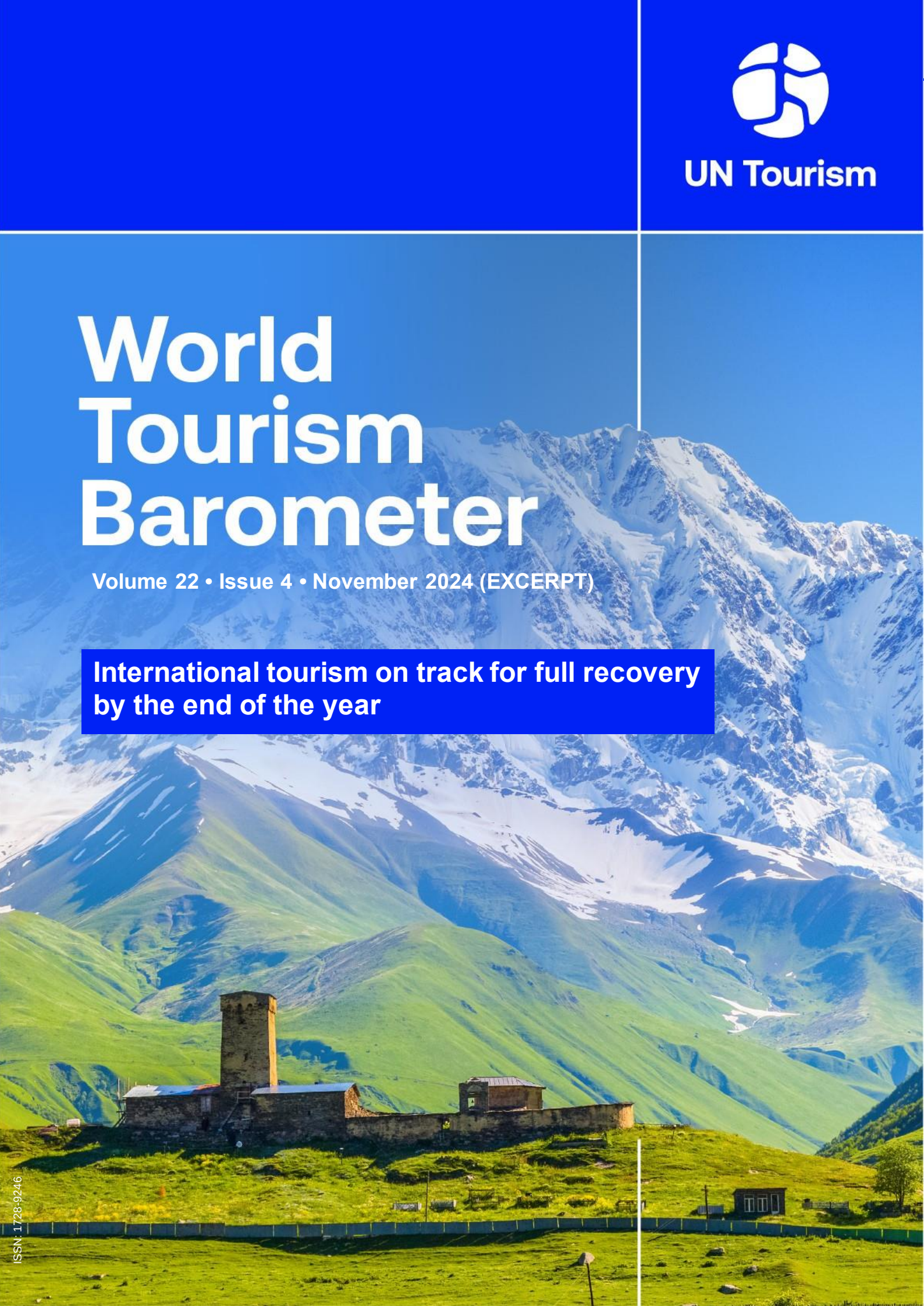
UN Tourism

World Tourism Barometer

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International tourism on track for full recovery by the end of the year



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UN Tourism

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About the *World Tourism Barometer*

The *World Tourism Barometer* is a publication of the World Tourism Organization 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 UN Tourism Panel of Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

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

This report was prepared under the coordination of Zoritsa Urosevic, Executive Director, by the Market Intelligence, Policies 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-November 2024.

The next issue of the UNWTO World Tourism Barometer is scheduled to be published on the occasion of FITUR, the Spanish tourism fair (22-26 January 2025).

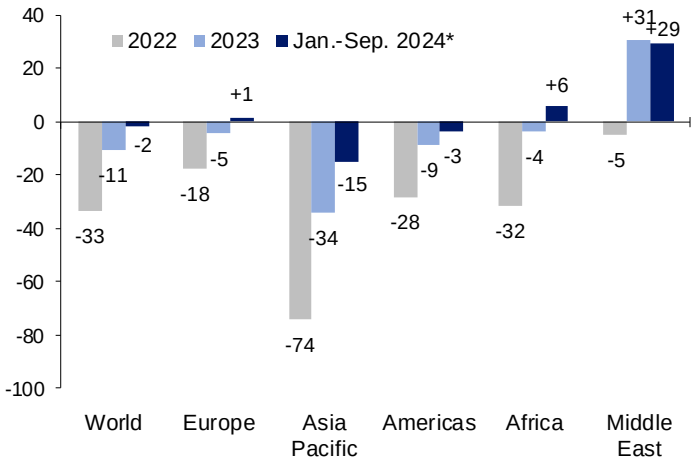
Pages 1–5 of this document constitute the Excerpt of the *World Tourism Barometer*. The full document is available free of charge for UN Tourism Members and subscribers from the UN Tourism Elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French and Spanish.

Key results

International tourism on track for full recovery by the end of the year with spending growing faster than arrivals

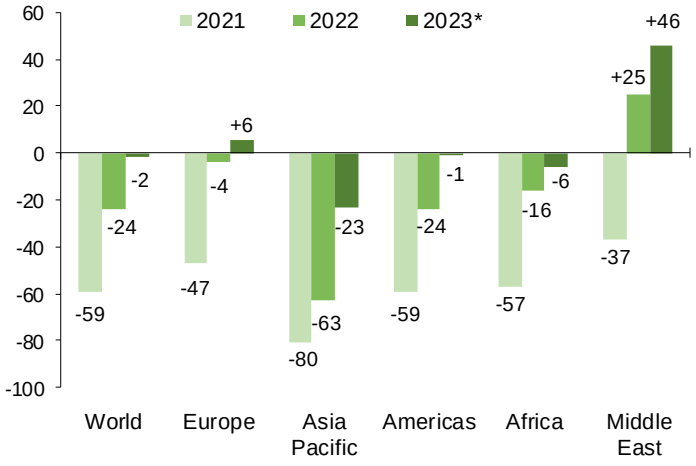
- An estimated 1.1 billion international tourist arrivals (overnight visitors) were recorded in the January-September 2024, about 11% more than in the same period of 2023.
- International arrivals reached 98% of 2019 levels in the first nine months of the year (-2% over same period of 2019) following a strong Northern Hemisphere summer season.
- Results were driven by strong post-pandemic demand in Europe and robust performance from large source markets globally, as well as the ongoing recovery of destinations in Asia and the Pacific. Increased air connectivity and visa facilitation also supported international travel.
- Most destinations reporting monthly data continued to enjoy strong results in January-September 2024 compared to the same period in 2023, with a majority exceeding pre-pandemic levels.
- The Middle East remained the strongest-growing region, with international arrivals climbing 29% above 2019 levels. Africa welcomed 6% more tourists than the same months of 2019. Arrivals in Europe exceeded by 1% pre-pandemic arrivals, while America recovered 97% of 2019 levels and Asia and the Pacific 85%.
- By subregions, North Africa and Central America saw the strongest performance in January-September 2024, with 18% and 16% more international arrivals than before the pandemic respectively.
- International tourism receipts have seen extraordinary growth so far in 2024 following an already strong 2023, surpassing pre-pandemic levels in most destinations.
- The majority of destinations reporting data has seen faster growth in receipts than in arrivals due to higher average spending per international trip.
- Data on international tourism expenditure reflects the same trend, especially among large source markets such as Germany (+35% compared to 2019), the United States (+33%) and France (+11%).
- After four years since the start of the COVID-19 pandemic, international tourist arrivals are expected to reach 2019 levels by the end of 2024, though still in a challenging economic and geopolitical context.

International Tourist Arrivals (% change over 2019)



Source: UN Tourism (November 2024) * Provisional data

International Tourism Receipts (% change over 2019)[1]



Source: UN Tourism (November 2024) * Provisional data

[1]Local currencies, constant prices

Inbound tourism

International tourism reached 98% of pre-pandemic levels in January-September 2024

- An estimated 1.1 billion tourists travelled internationally in the first nine months of 2024, about 11% more than in the same period of 2023.
- International arrivals reached 98% of 2019 levels in the period January to September 2024 (-2% over same period of 2019) following a strong Northern Hemisphere summer season.
- Results were driven by strong post-pandemic demand in Europe and robust performance from large source markets globally, as well as the ongoing recovery of destinations in Asia and the Pacific. Increased air connectivity and visa facilitation also supported international travel.
- The summer season in the Northern Hemisphere was generally strong, with arrivals worldwide reaching 99% of pre-pandemic values in Q3 2024.
- Most destinations reporting monthly data continued to enjoy strong results in January-September 2024 compared to the same period in 2023, with a majority exceeding pre-pandemic levels.
- A total of 60 out of 111 destinations surpassed 2019 arrival numbers in the first eight to nine months of 2024.
- Some of the strongest performers in arrivals this period were Qatar (+141% versus 2019), where arrivals more than doubled, Albania (+77%), Saudi Arabia (+61%), Curaçao (+48%), Tanzania (+43%), Colombia and Andorra (both +36%).
- Other tourism industry indicators also reflect this global recovery. According to the UN Tourism Recovery Tracker, international passenger traffic fully recovered pre-pandemic levels in the months through September 2024, while international air capacity reached 99% of 2019 levels (IATA). Global occupancy rates in accommodation establishments reached 69% in October 2024, slightly above the level in August 2023 (68%) based on STR data.

The Middle East continues to show strongest growth while Asia and the Pacific consolidates its recovery

- The **Middle East** remained the strongest-growing region in relative terms, with international arrivals climbing 29% above 2019 levels in the first nine months of 2024.
- Some Middle Eastern destinations reported strong results through September 2024, among which Qatar (+141%), where arrivals more than doubled compared to 2019, as well as Saudi Arabia (+61%), Oman (+19%) and Jordan (+16%).
- **Europe**, the world's largest destination region, saw arrivals exceed pre-pandemic numbers by 1% in the first nine months of 2019, following robust intra-regional demand.
- The highest growth in Europe was reported by Albania (+77%), Andorra (+36%), Malta (+30%), Serbia (+28%), and Luxembourg (+24%) where arrivals climbed well above 2019 values.
- Among the larger destinations, Portugal reported 18% growth through September 2024 and Denmark 16%, while Greece and Türkiye both recorded 13% more arrivals and Spain 10%. A total of 30 European destinations surpassed pre-pandemic levels this period.
- **Africa** welcomed 6% more international arrivals in January-September 2024 compared to the same period of 2019. Tanzania (+43%) and Morocco (+29%) both reported double-digit growth and Kenya (+9%) also exceeded 2019 numbers.
- The **Americas** recovered 97% of pre-pandemic arrivals this nine-month period due to solid intraregional demand. Strong outbound travel from the United States benefitted destinations in Central America and the Caribbean in particular.
- Curaçao (+48%), Colombia (+36%), Guatemala (+31%), and the Dominican Republic (+29%) were among the strongest performers in the first nine months of 2024.

- International tourism continued to experience a rapid though uneven recovery in **Asia and the Pacific** where arrivals reached 85% of its pre-pandemic tourist numbers (-15% versus 2019) as compared to 66% at the end of 2023. International arrivals climbed to 92% in the month of August and 90% in September.
- South Asia saw the best results by Asian subregions, with a 94% recovery, followed by South-East Asia (87%), Oceania (83%) and North-East Asia (81%).
- Across individual destinations, Mongolia posted the highest growth in the region (+24% versus 2019), followed by Maldives (+19%) and Japan (+10%) which benefitted from the depreciation of the yen and enhanced connectivity. Fiji saw 9% more international arrivals this period and Sri Lanka 8% more.
- According to air booking data provided by ForwardKeys, international air travel to China improved from -44% in Q3 2023 to -18% in Q3 2024, showing a steady recovery of China's inbound travel. On 22 November 2024, China extended the unilateral visa-free policy to cover a sixth batch of nine more countries including Bulgaria, Romania, Croatia, Montenegro, North Macedonia, Malta, Estonia, Latvia and Japan, bringing total countries exempted from visa to enter China to 38.

North Africa and Central America remained the strongest subregions

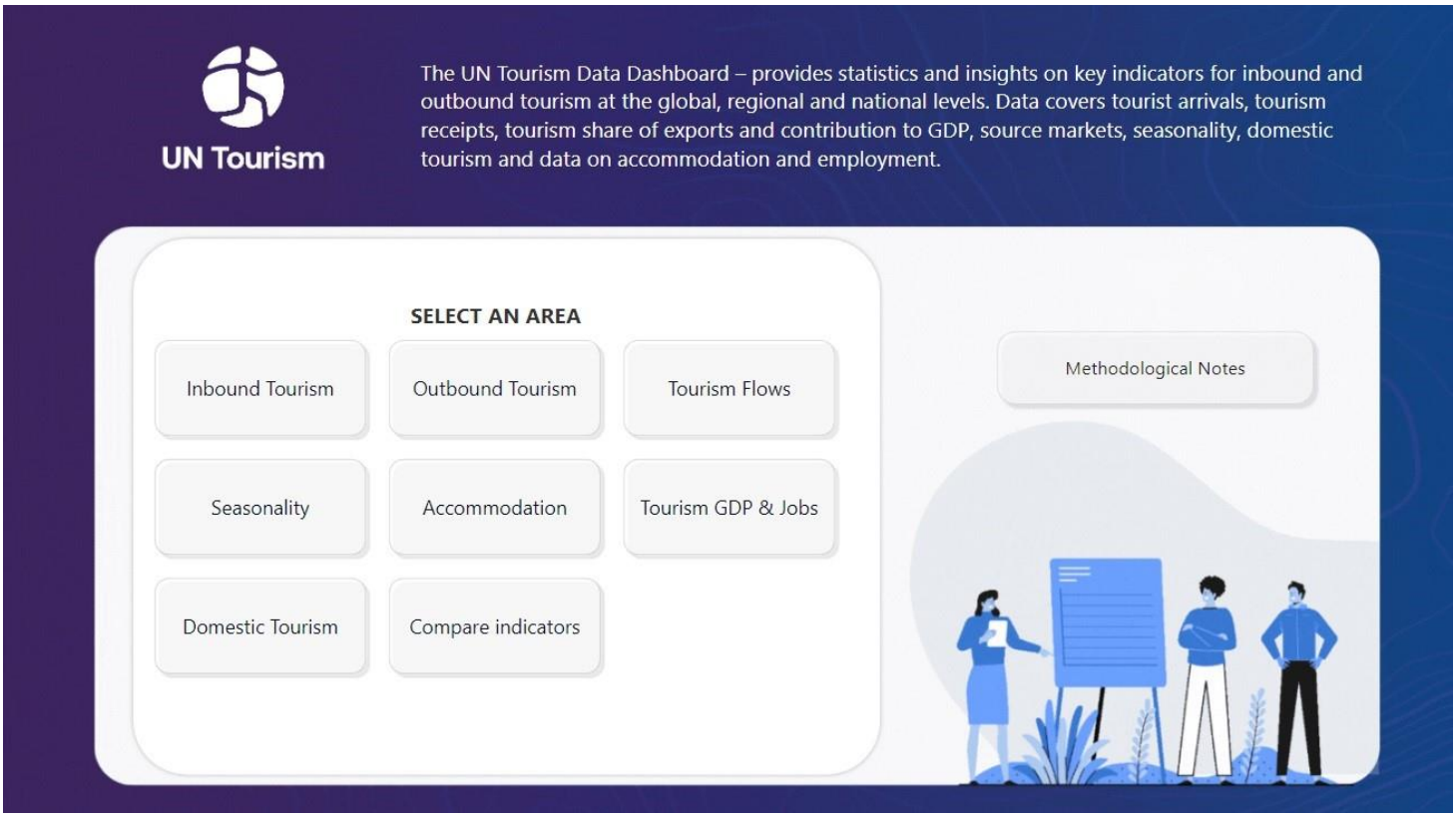
- By subregions, North Africa and Central America saw the strongest performance in January-September 2024, with 18% and 16% more international arrivals than before the pandemic respectively. The Caribbean (+9%) and Southern Mediterranean Europe (+7%) also enjoyed robust growth, followed by Northern Europe (+6%) and Western Europe (+5%).
- South America and Subsaharan Africa recovered 97% and 96% of their pre-pandemic numbers respectively.

Receipts grow faster than arrivals

- International tourism receipts have seen extraordinary growth following an already strong 2023, surpassing pre-pandemic levels in most destinations. In 2023 receipts had reached 98% of 2019 levels (real terms).
- Receipts have grown faster than arrivals in most destinations reporting data so far in 2024, reflecting higher average spending per trip.
- A total of 35 out of 43 countries with available data exceeded pre-pandemic receipts in the first eight to nine months of 2024, many reporting double-digit growth compared to 2019 (in local currencies), and well above inflation in most cases.
- Among the best performers in terms of earnings were Serbia (+99%) where receipts almost doubled (compared to the same months of 2019), as well as Pakistan (+64%), Romania (+61%), Japan (+59%), Portugal (+51%), Nicaragua and Tanzania (both +50%).
- Japan (+59%), Türkiye (+41%) and France (+27%) were among the world's top earners to record double-digit growth through September 2024 compared to the same period of 2019. Spain (+36%) and Italy (+26%) also reported strong growth in visitor receipts, through August. The United Kingdom recorded 43% higher earnings, Canada 35%, and Australia 18%, all through June. As for the United States, the world's top tourism earner, the destination reported 7% growth through September.
- Data on international tourism expenditure reflects the same trend, especially among large source markets such as Germany (+35% compared to 2019), the United States (+33%) and France (+11%).
- Strong expenditure growth was also reported by the United Kingdom (+46%) Australia (+34%), Canada (+28%) and Italy (+26%) all through June 2024. Available data for India shows a surge in outbound spending from this increasingly important market, with 81% growth through June 2024 (versus 2019).
- Robust tourism spending from many source markets reflects strong post-pandemic travel demand but also a higher visitor spending by consumers partly due to longer periods of stay.
- China, the world's top tourism spender, reached pre-pandemic expenditure figures in the first half of 2024, with 42% growth compared to 2023. Data reported through September by nearby destinations such as Malaysia, Singapore and Japan, show a steady increase in arrivals from China, supported by eased visa requirements.

International tourism expected to achieve complete recovery

- After four years since the start of the COVID-19 pandemic, international tourist arrivals are on track to reach 2019 levels by the end of 2024.
- The pace of recovery has been more moderate in the second half of 2024, reflecting a gradual normalization of growth rates after an already strong year 2023.
- While a large number of destinations already exceeded pre-pandemic arrival numbers in 2023, or has done so in 2024, there is still room for recovery across several subregions and destinations. A slower rebound in parts of North-East Asia and Central Eastern Europe contrasts with strong results in other European subregions, the Middle East, Central America and the Caribbean, where arrivals have surpassed pre-pandemic values.
- As in 2023, the year 2024 will also be marked by strong export revenues from international tourism as a result of higher average spending per trip (excluding the effects of inflation). International tourism virtually achieved pre-pandemic values in 2023 with USD 1.8 trillion (including receipts and passenger transport fares), or 99% of pre-pandemic values.
- The strong growth seen in tourism receipts is benefitting many economies around the world, especially those more dependent on tourism for export revenues. Visitor spending in destinations contributes to improve countries' trade balance, as well as create jobs, support small businesses, foster infrastructure development and generate tax revenues.
- However, economic, geopolitical and climate challenges remain. The tourism sector is still facing inflation in travel and tourism, namely high transport and accommodation prices, as part of higher services inflation, as well as volatile oil prices. Major conflicts and geopolitical tensions around the world continue to impact consumer confidence. Extreme weather events and staff shortages are also critical challenges affecting tourism performance.



International Tourist Arrivals by (Sub)region

(Percent changes over 2019)

	(millions)					Share (%)	Change (%) over 2019[2]				Monthly data Change (%) 2024 over 2019									
	2019	2020	2021	2022	2023*	2023*	20/19	21/19	22/19	23/19*	YTD	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.
World	**1465**	**406**	**460**	**975**	**1306**	**100**	**-72.3**	**-68.6**	**-33.4**	**-10.9**	**-1.8**	**-3.5**	**0.4**	**-1.8**	**-8.0**	**1.2**	**-1.3**	**-1.0**	**-1.5**	**-1.4**
Advanced economies[1]	*776*	*221*	*240*	*546*	*716*	*54.8*	*-71.5*	*-69.0*	*-29.6*	*-7.7*	*0.4*	*-2.1*	*1.8*	*1.6*	*-5.7*	*4.8*	*-0.9*	*0.7*	*2.4*	*-0.5*
Emerging economies[1]	*689*	*186*	*220*	*429*	*590*	*45.2*	*-73.1*	*-68.1*	*-37.7*	*-14.4*	*-4.5*	*-4.9*	*-1.0*	*-5.4*	*-10.7*	*-3.4*	*-1.8*	*-3.3*	*-6.8*	*-2.5*
By UNWTO regions:																				
Europe	***742.4***	***239.4***	***301.3***	***609.5***	***708.4***	***54.2***	***-67.8***	***-59.4***	***-17.9***	***-4.6***	***1.4***	***1.8***	***3.9***	***3.0***	***-3.8***	***8.7***	***0.0***	***1.2***	***1.2***	***-1.4***
Northern Europe	82.1	23.7	21.9	67.1	78.3	6.0	-71.1	-73.3	-18.3	-4.7	5.9	10.0	5.8	4.7	2.4	13.2	0.2	2.6	8.2	9.3
Western Europe	205.2	83.5	87.6	182.8	207.9	15.9	-59.3	-57.3	-10.9	1.3	5.3	4.9	6.3	9.1	-8.0	17.8	4.0	7.4	9.1	-3.0
Central/Eastern Eur.	150.9	43.8	53.0	94.1	113.7	8.7	-71.0	-64.9	-37.7	-24.7	-20.9	-20.7	-19.6	-20.1	-22.8	-19.7	-22.3	-21.6	-20.0	-20.7
Southern/Medit. Eur.	304.2	88.4	138.9	265.5	308.5	23.6	-71.0	-54.4	-12.7	1.4	7.3	11.3	16.6	9.6	7.4	14.4	5.9	5.4	2.6	5.6
- of which EU-27	*539.2*	*182.8*	*222.3*	*454.3*	*525.6*	*40.2*	*-66.1*	*-58.8*	*-15.7*	*-2.5*	*3.2*	*2.3*	*6.3*	*6.7*	*-2.4*	*10.8*	*1.9*	*3.0*	*3.2*	*-0.2*
Asia and the Pacific	***362.7***	***58.9***	***26.6***	***93.3***	***237.7***	***18.2***	***-83.7***	***-92.7***	***-74.3***	***-34.4***	***-15.1***	***-21.8***	***-15.5***	***-17.0***	***-20.6***	***-16.2***	***-13.5***	***-12.1***	***-8.3***	***-10.0***
North-East Asia	170.3	20.3	10.9	20.5	94.9	7.3	-88.1	-93.6	-88.0	-44.3	-18.5	-29.7	-22.6	-22.7	-25.0	-21.8	-18.5	-14.9	-4.4	-3.7
South-East Asia	138.6	25.5	3.3	42.3	99.0	7.6	-81.6	-97.6	-69.5	-28.6	-12.5	-17.3	-11.6	-11.8	-14.2	-8.2	-10.4	-10.3	-11.4	-17.6
Oceania	17.5	3.6	0.8	6.8	12.9	1.0	-79.4	-95.7	-61.3	-26.3	-17.3	-19.3	-12.4	-13.1	-21.3	-16.5	-16.9	-20.2	-20.8	-16.0
South Asia	36.3	9.6	11.7	23.8	30.9	2.4	-73.5	-67.8	-34.4	-14.8	-6.4	-2.6	-1.7	-10.0	-21.1	-14.6	4.9	0.6	-7.0	-5.0
Americas	***219.3***	***69.7***	***81.8***	***157.2***	***200.1***	***15.3***	***-68.2***	***-62.7***	***-28.3***	***-8.8***	***-3.5***	***-1.7***	***1.1***	***0.9***	***-8.8***	***-3.9***	***-5.2***	***-5.8***	***-5.3***	***-1.4***
North America	146.6	46.5	57.2	101.9	126.8	9.7	-68.3	-61.0	-30.5	-13.5	-7.1	-4.5	-2.8	-3.9	-11.4	-7.2	-9.3	-9.4	-8.9	-4.2
Caribbean	26.1	10.4	14.5	23.6	28.1	2.2	-60.1	-44.4	-9.7	7.9	8.5	8.9	11.3	7.4	2.7	8.7	15.0	6.2	7.2	9.8
Central America	10.9	3.1	4.7	9.3	11.5	0.9	-71.6	-57.1	-15.3	5.4	16.1	6.6	21.2	28.0	6.6	24.1	20.8	14.0	13.4	11.4
South America	35.6	9.8	5.3	22.4	33.6	2.6	-72.6	-85.0	-37.1	-5.6	-3.1	-2.9	-0.4	3.8	-12.4	-7.1	-10.4	-3.2	-0.3	2.4
Africa	***68.8***	***18.8***	***19.8***	***47.1***	***66.2***	***5.1***	***-72.7***	***-71.2***	***-31.6***	***-3.9***	***5.9***	***5.2***	***11.6***	***1.4***	***-3.1***	***17.6***	***7.7***	***7.5***	***-0.1***	***8.3***
North Africa	25.6	5.6	6.6	19.1	26.9	2.1	-78.2	-74.4	-25.4	5.0	18.4	24.6	34.1	12.9	9.1	50.5	18.4	14.0	4.2	21.9
Subsaharan Africa	43.2	13.3	13.3	28.0	39.3	3.0	-69.3	-69.3	-35.2	-9.1	-4.1	-4.5	-1.4	-5.9	-12.1	-3.2	-1.8	-1.0	-4.7	-2.2
Middle East	***71.6***	***19.4***	***30.5***	***68.0***	***93.5***	***7.2***	***-72.9***	***-57.4***	***-5.1***	***30.5***	***29.1***	***45.2***	***51.4***	***30.5***	***15.6***	***10.5***	***55.0***	***31.1***	***-0.5***	***36.6***
Memorandum[3]																				
ASEAN	138.6	25.5	3.3	42.3	99.0	7.6	-81.6	-97.6	-69.5	-28.6	-12.6	-17.3	-11.6	-11.8	-14.2	-8.3	-10.4	-10.3	*-11.4*	*-17.6*
G20	1000.4	300.1	348.4	719.0	899.7	68.9	-70.0	-65.2	-28.1	-10.1	-0.8	-2.1	1.6	0.8	-6.9	2.8	-0.9	-0.2	*-1.4*	*-0.6*
GCC	47.7	13.4	18.3	47.8	68.1	5.2	-71.9	-61.7	0.1	42.8	40.6	58.7	63.7	45.4	25.2	4.9	84.4	49.7	*0.1*	*59.2*
LDCs	34.2	9.8	7.5	17.0	27.4	2.1	-71.3	-78.1	-50.3	-19.9	-12.7	-17.4	-21.3	-17.3	-14.7	-8.0	-6.4	-6.2	*-10.7*	*-11.1*
LLDCs	50.2	12.0	13.1	32.0	44.5	3.4	-76.2	-73.9	-36.4	-11.4	-2.9	-6.0	-3.9	-9.3	-5.9	2.9	-2.4	-1.1	*-1.9*	*0.2*
SIDS	40.1	9.6	11.3	25.7	36.5	2.8	-76.1	-71.8	-35.8	-8.9	-2.8	-2.7	2.7	1.6	-6.5	-3.1	-3.2	0.7	*-1.0*	*-18.2*

Source: World Tourism Organization (UN Tourism) (Data as collected by UN Tourism, November 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 'A-2' for explanation of abbreviations and symbols used.

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



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