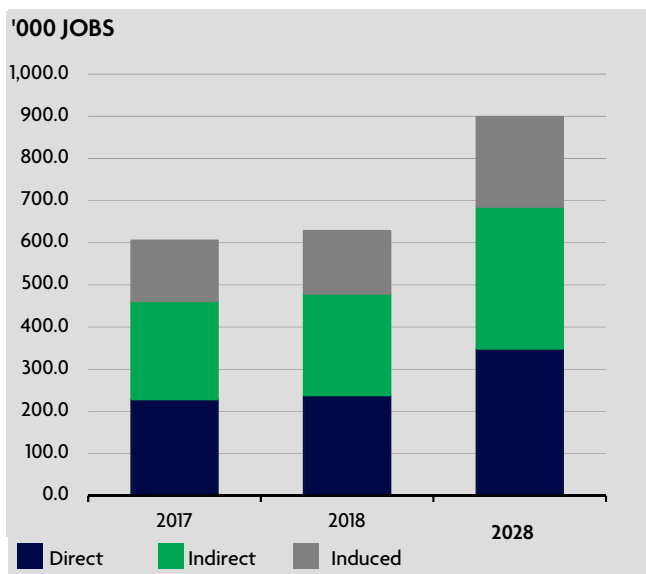
UGANDA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 605,500 jobs in 2017 (6.3% of total employment). This is forecast to rise by 3.8% in 2018 to 628,000 jobs (6.3% of total employment).

By 2028, Travel & Tourism is forecast to support 898,000 jobs (6.2% of total employment), an increase of 3.6% pa over the period.

UGANDA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



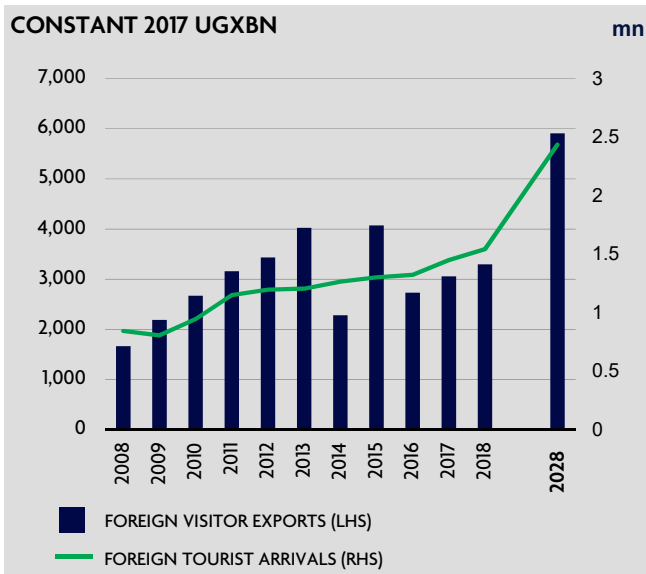
VISITOR EXPORTS AND INVESTMENT¹

VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2017, Uganda generated UGX3,060.1bn in visitor exports. In 2018, this is expected to grow by 7.8%, and the country is expected to attract 1,543,000 international tourist arrivals.

By 2028, international tourist arrivals are forecast to total 2,435,000, generating expenditure of UGX5,908.6bn, an increase of 6.0% pa.

UGANDA:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

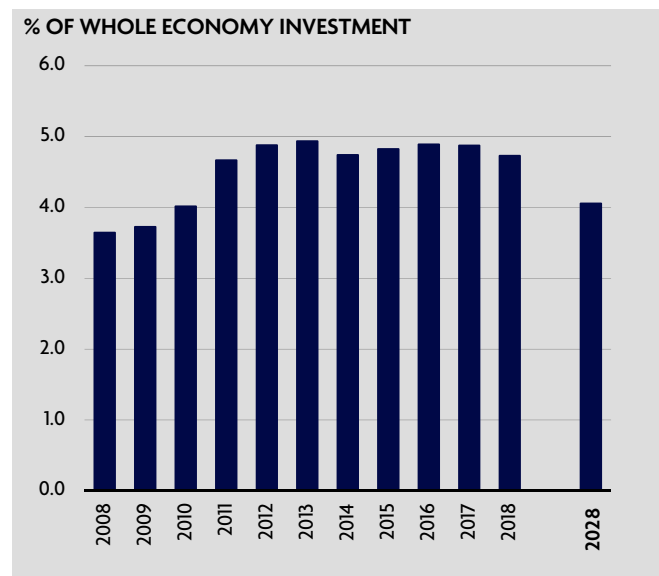
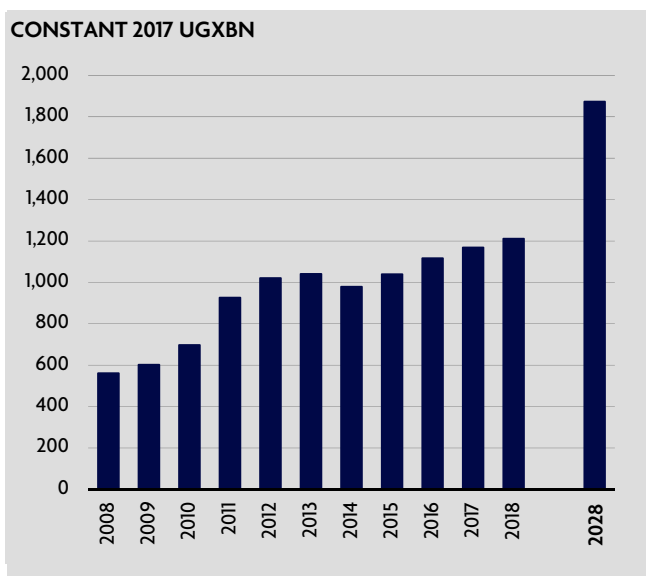


INVESTMENT

Travel & Tourism is expected to have attracted capital investment of UGX1,168.3bn in 2017. This is expected to rise by 3.6% in 2018, and rise by 4.5% pa over the next ten years to UGX1,872.3bn in 2028.

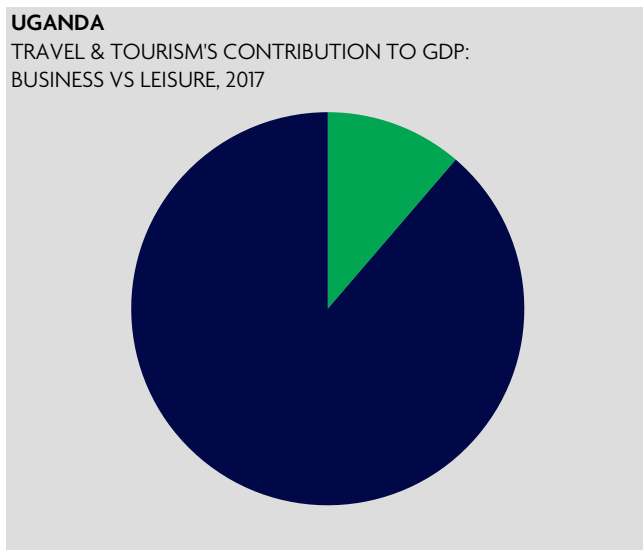
Travel & Tourism's share of total national investment will fall from 4.7% in 2018 to 4.1% in 2028.

UGANDA:CAPITAL INVESTMENT IN TRAVEL & TOURISM



¹ All values are in constant 2017 prices & exchange rates

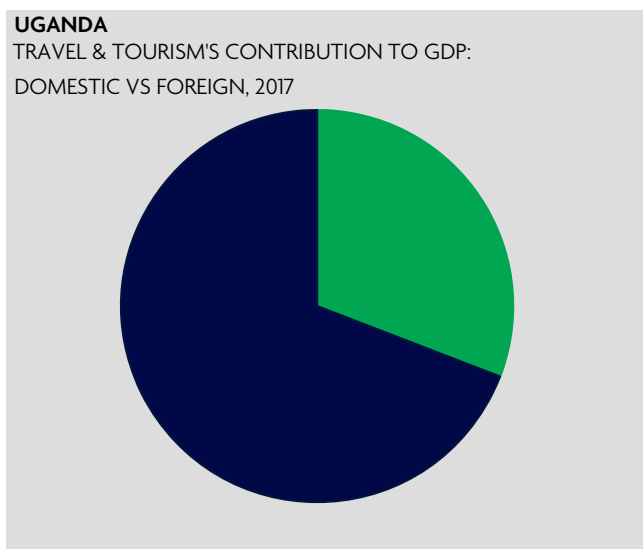
DIFFERENT COMPONENTS OF TRAVEL & TOURISM¹



Leisure travel spending (inbound and domestic) generated 88.7% of direct Travel & Tourism GDP in 2017 (UGX3,926.6bn) compared with 11.3% for business travel spending (UGX499.3bn).

Leisure travel spending is expected to grow by 6.8% in 2018 to UGX4,192.6bn, and rise by 6.0% pa to UGX7,510.1bn in 2028.

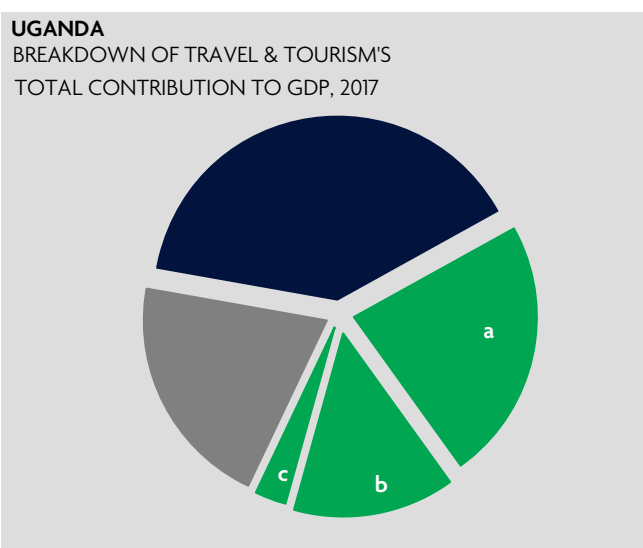
Business travel spending is expected to grow by 4.6% in 2018 to UGX522.1bn, and rise by 4.5% pa to UGX812.4bn in 2028.



Domestic travel spending generated 30.9% of direct Travel & Tourism GDP in 2017 compared with 69.1% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 3.6% in 2018 to UGX1,415.1bn, and rise by 5.5% pa to UGX2,413.9bn in 2028.

Visitor exports are expected to grow by 7.8% in 2018 to UGX3,299.6bn, and rise by 6.0% pa to UGX5,908.6bn in 2028.



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is nearly three times greater than its direct contribution.

¹ All values are in constant 2017 prices & exchange rates

COUNTRY RANKINGS: ABSOLUTE CONTRIBUTION, 2017

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 (US\$bn)
World Average		21.5
39	South Africa	10.2
68	Kenya	2.8
84	Tanzania	2.0
Sub-Saharan Africa Average		1.0
119	Uganda	0.7
121	Senegal	0.7
125	Madagascar	0.7
135	Rwanda	0.5
138	Namibia	0.4
170	Gambia	0.09
178	Central African Republic	0.06

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 (US\$bn)
World Average		62.9
34	South Africa	31.0
71	Kenya	7.4
89	Tanzania	4.7
Sub-Saharan Africa Average		2.8
121	Uganda	1.9
124	Namibia	1.8
125	Madagascar	1.8
128	Senegal	1.7
138	Rwanda	1.1
173	Gambia	0.2
179	Central African Republic	0.1

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 '000 jobs
World Average		937.5
24	South Africa	726.6
37	Tanzania	445.8
38	Kenya	429.4
49	Madagascar	287.3
55	Uganda	228.8
67	Senegal	177.5
Sub-Saharan Africa Average		161.7
80	Rwanda	132.2
121	Gambia	41.8
143	Namibia	22.8
152	Central African Republic	15.8

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 '000 jobs
World Average		2341.0
29	South Africa	1530.3
35	Kenya	1137.2
37	Tanzania	1092.7
45	Madagascar	797.0
54	Uganda	605.4
73	Senegal	422.0
Sub-Saharan Africa Average		409.6
84	Rwanda	333.6
123	Gambia	107.3
126	Namibia	98.2
154	Central African Republic	40.4

TRAVEL & TOURISM INVESTMENT		2017 (US\$bn)
28	South Africa	5.3
World Average		4.8
73	Kenya	0.8
Sub-Saharan Africa Average		0.4
101	Tanzania	0.3
102	Madagascar	0.3
103	Namibia	0.3
105	Uganda	0.3
120	Rwanda	0.2
136	Senegal	0.1
171	Gambia	0.03
179	Central African Republic	0.01

VISITOR EXPORTS		2017 (US\$bn)
37	South Africa	9.5
World Average		8.1
79	Tanzania	2.2
88	Kenya	1.9
107	Madagascar	1.0
111	Uganda	0.9
Sub-Saharan Africa Average		0.7
130	Rwanda	0.5
137	Senegal	0.4
144	Namibia	0.3
161	Gambia	0.1
178	Central African Republic	0.02

The tables on pages 7-10 provide brief extracts from the full WTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world and regional average. Averages in above tables are simple cross-country averages. The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

COUNTRY RANKINGS: RELATIVE CONTRIBUTION, 2017

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2017 % share
31	Gambia	8.2
44	Madagascar	6.3
59	Rwanda	5.2
65	Senegal	4.5
85	Tanzania	3.8
89	Kenya	3.7
	World	3.2
114	South Africa	2.9
119	Central African Republic	2.9
120	Namibia	2.9
121	Uganda	2.9
	Sub-Saharan Africa	2.7

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 % share
41	Gambia	6.7
59	Madagascar	5.0
72	South Africa	4.5
73	Rwanda	4.4
84	Senegal	3.8
	World	3.8
103	Kenya	3.4
104	Tanzania	3.3
108	Namibia	3.2
132	Uganda	2.4
	Sub-Saharan Africa	2.3
153	Central African Republic	1.9

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2017 % share
18	Madagascar	19.0
34	Gambia	12.1
37	Namibia	12.0
56	Tanzania	8.7
57	Rwanda	8.6
62	South Africa	8.2
88	Kenya	5.7
	Sub-Saharan Africa	5.2
98	Uganda	4.9
	World	4.5
115	Central African Republic	4.1
133	Senegal	3.5

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2017 % share
37	Gambia	20.1
48	Madagascar	16.6
58	Namibia	13.8
66	Rwanda	12.7
85	Senegal	10.4
	World	10.4
95	Kenya	9.7
103	Tanzania	9.0
107	South Africa	8.9
128	Uganda	7.3
	Sub-Saharan Africa	7.1
142	Central African Republic	6.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 % share
43	Gambia	17.2
55	Namibia	14.0
57	Madagascar	13.9
75	Rwanda	11.1
	World	9.9
89	South Africa	9.5
96	Senegal	9.1
98	Kenya	9.0
109	Tanzania	8.2
132	Uganda	6.3
	Sub-Saharan Africa	5.8
159	Central African Republic	5.0

VISITOR EXPORTS CONTRIBUTION TO EXPORTS		2017 % share
3	Gambia	90.6
42	Rwanda	30.5
48	Madagascar	26.0
49	Tanzania	26.0
66	Kenya	18.1
67	Uganda	17.9
91	Senegal	9.5
93	South Africa	9.2
	Sub-Saharan Africa	8.5
	World	6.5
116	Central African Republic	6.5
120	Namibia	6.2

COUNTRY RANKINGS: REAL GROWTH, 2018

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2018 % growth
2	Tanzania	9.4
7	Namibia	8.0
27	Uganda	6.5
44	Rwanda	5.7
52	Kenya	5.2
	Sub-Saharan Africa	4.2
	World	4.0
86	Gambia	3.9
94	Central African Republic	3.7
119	Senegal	3.1
142	Madagascar	2.4
145	South Africa	2.4

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2018 % growth
2	Tanzania	7.1
7	Namibia	6.5
37	Uganda	4.2
	Sub-Saharan Africa	3.3
73	Rwanda	2.9
74	Kenya	2.8
	World	2.4
111	Senegal	1.7
121	Central African Republic	1.5
135	South Africa	1.0
157	Gambia	-0.02
159	Madagascar	-0.1

TRAVEL & TOURISM INVESTMENT		2018 % growth
4	Rwanda	9.6
11	Tanzania	8.2
28	Kenya	7.1
31	Senegal	7.0
41	Central African Republic	6.6
	World	4.8
103	Gambia	4.3
121	Uganda	3.6
127	Namibia	3.4
131	South Africa	3.4
	Sub-Saharan Africa	2.5
157	Madagascar	2.0

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2018 % growth
2	Tanzania	9.1
18	Rwanda	6.8
33	Uganda	6.0
41	Kenya	5.5
42	Namibia	5.5
83	Central African Republic	4.2
	World	4.0
91	Senegal	4.0
	Sub-Saharan Africa	3.8
95	Gambia	3.8
129	South Africa	2.9
142	Madagascar	2.6

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2018 % growth
7	Tanzania	6.6
21	Namibia	4.9
39	Rwanda	3.9
43	Uganda	3.8
64	South Africa	3.3
	Sub-Saharan Africa	3.2
71	Kenya	3.1
	World	3.0
98	Gambia	2.3
101	Central African Republic	2.1
118	Senegal	1.5
161	Madagascar	0.1

VISITOR EXPORTS		2018 % growth
3	Namibia	10.6
6	Tanzania	9.5
21	Uganda	7.8
59	Rwanda	5.7
66	Kenya	5.2
87	Gambia	4.3
	Sub-Saharan Africa	4.2
	World	3.9
116	South Africa	3.4
143	Central African Republic	2.3
147	Madagascar	2.0
180	Senegal	-1.17

COUNTRY RANKINGS: LONG TERM GROWTH, 2018 - 2028

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP		2018 - 2028 % growth pa
2	Tanzania	7.2
6	Namibia	6.6
11	Rwanda	6.1
20	Uganda	5.9
32	Central African Republic	5.5
47	Kenya	5.2
50	Senegal	5.1
61	Gambia	4.7
	Sub-Saharan Africa	4.4
96	Madagascar	4.1
	World	3.8
122	South Africa	3.6

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2018 - 2028 % growth pa
2	Tanzania	5.2
19	Uganda	3.9
22	Namibia	3.6
	Sub-Saharan Africa	3.0
52	Gambia	3.0
54	South Africa	2.9
55	Rwanda	2.9
76	Kenya	2.7
89	Central African Republic	2.3
	World	2.2
124	Madagascar	1.8
171	Senegal	0.9

TRAVEL & TOURISM CONTRIBUTION TO TOTAL CAPITAL INVESTMENT		2018 - 2028 % growth pa
10	Rwanda	6.5
13	Tanzania	6.4
38	Namibia	5.5
52	Senegal	5.0
53	Central African Republic	5.0
	Sub-Saharan Africa	4.7
74	Uganda	4.5
82	South Africa	4.4
85	Kenya	4.4
	World	4.3
99	Madagascar	4.1
103	Gambia	3.9

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP		2018 - 2028 % growth pa
2	Tanzania	7.1
8	Rwanda	6.2
24	Uganda	5.7
32	Central African Republic	5.5
34	Namibia	5.4
45	Kenya	5.1
48	Senegal	5.1
72	Gambia	4.6
	Sub-Saharan Africa	4.4
92	Madagascar	4.1
	World	3.8
121	South Africa	3.5

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2018 - 2028 % growth pa
2	Tanzania	5.0
12	Uganda	3.6
19	Gambia	3.5
38	Rwanda	3.1
	Sub-Saharan Africa	3.0
46	Namibia	2.9
54	South Africa	2.8
72	Kenya	2.6
	World	2.5
85	Central African Republic	2.3
105	Madagascar	1.8
113	Senegal	1.7

VISITOR EXPORTS CONTRIBUTION TO TOTAL EXPORTS		2018 - 2028 % growth pa
10	Tanzania	6.5
26	Uganda	6.0
29	Namibia	6.0
52	South Africa	5.3
67	Rwanda	4.9
	Sub-Saharan Africa	4.8
76	Kenya	4.7
98	Gambia	4.4
103	Central African Republic	4.3
	World	4.1
118	Senegal	4.0
124	Madagascar	3.9

SUMMARY TABLES: ESTIMATES & FORECASTS

UGANDA	2017 USDm ¹	2017 % of total	2018 Growth ²	USDm ¹	2028 % of total	Growth ³
Direct contribution to GDP	749.9	2.9	6.5	1,412.8	2.8	5.9
Total contribution to GDP	1,913.9	7.3	6.0	3,516.1	7.1	5.7
Direct contribution to employment ⁴	229	2.4	4.2	349	2.4	3.9
Total contribution to employment ⁴	605	6.3	3.8	898	6.2	3.6
Visitor exports	850.2	17.9	7.8	1,641.7	18.0	6.0
Domestic spending	379.5	1.4	3.6	670.7	1.3	5.5
Leisure spending	1,091.0	2.5	6.8	2,086.7	2.5	6.0
Business spending	138.7	0.3	4.6	225.7	0.3	4.5
Capital investment	324.6	4.9	3.6	520.2	4.1	4.5

¹2017 constant prices & exchange rates; ²2018 real growth adjusted for inflation (%); ³2018-2028 annualised real growth adjusted for inflation (%); ⁴000 jobs

SUB-SAHARAN AFRICA	2017 USDbn ¹	2017 % of total	2018 Growth ²	USDbn ¹	2028 % of total	Growth ³
Direct contribution to GDP	43.7	2.7	4.2	70.3	2.7	4.4
Total contribution to GDP	116.9	7.1	3.8	186.8	7.2	4.4
Direct contribution to employment ⁴	6,789	2.3	3.3	9,405	2.3	3.0
Total contribution to employment ⁴	17,204	5.8	3.2	23,807	5.8	3.0
Visitor exports	30.2	8.5	4.2	50.3	8.0	4.8
Domestic spending	50.4	3.1	4.0	78.8	3.1	4.2
Leisure spending	50.7	1.7	4.3	82.1	1.7	4.5
Business spending	30.0	1.0	3.7	47.0	1.0	4.2
Capital investment	17.5	5.2	2.5	28.4	5.4	4.7

¹2017 constant prices & exchange rates; ²2018 real growth adjusted for inflation (%); ³2018-2028 annualised real growth adjusted for inflation (%); ⁴000 jobs

WORLDWIDE	2017 USDbn ¹	2017 % of total	2018 Growth ²	USDbn ¹	2028 % of total	Growth ³
Direct contribution to GDP	2,570.1	3.2	4.0	3,890.0	3.6	3.8
Total contribution to GDP	8,272.3	10.4	4.0	12,450.1	11.7	3.8
Direct contribution to employment ⁴	118,454	3.8	2.4	150,139	4.2	2.2
Total contribution to employment ⁴	313,221	9.9	3.0	413,556	11.6	2.5
Visitor exports	1,494.2	6.5	3.9	2,311.4	6.9	4.1
Domestic spending	3,970.5	5.0	4.1	6,051.5	5.8	3.9
Leisure spending	4,233.3	2.5	4.1	6,605.3	2.8	4.1
Business spending	1,230.6	0.7	3.8	1,756.1	0.8	3.2
Capital investment	882.4	4.5	4.8	1,408.3	5.1	4.3

¹2017 constant prices & exchange rates; ²2018 real growth adjusted for inflation (%); ³2018-2028 annualised real growth adjusted for inflation (%); ⁴000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and services. Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: REAL 2017 PRICES

UGANDA (UGXbn, real 2017 prices)	2012	2013	2014	2015	2016	2017	2018E	2028F
1. Visitor exports	3435.6	4025.0	2284.7	4072.1	2731.8	3060.1	3299.6	5908.6
2. Domestic expenditure (includes government individual spending)	984.6	956.1	1285.0	1303.0	1367.2	1365.7	1415.1	2413.9
3. Internal tourism consumption (= 1 + 2)	4420.1	4981.1	3569.7	5375.1	4099.0	4425.9	4714.7	8322.5
4. Purchases by tourism providers, including imported goods (supply chain)	-1,731.9	-1,934.1	-1,391.5	-2,095.1	-1,596.7	-1,726.8	-1,840.2	-3,237.7
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	2,688.2	3,046.9	2,178.2	3,280.0	2,502.3	2,699.1	2,874.4	5,084.8
Other final impacts (indirect & induced)	1,606.6	1,821.0	1,301.8	1,960.3	1,495.5	1,613.1	1,717.9	3,039.0
6 Domestic supply chain								
7. Capital investment	1,020.3	1,040.4	978.4	1,039.0	1,116.5	1,168.3	1,210.5	1,872.3
8. Government collective spending	122.5	127.9	148.8	170.3	181.6	191.6	204.3	352.5
9. Imported goods from indirect spending	-171.2	-162.1	-191.1	-206.1	-200.8	-209.9	-216.6	-317.6
10. Induced	1,325.5	1,493.8	1,143.8	1,581.9	1,334.4	1,426.3	1,513.1	2,624.0
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	6,591.9	7,368.0	5,559.9	7,825.4	6,429.4	6,888.5	7,303.6	12,655
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	198.1	264.9	186.3	274.9	213.7	228.8	238.5	348.8
13. Total contribution of Travel & Tourism to employment	524.5	664.2	493.1	679.8	569.4	605.4	628.1	898.3
Other indicators								
14. Expenditure on outbound travel	1,912.6	2,074.1	1,071.6	1,834.6	1,418.5	1,684.2	1,751.4	2,726.6

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES

UGANDA (UGXbn, nominal prices)	2012	2013	2014	2015	2016	2017	2018E	2028F
1. Visitor exports	2826.2	3437.5	2033.3	3763.4	2574.8	3060.1	3477.8	10,422
2. Domestic expenditure (includes government individual spending)	809.9	816.5	1143.6	1204.2	1288.6	1365.7	1491.5	4257.8
3. Internal tourism consumption (= 1 + 2)	3636.1	4254.0	3176.9	4967.5	3863.4	4425.9	4969.3	14,680
4. Purchases by tourism providers, including imported goods (supply chain)	-1,424.7	-1,651.8	-1,238.4	-1,936.2	-1,504.9	-1,726.8	-1,939.6	-5,710.8
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	2,211.3	2,602.2	1,938.5	3,031.3	2,358.4	2,699.1	3,029.7	8,968.8
Other final impacts (indirect & induced)	1,321.6	1,555.2	1,158.6	1,811.7	1,409.5	1,613.1	1,810.7	5,360.2
6. Domestic supply chain								
7. Capital investment	839.3	888.5	870.7	960.3	1,052.3	1,168.3	1,275.9	3,302.4
8. Government collective spending	100.7	109.3	132.4	157.4	171.1	191.6	215.3	621.7
9. Imported goods from indirect spending	-140.8	-138.4	-170.1	-190.5	-189.3	-209.9	-228.4	-560.2
10. Induced	1,090.4	1,275.8	1,017.9	1,462.0	1,257.7	1,426.3	1,594.9	4,628.3
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	5,422.6	6,292.5	4,948.1	7,232.1	6,059.8	6,888.5	7,698.0	22,321
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	198.1	264.9	186.3	274.9	213.7	228.8	238.5	348.8
13. Total contribution of Travel & Tourism to employment	524.5	664.2	493.1	679.8	569.3	605.4	628.1	898.3
Other indicators								
14. Expenditure on outbound travel	1,573.3	1,771.4	953.7	1,695.5	1,336.9	1,684.2	1,846.0	4,809.2

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: GROWTH

UGANDA Growth ¹ (%)	2012	2013	2014	2015	2016	2017	2018E	2028F ²
1. Visitor exports	8.7	17.2	-43.2	78.2	-32.9	12.0	7.8	6.0
2. Domestic expenditure (includes government individual spending)	-2.1	-2.9	34.4	1.4	4.9	-0.1	3.6	5.5
3. Internal tourism consumption (= 1 + 2)	6.1	12.7	-28.3	50.6	-23.7	8.0	6.5	5.8
4. Purchases by tourism providers, including imported goods (supply chain)	5.2	11.7	-28.1	50.6	-23.8	8.1	6.6	5.8
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	6.7	13.3	-28.5	50.6	-23.7	7.9	6.5	5.9
Other final impacts (indirect & induced)	6.7	13.3	-28.5	50.6	-23.7	7.9	6.5	5.9
6. Domestic supply chain								
7. Capital investment	10.2	2.0	-6.0	6.2	7.5	4.6	3.6	4.5
8. Government collective spending	-20.0	4.5	16.3	14.4	6.6	5.5	6.6	5.6
9. Imported goods from indirect spending	-32.0	-5.3	17.9	7.9	-2.6	4.5	3.2	3.9
10. Induced	10.7	12.7	-23.4	38.3	-15.6	6.9	6.1	5.7
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	8.9	11.8	-24.5	40.7	-17.8	7.1	6.0	5.7
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	-3.9	33.7	-29.7	47.6	-22.3	7.1	4.2	3.9
13. Total contribution of Travel & Tourism to employment	1.3	26.6	-25.8	37.9	-16.2	6.3	3.8	3.6
Other indicators								
14. Expenditure on outbound travel	9.2	8.4	-48.3	71.2	-22.7	18.7	4.0	4.5

¹2012-2017 real annual growth adjusted for inflation (%); ²2018-2028 annualised real growth adjusted for inflation (%)

GLOSSARY

KEY DEFINITIONS

TRAVEL & TOURISM

Relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

DIRECT CONTRIBUTION TO GDP

GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

DIRECT CONTRIBUTION TO EMPLOYMENT

The number of direct jobs within Travel & Tourism. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

TOTAL CONTRIBUTION TO GDP

GDP generated directly by the Travel & Tourism sector plus its indirect and induced impacts (see below).

TOTAL CONTRIBUTION TO EMPLOYMENT

The number of jobs generated directly in the Travel & Tourism sector plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

VISITOR EXPORTS

Spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

DOMESTIC TRAVEL & TOURISM SPENDING

Spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

GOVERNMENT INDIVIDUAL SPENDING

Spending by government on Travel & Tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services (eg national parks).

INTERNAL TOURISM CONSUMPTION

Total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

BUSINESS TRAVEL & TOURISM SPENDING

Spending on business travel within a country by residents and international visitors.

LEISURE TRAVEL & TOURISM SPENDING

Spending on leisure travel within a country by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

INDIRECT CONTRIBUTION

The contribution to GDP and jobs of the following three factors:

- **CAPITAL INVESTMENT:** Includes capital investment spending by all industries directly involved in Travel & Tourism. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.
- **GOVERNMENT COLLECTIVE SPENDING:** Government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.
- **SUPPLY-CHAIN EFFECTS:** Purchases of domestic goods and services directly by different industries within Travel & Tourism as inputs to their final tourism output.

INDUCED CONTRIBUTION

The broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

OTHER INDICATORS

OUTBOUND EXPENDITURE

Spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

FOREIGN VISITOR ARRIVALS

The number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.

METHODOLOGICAL NOTE

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008). This involves the benchmarking of country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New country TSAs incorporated this year include Bulgaria, Hungary, Portugal and Vietnam, bringing our total of countries in our benchmarking dataset to 58. Furthermore, we have sourced updated TSAs for 26 countries.

WTTC coverage includes data on 185 countries and reports on 25 other regions, sub-regions and economic and geographic groups. This year, there are 10 reports for special economic and geographic groups.

ECONOMIC AND GEOGRAPHIC GROUPS

APEC (ASIA-PACIFIC ECONOMIC COOPERATION)

Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan, Thailand, USA, Vietnam.

FORMER NETHERLANDS ANTILLES

Bonaire, Curacao, Sint Maarten, Saba and Sint Eustatius.

G20

Argentina, Australia, Brazil, Canada, China, European Union, France*, Germany*, India, Indonesia, Italy*, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, South Korea, Turkey, UK*, USA.

GCC (GULF COOPERATION COUNCIL)

Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE.

OAS (ORGANIZATION OF AMERICAN STATES)

Argentina, Antigua and Barbuda, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, St Kitts and Nevis, Nicaragua, Panama, Paraguay, Peru, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay.

OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)

Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

(OIC) ORGANISATION FOR ISLAMIC COOPERATION**

Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei Darussalam, Burkina Faso, Cameroon, Chad, Comoros, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Ivory Coast, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Lebanon, Libya, Malaysia, Maldives, Mali, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Qatar, Saudi Arabia, Senegal, Sierra Leone, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Turkey, UAE, Uganda, Uzbekistan, Yemen.

OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

PACIFIC ALLIANCE

Chile, Colombia, Mexico, Peru.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)

Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

* included in European Union

** no data for Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Palestine, Somalia or Turkmenistan

ECONOMIC IMPACT REPORTS

REGIONS, SUB REGIONS & COUNTRIES

WORLD											
REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY	REGION	SUB REGION	COUNTRY
AFRICA	NORTH AFRICA	Algeria	AMERICAS	CARIBBEAN	Anguilla	ASIA-PACIFIC	NORTHEAST ASIA	China	EUROPE	EUROPEAN UNION	Hungary
		Egypt			Antigua and Barbuda			Hong Kong			Ireland
		Libya			Aruba			Japan			Italy
		Morocco			Bahamas			South Korea			Latvia
		Tunisia			Barbados			Macau			Lithuania
	Angola	Bermuda			Mongolia			Luxembourg			
	Benin	British Virgin Islands			Taiwan			Malta			
	Botswana	Cayman Islands			Kazakhstan			Netherlands			
	Burkina Faso	Cuba			Kyrgyzstan			Poland			
	Burundi	Dominica			Tajikistan			Portugal			
	Cameroon	Dominican Republic			Uzbekistan		Romania				
	Cape Verde	Former Netherland Antillies			Australia		Slovakia				
	Central African Republic	Grenada			Fiji		Slovenia				
	Chad	Guadeloupe			Kiribati		Spain				
	Comoros	Haiti			New Zealand		Sweden				
	Congo	Jamaica			Papua New Guinea		Switzerland				
	Cote d'Ivoire	Martinique			Solomon Islands		UK				
	Democratic Republic of Congo	Puerto Rico			Tonga		Albania				
	Ethiopia	St Kitts and Nevis			Vanuatu		Armenia				
	Gabon	St Lucia			Other Oceanic States		Azerbaijan				
	Gambia	St Vincent and the Grenadines			Bangladesh		Belarus				
	Ghana	Trinidad and Tobago			India		Bosnia and Herzegovina				
	Guinea	US Virgin Islands			Maldives		Georgia				
	Kenya	Argentina			Nepal		Iceland				
	Lesotho	Belize			Pakistan		Macedonia				
	Madagascar	Bolivia			Sri Lanka		Moldova				
	Malawi	Brazil			Brunei Darussalam		Montenegro				
	Mali	Chile			Cambodia		Norway				
	Mauritius	Colombia			Indonesia		Russian Federation				
	Mozambique	Costa Rica			Laos		Serbia				
	Namibia	Costa Rica			Malaysia		Switzerland				
	Niger	Ecuador			Myanmar		Turkey				
	Nigeria	El Salvador			Philippines		Ukraine				
	Reunion	Guatemala			Singapore		Bahrain				
	Rwanda	Guyana		Thailand	Iran						
	Sao Tome and Principe	Honduras		Vietnam	Iraq						
	Senegal	Nicaragua		Austria	Israel						
	Seychelles	Panama		Belgium	Jordan						
	Sierra Leone	Paraguay		Bulgaria	Kuwait						
	South Africa	Peru		Croatia	Lebanon						
	Sudan and South Sudan	Suriname		Cyprus	Oman						
	Swaziland	Uruguay		Czech Republic	Qatar						
	Tanzania	Venezuela		Denmark	Saudi Arabia						
	Togo	Canada		Estonia	Syria						
	Uganda	Mexico		Finland	United Arab Emirates						
	Zambia	USA		France	Yemen						
	Zimbabwe			Germany							
		Greece									



The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism.

WTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading private sector Travel & Tourism businesses.

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To download reports or data, please visit www.wttc.org



Assisting WTTC to Provide Tools for Analysis, Benchmarking, Forecasting and Planning.

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Contributing data to the WTTC Economic Impact Model



STR is the source for premium hotel data benchmarking, analytics and marketplace insights. STR provides data that is reliable, confidential, accurate and actionable, and their comprehensive solutions empower clients to strategize and compete within their markets. The company's range of products includes data-driven solutions, thorough analytics and unrivalled marketplace insights, all built to fuel business growth and help clients make better operational and financial decisions. STR maintains a presence in 15 countries and collects data for over 59,000 hotels across 180 countries.



ForwardKeys analyses more than 17m flight booking transactions a day, drawing data from all the major global air reservation systems and selected airlines and tour operators. This information is enhanced with further independent data sets, including flight search and official government statistics, plus data science to paint a picture of who is travelling where and when. ForwardKeys' analytics are used by traveller-focused businesses worldwide to monitor and anticipate traveller arrivals from a particular origin market at a specific time. This analysis enables parties to anticipate the impact of events, better manage their staffing levels, fine tune supply requirements, adjust and measure the effectiveness of their marketing efforts and anticipate future market trends.



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