

World Tourism Barometer (PPT version)

Volume 22 · Issue 1 · January 2024

UNWTO Tourism Market Intelligence and Competitiveness Department

Contents

- 1. Key findings
- 2. International tourist arrivals, 2023
- 3. Best performing destinations and markets, January-December 2023
- 4. Preliminary estimates of international tourism receipts, 2023
- 5. Outlook for 2024

Key findings (1)

World Tourism Barometer January 2024

2023 Results

- International tourism recovered 88% of pre-pandemic levels in 2023 (-12% versus pre-pandemic year 2019) with an estimated 1286 billion arrivals (1.3 billion), up 34% from 2022.
- The Middle East recorded the best results, with arrivals 22% above pre-pandemic levels. Africa recovered 96% of 2019 numbers, Europe 96%, the Americas 90% and Asia and the Pacific 65%.
- International tourism receipts reached USD 1.4 trillion in 2023 based on 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.
- Tourism direct gross domestic product (TDGDP) climbed to USD 3.3 trillion in 2023 according to provisional estimates, about 3% of global GDP, similar to 2019 values, driven by strong domestic and international travel.



Key findings (2)

World Tourism Barometer January 2024

Projections for 2024

- International tourism is expected to recover pre-pandemic levels in 2024, with initial estimates pointing to 2% growth above 2019 levels.
- This projection is subject to several factors including the pace of recovery of Asia and the Pacific, economic circumstances such as inflation and its effect on transport and accommodations costs, as well as the evolution of geopolitical tensions and conflicts.
- The latest UNWTO Panel of Experts survey shows that 67% of tourism professionals expect better performance in 2024 than in 2023, while 28% expect similar performance and 6% suggest it could be worse.
- The UNWTO Tourism Confidence Index indicates slightly weaker prospects for January-April 2024 (score of 122) than for September-December 2023 (score of 126).

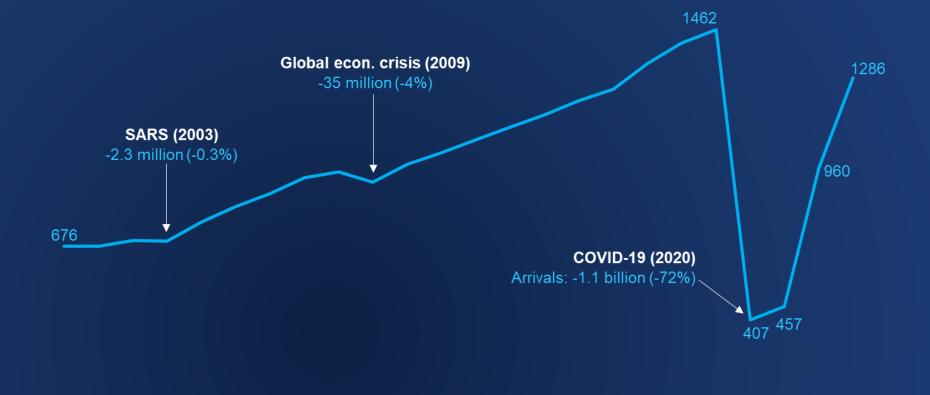


International tourist arrivals

(millions)

Source: UNWTO (Jan. 2024)

* Provisional data



'06 '07 '08

'09

'10 '11

'12 '13 '14 '15 '16

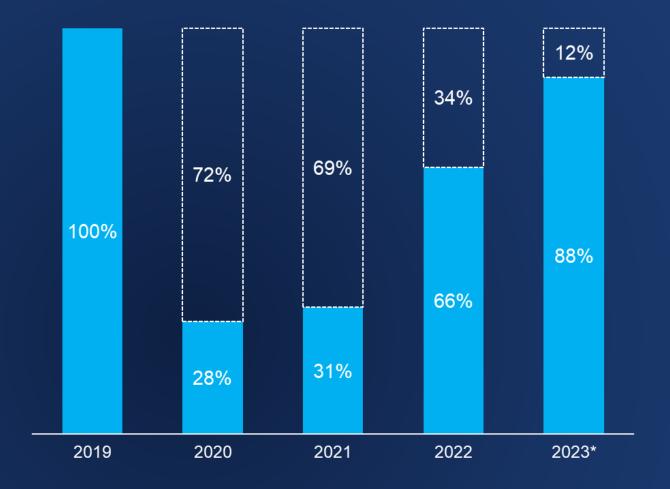


Recovery of international tourist arrivals

Percentage of 2019 levels

Percentage not recovered

Percentage recovered





^{*} Data for 2023 are provisional

International tourist arrivals, with 2023 Scenarios (monthly % change over 2019)



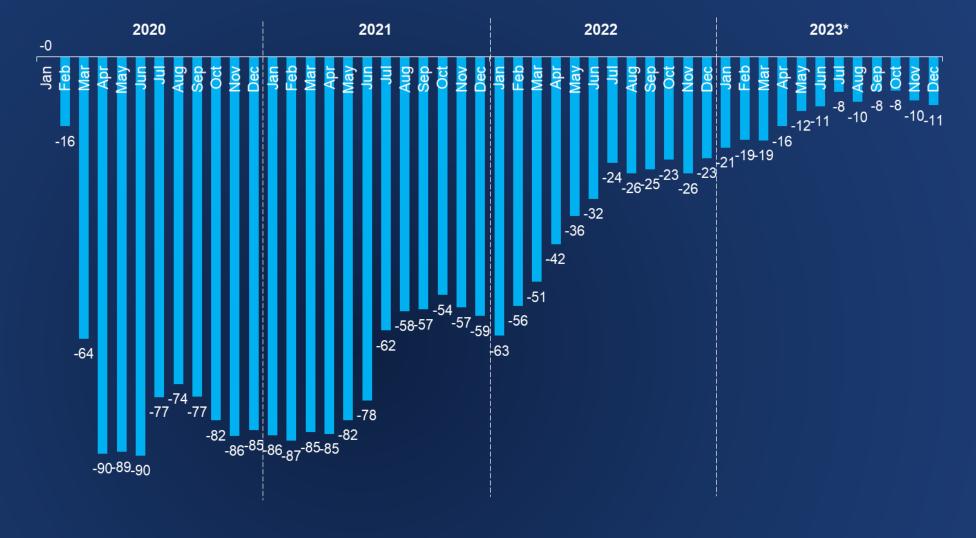
Source: UNWTO (January 2024). Scenarios first published in the January 2023 World Tourism Barometer.

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

International tourist arrivals

% change vs. 2019

Source: UNWTO (Jan. 2024)





-72%	-69%	-34%	-12%
2020 vs. 2019	2021 vs. 2019	2022 vs. 2019	2023 vs. 2019

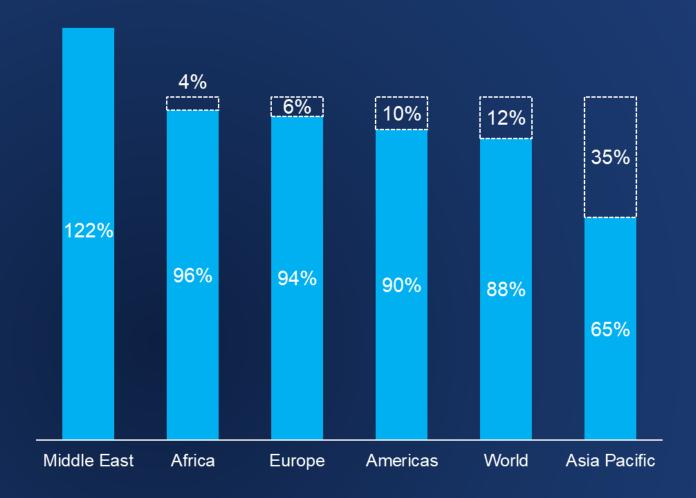
Recovery of international tourist arrivals, 2023

Percentage of 2019 levels recovered in 2023*

Percentage not recovered

Percentage recovered

Source: UNWTO (January 2024)





International tourist arrivals, 2020-2023

% change vs. 2019

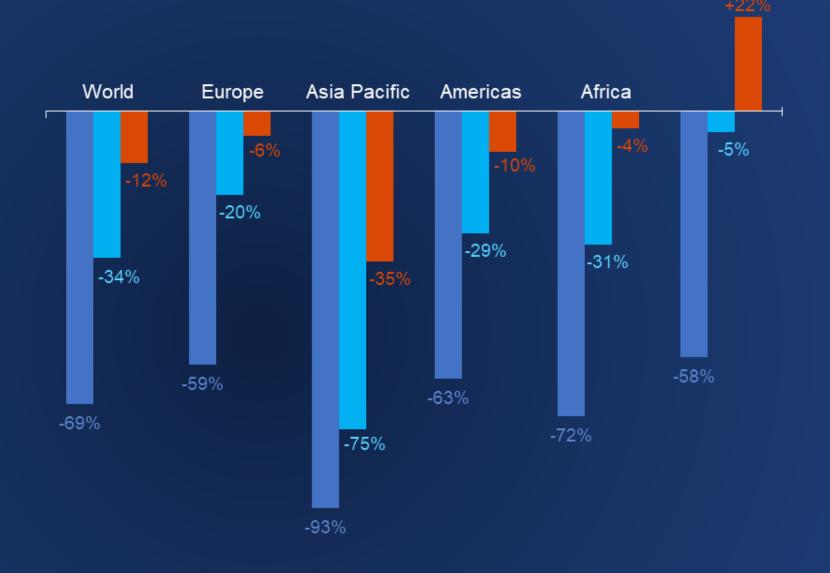
2021

2022

2023*

Source: UNWTO (January 2024)





International tourist arrivals by region

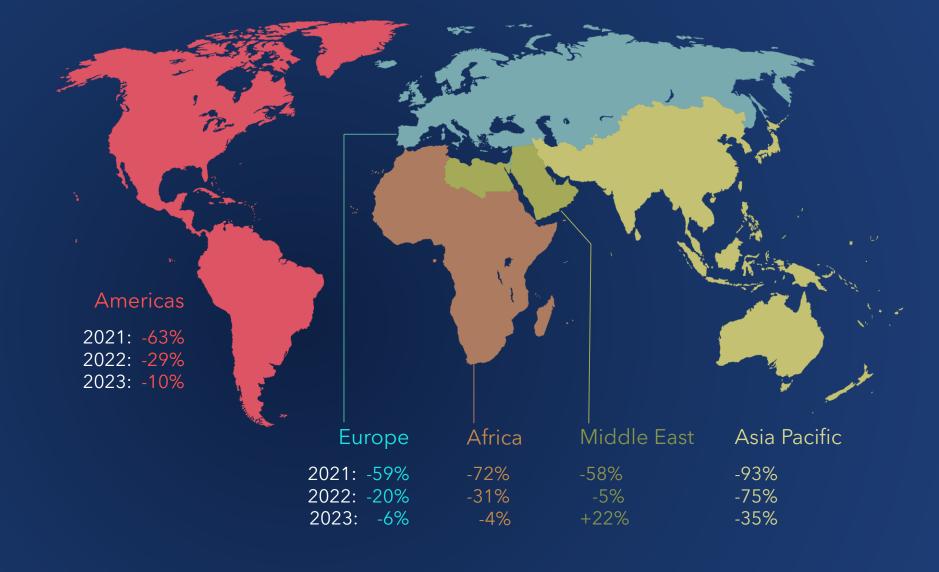
% change vs. 2019

World

2021: -69% 2022: -34% 2023: -12%

Source: UNWTO (January 2024) 2023 data are provisional





The designations and images in this map do not imply the expression of opinions whatsoever on the part of the Secretariat of the World Tourism Organization (UNWTO) concerning the legal status of any country, territory, or of its authorities, or concerning the delimitation of its frontiers.

International tourist arrivals (world)

(millions)

2019

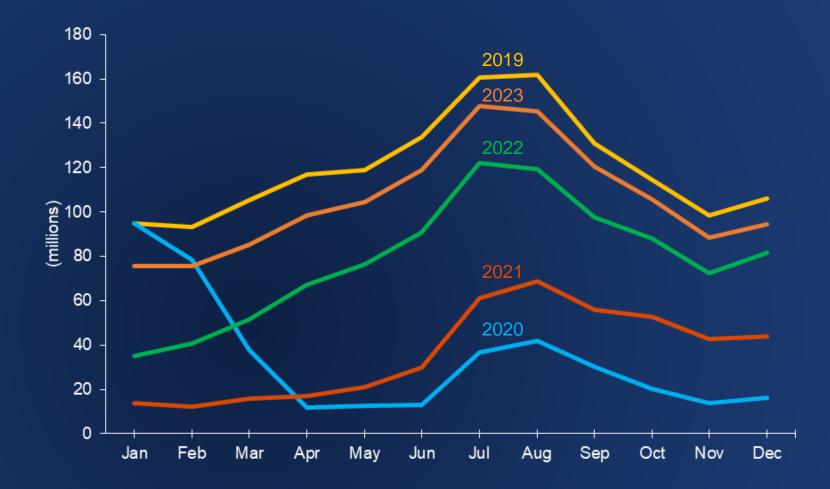
2020

2021

2022

2023*

Source: UNWTO (January 2024)

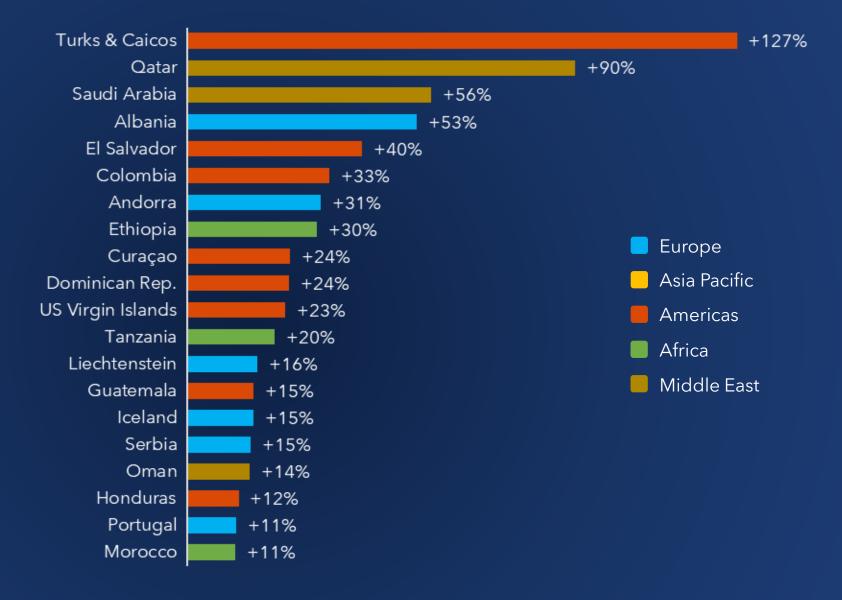




Best performing destinations in Jan-Dec 2023*

International tourist arrivals (% change vs. 2019)





^{*} Based on destinations with available data for the first 10 to 12 months of 2023.

Best performing destinations in Jan-Dec 2023*

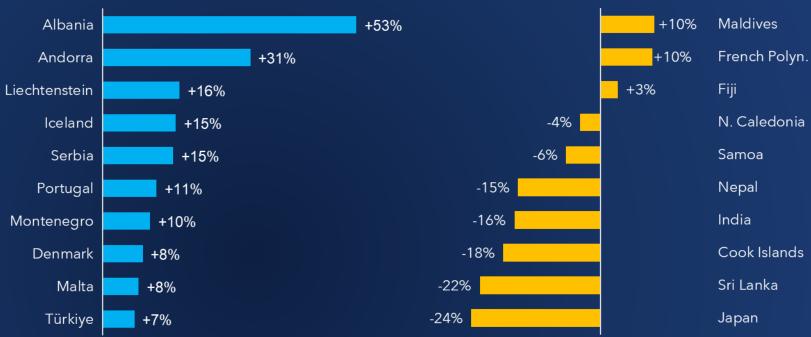
By Region

International tourist arrivals (% change vs. 2019)

Source: UNWTO (January 2024)

* Based on destinations with available data for the first 10 to 12 months of 2023.

Europe Asia Pacific





Best performing destinations in Jan-Dec 2023*

By Region

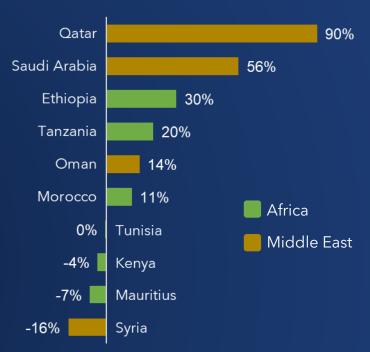
International tourist arrivals (% change vs. 2019)

Source: UNWTO (January 2024)

Americas



Africa and Middle East





^{*} Based on destinations with available data for the first 10 to 12 months of 2023.

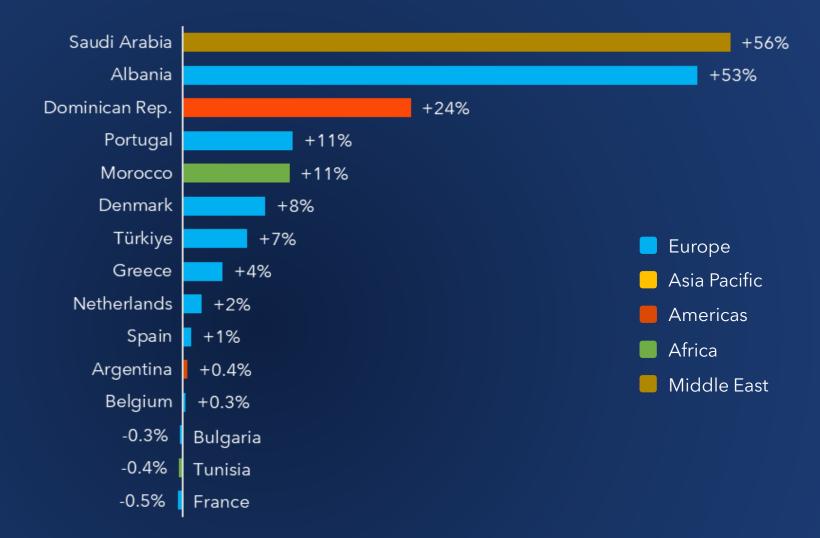
Large best-performing destinations in Jan-Dec 2023*

International tourist arrivals (% change vs. 2019)

Source: UNWTO (January 2024)

* Based on destinations recording 5 million arrivals or more in 2019 and reporting data for 10 to 12 months of 2023.

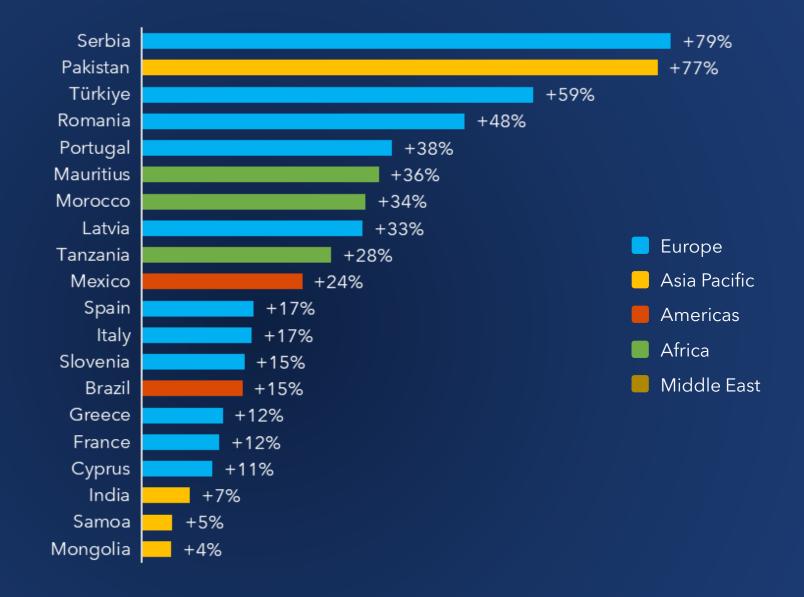




Best performing destinations in terms of receipts:
Jan-Dec 2023*

International tourism receipts (% change vs. 2019)¹



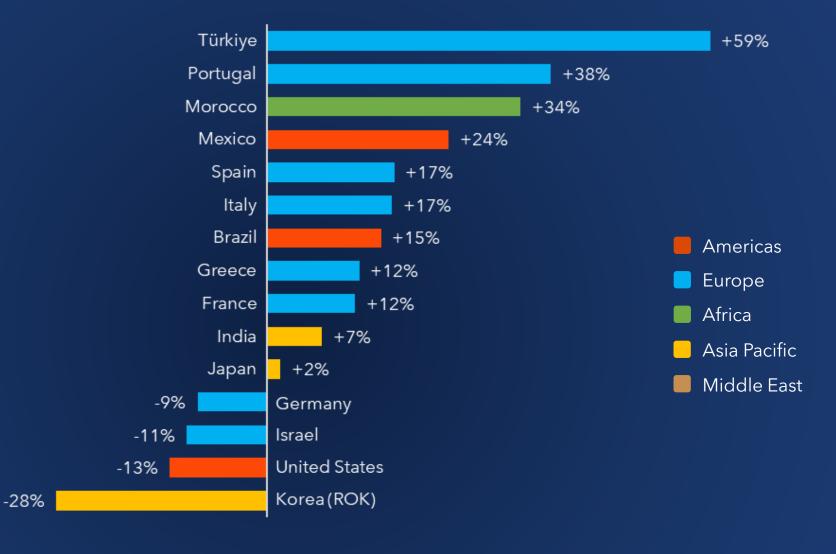


^{*} Based on destinations with available data for 10 to 12 months of 2023.

¹ In local currencies if so reported by the destination.

Large best-performing destinations in terms of receipts:
Jan-Dec 2023*

International tourism receipts (real % change vs. 2019) ¹





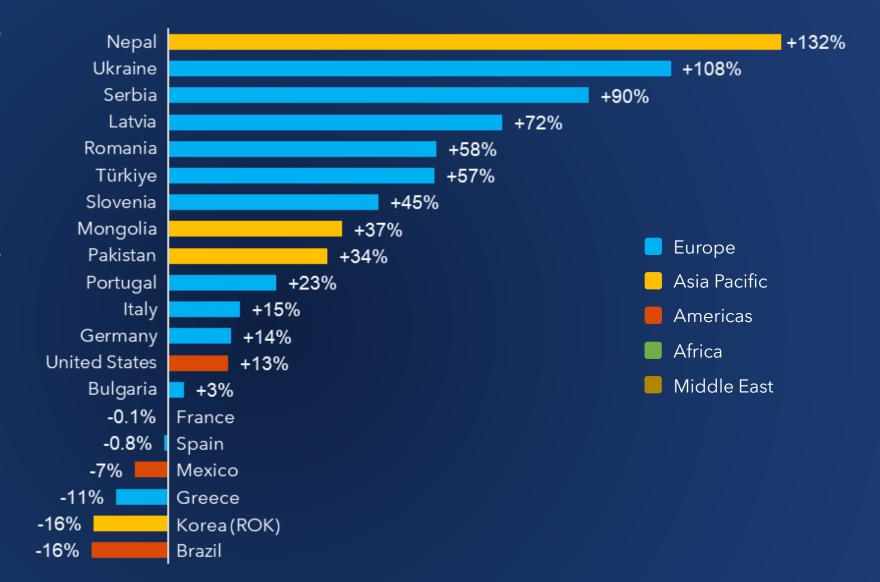
^{*} Based on destinations earning USD 5 billion or more in receipts in 2019 and reporting data for 10 to 12 months of 2023.

¹ In local currencies if so reported by the destination.

Markets reporting strongest recovery in outbound spending, Jan-Dec 2023*

International tourism expenditure (% change vs. 2019)¹



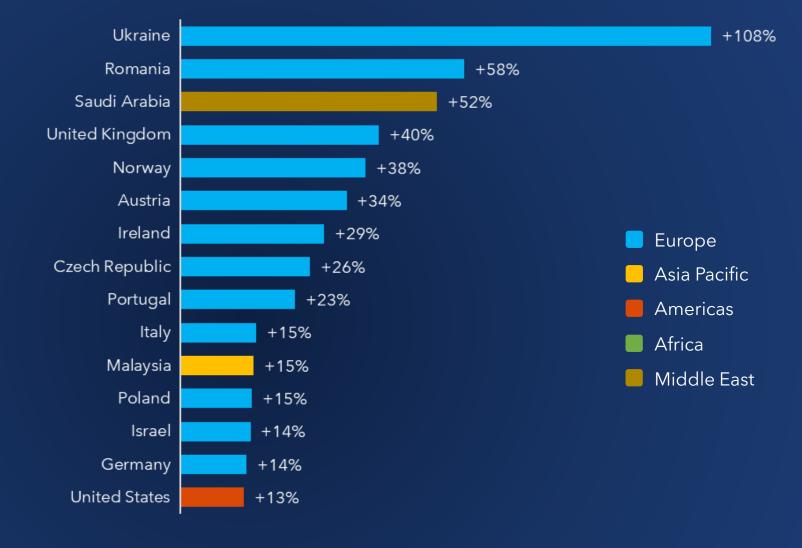


^{*} Based on destinations with available data for 10 to 12 months of 2023.

¹ In local currencies if so reported by the destination.

Large markets reporting strongest recovery in outbound spending, Jan-Dec 2023*

International tourism expenditure (% change vs. 2019)¹





^{*} Based on markets spending USD 5 billion or more on international tourism in 2019 and reporting data for 9 to 12 months of 2023.

¹ In local currencies if so reported by the destination.

International tourist arrivals and receipts

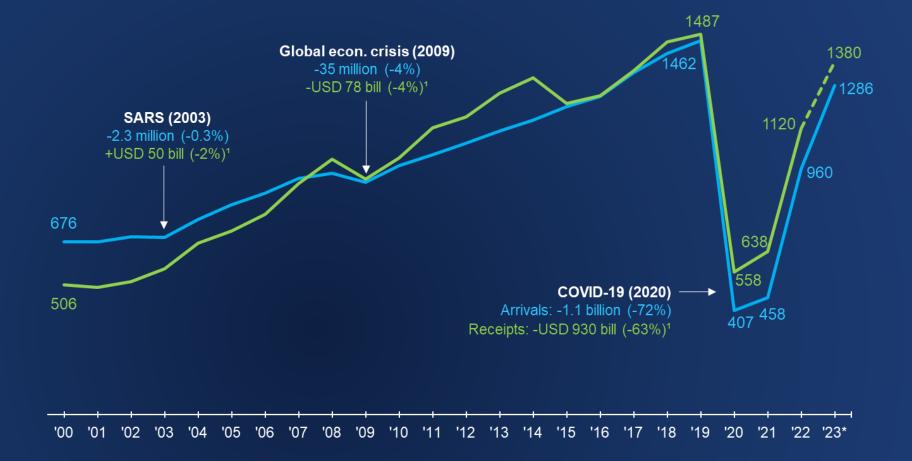
Arrivals (millions)

Receipts (USD billions)

Source: UNWTO (January 2024)

* All data for 2023 are provisional. International tourism receipts for 2023 are preliminary estimates.

¹ Change is in local currencies and constant prices.





International tourist arrivals and receipts

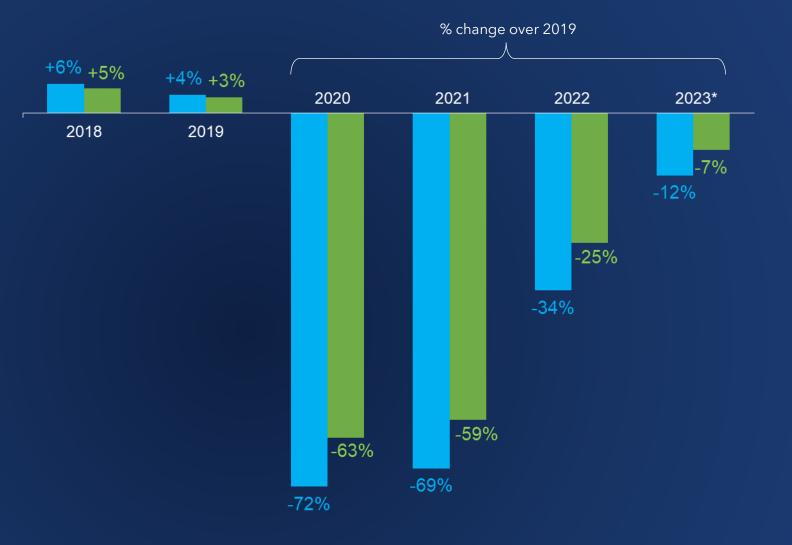
(yearly % change)

Arrivals



Receipts¹

- * All data for 2023 are provisional. Receipts data for 2023 are preliminary estimates.
- ¹ Real change (local currencies at constant prices).





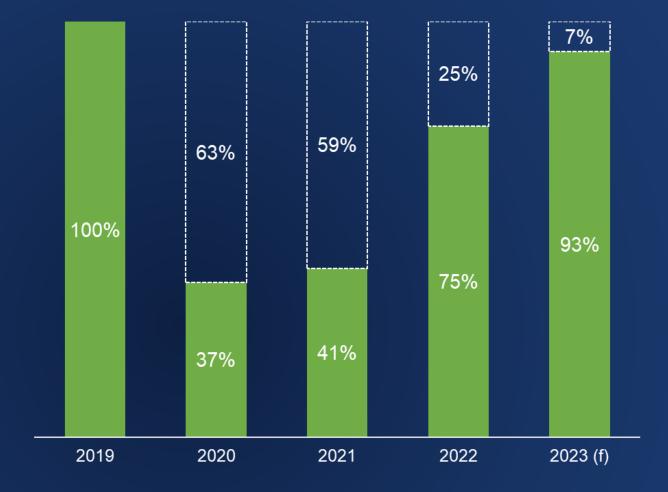
Recovery of international tourism receipts

Percentage of 2019 levels (real terms)

Percentage not recovered

Percentage recovered

Source: UNWTO (January 2024) (f) Data for 2023 are forecasts





International tourism

Three key indicators

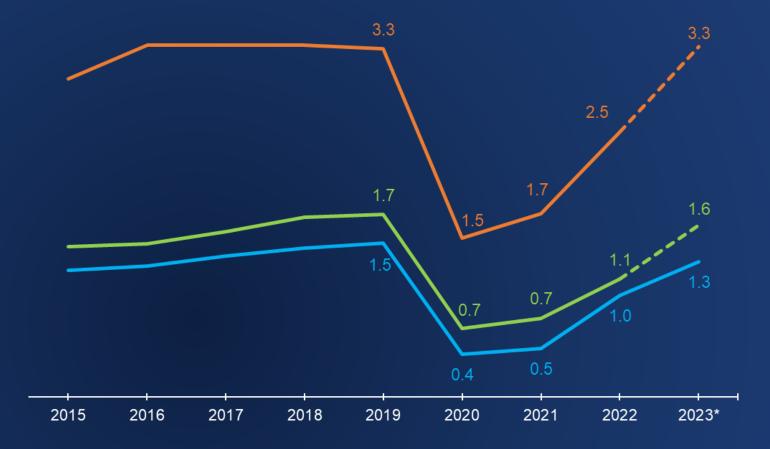
Tourism direct GDP (USD trill)

Export revenues from tourism (USD trill)

International tourist arrivals (USD bill)

Source: UNWTO (January 2024)

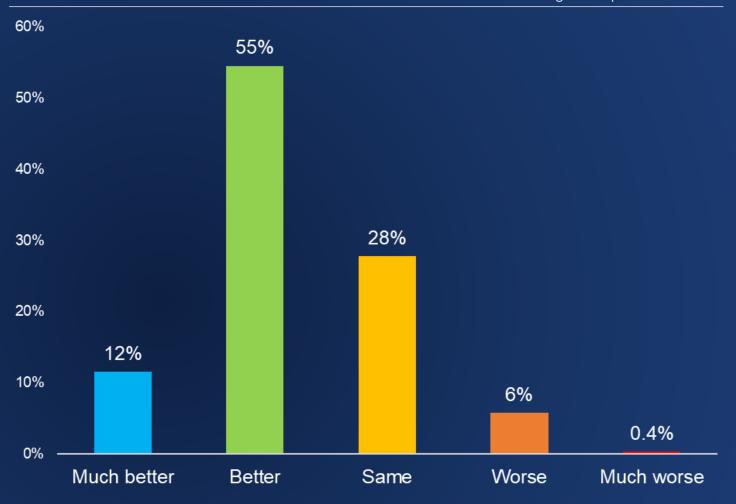
* All data for 2023 are provisional. Tourism direct GDP and export revenues from tourism are preliminary estimates.





What are your prospects for your destination in 2024?

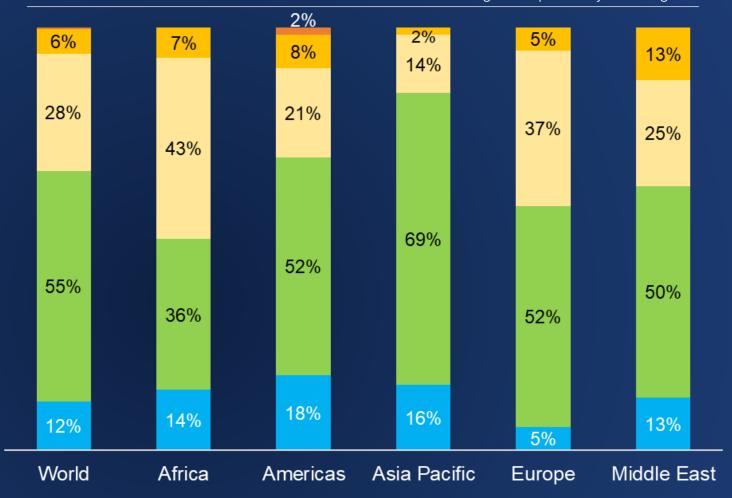




What are your prospects for your destination in 2024?

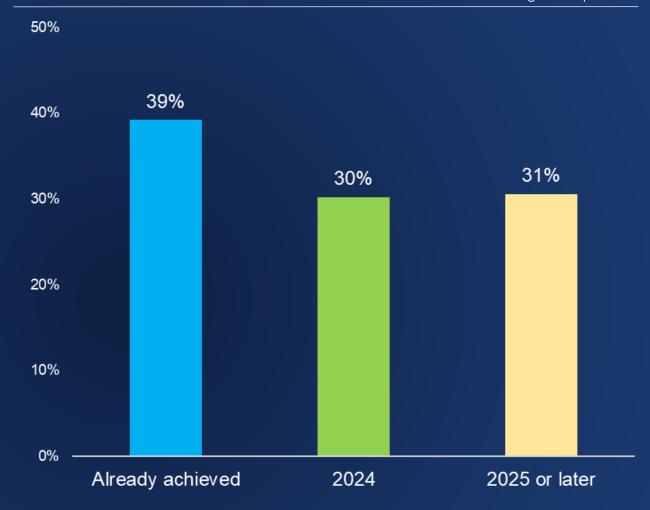
- Much worse
- Worse
- Equal
- Better
- Much better





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





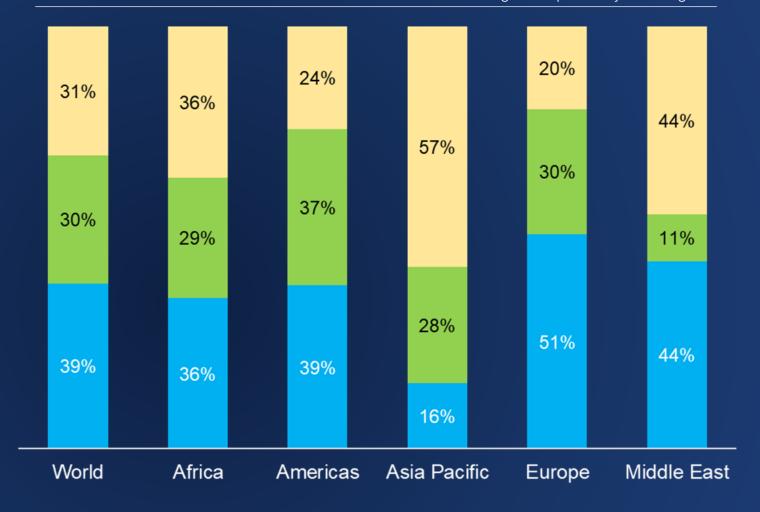
When do you expect international tourism to return to 2019 levels in your country?

2025 or later

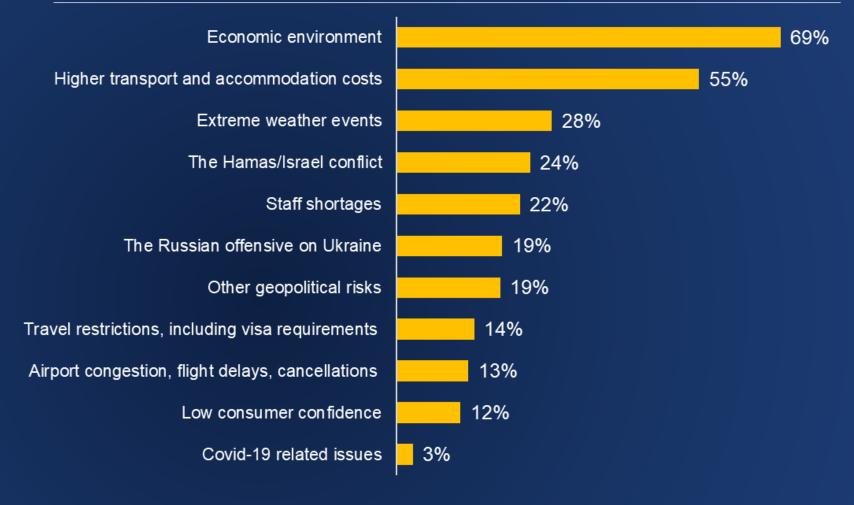
2024

Already achieved





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





UNWTO Confidence Index

Evaluation of past 4 months

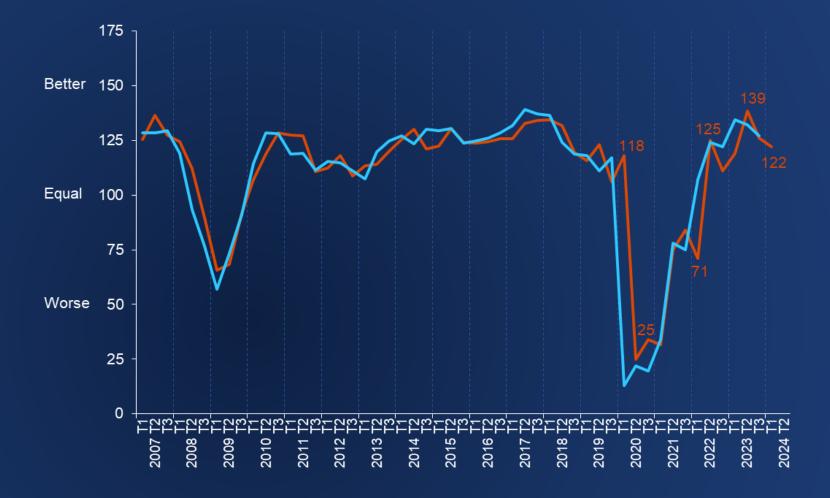
Prospects for next 4 months

Source: UNWTO Panel of Experts Survey (Jan. 2024)

Note: The UNWTO Confidence Index reflects perceived performance (evaluation) and expectations (prospects) for the tourism sector every four months.

T1: January to Apri T2: May to August

T3: September to December





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



^{*} Data for 2023 are preliminary and based on estimates for destinations which have not yet reported results. Data for 2024 are projections.

This report is the PowerPoint presentation version of the UNWTO World Tourism Barometer, a publication of the UNWTO Tourism Market Intelligence and Competitiveness Department that monitors international tourism trends on a regular basis to provide global tourism stakeholders with the latest data and analysis on inbound and outbound travel, confidence levels, prospects and other indicators.

Data was compiled from the <u>Tourism Market Intelligence Database</u> and the <u>Tourism Statistics Database</u> based on national and international sources. See full report and other resources below:

- World Tourism Barometer (e-Library)
- Tourism Data Dashboard
- Press note

UNWTO World Tourism Barometer - Volume 22 \cdot Issue 1 \cdot January 2024





