



## November 2019

### Japan Outbound - Japan

“Japan outbound is a mature market, reaching departures of almost 19 million in 2018. The Japanese are avid travellers enjoying the experience of foreign travel and the opportunity to explore new cultures. The depreciation of the Yen in 2013 took its toll on the market, raising travel costs and forcing ...

### Hotels in Southeast Asia - International

“As of August 2019, there were an estimated 414 projects for new hotels in seven South East Asian countries, which represents 19% of the total Asia-Pacific pipeline. Over 80% of the pipeline projects are in three South East Asian countries, namely Indonesia, Thailand and Vietnam.”

– Jessica Kelly, Senior ...

### LCCs in the Middle East - Middle East

“As the GCC country with the largest population and the greatest distances between its major cities, combined with a wealthy populace, Saudi Arabia offers excellent potential to develop a strong domestic LCC network. Indeed, the Saudi Arabian aviation market is poised for rapid growth over the next few years as ...

## October 2019

### The Netherlands Outbound - Netherlands

“The booking behaviour of Dutch travellers is governed to a large extent by their age. Older people (notably retirees with time to do in-depth research) might choose a destination as far as a year in advance. Time-pressed Millennials, on the other hand, who are moving into their peak working years ...

### Thailand Outbound - Thailand

“Thai outbound tourism crossed the 10-million barrier in 2018, posting robust growth of 13.8% in outbound departures. Almost 15% of Thais travelled abroad, mainly to neighbouring countries in the ASEAN region and broader Asian continent.”

– Jessica Kelly, Senior Tourism Analyst

## September 2019

### Winter Sports in Europe - International

“Europe’s spectacular mountain ranges have supported a winter-sports tourism industry for well over a century and it is the world’s largest market. Skiing and snowboarding are the most popular activities, but more sports are popping up all the time, providing variety and interest for skiers and non-skiers alike. A stable ...

## August 2019



## Egypt Outbound - Egypt

“Egypt’s outbound market is underdeveloped compared to its inbound market. In a country of almost 1 billion, less than 2% of Egyptians travelled abroad in 2017. Foreign travel is a luxury for most, afforded by only the most wealthy and upper-middle-class consumers. Economic reforms imposed in 2016 have only exacerbated ...

## Tourism Investment in South East Asia - International

“The past decade has witnessed a dramatic upsurge in inbound, outbound and domestic travel across the ten countries of South East Asia. In response, each nation has identified its own investment priorities to expand tourism and create new revenues and job opportunities.”

- Jessica Kelly, Senior Tourism Analyst

## July 2019

### The Future of the Sharing Economy in Tourism - International

“A decade ago, collaborative consumption was a relatively unknown concept and tourism-related goods and services – including accommodation, rental cars and guided tours – were booked almost exclusively through travel agents or direct with a mainstream tourism provider such as a hotel, car-rental firm or holiday letting company. The sharing ...

### The Sub-Saharan African Hotel Sector - International

“Since 2015, the pipeline of chain hotel rooms in Sub-Saharan Africa has grown by almost half, which portends a significant increase in chain-hotel capacity across the region. Otherwise, the franchising of hotels is on the rise in the region – especially in East Africa – and the underserved Francophone countries ...

## June 2019

### Holistic Retreats in the Americas - International

While spas and wellness have grabbed the headlines in recent years, the exponential growth of holistic retreats has attracted little attention. Yet, with the pace of life getting faster and renewed interest in the meaning of life and spirituality, more people than ever before are visiting retreats – to reflect ...

### China and India: Expansion of the Superpowers - International

“A decade ago collaborative consumption was a relatively unknown concept and tourism related goods and services – including accommodation, rental cars and guided tours – were booked almost exclusively through travel agents or direct with a mainstream tourism provider such as a hotel, car rental firm or holiday letting company ...

## May 2019

### Boutique & Lifestyle Hotels in South America - International

“Hotel groups, both large and small, are expanding their portfolios of boutique and lifestyle brands in South America. Up until now, South American boutique and lifestyle hotels have been largely clustered in key urban and resort locations. However, there are other destinations, yet to be fully exploited, that could offer ...

### Wildlife Refuge Tourism & Market Differentiation - International

“Today, the most productive trend in the marketing of sustainable tourism is differentiation, most especially when it is based on innovations in environmental sustainability and conservation.”

– Jessica Kelly, Senior Tourism Analyst



## April 2019

### South Africa Outbound - International

“South Africa’s outbound market has posted moderate growth in recent years given its downbeat economy and the weak Rand. South Africans have a strong zest for travel and will work around monetary constraints to bring foreign trips to fruition. Travel behaviour has adapted to the tougher economic climate, encouraging South ...

### SAVE Tourism (Scientific, Academic, Volunteer, Educational) - International

“SAVE travel is a substantial travel niche comprised of the four market profiles of scientific, academic, volunteer and educational tourism, practised by a broad range of tourists who travel for different reasons, predominantly leisure and education but also business, taking part in a multitude of activities. As the desire for ...

## March 2019

### Social Media in the Hotel Industry - International

“Social media, which gives billions of people around the globe round-the-clock access to the stories, images and opinions of their peers, has fundamentally changed the way many people travel. With Millennials and the iGeneration poised to become the predominant cohort of travellers, this type of crowd-sourced UGC [user-generated content] will ...

### Intercity Buses in Europe - International

“The transition to a low-carbon economy clearly has its challenges but local and regional governments, as well as deep-pocketed investors, have a leading role to play in creating energy-efficient, sustainable transport networks across Europe. State-of-the art intercity buses and coaches are certainly very much part of that scenario.”

- Jessica ...

## February 2019

### Scandinavia Outbound - International

“Scandinavia’s outbound travel market has made mixed progress in recent years, reflecting its mature status. Sweden is the largest market in terms of outbound trips, although only slightly ahead of Norway and Denmark. Outbound travel is common and affordable among Scandinavians, but fluctuations in economic performance can impact demand.” ...

### The Italian Hotel Sector - International

“It is surprising that in a major hospitality and tourism market such as Italy, larger domestically controlled hotel groups have not emerged, especially given the inherent advantages of domestic operators in the country. There are 65 projects for upmarket hotels, with 9,612 rooms in the active pipeline in Italy ...