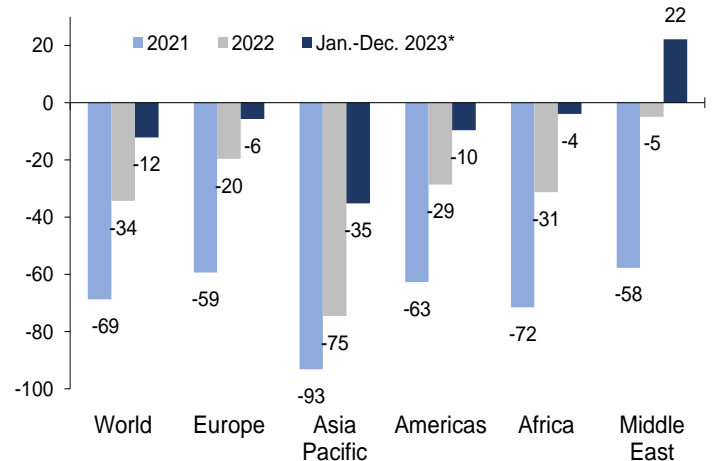## International tourism to reach pre-pandemic levels in 2024

- An estimated 1286 million international tourists (overnight visitors) were recorded around the world in 2023, an increase of 34% over 2022.

- International tourism recovered 88% of pre-pandemic levels, supported by strong pent-up demand.

- The Middle East led the recovery by regions in relative terms, being the only region to overcome pre-pandemic levels with arrivals 22% above 2019.

- Europe reached 94% of pre-pandemic levels in 2023, while Africa recovered 96% and the Americas 90%.

- Asia and the Pacific reached 65% of pre-pandemic levels, with a gradual recovery since the start of 2023.

- Four subregions: North Africa, Central America (both +5%), Southern Mediterranean Europe and the Caribbean (both +1%) exceeded pre-pandemic levels in 2023.

- Total export revenues from tourism (including passenger transport) are estimated at USD 1.6 trillion in 2023, almost 95% of the USD 1.7 trillion recorded in 2019.

- Preliminary estimates of tourism direct gross domestic product (TDGDP) point to USD 3.3 trillion in 2023, or 3% of global GDP, the same level as in 2019, driven by both domestic and international travel.

- Following a strong rebound in 2023, international tourism is expected to fully recover pre-pandemic levels in 2024, with initial estimates pointing to 2% growth above 2019 levels in international tourist arrivals.

- The positive outlook for the sector is reflected in the latest UNWTO Tourism Confidence Index survey, with 67% of tourism professionals indicating better or much better prospects for 2024 compared to 2023.

- The unleashing of remaining pent-up demand, increased air connectivity, and a stronger recovery of Asian markets and destinations are expected to underpin a full recovery by the end of 2024.

- Economic and geopolitical challenges continue to pose significant challenges to the sustained recovery of international tourism and confidence levels.

International Tourist Arrivals   (% change over 2019)

Legend: 2021, 2022, Jan.-Dec. 2023*

	World	Europe	Asia Pacific	Americas	Africa	Middle East
2021	-69	-59	-93	-63	-72	-58
2022	-34	-20	-75	-29	-31	-5
Jan.-Dec. 2023*	-12	-6	-35	-10	-4	22

Source: UNWTO   * Provisional data

About the *UNWTO World Tourism Barometer*

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

For more information including copies of previous issues, please visit: www.e-unwto.org/loi/wtobarometereng.

We welcome your comments and suggestions at barom@unwto.org.

Data collection for this issue was closed at the end of January 2024.

The next issue of the UNWTO World Tourism Barometer with more comprehensive results is scheduled to be published in May 2024.

Pages 1-6 of this document constitute the Excerpt of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French and Spanish.

Inbound tourism

International tourism reached 88% of pre-pandemic levels in 2023

- An estimated 1286 million international tourists (overnight visitors) were recorded around the world in 2023, an increase of 34% over 2022, or 325 million more.

- This puts international tourism at 88% of pre-pandemic levels in 2023, following a sustained recovery, especially during the first half of the year supported by strong pent-up demand and increased connectivity.

- July, September and October 2023 were particularly strong months, with arrivals reaching 92% of 2019 levels.

- The Northern Hemisphere summer months of June, July and August accounted for one third of total arrivals recorded in 2023.

- Europe welcomed 700 million of the 1.3 billion travellers recorded globally in 2023, or 54% of the world total.

The Middle East, Europe and Africa performed strongest in 2023

- The **Middle East** led the recovery by regions in relative terms, being the only region to overcome pre pandemic levels with arrivals 22% above 2019. Several destinations enjoyed extraordinary results, among which Qatar (+90%) and Saudi Arabia (+56%).

- **Europe**, the world's most visited destination region, reached 94% of pre-pandemic levels in 2023, supported by robust intra-regional demand and travel from the United States. According to the US National Travel and Tourism Office (NTTO), US travel to Europe grew 29% through October (compared to 2022) and represents 21% of total US overseas travel.

- Europe enjoyed a strong summer season with June, July and August accounting for 37% of the yearly total. September and October were also busy months, partly due to favourable weather conditions.

- Some of the strongest results in Europe were reported by Albania which saw 49% more arrivals in January-November 2023 than in the same months of 2019. Andorra recorded 31% more in the same

period, Iceland and Serbia both 15% and Portugal 11% more. Türkiye posted 7% growth through November and Greece 4% through October. France (-1% through October) virtually recovered its 2019 levels and Spain exceeded by 1% those levels through November.

- **Africa** recovered 96% of pre-pandemic visitors in 2023, with robust demand from European markets, with Ethiopia (+30%), Tanzania (+20%) and Morocco (+11%) all exceeding their 2019 numbers through October or November 2023. According to IATA, the region saw buoyant recovery in international connectivity on intra-regional routes and to Europe and the Middle East.

- Arrivals in the **Americas** reached 90% of 2019 numbers in 2023, backed by solid intra-regional demand. Strong travel from the United States benefitted in particular Caribbean and Central American destinations. El Salvador (+40%), Colombia (+33%), the Dominican Republic and Curaçao (both +24%) were among the strongest performers in the first ten or more months of 2023.

- **Asia and the Pacific** reached 65% of pre-pandemic levels, with a gradual recovery since the start of 2023 following the reopening of several markets and destinations. However, performance among subregions was mixed, with South Asia recovering 87% of pre-pandemic levels and North-East Asia 55%.

- South Asia outperformed other Asian subregions due to robust demand from European source markets, which are closer.

- Among the best performers in Asia Pacific were Maldives (+10%) and Fiji (+3%) which recovered 2019 levels in the months through November 2023, while New Caledonia (-4%) and Samoa (-6%) came close.

- Four subregions, North Africa, Central America (both +5%), Southern Mediterranean Europe and the Caribbean (both +1%) exceeded pre-pandemic levels in 2023.

- Northern Europe (-2%), and Western Europe (-3%) came close to recovering their 2019 levels.

International Tourist Arrivals by (Sub)region

	(millions)					Share (%)	Change (%) vs. previous year[2]				vs. 2019			Monthly/ quarterly data series Change (%)* 2023 versus 2022[2]				2023 versus 2019			
	2019	2020	2021	2022	2023*	2023*	20/19	21/20	22/21	23/22*	21/19	22/19	23/19*	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
World	**1462**	**407**	**458**	**960**	**1286**	**100**	**-72.2**	**12.5**	**109.9**	**33.9**	**-68.7**	**-34.3**	**-12.1**	**85.6**	**37.3**	**22.0**	**19.3**	**-19.4**	**-13.0**	**-8.7**	**-9.5**
Advanced economies[1]	*776*	*221*	*240*	*532*	*708*	*55.1*	*-71.5*	*8.8*	*121.3*	*33.3*	*-69.0*	*-31.5*	*-8.7*	*78.6*	*44.7*	*19.5*	*3.7*	*16.3*	*13.6*	*5.1*	*10.6*
Emerging economies[1]	*687*	*186*	*217*	*429*	*577*	*44.9*	*-73.0*	*17.0*	*97.2*	*34.7*	*-68.4*	*-37.6*	*-15.9*	*84.0*	*33.0*	*21.3*	*22.9*	*-18.3*	*-9.6*	*-5.1*	*-5.0*
By UNWTO regions:																					
Europe	***742.4***	***239.7***	***301.3***	***596.8***	***700.4***	***54.5***	***-67.7***	***25.7***	***98.1***	***17.4***	***-59.4***	***-19.6***	***-5.7***	***51.6***	***18.9***	***9.6***	***7.5***	***-9.1***	***-5.5***	***-4.5***	***-5.4***
Northern Europe	82.1	23.8	21.9	67.5	80.8	6.3	-71.1	-7.8	207.8	19.7	-73.3	-17.8	-1.6	78.3	16.5	3.0	0.6	-5.1	-0.6	0.0	-2.5
Western Europe	205.1	83.5	87.6	169.5	199.3	15.5	-59.3	4.9	93.5	17.6	-57.3	-17.4	-2.9	55.5	20.5	9.3	7.1	-8.7	-1.5	-0.6	-3.6
Central/Eastern Eur.	150.9	44.1	52.9	94.2	112.9	8.8	-70.8	20.1	78.0	19.9	-64.9	-37.6	-25.2	43.2	25.2	13.8	8.0	-27.0	-28.2	-27.2	-25.6
Southern/Medit. Eur.	304.2	88.4	138.9	265.7	307.4	23.9	-71.0	57.1	91.3	15.7	-54.4	-12.7	1.1	45.3	16.6	10.3	9.9	0.1	0.4	0.9	3.1
- of which EU-27	539.2	182.8	222.3	441.7	519.6	40.4	-66.1	21.6	98.6	17.6	-58.8	-18.1	-3.6	52.0	17.3	9.4	9.6	-7.9	-3.5	-2.8	-2.8
Asia and the Pacific	***360.1***	***59.1***	***24.6***	***91.5***	***233.4***	***18.2***	***-83.6***	***-58.4***	***272.0***	***155.1***	***-93.2***	***-74.6***	***-35.2***	***489.2***	***230.2***	***141.5***	***81.7***	***-49.1***	***-38.6***	***-27.2***	***-25.5***
North-East Asia	170.3	20.3	10.9	20.5	93.5	7.3	-88.1	-46.4	88.9	356.3	-93.6	-88.0	-45.1	493.6	569.8	549.7	249.6	-65.0	-50.3	-33.3	-29.4
South-East Asia	138.6	25.5	3.0	41.6	97.6	7.6	-81.6	-88.2	↑	134.5	-97.8	-70.0	-29.6	↑	228.7	88.1	42.2	-38.7	-28.6	-25.3	-25.6
Oceania	17.5	3.6	0.8	6.8	12.9	1.0	-79.2	-79.1	790.2	91.2	-95.6	-61.3	-26.0	491.7	112.8	62.8	31.1	-35.0	-25.1	-22.7	-22.0
South Asia	33.8	9.8	10.0	22.7	29.4	2.3	-71.1	2.1	127.0	29.7	-70.5	-33.0	-13.0	107.7	26.6	11.6	11.6	-21.2	-17.5	-4.2	-9.1
Americas	***219.3***	***69.6***	***81.8***	***156.6***	***198.3***	***15.4***	***-68.2***	***17.4***	***91.5***	***26.6***	***-62.7***	***-28.6***	***-9.6***	***62.7***	***23.9***	***19.4***	***13.2***	***-11.2***	***-12.5***	***-9.4***	***-5.5***
North America	146.6	46.5	57.2	102.0	126.9	9.9	-68.3	23.1	78.3	24.4	-61.0	-30.4	-13.5	54.6	23.0	19.3	12.4	-13.3	-16.1	-13.6	-10.7
Caribbean	26.1	10.3	14.5	22.9	26.5	2.1	-60.6	40.7	57.7	15.9	-44.5	-12.5	1.4	36.6	13.1	9.8	7.4	-6.1	-0.3	8.1	5.5
Central America	10.9	3.1	4.7	9.3	11.5	0.9	-71.6	51.1	97.6	24.3	-57.1	-15.3	5.3	43.1	19.0	23.7	14.8	-2.7	4.2	11.4	9.6
South America	35.6	9.8	5.4	22.5	33.4	2.6	-72.6	-45.1	318.1	48.8	-84.9	-37.0	-6.2	143.9	44.5	27.1	20.0	-10.9	-10.9	-6.3	3.6
Africa	***69.1***	***18.7***	***19.7***	***47.5***	***66.4***	***5.2***	***-72.9***	***5.0***	***141.5***	***39.8***	***-71.5***	***-31.3***	***-3.9***	***108.2***	***45.4***	***20.1***	***9.2***	***-4.9***	***-0.7***	***-4.9***	***-2.6***
North Africa	25.6	5.6	6.6	19.1	26.8	2.1	-78.2	17.9	190.8	40.3	-74.4	-25.4	4.6	180.0	61.9	20.2	3.2	9.1	12.3	-3.1	5.3
Subsaharan Africa	43.5	13.2	13.1	28.4	39.6	3.1	-69.8	-0.5	116.8	39.5	-69.9	-34.7	-8.9	76.2	32.8	20.0	14.0	-12.8	-10.5	-6.8	-7.6
Middle East	***71.3***	***19.4***	***30.2***	***67.8***	***87.1***	***6.8***	***-72.8***	***55.9***	***124.5***	***28.5***	***-57.7***	***-4.9***	***22.1***	***66.0***	***44.3***	***19.0***	***0.4***	***32.0***	***25.0***	***14.4***	***21.5***
Memorandum[3]																					
ASEAN	138.5	25.4	3.0	41.6	97.5	7.6	-81.6	-88.2	↑	134.5	-97.8	-70.0	-29.6	↑	228.8	88.1	42.3	-38.7	-28.6	-25.3	-25.6
G20	1000	300	348	706	892.6	69.4	-70.0	16.1	102.7	26.4	-65.2	-29.4	-10.8	71.1	27.3	16.0	16.1	-17.0	-11.8	-8.1	-8.8
GCC	47.7	13.4	18.3	47.7	61.5	4.8	-71.9	36.3	160.8	28.9	-61.7	0.0	28.9	68.9	45.5	17.8	-0.3	40.9	29.4	15.2	29.3
LDCs	36.7	10.4	7.8	18.3	29.6	2.3	-71.6	-25.2	134.0	62.2	-78.8	-50.3	-19.4	174.4	84.4	45.7	40.1	-30.0	-23.1	-19.7	-20.2
LLDCs	50.6	12.0	12.8	32.3	43.4	3.4	-76.3	6.8	152.0	34.2	-74.7	-36.2	-14.3	140.4	52.1	18.2	17.4	-16.4	-14.9	-15.6	-15.3
SIDS	43.7	10.4	13.2	28.6	40.6	3.2	-76.1	26.6	116.7	41.9	-69.8	-34.5	-7.1	91.7	48.6	31.9	16.4	-13.5	-6.7	-2.9	-5.5

Source: World Tourism Organization (UNWTO)   (Data as collected by UNWTO, January 2024)

* Provisional data
[1] Classification based on the International Monetary Fund (IMF).
[2] Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)
[3] ASEAN: Association of Southeast Asian Nations, G20: Group of Twenty, GCC: Gulf Cooperation Council,
  LDCs: Least Developed Countries, LLDCs: Landlocked Developing Countries, SIDS: Small Island Developing States. (See Methodological Notes)
See box in page 'Annex-1' for explanation of abbreviations and symbols used.

For regularly updated data, please check the *UNWTO Tourism Recovery Tracker:* https://www.unwto.org/unwto-tourism-recovery-tracker

Many destinations reported arrivals and receipts well above pre-pandemic levels in 2023

- Available data for the first 10 to 12 months of 2023 shows several destinations reporting double-digit growth in international arrivals (compared to 2019), including Qatar (+90%) where visitors almost doubled, Saudi Arabia (+56%), Albania (+53%), El Salvador (+40%), Colombia (+33%) and Andorra (+31%).

- The Dominican Republic (+24%) and Tanzania (+20%) also enjoyed strong growth last year, as did Guatemala, Iceland and Serbia, all three reporting 15% more arrivals than in the same period of 2019.

- Among smaller destinations, Turks and Caicos saw its arrivals more than double (+127%), while Ethiopia reported 30% growth and Curaçao 24%, compared to 2019.

- Available data through October, November or December 2023 show a total of 40 world destinations recovering pre-pandemic visitors, including both large and smaller destinations, among which several islands. These countries represent 23% of the world's international arrivals (as of 2019).

- Several destinations also reported strong growth in international tourism receipts during the first ten or eleven months of 2023, including Serbia (+79% over 2019), Pakistan (+77%), Türkiye (+59%), Romania (+48%), Portugal (+38%), Mauritius (+36%) and Morocco (+34%), among others.

- Strong demand for outbound travel was reported by several large source markets in the first ten to eleven months, with many exceeding 2019 levels. Germany and the United States spent 14% and 13% more respectively on outbound travel than in 2019, while Italy spent 15% more. France (+0%) recovered 2019 expenditure levels.

- The sustained recovery is also reflected in the performance of industry indicators. According to the UNWTO Tourism Recovery Tracker, both international air capacity and passenger demand recovered 87% of pre-pandemic levels through October 2023 (IATA). Global occupancy rates in accommodation establishments reached 65% in November, slightly above 62% in November 2022 (based on STR data).

International tourism receipts hit US$1.4 trillion in 2023 and tourism direct GDP US$ 3.3 trillion

- International tourism receipts reached USD 1.4 trillion in 2023 according to preliminary estimates, about 93% of the USD 1.5 trillion earned by destinations in 2019.

- Total export revenues from tourism (including passenger transport) are estimated at USD 1.6 trillion in 2023, almost 95% of the USD 1.7 trillion recorded in 2019.

- Preliminary estimates on the economic contribution of tourism, measured in tourism direct gross domestic product (TDGDP) point to USD 3.3 trillion in 2023, or 3% of global GDP. This indicates a recovery of pre-pandemic TDGDP driven by strong domestic and international tourism.

International tourism on the way to full recovery in 2024, amid challenges ahead

- Following a strong rebound in 2023, international tourism is expected to **recover pre-pandemic levels in 2024**, with initial estimates pointing to 2% growth above 2019 levels. This central forecast by UNWTO remains subject to the pace of recovery in Asia and to the evolution of existing economic and geopolitical challenges.

- The positive outlook for the sector is reflected in the latest **UNWTO Confidence Index** survey, with 67% of tourism professionals indicating better or much better prospects for 2024 compared to 2023. Some 28% expect similar performance as in 2023, while only 6% expect tourism performance in 2024 to be worse than last year.

- There is still significant room for recovery across Asia. The recent reopening of several source markets and destinations is expected to boost recovery in the region and globally.

- The recovery of **Chinese outbound and inbound tourism** is expected to accelerate in 2024, due to visa facilitation and improved air capacity. China is granting visa-free travel to citizens from France, Germany, Italy, the Netherlands, Spain and Malaysia for a year from December 2023 to 30 November 2024.

- According to data from Trip.com, inbound travel bookings from different markets are experiencing an increase for the Spring Festival (10-17 February 2024), compared to 2023. In terms of outbound travel, Chinese travellers are seeking short-haul destinations in the Asia Pacific region, especially in countries such as Singapore, Thailand and Malaysia where visa requirements are more flexible. Trip.com indicates that bookings for outbound travel during the 2024 Spring Festival (10-17 February) have increased tenfold, in particular to South-East Asia, Japan, and the Republic of Korea.

- **Visa and travel facilitation** measures could also promote travel to and within the Middle East and Africa. The Gulf Cooperation Council (GCC) countries are set to implement a unified tourist visa, similar to the Schengen visa in Europe, while Kenya and Rwanda have introduced measures to facilitate intra-African travel.

- **Europe** is expected to drive results again in 2024. Romania and Bulgaria will join the Schengen area of free movement in March 2024, and Paris will host the 2024 Summer Olympics in July and August.

- **Strong travel from the United States**, backed by a strong US dollar, will continue to benefit destinations in the Americas and beyond. As in 2023, robust source markets in Europe, the Americas and the Middle East, will continue to fuel tourism flows and spending around the world.

- **Economic and geopolitical** headwinds continue to pose significant challenges to the sustained recovery of international tourism and confidence levels. Persisting inflation, high interest rates, volatile oil prices and disruptions to trade could continue to impact transport and accommodations costs in 2024.

- Against this backdrop, tourists are expected to increasingly seek **value for money and travel closer to home**, in response to elevated prices and the overall economic challenges.

- **Staff shortages** remain a critical issue, as tourism businesses face a shortfall in labor to cope with high travel demand.

- The evolution of the Hamas-Israel conflict is a factor to consider regarding a possible disruption of travel in the Middle East as well as negative effects on traveller confidence globally. Israel saw an 80% decline in international arrivals in December 2023 compared to December 2022 and 85% versus 2019.

- Uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions, continue to weigh on traveler confidence.

- Sustainable practices and adaptability will play an increasing role in destinations and consumer choice in 2024.
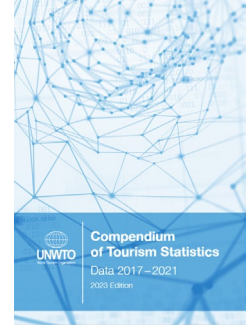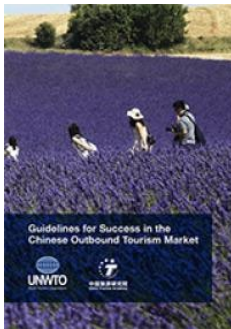
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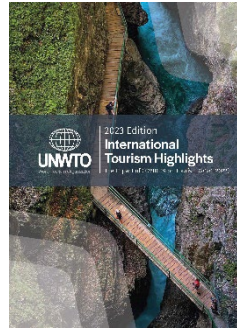
International Tourism Highlights - 2023 Edition The Impact of COVID-19 on Tourism (2020–2022)
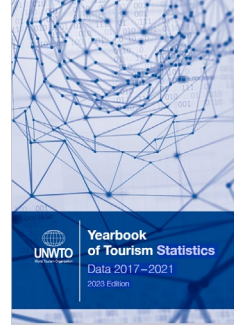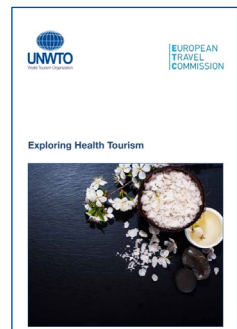
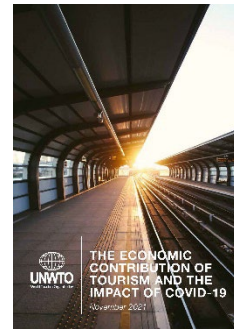**Yearbook of Tourism Statistics (2017-2021)**

Compendium of Tourism Statistics (2017-2021)

Guidelines for Success in the Chinese Outbound Tourism Market (2019)
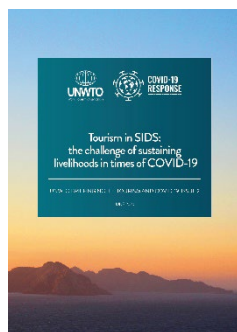
Exploring Health Tourism (2018)

The Economic Contribution of Tourism and the Impact of COVID-19 (2021)
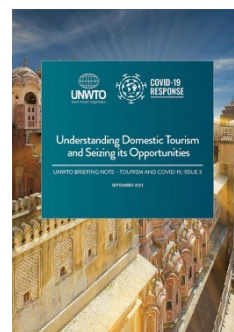
European Union Tourism Trends (2018)

How are countries supporting tourism recovery? Tourism and Covid-19 (2020)

Tourism in SIDS: the challenge of sustaining livelihoods in times of Covid-19 (2020)

Understanding domestic tourism and seizing its opportunities (2020)

UNWTO/GTERC Asia Tourism Trends, 2020 Edition

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