



World Tourism Barometer

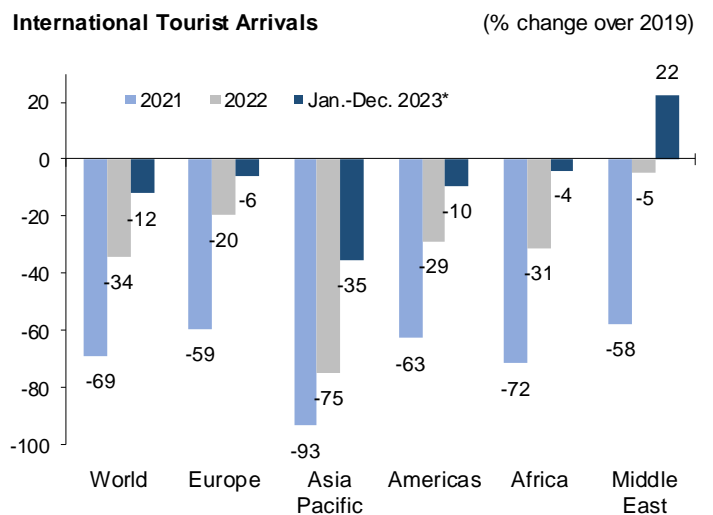
Volume 22 • Issue 1 • January 2024

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 risks to the sustained recovery of international tourism and confidence levels.



Source: UNWTO

* Provisional data



The World Tourism Organization (UNWTO) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

UNWTO's membership includes 160 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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C/ Poeta Joan Maragall 42, 28020 Madrid, Spain

UNWTO World Tourism Barometer

ISSN: 1728-9246

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World Tourism Organization

C/ Poeta Joan Maragall 42, 28020 Madrid, Spain
Tel (34) 91 567 81 00 / Fax (34) 91 131 17 02
info@unwto.org - www.unwto.org

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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.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this *UNWTO World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

This report was prepared by the UNWTO Tourism Market Intelligence and Competitiveness Department, under the supervision of Sandra Carvão, Director of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian and Javier Ruescas. Data was compiled from the [Tourism Market Intelligence Database](#) and the [Tourism Statistics Database](#) based on official country sources.

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 mid-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, with arrivals 22% above 2019 levels. It was the only world region to surpass pre-pandemic tourist numbers. 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. Ethiopia (+30%), Tanzania (+20%) and Morocco (+11%) all exceeded their 2019 numbers through October or November 2023. According to IATA, the region saw a buoyant recovery in international connectivity to Europe and the Middle East and on intra-regional routes.
- Arrivals in the **Americas** reached 90% of 2019 numbers in 2023, backed by solid intra-regional demand. Strong travel from the United States benefitted Caribbean and Central American destinations in particular. 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

															Quarterly data series							
	(millions)					Share (%)	Change (%)					Change (%)*										
							2019	2020	2021	2022	2023*	2023*	vs. previous year ²			vs. 2019			2023 versus 2022 ²			
	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	85.7	37.4	22.1	19.4	-19.5	-13.0	-8.8	-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	78.7	44.8	19.6	3.8	16.3	13.6	5.0	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	84.1	33.1	21.3	23.0	-18.4	-9.7	-5.2	-5.0	
<i>By UNWTO regions:</i>																						
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	51.7	19.0	9.7	7.7	-9.2	-5.6	-4.5	-5.5	
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	55.6	20.8	9.5	7.4	-8.9	-1.7	-0.7	-3.7	
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	43.5	25.5	14.0	8.2	-27.1	-28.3	-27.4	-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	0.0	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	52.2	17.5	9.6	9.8	-8.0	-3.7	-2.9	-2.9	
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	230.1	141.3	81.5	-49.1	-38.6	-27.1	-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	↑ 228.5	88.0	42.0		-38.7	-28.5	-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	491.5	112.7	62.7	30.9	-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	62.8	24.0	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	36.8	13.3	9.9	7.6	-6.3	-0.4	8.0	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	4.1	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	144.0	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	108.7	45.7	20.3	9.4	-5.0	-0.8	-5.0	-2.7	
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	76.8	33.1	20.3	14.4	-13.0	-10.6	-7.0	-7.7	
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	
<i>Memorandum³</i>																						
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	↑ 228.6	88.0	42.0		-38.7	-28.5	-25.3	-25.5	
G20	1000.5	300.1	348.5	706.4	892.6	69.4	-70.0	16.1	102.7	26.4	-65.2	-29.4	-10.8	71.3	27.4	16.1	16.2	-17.0	-11.9	-8.2	-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	177.0	85.6	46.5	41.2	-30.2	-23.3	-19.9	-20.3	
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	139.5	51.7	18.0	17.3	-16.3	-14.8	-15.4	-15.2	
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.

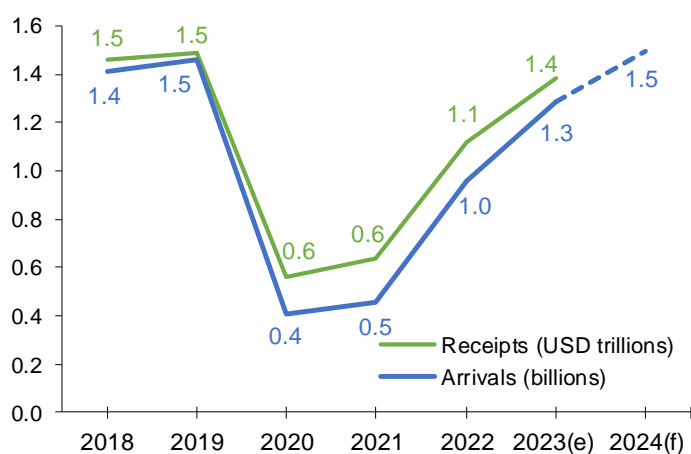
International tourism on the way to full recovery in 2024, amid challenges

- 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 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.

International tourist arrivals and tourism receipts



Source: UNWTO (Data as of January 2024)
 (e) preliminary estimate (f) forecast

International Tourist Arrivals by (Sub)region

	(millions)			Change (%)						Monthly data												
				vs. previous year ²			vs. 2019			Change (%)*												
	2019	2022	2023*	20/19	21/20	22/21	23/22*	21/19	22/19	23/19*	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
World	1462	960	1286	-72.2	12.5	109.9	33.9	-68.7	-34.3	-12.1	-20.6	-18.9	-19.0	-15.8	-12.3	-11.3	-8.0	-10.3	-7.8	-7.7	-10.0	-11.0
Advanced economies ¹	776	532	708	-71.5	8.8	121.3	33.3	-69.0	-31.5	-8.7	-20.0	-17.5	-17.8	-10.7	-9.1	-9.4	-4.7	-5.6	-5.3	-3.3	-5.0	-7.1
Emerging economies ¹	687	429	577	-73.0	17.0	97.2	34.7	-68.4	-37.6	-15.9	-21.2	-20.2	-20.2	-21.6	-16.4	-13.7	-12.7	-16.6	-11.2	-12.9	-14.9	-14.7
<i>By UNWTO regions:</i>																						
Europe	742.4	596.8	700.4	-67.7	25.7	98.1	17.4	-59.4	-19.6	-5.7	-7.3	-7.8	-11.9	-6.3	-4.0	-6.5	-2.7	-5.6	-5.6	-2.8	-6.5	-8.1
Northern Europe	82.1	67.5	80.8	-71.1	-7.8	207.8	19.7	-73.3	-17.8	-1.6	-6.2	-4.7	-4.5	-0.5	-0.2	-1.1	-0.8	-0.2	1.2	-0.1	-2.2	-5.3
Western Europe	205.1	169.5	199.3	-59.3	4.9	93.5	17.6	-57.3	-17.4	-2.9	-4.8	-6.4	-14.2	-5.6	3.6	-2.9	2.4	-0.7	-4.8	-2.4	-4.8	-4.3
Central/Eastern Eur.	150.9	94.2	112.9	-70.8	20.1	78.0	19.9	-64.9	-37.6	-25.2	-27.9	-27.2	-26.3	-27.9	-28.1	-28.9	-27.7	-27.7	-26.7	-24.6	-26.4	-25.9
Southern/Medit. Eur.	304.2	265.7	307.4	-71.0	57.1	91.3	15.7	-54.4	-12.7	1.1	4.0	2.4	-4.6	2.7	1.0	-1.7	2.9	-1.6	1.4	4.8	3.3	-0.3
- of which EU-27	539.2	441.7	519.6	-66.1	21.6	98.6	17.6	-58.8	-18.1	-3.6	-6.1	-5.8	-11.3	-3.2	-1.9	-5.5	-0.9	-3.9	-4.2	-1.0	-3.6	-4.7
Asia and the Pacific	360.1	91.5	233.4	-83.6	-58.4	272.0	155.1	-93.2	-74.6	-35.2	-53.2	-49.5	-44.8	-42.5	-38.5	-34.6	-29.4	-27.1	-24.6	-25.5	-26.2	-24.9
North-East Asia	170.3	20.5	93.5	-88.1	-46.4	88.9	356.3	-93.6	-88.0	-45.1	-72.0	-65.3	-58.4	-53.8	-51.3	-45.5	-38.5	-30.6	-30.2	-29.8	-29.2	-29.2
South-East Asia	138.6	41.6	97.6	-81.6	-88.2	↑	134.5	-97.8	-70.0	-29.6	-39.8	-40.7	-35.4	-31.3	-27.2	-26.9	-24.3	-26.9	-24.5	-26.6	-26.0	-24.2
Oceania	17.5	6.8	12.9	-79.2	-79.1	790.2	91.2	-95.6	-61.3	-26.0	-39.5	-36.3	-29.3	-25.7	-26.5	-23.0	-23.2	-25.5	-19.1	-23.1	-22.1	-21.1
South Asia	33.8	22.7	29.4	-71.1	2.1	127.0	29.7	-70.5	-33.0	-13.0	-23.3	-20.9	-19.3	-30.1	-11.0	-8.8	-4.7	-10.3	3.3	1.8	-15.5	-11.8
Americas	219.3	156.6	198.3	-68.2	17.4	91.5	26.6	-62.7	-28.6	-9.6	-10.4	-10.5	-12.6	-12.7	-12.5	-12.3	-9.4	-11.4	-7.0	-6.2	-4.3	-6.0
North America	146.6	102.0	126.9	-68.3	23.1	78.3	24.4	-61.0	-30.4	-13.5	-12.0	-13.2	-14.7	-16.4	-15.9	-16.2	-13.5	-15.6	-11.2	-11.0	-9.4	-11.4
Caribbean	26.1	22.9	26.5	-60.6	40.7	57.7	15.9	-44.5	-12.5	1.4	-4.6	-4.7	-9.0	-2.3	-2.2	3.5	7.6	5.0	13.3	9.9	6.6	1.8
Central America	10.9	9.3	11.5	-71.6	51.1	97.6	24.3	-57.1	-15.3	5.3	-9.9	0.8	1.8	1.2	5.2	6.5	9.3	9.7	16.8	2.2	11.9	12.4
South America	35.6	22.5	33.4	-72.6	-45.1	318.1	48.8	-84.9	-37.0	-6.2	-10.1	-10.2	-12.6	-10.5	-10.0	-12.3	-7.6	-7.4	-3.5	4.7	4.0	2.4
Africa	69.1	47.5	66.4	-72.9	5.0	141.5	39.8	-71.5	-31.3	-3.9	-4.4	-3.5	-7.1	-8.3	7.1	-0.1	-4.4	-8.9	-0.7	1.6	-0.6	-8.3
North Africa	25.6	19.1	26.8	-78.2	17.9	190.8	40.3	-74.4	-25.4	4.6	11.1	12.8	4.2	-3.6	35.8	10.0	-3.2	-8.7	6.0	11.4	10.5	-4.8
Subsaharan Africa	43.5	28.4	39.6	-69.8	-0.5	116.8	39.5	-69.9	-34.7	-8.9	-12.3	-12.8	-14.1	-11.8	-11.0	-9.0	-5.9	-9.0	-5.8	-5.4	-6.9	-10.5
Middle East	71.3	67.8	87.1	-72.8	55.9	124.5	28.5	-57.7	-4.9	22.1	24.0	37.1	35.3	16.6	16.4	44.6	18.7	-2.9	37.1	22.0	24.3	18.5
<i>Memorandum³</i>																						
ASEAN	138.5	41.6	97.5	-81.6	-88.2	↑	134.5	-97.8	-70.0	-29.6	-39.8	-40.7	-35.4	-31.3	-27.2	-26.9	-24.3	-26.9	-24.5	-26.5	-25.9	-24.2
G20	1000.5	706.4	892.6	-70.0	16.1	102.7	26.4	-65.2	-29.4	-10.8	-16.7	-16.2	-18.0	-13.9	-11.8	-10.2	-6.8	-9.9	-7.8	-6.7	-9.8	-10.3
GCC	47.7	47.7	61.5	-71.9	36.3	160.8	28.9	-61.7	0.0	28.9	29.6	47.3	46.9	23.2	7.2	65.8	21.9	-9.0	52.2	31.4	32.9	24.7
LDCs	36.7	18.3	29.6	-71.6	-25.2	134.0	62.2	-78.8	-50.3	-19.4	-30.1	-28.8	-31.6	-26.1	-23.9	-19.6	-19.5	-21.8	-18.4	-19.1	-20.7	-20.9
LLDCs	50.6	32.3	43.4	-76.3	6.8	152.0	34.2	-74.7	-36.2	-14.3	-16.9	-14.7	-17.0	-15.2	-12.5	-16.5	-15.5	-17.4	-13.2	-14.9	-15.8	-14.9
SIDS	43.7	28.6	40.6	-76.1	26.6	116.7	41.9	-69.8	-34.5	-7.1	-14.5	-12.7	-13.2	-8.6	-5.9	-5.5	-2.9	-3.9	-1.5	-2.9	-5.4	-7.6

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.

International Tourism by (Sub)region

	International Tourism Receipts												International Tourist Arrivals					
	(USD billions)				(EUR billions)				Share (%)	Change (%)				(millions)		Change (%)		
	2019	2020	2021	2022*	2019	2020	2021	2022*		2022*	Local currencies, constant prices				2019	2022*	2022/21*	22/19*
World	1487	558	638	1120	1328	488	540	1064	100	-62.7	8.5	74.5	-59.3	-25.1	1462	960	109.9	-34.3
Advanced economies ¹	936	367	404	689	836	321	342	654	61.5	-61.4	3.8	72.2	-59.4	-25.7	776	532	121.3	-31.5
Emerging economies ¹	551	191	234	431	492	167	198	409	38.5	-64.9	17.5	78.4	-59.2	-24.1	687	429	97.2	-37.6
<i>By UNWTO regions:</i>																		
Europe	584.1	249.3	329.3	555.1	521.7	218.3	278.5	527.2	49.6	-58.1	24.1	71.7	-47.0	-3.2	742.4	596.8	98.1	-19.6
Northern Europe	95.1	41.1	50.6	103.0	84.9	36.0	42.8	97.8	9.2	-57.3	12.3	110.3	-51.4	11.9	82.1	67.5	207.8	-17.8
Western Europe	179.1	99.0	107.1	156.9	160.0	86.7	90.5	149.0	14.0	-46.3	2.1	52.2	-43.6	-9.0	205.1	169.5	93.5	-17.4
Central/Eastern Eur.	69.0	28.6	34.7	56.3	61.7	25.1	29.4	53.4	5.0	-58.4	14.0	55.2	-52.7	-21.9	150.9	94.2	78.0	-37.6
Southern/Medit. Eur.	240.9	80.6	136.9	239.0	215.2	70.6	115.8	226.9	21.3	-67.1	60.8	76.8	-46.2	0.5	304.2	265.7	91.3	-12.7
- of which EU-27	423.2	182.3	234.1	386.3	378.0	159.6	197.9	366.8	34.5	-57.8	20.9	70.8	-47.9	-5.5	539.2	441.7	98.6	-18.1
Asia and the Pacific	441.2	126.3	90.6	155.8	394.1	110.6	76.6	147.9	13.9	-71.5	-31.6	75.3	-80.4	-64.0	360.1	91.5	272.0	-74.6
North-East Asia	187.2	44.9	44.9	44.8	167.2	39.3	38.0	42.5	4.0	-76.4	-2.9	5.7	-76.7	-74.6	170.3	20.5	88.9	-88.0
South-East Asia	146.9	31.2	11.0	49.7	131.2	27.3	9.3	47.2	4.4	-78.6	-65.4	353.3	-92.6	-66.0	138.6	41.6	↑	-70.0
Oceania	61.4	32.7	20.3	30.8	54.9	28.7	17.2	29.2	2.7	-46.7	-44.6	53.6	-70.5	-49.1	17.5	6.8	790.2	-61.3
South Asia	45.7	17.5	14.3	30.5	40.8	15.3	12.1	28.9	2.7	-62.1	-20.8	110.7	-69.7	-33.9	33.8	22.7	127.0	-33.0
Americas	330.5	125.4	142.5	261.2	295.2	109.8	120.5	248.1	23.3	-61.7	7.6	71.2	-59.2	-26.2	219.3	156.6	91.5	-28.6
North America	253.4	97.3	106.5	192.9	226.3	85.2	90.1	183.2	17.2	-61.6	2.6	68.8	-60.6	-29.0	146.6	102.0	78.3	-30.4
Caribbean	35.0	14.3	20.9	33.0	31.2	12.5	17.6	31.3	2.9	-58.7	40.8	46.1	-42.5	-12.8	26.1	22.9	57.7	-12.5
Central America	12.6	4.0	6.3	12.6	11.3	3.5	5.3	12.0	1.1	-68.2	54.6	92.4	-50.8	-4.5	10.9	9.3	97.6	-15.3
South America	29.5	9.8	8.8	22.7	26.4	8.5	7.5	21.6	2.0	-63.3	-11.0	143.8	-70.6	-27.0	35.6	22.5	318.1	-37.0
Africa	39.1	14.9	17.8	32.7	34.9	13.1	15.1	31.0	2.9	-61.5	12.0	81.7	-57.3	-17.1	69.1	47.5	141.5	-31.3
North Africa	11.2	5.4	6.0	11.9	10.0	4.7	5.1	11.3	1.1	-53.0	3.9	106.6	-49.9	10.1	25.6	19.1	190.8	-25.4
Subsaharan Africa	27.9	9.5	11.9	20.8	24.9	8.3	10.0	19.7	1.9	-64.9	16.6	69.2	-60.3	-28.1	43.5	28.4	116.8	-34.7
Middle East	91.7	41.9	58.0	115.3	82.0	36.7	49.1	109.5	10.3	-54.3	37.7	94.7	-37.2	23.1	71.3	67.8	124.5	-4.9

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, January 2024)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.

See box in page 'Annex-1' for explanation of abbreviations and symbols used.

Industry Indicators

Strong recovery of air passenger traffic in 2023

Air passenger traffic

- According to **IATA**, the year 2023 was marked by a strong air passenger market recovery. Global air passenger numbers reached 94% of pre-pandemic levels in 2023, a significant increase from 2022 when it stood at 69%.
- International traffic recovered 89% of 2019 levels in 2023, mirroring the result on international arrivals for the year 2023 (88%). All regions contributed to these results.
- North America led the recovery among regions, with international air traffic exceeding 2019 levels by 1%, while the Middle East reached 98% of pre-pandemic levels in 2023 (-2% versus 2019). International revenue passenger-kilometres (RPKs) in Latin America (-6%) and Europe (-7%) came close to pre-pandemic values, while Africa reported traffic levels 9% below 2019. International RPKs in Asia and the Pacific more than doubled compared to 2022, though were still 27% below 2019.
- Global domestic air traffic (RPKs) exceeded pre-pandemic levels by 4% in 2023. By market, China (+7% RPKs), India (+5%), the United States and Brazil (both +3%) exceeded 2019 levels in 2023.

Air capacity

- Data from **IATA** shows international air capacity worldwide (measured in available seat-kilometres or ASKs) climbing to 12% below 2019 levels in 2023, showing a significant improvement compared to 2022 (-35%). North America exceeded pre-pandemic levels by 1%. Europe recovered 95% of 2019 levels, the Middle East 93%, Latin America 92% and Africa 90%.
- Domestic air capacity (ASKs) exceeded 2019 levels by 7% in 2023. By market, China (+19%), India (+6%), the United States (+5%) and Brazil (+3%) all 2019 levels.

Accommodation

- According to **STR**, global occupancy in accommodation establishments reached 60% in December 2023, with continued improvement from 54% in January 2023 and a peak of 68% in July. The Middle East (66%) and Asia Pacific (65%) recorded the highest occupancy in December 2023.
- By subregion, the Caribbean, South Asia (both 69%), Northern Europe, Oceania (both 68%), as well as South-East Asia (67%) and North East Asia (64%) saw the highest occupancy rates in December 2023. (Data by region are based on STR regions).

UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.



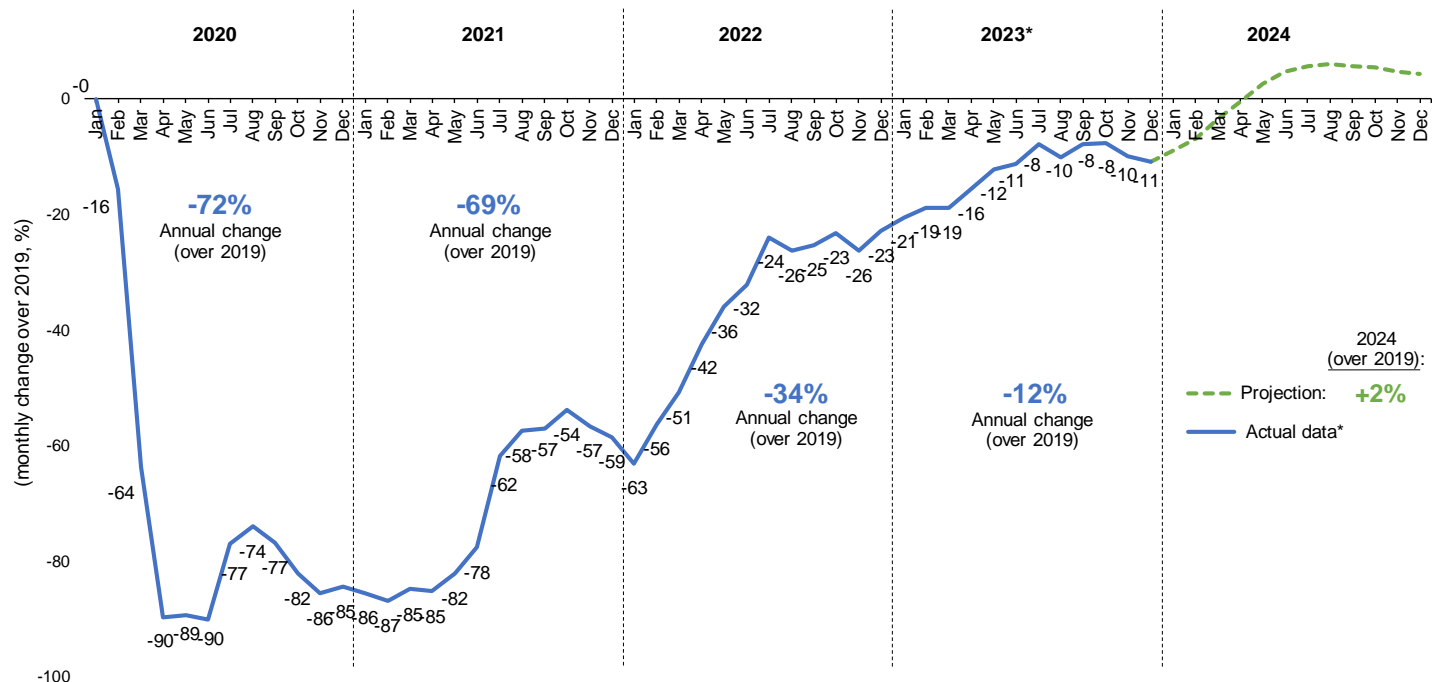
Consult the tourism dashboard at: www.unwto.org/unwto-tourism-dashboard



Outlook for 2024

- After four years of subdued travel activity due to the coronavirus pandemic, international tourism is expected to fully recover in 2024, climbing 2% above pre-pandemic levels to 1.5 billion arrivals. Last year’s upward momentum could continue in 2024 driven by remaining pent-up demand, particularly from some large Asian source markets, supported by increased capacity and connectivity. Policy efforts such as visa facilitation and promotion in many destinations are also expected to drive growth.
- The latest UNWTO Panel of Experts survey reflects this moderately positive outlook, with 67% of tourism professionals expecting “better” or “much better” performance in 2024 than in 2023. Almost 70% believe international tourism has either reached pre-pandemic levels in their destination or will do so in 2024.
- Despite the positive prospects, global economic and geopolitical challenges pose significant risks to the recovery of international tourism in 2024. Transport and accommodation prices could remain elevated due to inflation, while high interest rates could dampen purchasing power and consumer demand.
- Many tourists will continue to seek value for money and take trips closer to home in response to the economic circumstances, though luxury travel is expected to grow in 2024.
- The Russian offensive in Ukraine will continue to impact travel in those destinations and between Europe and Asia, due to the closure of Russian airspace.
- The Hamas-Israel conflict is also a factor to consider regarding travel disruptions in the Middle East and Israel itself, where arrivals dropped 80% in December 2023. Geopolitical tensions in North-East Asia could also affect traveler confidence in the region and globally.
- All world regions are projected to recover pre-crisis tourist numbers in 2024 (aside from the Middle East which already did so in 2023) with the possible exception of Asia and the Pacific which has been slower to recover. This will depend on public and private sector initiatives to attract visitors, on economic factors and on confidence levels.

International tourist arrivals: 2020-2023 and Projection for 2024 (monthly change over 2019, %)



Source: UNWTO

* Actual data for 2023 is preliminary and based on estimates for destinations which have not yet reported results.

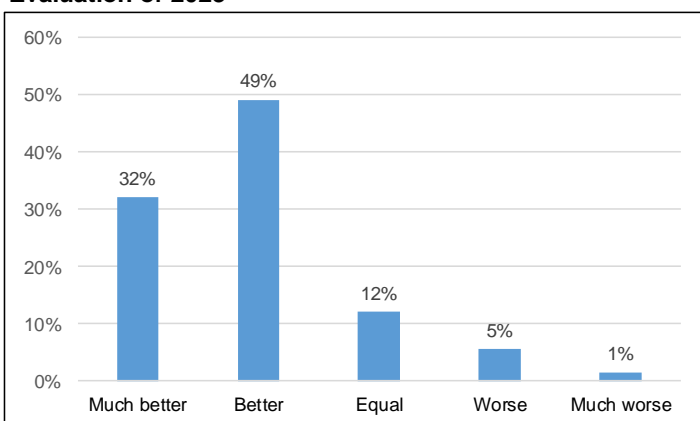
(Data as of January 2024)

UNWTO Confidence Index

International tourism ends 2023 on a high note with strong prospects for 2024

- The **UNWTO Confidence Index** confirms the strong rebound experienced by international tourism in 2023, reaching 152 points (on a scale of 0 to 200) the highest in the time series together with the year 2022.
- The vast majority of experts (81%) evaluated the year 2023 as better (49%) or much better (32%) than 2022. Only 6% considered it to be worse, while 12% saw similar performance.

Evaluation of 2023



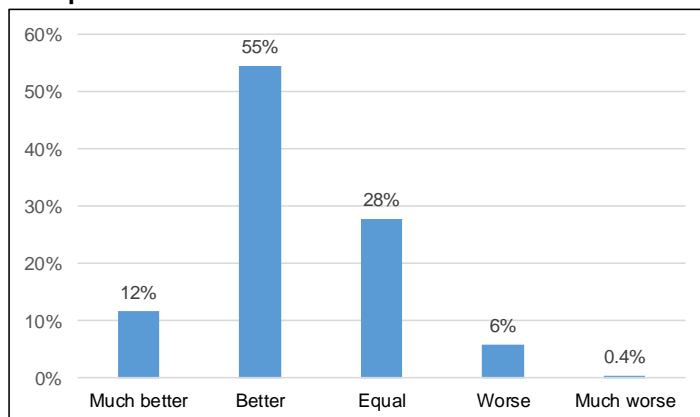
Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

- The UNWTO Confidence Index also confirmed the sector's continued recovery in the last months of the year, though at a more moderate pace following the peak summer season in the Northern Hemisphere.
- The UNWTO Panel of Tourism Experts rated the period **September-December 2023** with a score of 127, matching the expectations expressed in the September survey ahead of that 4-month period (126).
- Some 57% of survey respondents evaluated September-December 2023 as better (42%) or much better (15%) than expected, while 27% did not see any change. Some 16% considered it to be worse or much worse.
- Experts mentioned the strong increase in tourism demand for many destinations around the world, coupled with longer stays and higher average spending.
- The 4-month period saw some successful large events such as the 2023 Rugby World Cup in France and the COP 28 in Dubai (UAE).

Full recovery expected in 2024 amid challenges

- Following a strong 2023, international tourism is expected to consolidate its recovery in **2024** backed by remaining pent-up demand, increased air connectivity, travel facilitation as well as the continued recovery of Asian markets and destinations.

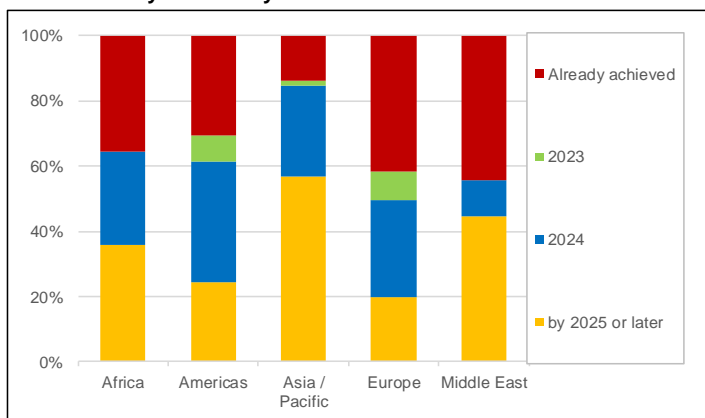
Prospects for 2024



Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

- This translates into a Confidence Index of 136 for 2024, a very positive score following a particularly strong 2023, though less bullish than the evaluation made for 2023 (152).
- Most experts (70%) expect results in their respective destinations to exceed pre-pandemic levels in 2024, of which 33% indicating an increase of 10% to 20% above 2019 levels or more. The remaining 30% expressed that their destination is still on the way of recovering 2019 levels.
- Looking ahead, 61% of UNWTO Panel experts believe international tourism will return to 2019 levels in their destination either in 2024 (30%) or in 2025 or later (31%). Some 39% mentioned their destination had already recovered pre-pandemic levels or were about to reach them by the end of 2023.
- While the percentage of experts pointing to 2024 has decreased compared to the September survey (37%), the share of those indicating 2025 or later has increased (from 21% in September to 31%).
- The largest share of experts pointing to a return to 2019 levels in 2025 or later continues to be in Asia and the Pacific (57%). This share has increased compared to the September survey (50%), indicating a comparatively slower recovery of some destinations and markets in the region.

When do you expect international tourism to return to pre-pandemic 2019 levels in your country?



Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

- 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.

Cautious optimism for the early months of 2024

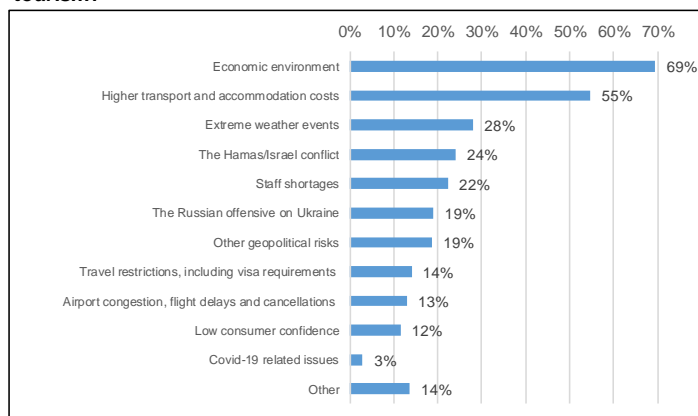
- Expectations for the period **January-April 2024** indicate cautious optimism, with still large pent-up demand though in a context of uncertainty and volatility. Half of respondents expect better (41%) or much better (9%) performance, while 36% see equal performance and 15% worse or much worse. The first four months of the year cover most of the Northern Hemisphere winter season and the Southern Hemisphere summer season, as well as major travel periods such as the Chinese New Year and Easter.
- 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.

The economic environment remains the main factor weighing on the recovery

- The **challenging economic environment** continues to pose an important risk to the sustained recovery of international tourism, according to UNWTO’s Panel of Experts.
- Persisting inflation, high interest rates, volatile oil prices and disruptions to trade can continue to impact transport and accommodation costs in 2024.

- Against this backdrop, tourists are expected to increasingly seek value for money and travel closer to home, in a context of rising cost of living and disposable income under pressure.
- Exchange rate fluctuations might also affect travel decisions.
- According to experts, extreme weather events are increasingly becoming a concern for many destinations and operators. Around 28% of experts rated extreme weather events as one of the main critical factors along with the economic environment and high travel prices.
- Experts also raised concerns about the evolution of the Hamas-Israel conflict in terms of scope and duration. Furthermore, continued uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions, also represent downside risks. In a context of geopolitical volatility, some experts mentioned that destinations perceived as safe could benefit from increased demand.

What are the main factors weighing on the recovery of international tourism?



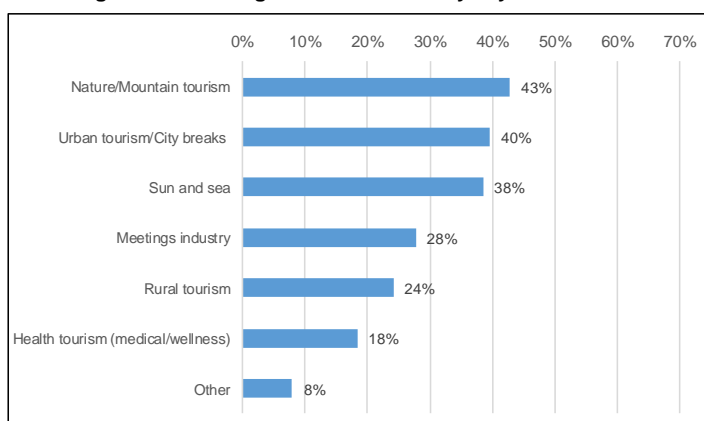
Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

- In addition, 2024 will see an extraordinary number of elections in about 70 countries, including major economies like the United States, United Kingdom, South Africa, India, Mexico and Indonesia.
- Finally, experts point out that staff shortages remain a critical issue, as tourism businesses face a shortfall in labour to cope with high travel demand.

Leisure-related travel segments continue to show fastest recovery

- According to Panel experts, **nature and mountain tourism** is showing the fastest recovery in their respective destination, underlining the growing importance of sustainability in consumer choice.
- Urban tourism and city breaks, one of the most affected segments during the pandemic, continues to show rapid recovery, along with sun and sea. This reflects the significant weight of travel for leisure purposes.
- Experts also highlighted the importance of meetings and events, with an increasing number of large international events worldwide. Paris will host the Summer Olympics in July and August 2024.

What segment is showing the fastest recovery in your destination?

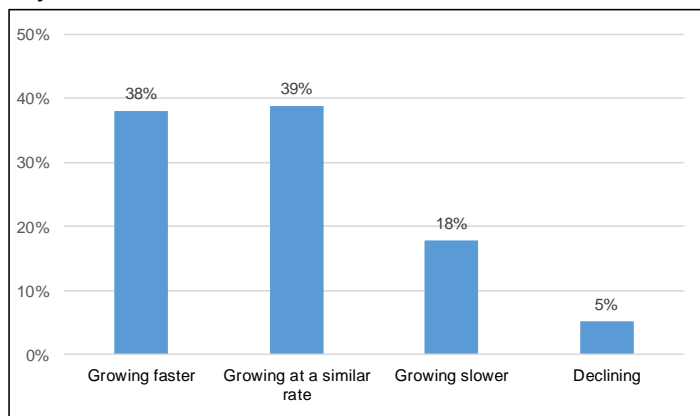


Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

Domestic tourism growing faster in several destinations compared to pre-pandemic

- **Domestic tourism** will continue to support the recovery in an important number of destinations, particularly those with large domestic markets. Around 42% of experts mentioned that domestic tourism is still driving the recovery in their destination. Some 77% indicated that domestic tourism is growing faster (38%) or at a similar rate (39%) compared to before the pandemic.
- However, around 40% of experts considered that domestic tourism is driving the recovery only partially while 18% saw no contribution. This reflects the importance of international tourism in many destinations and the sustained recovery of international demand.

How is domestic tourism performing compared to before the pandemic in your destination?

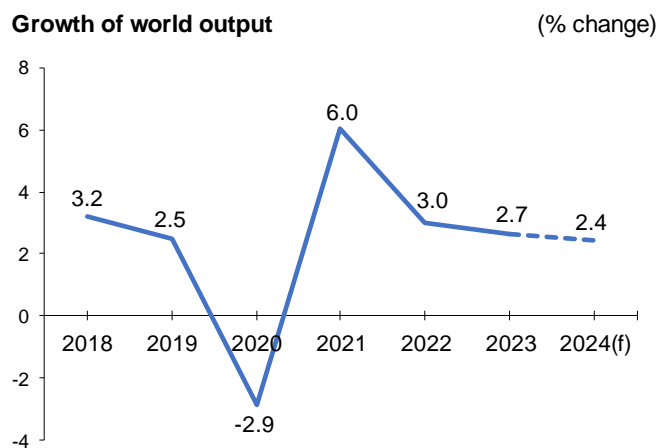


Source: January 2024 Survey of the UNWTO Panel of Tourism Experts

- Domestic tourism has been a key driver for the recovery of destinations that were closed to non-essential inbound travel for a long time, in particular Asian destinations such as China, Macao (China) and Japan. Domestic tourism has also partly compensated for weaker inbound travel in some Eastern European destinations affected by the proximity of the war in Ukraine.

Economic environment

- The global economy is forecast to grow 2.4% in 2024¹, below a stronger-than-expected 2.7% in 2023, according to the United Nations World Economic Situation and Prospects (WESP) 2024². Many large economies bounced back from the Covid-19 pandemic in 2023, with robust labour markets supporting consumer spending, despite sharp monetary tightening to control inflation.
- Unemployment fell below pre-pandemic levels across many economies in 2023, reaching near-historic lows in the United States and several European countries. Central banks were able to slow or pause interest rate hikes as inflation declined in most regions due to lower energy and food prices.
- However, prospects of ongoing tight credit conditions, weak international trade and the escalation of conflicts pose major risks for global growth in 2024. Inflation remains elevated in Europe and other parts of the world, while high debt levels represent an important challenge, especially for developing countries which rely on external finance.
- GDP growth in the United States could decelerate from 2.5% in 2023 to 1.4% in 2024, after robust consumer spending with strong labour and housing markets. US consumer demand could weaken in 2024 amid falling household savings, high interest rates, and a gradually softening labour market.
- The European Union economy is expected to grow 1.2% in 2024, up from 0.5% in 2023 despite inflation and high interest rates. The mild recovery could be driven by a pick-up in consumer spending as inflationary pressures recede, real wages rise, and labour markets remain robust. Growth in Japan is forecast to slow from 1.7% in 2023 to 1.2% in 2024 despite accommodative monetary and fiscal policy stances.
- In China, the recovery from pandemic-related lockdowns has been slower than expected amid domestic and international headwinds. After reaching 5.3% in 2023, growth is expected to moderate to 4.7% in 2024 partly due to continued weakness in the property sector and sluggish external demand.
- International trade is projected to recover from 0.6% in 2023 to 2.4% in 2024, though below the pre-pandemic trend of 3.2%. In contrast to weaker merchandise trade in 2023, trade in services continued to recover, particularly tourism and transport. International tourism reached 88% of pre-pandemic levels in 2023 and is projected to exceed those levels by 2% in 2024 (see Outlook section).



Source: UN DESA (WESP 2024)

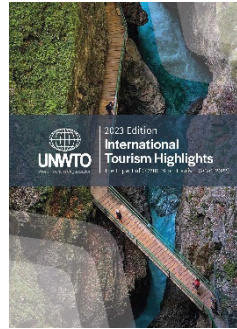
(f) forecast

¹ GDP growth is based on market exchange rates, as opposed to purchasing power parity (PPP) as in other global economic reports such as the WEO by the IMF.

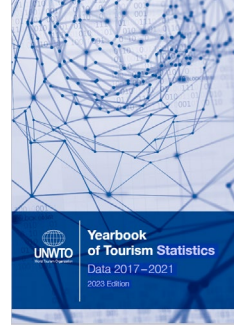
² UN World Economic Situation and Prospects (WESP) 2024, available at: www.un.org/development/desa/dpad/publication/world-economic-situation-and-prospects-2024/



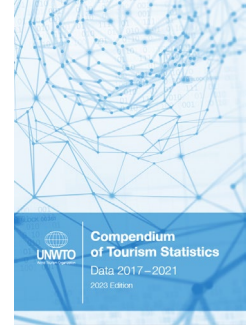
UNWTO World Tourism Barometer



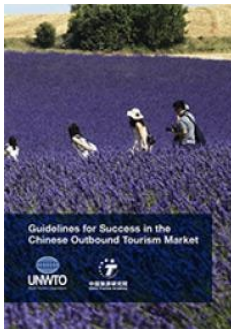
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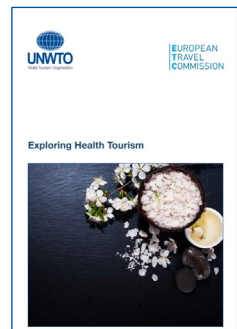
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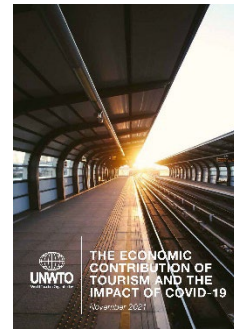
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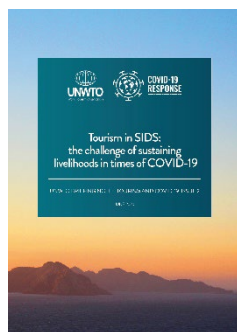
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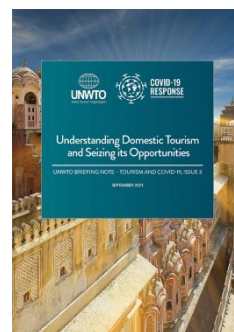
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