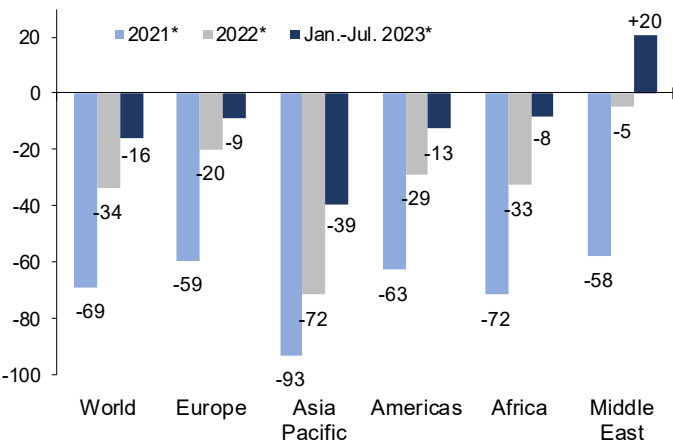




## International tourism recovered 84% of pre-pandemic levels through July 2023

- International tourism recovered 84% of pre-pandemic levels in the period January-July 2023 (-16% versus 2019) following a strong second quarter and early part of the Northern Hemisphere summer season.
- Travel demand continued to show remarkable resilience and sustained recovery, amid economic and geopolitical challenges.
- After reaching 80% in Q1 2023, international tourist arrivals hit 85% of pre-pandemic levels in Q2 2023 and 90% in July 2023, backed by continued pent-up demand.
- An estimated 700 million tourists travelled internationally between January and July 2023, about 43% more than in the same months of 2022, though 16% fewer than in 2019.
- By regions, the Middle East saw the best results in January-July 2023, with arrivals exceeding by 20% pre-pandemic levels. Europe, the world's largest destination region, reached 91% of pre-pandemic levels, supported by robust intra-regional demand.
- Africa recovered 92% of pre-crisis visitors this seven-month period and the Americas 87%. In Asia and the Pacific arrivals climbed to 61% of pre-pandemic levels.
- By subregions, North Africa (+8%), Central America (+2%) and Southern Mediterranean Europe (+1%) exceeded pre-pandemic levels in January-July 2023.
- These results show international tourism remains well on track to reach 80% to 95% of pre-pandemic levels in 2023 as projected by UNWTO in the January 2023 World Tourism Barometer.
- Prospects for September-December 2023 point to continued recovery, according to the latest UNWTO Confidence Index, though at a more moderate pace following the peak travel season of June-August.
- The challenging economic environment could weigh on spending patterns over the remainder of the year, with tourists increasingly seeking value for money, travelling closer to home and making shorter trips.

International Tourist Arrivals (% change over 2019)



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 159 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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### 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](mailto:info@unwto.org) - [www.unwto.org](http://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](http://www.e-unwto.org/loi/wtobarometereng).

**We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org).**

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Data collection for this issue was closed mid-September 2023.

The next issue of the UNWTO World Tourism Barometer is scheduled to be published in November 2023.

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](http://www.e-unwto.org). This release is available in English, while the Statistical Annex is provided in English, French and Spanish.

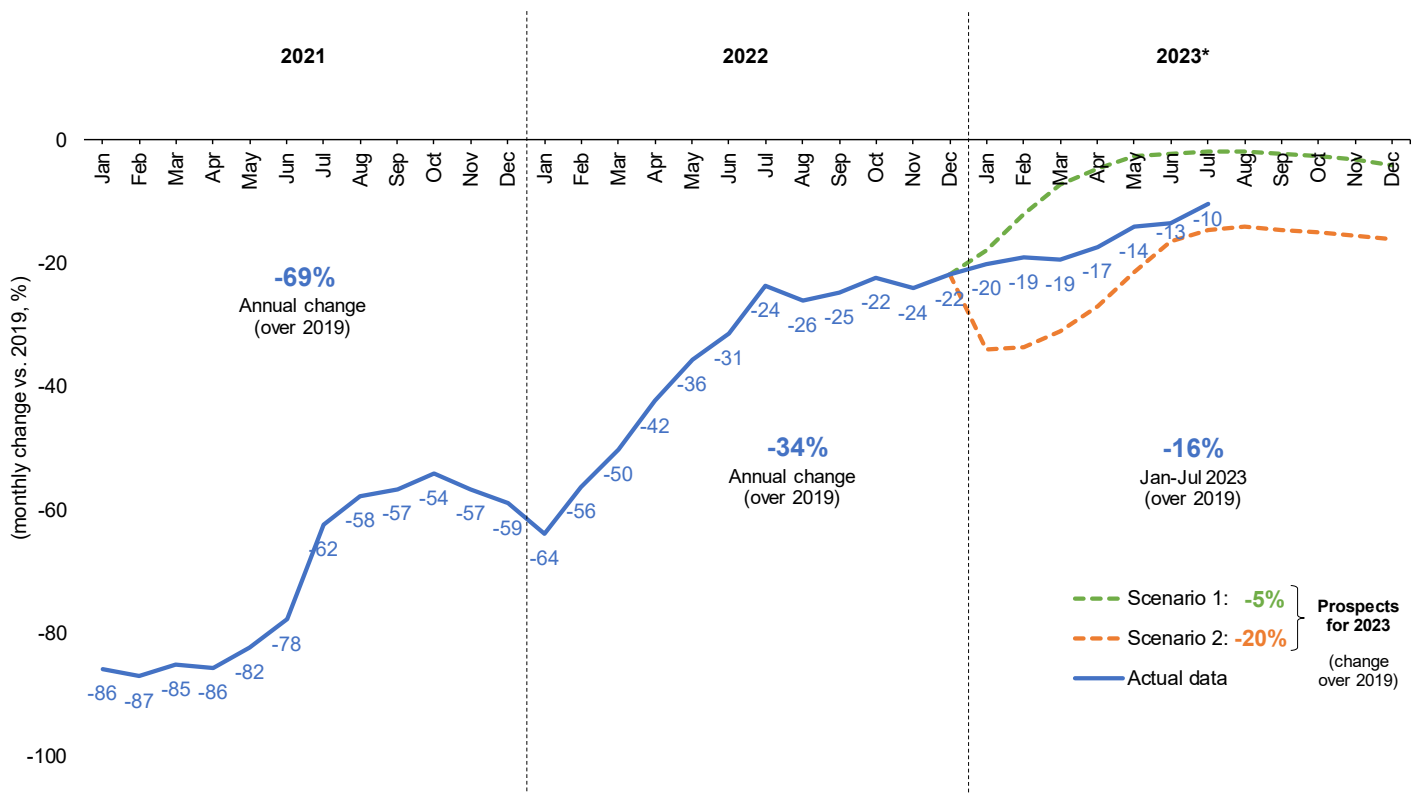
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## Inbound tourism

### International tourism maintains strong momentum with 84% recovery through July 2023

- International tourism recovered 84% of pre-pandemic levels in the first seven months of 2023 (-16% versus 2019) following a strong second quarter and early part of the Northern Hemisphere summer season.
- Travel demand continued to show remarkable resilience in the face of economic and geopolitical challenges.
- After reaching 80% in Q1 2023, international tourist arrivals (overnight visitors) hit 85% of pre-pandemic levels in Q2 2023 and 90% in July 2023, due to continued pent-up demand and very few remaining travel restrictions.
- The month of July was the busiest so far, with 145 million international travellers crossing international borders, about 20% of the seven-month total.
- An estimated 700 million tourists travelled internationally between January and July 2023, an increase of 43% over the same months of 2022, though 16% fewer than in 2019.
- Europe welcomed 375 million of those travellers, 54% of the world total.
- This latest data shows international tourism well on track to reach 80% to 95% of pre-pandemic levels in 2023, as projected in the January 2023 issue of the UNWTO World Tourism Barometer.

International tourist arrivals in 2021, 2022 and Scenarios for 2023 (monthly change over 2019, %)



Source: UNWTO

(Data as of September 2023)

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



### *Arrivals in the Middle East exceeded by 20% pre-pandemic levels*

- The **Middle East** saw the best results across regions in January-July 2023, with arrivals exceeding by 20% pre-pandemic levels. The Middle East is the only world region to surpass 2019 levels this period, with several destinations enjoying extraordinary results, among which Qatar (+95%), Saudi Arabia (+58%) and Jordan (+23%).
- **Europe**, the world's largest destination region, reached 91% of pre-pandemic levels in January-July 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 43% through June (compared to 2022) accounting for 20% of total US overseas travel.
- In Europe, some of the strongest results this period were reported by Albania (+56% over 2019), Andorra (+31%), Armenia (+30%), Liechtenstein (+19%) and Serbia (+17%).
- **Africa** recovered 92% of pre-crisis arrivals this seven-month period, with Ethiopia (+28%), Tanzania (+19%) and Morocco (+15%) by far exceeding their respective pre-pandemic levels in January-July 2023.
- Arrivals in the **Americas** reached 87% of 2019 numbers this period, led by El Salvador (+32%), Colombia (+23%), the Dominican Republic and Honduras (both +17%) among other strong performers.
- International tourism is experiencing a rapid recovery in **Asia and the Pacific** where arrivals climbed to 61% of pre-pandemic levels this period (up from 54% in Q1 2023) after the reopening of many destinations and source markets earlier this year. Maldives (+8%) and Mongolia (+4%) are some Asia Pacific destinations that recovered 2019 levels.
- The strong results in January-July 2023 are confirmed by the UNWTO Panel of Experts, of which 63% believe tourism performance in May-August 2023 was better (46%) or much better (17%) than in the previous periods.
- By subregions, North Africa (+8%), Central America (+2%) and Southern Mediterranean Europe (+1%) exceeded pre-pandemic levels in January-July 2023.

- Northern Europe, the Caribbean (both -5%) and South Asia (-7%) came close to recovering their 2019 levels.

### *Many destinations reported arrivals well above pre-pandemic levels*

- According to available data, several destinations reported double-digit growth in January-July 2023 compared to the same months of 2019, including Qatar (+95%) where arrivals almost doubled, Saudi Arabia (+58%), Albania (+56%), El Salvador (+32%), Armenia (+30%), Ethiopia (+28%), Jordan and Colombia (both +23%).
- Tanzania (+19%), the Dominican Republic, Honduras and Serbia (all +17%) also enjoyed strong growth through July, as did Morocco (+15%), Montenegro (+14%), Iceland (+13%), Guatemala (+12%), Portugal (+11%), United Arab Emirates and French Polynesia (both +10%).
- The destinations reporting the highest growth in international tourism receipts during the first six to seven months of 2023 were Pakistan (+115%), Albania (+82%), Montenegro (+77%), Türkiye (+75%), Romania (+76%), North Macedonia (+56%), Portugal (+40%), Ireland (+37%) and Colombia (+31%), among others.
- Strong demand for international travel was seen from several large source this period, with many exceeding the levels of 2019. The United States and Germany both spent 11% more on outbound travel than in the same months of 2019, while Italy spent 15% more. International tourism expenditure also exceeded pre-pandemic levels in Scandinavian countries Norway (+28%), Sweden (+9%) and Denmark (+7%).
- 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 about 84% of pre-pandemic levels through June 2023 (IATA). Hotel bookings doubled in January-August 2023 compared to the same period last year (Sojern). Global occupancy rates in accommodation establishments reached 70% in August (based on STR data).

### ***Receipts exceed pre-pandemic levels in major destinations through July 2023***

- A number of destinations saw international tourism receipts exceed pre-pandemic levels in January-July 2023, including Saudi Arabia (+151% in Q1 2023), Türkiye (+66%), the United Kingdom (+42% in Q1), Portugal (+40% through June), India (+30% in Q1), Mexico (+20%), France (+16%), Spain (+15% through June), Greece (+14% through June) and Italy (+12% through June).

### ***Recovery momentum expected to continue in September-December 2023***

- The latest UNWTO Confidence Index shows positive prospects for September-December 2023, with a score of 126 on a scale of 0 to 200, though slightly below the evaluation of May-August (132).
- International tourism is expected to continue to recover through December 2023 driven by remaining pent-up demand and increased air connectivity, though at a more moderate pace following the summer peak travel season.
- While an increasing number of destinations have reached pre-pandemic levels or are coming close, many have yet to recover those numbers, in particular the larger ones.
- Available data shows a total of 40 world destinations recovered pre-pandemic visitors in January-July 2023, including both large and smaller destinations, among which several islands. These countries represent 16% of the world's international arrivals (as of 2019).
- The reopening of China and other Asian markets is expected to continue boosting travel in the region and to other parts of the world. On 10 August, China announced the resumption of outbound group tour services to a third batch of 78 countries, including the US, Japan, the Republic of Korea, Australia, India and most European countries. The number of outbound group tour countries has expanded from 60 in April to 138 in August. However, the recovery of international travel to and from China has been hampered by still limited international flight connectivity and visa backlogs.
- Travel from the United States to Asia has more than tripled through June 2023 (compared to 2022) according to the US NTTO.

- Looking ahead, some 58% of UNWTO Panel experts believe international tourism will not return to 2019 levels this year, of which 37% point to 2024 and 21% to 2025 or later. Yet, this share has decreased slightly compared to the May survey (61%) showing that a larger number of destinations has achieved pre-pandemic levels (27% compared to 11% in May).

### ***The economic environment remains a major challenge***

- The challenging economic environment continues to be an important factor for the effective recovery of international tourism in 2023, according to the Panel of Experts.
- Persisting inflation and rising oil prices have translated into higher transport and accommodations costs. The combination of inflation and rising interest rates continue to put pressure on household budgets and confidence levels, and increase the cost of living.
- As a result, this could weigh on spending patterns over the remainder of the year, with tourists increasingly seeking value for money, travelling closer to home and making shorter trips, in response to elevated prices and the overall economic challenges.
- The International Monetary Fund's latest World Economic Outlook (July 2023 update) indicates that the global recovery is slowing amid widening divergences among economic sectors and regions. Global growth is projected to fall from an estimated 3.5% in 2022 to 3.0% in 2023. While the forecast is slightly higher than in the April WEO, it remains weak by historical standards.
- Interest rates hikes by central banks to fight inflation continue to weigh on economic activity according to the WEO report. Global inflation is expected to fall from 8.7% in 2022 to 6.8% in 2023, though there are risks that levels remain high or even rise.
- Uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions, as well as the resurgence of COVID-19 cases, also continue to represent downside risks.
- The extreme weather-related events occurred over recent months as well as the critical challenges of managing increasing tourism flows underline the need to build a more inclusive, sustainable and resilient sector.

## International Tourist Arrivals by (Sub)region

											Monthly/ quarterly data series									
	(millions)				Share (%)	Change (%)					Change (%)*									
						vs. previous year <sup>2</sup>	vs. 2019	2023 versus 2022 <sup>2</sup>					2023 versus 2019							
	2019	2020	2021	2022*	2022*	20/19	21/20	22/21*	21/19	22/19*	YTD	Q1	Q2	Jun.	Jul.	YTD	Q1	Q2	Jun.	Jul.
World	1464	407	458	969	100	-72.2	12.7	111.5	-68.7	-33.8	42.9	85.0	33.5	26.0	17.3	-15.6	-19.5	-14.8	-13.5	-10.4
Advanced economies <sup>1</sup>	775	221	240	540	55.7	-71.5	8.9	124.7	-69.0	-30.3	38.0	76.3	40.5	20.2	15.3	-13.1	11.2	7.8	-12.7	-8.5
Emerging economies <sup>1</sup>	688	186	218	429	44.3	-73.0	17.1	97.0	-68.3	-37.7	49.4	85.5	28.3	34.9	20.2	-18.6	-17.6	-12.1	-14.4	-13.2
By UNWTO regions:																				
Europe	742.1	239.6	301.3	594.9	61.4	-67.7	25.7	97.5	-59.4	-19.8	20.3	51.4	14.9	8.8	4.6	-8.8	-9.5	-9.1	-10.7	-7.2
Northern Europe	81.9	23.7	21.9	70.0	7.2	-71.1	-7.3	219.5	-73.2	-14.5	22.3	79.4	10.7	4.9	1.0	-4.6	-5.1	-5.5	-6.3	-2.3
Western Europe	205.1	83.5	87.6	168.9	17.4	-59.3	4.9	92.8	-57.3	-17.6	15.5	55.0	8.8	0.9	-5.6	-10.5	-9.1	-11.5	-15.0	-10.7
Central/Eastern Eur.	150.9	44.1	52.9	90.8	9.4	-70.8	20.1	71.7	-64.9	-39.8	26.9	42.0	24.9	20.6	11.6	-29.2	-27.9	-29.8	-30.3	-30.0
Southern/Medit. Eur.	304.2	88.4	138.9	265.1	27.3	-70.9	57.1	90.9	-54.3	-12.8	20.9	45.4	16.8	11.5	10.6	0.6	-0.1	0.3	-1.8	2.3
- of which EU-27	539.0	182.7	222.3	443.1	45.7	-66.1	21.7	99.3	-58.8	-17.8	18.6	51.7	12.5	6.4	3.3	-7.5	-8.3	-7.7	-10.5	-6.3
Asia and the Pacific	360.1	59.1	24.8	102.3	10.6	-83.6	-58.0	311.7	-93.1	-71.6	241.0	455.4	196.8	149.2	134.6	-39.3	-46.9	-36.2	-32.0	-25.1
North-East Asia	170.3	20.3	10.9	19.2	2.0	-88.1	-46.4	76.8	-93.6	-88.7	561.5	483.1	563.0	564.6	736.0	-55.0	-65.6	-50.8	-46.2	-36.8
South-East Asia	138.6	25.5	3.3	48.5	5.0	-81.6	-87.2	↑	-97.7	-65.0	272.9	↑	189.6	117.0	89.9	-27.8	-35.0	-23.5	-21.2	-18.0
Oceania	17.5	3.6	0.8	6.8	0.7	-79.2	-79.1	790.1	-95.6	-61.3	178.8	490.1	112.5	81.5	71.3	-29.6	-35.2	-25.4	-23.4	-23.2
South Asia	33.8	9.8	10.0	27.8	2.9	-71.1	2.1	178.8	-70.5	-17.7	37.7	100.1	15.9	5.1	-4.1	-6.7	-9.9	-7.8	2.0	7.1
Americas	219.3	69.6	81.7	156.2	16.1	-68.3	17.4	91.2	-62.7	-28.8	34.8	60.2	22.3	20.2	19.4	-12.7	-12.7	-13.5	-13.3	-10.5
North America	146.6	46.5	57.2	102.0	10.5	-68.3	23.1	78.3	-61.0	-30.4	31.7	52.1	22.4	21.4	20.4	-15.4	-14.7	-16.6	-16.1	-13.7
Caribbean	26.3	10.3	14.5	22.5	2.3	-61.0	41.1	55.3	-44.9	-14.4	18.5	35.4	9.1	7.4	4.3	-4.6	-7.6	-3.6	-0.7	2.5
Central America	10.9	3.1	4.7	9.3	1.0	-71.6	51.1	97.6	-57.1	-15.3	29.0	43.1	18.7	18.6	22.8	1.7	-2.7	3.9	6.2	9.1
South America	35.4	9.8	5.3	22.4	2.3	-72.4	-45.7	321.8	-85.0	-36.9	72.8	138.4	39.7	29.8	28.5	-12.8	-12.9	-13.3	-16.4	-10.6
Africa	69.1	18.7	19.6	46.6	4.8	-72.9	5.1	137.2	-71.5	-32.5	56.7	109.1	46.6	33.6	16.7	-8.4	-10.4	-6.6	-6.0	-8.2
North Africa	25.6	5.6	6.6	19.1	2.0	-78.2	17.9	190.5	-74.4	-25.5	69.6	180.6	62.6	39.3	14.3	7.6	9.3	12.8	10.7	-2.6
Subsaharan Africa	43.4	13.1	13.1	27.5	2.8	-69.8	-0.4	110.4	-69.9	-36.6	45.4	74.2	32.8	27.1	20.5	-20.5	-21.6	-21.0	-20.7	-15.7
Middle East	73.0	19.8	30.9	69.4	7.2	-72.9	55.9	124.7	-57.7	-4.9	41.6	63.8	37.3	56.6	3.2	20.3	25.9	18.0	38.5	10.3
Memorandum <sup>3</sup>																				
ASEAN	138.5	25.4	3.2	48.5	5.0	-81.6	-87.2	↑	-97.7	-65.0	↑	↑	189.6	116.9	89.9	-27.8	-35.0	-23.5	-21.2	-18.0
G20	1000	300	348	711	73.3	-70.0	16.1	104.0	-65.2	-28.9	113.0	70.1	23.3	18.4	10.7	-14.3	-17.0	-14.3	-13.3	-9.9
GCC	47.7	13.5	18.3	47.7	4.9	-71.7	35.5	160.9	-61.7	0.0	161.4	68.9	45.6	88.7	-0.2	34.0	41.0	29.5	66.0	22.6
LDCs	36.7	10.4	7.9	17.1	1.8	-71.6	-24.5	117.5	-78.6	-53.4	139.4	180.6	90.9	55.7	53.0	-30.7	-35.4	-28.4	-25.5	-22.5
LLDCs	50.6	12.0	12.8	30.0	3.1	-76.3	6.9	134.1	-74.7	-40.7	163.0	143.1	54.4	35.8	23.0	-21.8	-23.2	-21.3	-23.4	-19.5
SIDS	43.9	10.5	13.5	35.3	3.6	-76.1	28.4	162.1	-69.4	-19.7	162.6	109.4	41.8	28.6	22.5	3.9	-2.2	6.7	7.7	13.7

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, September 2023)

\* Provisional data

<sup>1</sup> Classification based on the International Monetary Fund (IMF).<sup>2</sup> Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)<sup>3</sup> 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>

## International Tourist Arrivals by (Sub)region

											Monthly/ quarterly data series										
	(millions)				Change (%)						Change (%)*										
					vs. previous year <sup>2</sup>						2023 versus 2019										
	2019	2020	2021	2022*	20/19	21/20	22/21	21/19	22/19*	YTD	H1	Q1	Q2	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	
World	1464	407	458	969	-72.2	12.7	111.5	-68.7	-33.8	-15.6	-16.9	-19.5	-14.8	-20.1	-19.1	-19.4	-17.3	-14.0	-13.5	-10.4	
Advanced economies <sup>1</sup>	775	221	240	540	-71.5	8.9	124.7	-69.0	-30.3	-13.1	-14.4	11.2	7.8	-18.4	-16.9	-17.5	-12.2	-11.3	-12.7	-8.5	
Emerging economies <sup>1</sup>	688	186	218	429	-73.0	17.1	97.0	-68.3	-37.7	-18.6	-19.8	-17.6	-12.1	-21.6	-21.2	-21.3	-23.1	-17.5	-14.4	-13.2	
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Northern Europe	81.9	23.7	21.9	70.0	-71.1	-7.3	219.5	-73.2	-14.5	-4.6	-5.3	-5.1	-5.5	0.0	-4.5	-9.9	-6.0	-4.1	-6.3	-2.3	
Western Europe	205.1	83.5	87.6	168.9	-59.3	4.9	92.8	-57.3	-17.6	-10.5	-10.5	-9.1	-11.5	-4.9	-6.7	-14.4	-11.7	-6.7	-15.0	-10.7	
Central/Eastern Eur.	150.9	44.1	52.9	90.8	-70.8	20.1	71.7	-64.9	-39.8	-29.2	-29.0	-27.9	-29.8	-28.9	-28.0	-26.8	-29.7	-29.2	-30.3	-30.0	
Southern/Medit. Eur.	304.2	88.4	138.9	265.1	-70.9	57.1	90.9	-54.3	-12.8	0.6	0.2	-0.1	0.3	3.8	2.4	-4.8	2.6	1.0	-1.8	2.3	
- of which EU-27	539.0	182.7	222.3	443.1	-66.1	21.7	99.3	-58.8	-17.8	-7.5	-7.9	-8.3	-7.7	-6.4	-6.1	-11.6	-6.0	-5.7	-10.5	-6.3	
Asia and the Pacific	360.1	59.1	24.8	102.3	-83.6	-58.0	311.7	-93.1	-71.6	-39.3	-41.6	-46.9	-36.2	-50.6	-47.3	-42.9	-40.4	-36.1	-32.0	-25.1	
North-East Asia	170.3	20.3	10.9	19.2	-88.1	-46.4	76.8	-93.6	-88.7	-55.0	-58.0	-65.6	-50.8	-72.0	-66.0	-59.5	-54.2	-51.7	-46.2	-36.8	
South-East Asia	138.6	25.5	3.3	48.5	-81.6	-87.2	↑	-97.7	-65.0	-27.8	-29.5	-35.0	-23.5	-36.1	-37.2	-31.6	-27.0	-22.1	-21.2	-18.0	
Oceania	17.5	3.6	0.8	6.8	-79.2	-79.1	790.1	-95.6	-61.3	-29.6	-30.8	-35.2	-25.4	-39.6	-36.4	-29.7	-25.9	-26.8	-23.4	-23.2	
South Asia	33.8	9.8	10.0	27.8	-71.1	2.1	178.8	-70.5	-17.7	-6.7	-8.9	-9.9	-7.8	-11.4	-9.6	-8.5	-21.8	-0.7	2.0	7.1	
Americas	219.3	69.6	81.7	156.2	-68.3	17.4	91.2	-62.7	-28.8	-12.7	-13.1	-12.7	-13.5	-11.6	-12.2	-14.0	-13.8	-13.5	-13.3	-10.5	
North America	146.6	46.5	57.2	102.0	-68.3	23.1	78.3	-61.0	-30.4	-15.4	-15.7	-14.7	-16.6	-13.1	-14.9	-16.1	-17.8	-15.9	-16.1	-13.7	
Caribbean	26.3	10.3	14.5	22.5	-61.0	41.1	55.3	-44.9	-14.4	-4.6	-5.7	-7.6	-3.6	-5.7	-6.6	-10.0	-4.4	-5.6	-0.7	2.5	
Central America	10.9	3.1	4.7	9.3	-71.6	51.1	97.6	-57.1	-15.3	1.7	0.4	-2.7	3.9	-9.8	0.8	1.8	1.0	4.9	6.2	9.1	
South America	35.4	9.8	5.3	22.4	-72.4	-45.7	321.8	-85.0	-36.9	-12.8	-13.1	-12.9	-13.3	-11.9	-12.3	-15.0	-10.0	-14.0	-16.4	-10.6	
Africa	69.1	18.7	19.6	46.6	-72.9	5.1	137.2	-71.5	-32.5	-8.4	-8.5	-10.4	-6.6	-9.6	-9.4	-12.3	-14.5	2.0	-6.0	-8.2	
North Africa	25.6	5.6	6.6	19.1	-78.2	17.9	190.5	-74.4	-25.5	7.6	11.2	9.3	12.8	11.3	12.8	4.6	-3.3	36.1	10.7	-2.6	
Subsaharan Africa	43.4	13.1	13.1	27.5	-69.8	-0.4	110.4	-69.9	-36.6	-20.5	-21.3	-21.6	-21.0	-20.0	-22.1	-22.9	-22.8	-19.4	-20.7	-15.7	
Middle East	73.0	19.8	30.9	69.4	-72.9	55.9	124.7	-57.7	-4.9	20.3	22.0	25.9	18.0	20.4	29.7	27.9	8.4	9.8	38.5	10.3	
Memorandum <sup>3</sup>																					
ASEAN	138.5	25.4	3.2	48.5	-81.6	-87.2	↑	-97.7	-65.0	-27.8	-29.5	-35.0	-23.5	-36.1	-37.2	-31.6	-27.0	-22.1	-21.2	-18.0	
G20	1,000	300	348	711	-70.0	16.1	104.0	-65.2	-28.9	-14.3	-15.5	-17.0	-14.3	-16.0	-16.2	-18.5	-15.8	-14.1	-13.3	-9.9	
GCC	47.7	13.5	18.3	47.7	-71.7	35.5	160.9	-61.7	0.0	34.0	35.5	41.0	29.5	29.6	47.3	46.9	23.2	7.3	66.0	22.6	
LDCs	36.7	10.4	7.9	17.1	-71.6	-24.5	117.5	-78.6	-53.4	-30.7	-32.1	-35.4	-28.4	-34.5	-35.2	-36.4	-32.6	-26.8	-25.5	-22.5	
LLDCs	50.6	12.0	12.8	30.0	-76.3	6.9	134.1	-74.7	-40.7	-21.8	-22.2	-23.2	-21.3	-23.5	-22.4	-23.7	-23.1	-17.4	-23.4	-19.5	
SIDS	43.9	10.5	13.5	35.3	-76.1	28.4	162.1	-69.4	-19.7	3.9	2.1	-2.2	6.7	-3.0	-1.5	-2.1	3.9	8.7	7.7	13.7	

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, September 2023)

\* Provisional data

<sup>1</sup> Classification based on the International Monetary Fund (IMF).<sup>2</sup> Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)<sup>3</sup> 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 (%)		
									(%)	Local currencies, constant prices								
	2019	2020	2021	2022*	2019	2020	2021	2022*	2022*	20/19	21/20	22/21*	21/19	22/19*	2019	2022*	22/21*	22/19*
<b>World</b>	<b>1486</b>	<b>554</b>	<b>632</b>	<b>1109</b>	<b>1328</b>	<b>485</b>	<b>534</b>	<b>1054</b>	<b>100</b>	<b>-63.0</b>	<b>8.0</b>	<b>74.6</b>	<b>-59.7</b>	<b>-25.8</b>	<b>1464</b>	<b>969</b>	<b>111.5</b>	<b>-33.8</b>
Advanced economies <sup>1</sup>	936	366	400	682	836	321	338	648	62	-61.5	2.8	72.3	-59.8	-26.4	775	540	124.7	-30.3
Emerging economies <sup>1</sup>	550	188	232	427	491	165	196	406	38	-65.5	18.2	78.7	-59.6	-24.7	688	429	97.0	-37.7
<i>By UNWTO regions:</i>																		
<b>Europe</b>	<b>584.1</b>	<b>249.5</b>	<b>327.5</b>	<b>553.2</b>	<b>521.7</b>	<b>218.4</b>	<b>276.9</b>	<b>525.4</b>	<b>49.9</b>	<b>-58.1</b>	<b>23.4</b>	<b>72.0</b>	<b>-47.3</b>	<b>-3.5</b>	<b>742.1</b>	<b>594.9</b>	<b>97.5</b>	<b>-19.8</b>
Northern Europe	95.1	41.1	50.6	102.8	84.9	36.0	42.8	97.6	9.3	-57.3	12.3	110.0	-51.5	11.7	81.9	70.0	219.5	-14.5
Western Europe	179.1	99.1	105.3	155.1	160.0	86.8	89.0	147.3	14.0	-46.2	0.2	53.1	-44.5	-10.0	205.1	168.9	92.8	-17.6
Central/Eastern Eur.	69.0	28.6	34.7	56.3	61.7	25.1	29.4	53.5	5.1	-58.4	14.0	55.3	-52.7	-21.8	150.9	90.8	71.7	-39.8
Southern/Medit. Eur.	240.9	80.6	137.0	239.0	215.2	70.6	115.8	226.9	21.5	-67.1	60.8	76.8	-46.2	0.5	304.2	265.1	90.9	-12.8
- of which EU-27	423.2	182.4	233.5	385.7	378.0	159.7	197.4	366.3	34.8	-57.8	20.5	70.9	-48.1	-5.7	539.0	443.1	99.3	-17.8
<b>Asia and the Pacific</b>	<b>441.2</b>	<b>126.3</b>	<b>90.6</b>	<b>157.3</b>	<b>394.1</b>	<b>110.6</b>	<b>76.6</b>	<b>149.4</b>	<b>14.2</b>	<b>-71.5</b>	<b>-31.7</b>	<b>77.2</b>	<b>-80.4</b>	<b>-63.6</b>	<b>360.1</b>	<b>102.3</b>	<b>311.7</b>	<b>-71.6</b>
North-East Asia	187.2	44.9	44.9	45.7	167.2	39.3	38.0	43.4	4.1	-76.4	-2.9	7.9	-76.7	-74.1	170.3	19.2	76.8	-88.7
South-East Asia	146.9	31.2	11.0	50.6	131.2	27.3	9.3	48.0	4.6	-78.7	-65.4	362.6	-92.7	-65.4	138.6	48.5	↑	-65.0
Oceania	61.4	32.7	20.3	30.5	54.9	28.7	17.2	28.9	2.7	-46.7	-44.6	52.0	-70.5	-49.6	17.5	6.8	790.1	-61.3
South Asia	45.7	17.5	14.3	30.5	40.8	15.3	12.1	29.0	2.7	-62.1	-21.0	111.2	-69.8	-33.9	33.8	27.8	178.8	-17.7
<b>Americas</b>	<b>330.6</b>	<b>125.2</b>	<b>140.4</b>	<b>255.0</b>	<b>295.3</b>	<b>109.6</b>	<b>118.7</b>	<b>242.2</b>	<b>23.0</b>	<b>-61.7</b>	<b>6.2</b>	<b>69.5</b>	<b>-59.8</b>	<b>-28.0</b>	<b>219.3</b>	<b>156.2</b>	<b>91.2</b>	<b>-28.8</b>
North America	253.4	97.1	104.4	187.6	226.3	85.0	88.3	178.1	16.9	-61.7	0.9	67.2	-61.3	-31.1	146.6	102.0	78.3	-30.4
Caribbean	35.0	14.4	20.9	32.3	31.3	12.6	17.7	30.7	2.9	-58.5	39.9	42.9	-42.5	-14.7	26.3	22.5	55.3	-14.4
Central America	12.6	4.0	6.3	12.5	11.3	3.5	5.3	11.8	1.1	-68.2	54.6	90.1	-50.8	-5.7	10.9	9.3	97.6	-15.3
South America	29.6	9.8	8.8	22.7	26.5	8.5	7.5	21.6	2.0	-63.4	-11.0	143.6	-70.7	-27.3	35.4	22.4	321.8	-36.9
<b>Africa</b>	<b>38.8</b>	<b>14.8</b>	<b>17.7</b>	<b>32.9</b>	<b>34.7</b>	<b>12.9</b>	<b>15.0</b>	<b>31.2</b>	<b>3.0</b>	<b>-61.7</b>	<b>12.6</b>	<b>83.9</b>	<b>-57.3</b>	<b>-16.1</b>	<b>69.1</b>	<b>46.6</b>	<b>137.2</b>	<b>-32.5</b>
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	190.5	-25.5
Subsaharan Africa	27.6	9.3	11.7	21.0	24.7	8.2	9.9	19.9	1.9	-65.3	17.6	72.3	-60.3	-26.8	43.4	27.5	110.4	-36.6
<b>Middle East</b>	<b>91.5</b>	<b>38.6</b>	<b>55.6</b>	<b>111.1</b>	<b>81.7</b>	<b>33.8</b>	<b>47.0</b>	<b>105.5</b>	<b>10.0</b>	<b>-57.8</b>	<b>42.9</b>	<b>96.0</b>	<b>-39.7</b>	<b>19.1</b>	<b>72.9</b>	<b>69.3</b>	<b>125.1</b>	<b>-4.9</b>

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, September 2023)

\* Provisional data

<sup>1</sup> 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](http://www.imf.org/external/ns/cs.aspx?id=29).

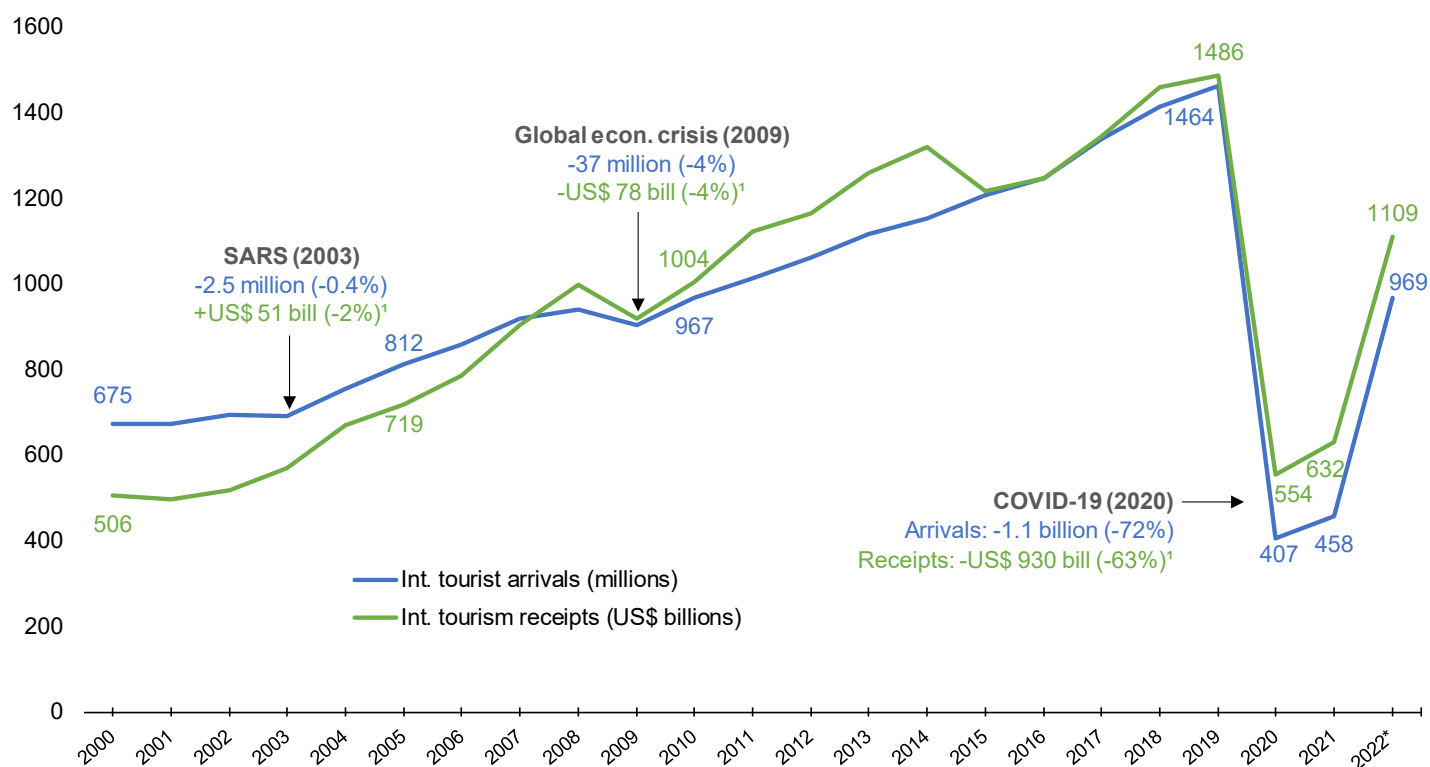
See box in page 'Annex-1' for explanation of abbreviations and symbols used.



## Revised data puts receipts at 74% of pre-pandemic levels in 2022

- International tourism receipts reached USD 1.1 trillion in 2022 according to the latest data from over 140 destinations around the world, an increase of 76% in real terms over 2021, reflecting the strong rebound in international travel last year.
- This puts tourism receipts at 74% of pre-pandemic levels in 2022 (-26% versus 2019), with some large destinations recovering or exceeding 2019 earnings, among which the United Kingdom, Mexico and Türkiye.
- As in 2020 and 2021, receipts recovered more than international arrivals in 2022, relative to pre-pandemic numbers. This is due to higher spending per trip by international travelers, partly the result of longer periods of stay. Arrivals recovered 66% of pre-pandemic levels in 2022, compared to 74% in the case of receipts.
- Total export revenues from tourism, which apart from international tourism receipts also include passenger transport fares, reached USD 1.3 trillion in 2022, equivalent to 76% of pre-pandemic revenues (-24% versus 2019). This means tourism represented 4% of the world's exports of goods and services in 2022, down from 7% in 2019. In terms of export categories, tourism dropped from 3rd export sector globally in 2019 to 9th in 2021 (data still unavailable for 2022).
- The Middle East saw the best performance across regions, with receipts climbing 32% above pre-pandemic levels in 2022 (real terms), the only world region to exceed 2019 earnings.
- Europe recovered 96% of pre-pandemic receipts in 2022 (-4% versus 2019) and Africa 84% (-16% versus 2019). Receipts in the Americas reached 72% of 2019 levels while Asia and the Pacific recovered 36%, as many countries in that region remained closed to non-essential travel in 2022.
- The loss in international tourism revenues from the pandemic is now estimated at USD 2.5 trillion for 2020-2022, slightly below the previous estimate of USD 2.6 trillion. Tourism revenues dropped 63% in 2020, 59% in 2021 and 24% in 2022 (real change versus 2019).

### International tourist arrivals and tourism receipts, 2000-2022



Source: UNWTO


(Data as of September 2023)

\* Real percentage change (local currencies, constant prices).

## Outbound tourism

### *Strong spending on international travel in January-July 2023*

- The rebound in international travel through July 2023 was driven by strong demand from source markets across all regions, as expenditure data shows.
- International tourism spending among the world's top source markets surpassed pre-pandemic levels in Germany (+11% through July), Italy (+15% through June) and the United Kingdom (+16% in Q1), fueling much inbound tourism in European destinations and beyond.
- Travellers from the Netherlands (+14%), Belgium (+13%) and Switzerland (+7%) also spent more on outbound travel in Q1 2023 than in the same period of 2019.
- Expenditure from the United States, the world's largest source market in 2022, grew 11% above pre-pandemic levels in January-July 2023, driving tourism numbers across the Americas and Europe in particular.
- In Asia and the Pacific, Indian travelers spent 75% more on international travel in Q1 2023 and Malaysian tourists 28% more through June, compared to 2019. Expenditure from other markets remained below 2019 levels due to more recent lifting of restrictions or reopening of borders, particularly in North-East Asia.
- In the Middle East, outbound tourism spending from Egypt and Qatar surpassed pre-pandemic levels by 63% and 50% respectively in Q1 2023, contributing to the region's strong inbound results.
- Strong spending on international travel was also reported by Austria (+38% in Q1 2023), Norway and Ireland (both +28% through June), all exceeding pre-pandemic expenditure numbers.



The UNWTO Tourism Data Dashboard – provides statistics and insights on key indicators for inbound and outbound tourism at the global, regional and national levels. Data covers tourist arrivals, tourism receipts, tourism share of exports and contribution to GDP, source markets, seasonality, domestic tourism and data on accommodation and employment.

**SELECT AN AREA**


- Global and regional tourism results
- Inbound Tourism
- Outbound Tourism
- Tourism Flows
- Seasonality
- Accommodation
- GDP & Jobs
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- UNWTO/IATA Easy Travel
- COVID-19: Measures to Support Travel and Tourism

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## Industry Indicators

### *International air travel saw steady recovery in January-July 2023*

#### *Air passenger traffic*

- According to **IATA**, global passenger traffic continued its steady recovery in January-July 2023 to stand at 92% of pre-pandemic levels. Global traffic measured in revenue passenger-kilometers (RPKs) saw an increase of 26% year-on-year in July showing strong passenger demand in the Northern Hemisphere summer.
- According to available data for January-July 2023, international traffic recovered 86% of 2019 levels in the first seven months of 2023, similar to the result on international arrivals for the same period (84%).
- By regions, international air traffic in North America recovered 99% and the Middle East 94% of 2019 levels. International RPKs in Europe (-8%) were close to pre-pandemic values, while Latin America and Africa reported traffic levels 11% and 12% below 2019. International RPKs in Asia and the Pacific improved from last year, though were still 33% below 2019, due to the slower rebound of international tourism in the region.
- Global domestic air traffic (RPKs) exceeded pre-pandemic levels by 3% in January-July 2023. By market, India (+6% RPKs), China (+4%), the United States (+3%) and Brazil (+1%) exceeded 2019 levels in the first seven months of 2023.

#### *Air capacity*

- In terms of capacity, data from **IATA** shows that international air capacity worldwide (measured in available seat-kilometres or ASKs) climbed to 15% below 2019 levels in January-July 2023, showing a significant improvement compared to the same period in 2022 (-31%). North America and Europe recovered 98% and 94% of pre-pandemic-levels in the first seven months of the year.
- Domestic air capacity (+7% ASKs) exceeded 2019 levels in most regions except the Middle East (-5%), where it came close to pre-pandemic levels. By country, domestic air capacity exceeded pre-pandemic levels in China (+18%), India (+7%), Brazil (+5%) and the United States (+4%).

#### *Accommodation*

- According to **STR**, global occupancy rates in accommodation establishments reached 70% in August 2023, with continued improvement since the beginning of the year (54% in January 2023). Europe (73%), and Asia Pacific (72%) recorded the highest occupancy in August 2023, followed by the Americas (66%), Africa and the Middle East (both 65%).
- Most subregions showed occupancy rates above 65% in August 2023. Northern Europe (80%) saw the highest occupancy rates in August 2022, followed by North-East Asia (73%), Asia Pacific (72%) and Oceania (71%). (Data by region are based on STR statistical 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](http://www.unwto.org/unwto-tourism-dashboard)



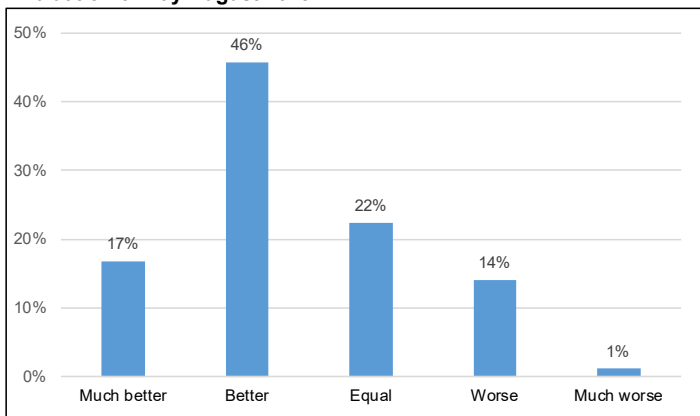


## UNWTO Confidence Index

### *Strong results in May-August 2023, backed by continued pent-up demand*

- Based on the survey conducted in September 2023, the UNWTO Confidence Index confirms the strong tourism results recorded in the Northern Hemisphere summer travel period. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period May-August 2023 with a score of 132, though somewhat below the expectations expressed in the May survey ahead of that 4-month period (139).
- Despite economic and geopolitical headwinds, experts pointed out that the strong pent-up demand, the lifting of travel restrictions in most remaining countries, especially in Asia and the Pacific, and the particularly robust performance of the US, Middle Eastern and European markets were pivotal for the continued recovery of tourism between May and August.
- Most survey respondents evaluated May-August 2023 as better (46%) or much better (17%) than expected, while 22% did not see any change. Some 15% considered it worse or much worse.

**Evaluation of May-August 2023**



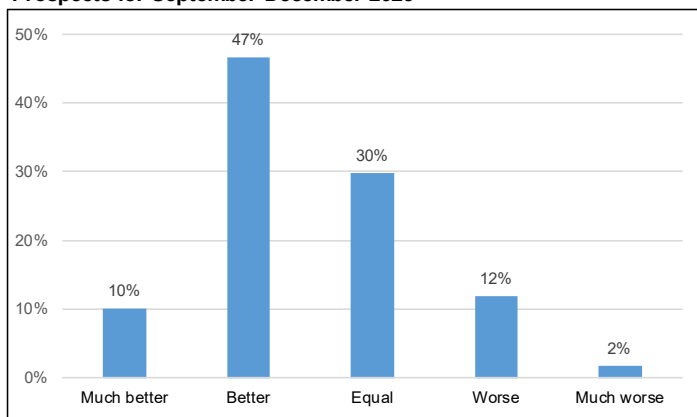
Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- Experts pointed out that many destinations saw strong growth, achieving or coming close to pre-pandemic levels, though others were still lagging pre-crisis figures, in particular Asian destinations recently opening up to international travel.

### *Recovery momentum expected to continue in September-December 2023*

- The latest UNWTO Confidence Index points to continued recovery in September-December 2023, backed by pent-up demand and increased air connectivity, though at a more moderate pace following the peak summer travel season in the northern hemisphere.
- Almost 57% of respondents expect better (47%) or much better (10%) performance for the 4-month period, while 30% see equal performance and only 12% worse.

**Prospects for September-December 2023**



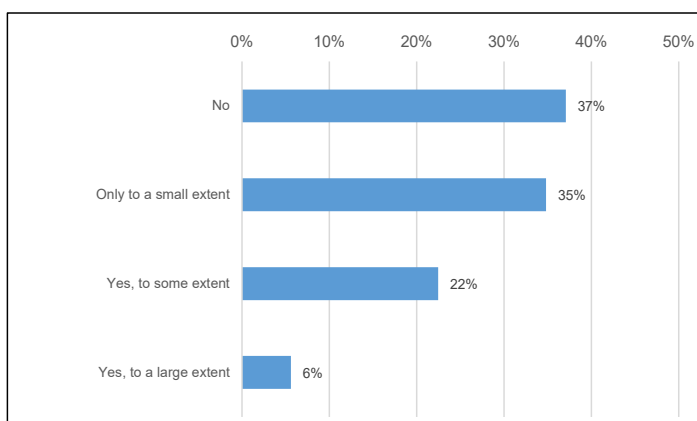
Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- Confidence levels (126 on a scale of 0 to 200) for the remainder of the year are slightly down compared to the evaluation made for the period May-August (132), amid persisting economic uncertainty that could influence how people travel, in particular the more price-sensitive segments.

### *The economic environment remains the main factor weighing on the recovery*

- The challenging economic environment continues to be a critical factor in the effective recovery of international tourism in 2023, according to UNWTO's Panel of Experts.
- High inflation and rising oil prices have increased transport and accommodations costs. This could weigh on spending patterns over the remainder of the year, with tourists increasingly seeking value for money, travelling closer to home and making shorter trips.
- Furthermore, continued uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions, as well as the resurgence of COVID-19 cases also represent downside risks.
- Experts point out that staff shortages remain a critical issue, as tourism businesses face a shortfall in labour to cope with high travel demand.
- Visa issuance and air capacity constraints continue to hamper the effective recovery of travel from China, in particular long-haul. According to experts, domestic and nearby destinations in the region could benefit from Chinese travel in a first stage, but also those destinations with easier entry requirements. China's 8-day Golden week holiday (from 29 September to 6 October) is raising expectations since it is the first long holiday since the resumption of Chinese travel.
- The extreme weather-related events (i.e. heatwaves, floods) taking place in recent months, with July as the hottest month on record according to the World Meteorological Organization, underlines the need of adaptation and effective management of tourism flows.
- Most experts (72%) indicated that inbound tourism in their destination was either not affected by weather-related events (37%) or it was affected only to a small extent (35%). However, 28% of respondents mentioned that some destinations have been affected to a large extent (6%) or to some extent (22%).

Has inbound tourism to your destination been affected by extreme weather conditions or events?



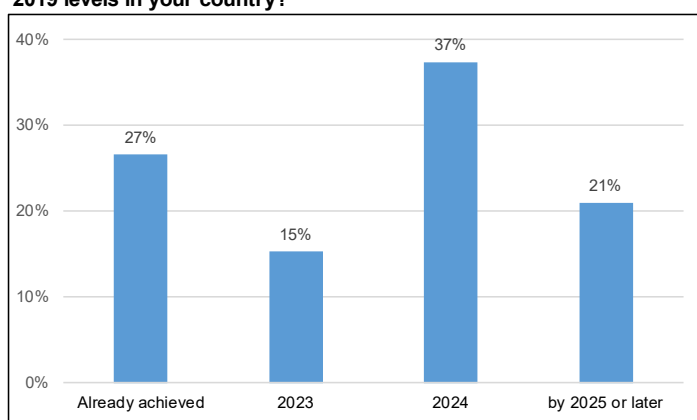
Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- Some experts pointed out that extreme weather events or conditions could trigger a redistribution of seasonality patterns, encouraging travel in shoulder or off-season periods. In addition, destinations with milder temperatures such as those with mountains could benefit.

### *Return to pre-pandemic levels for global tourism not expected before 2024*

- Looking ahead, some 58% of UNWTO Panel experts continue to believe international tourism will not return to 2019 levels this year, of which 37% point to 2024 and 21% to 2025 or later. Yet, this percentage has decreased slightly compared to the May survey (61%) showing that a larger number of destinations has achieved pre-pandemic levels (27% compared to 11% in May).

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



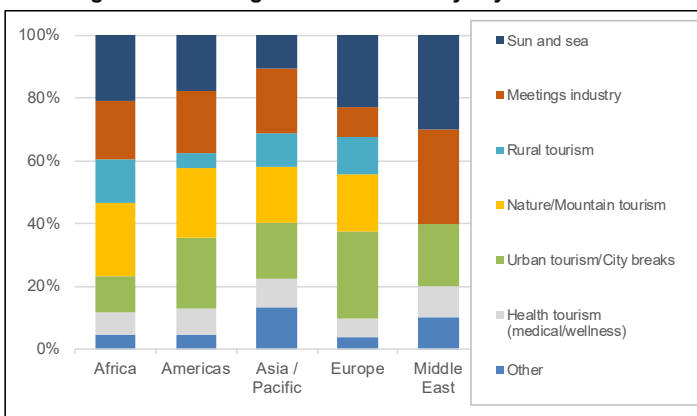
Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- The largest share of experts pointing to a return to 2019 levels in 2024 or later continues to be in Asia and the Pacific (91%), of which 41% pointed to 2024 and 50% to 2025 or later. This share has increased since the May survey (84%), indicating a comparatively slower recovery following the recent reopening of several markets and destinations in the region. Most experts in Africa (58%) indicated 2024 or later.

### *Leisure-related travel segments continue to show fastest recovery*

- According to Panel experts, urban tourism and city breaks, one of the most affected segments during the pandemic, continues to show the fastest recovery, along with sun and sea, nature and mountain tourism. This reflects the significant weight of travel for leisure purposes.
- While the meetings industry has experienced a comparatively slower recovery, an increasing number of international large events have been taking place.
- The share of experts highlighting the faster recovery of the meetings industry has increased since the May survey (from 24% to 34%). According to responses, this segment is showing faster recovery in Asia and the Pacific as well as in the Middle East.

What segment is showing the fastest recovery in your destination?

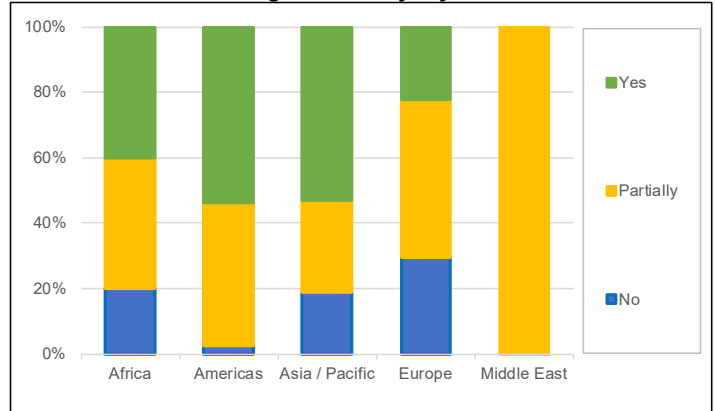


Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- Domestic tourism continues to support the overall recovery of the tourism sector in many destinations, in particular in those with a large domestic market. Domestic tourism has been a key driver for tourism recovery in destinations that were closed to non-essential travel for a long period, in particular Asian

destinations such as China, Macao (China) or Japan. Domestic tourism has also represented a buffer for Eastern European destinations affected by the proximity of the war in Ukraine.

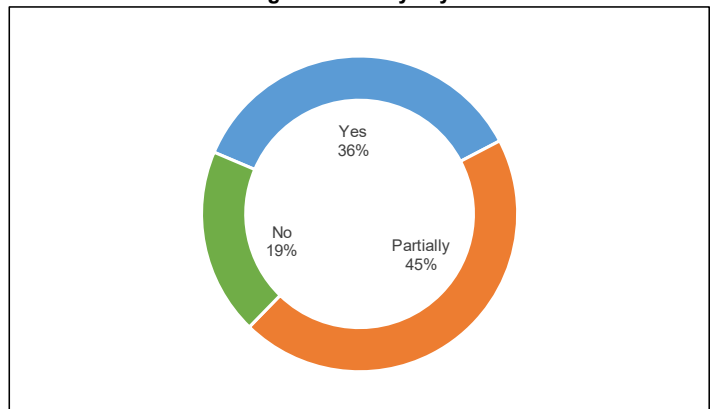
Is domestic tourism driving the recovery in your destination?



Source: September 2023 Survey of the UNWTO Panel of Tourism Experts

- However, around 45% consider that it is contributing to the recovery only partially. The share of experts indicating that domestic tourism is not driving tourism recovery in their destination has increased to 19%, up from 11% in the May survey. This reflects the importance of international tourism in many destinations and the sustained recovery of international demand.
- Experts from Europe indicated that financial constraints have influenced travel decisions in some domestic markets. The rising cost of travelling internally in some European countries has pushed price-sensitive traveler segments to opt for cheaper destinations.

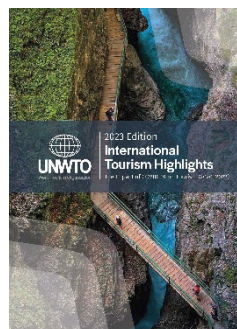
Is domestic tourism driving the recovery in your destination?



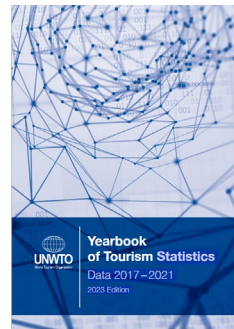
Source: September 2023 Survey of the UNWTO Panel of Tourism Experts



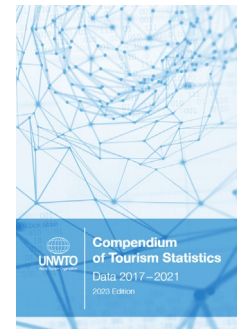
**UNWTO World Tourism Barometer**



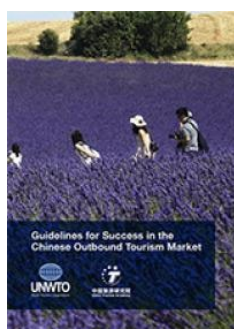
**International Tourism Highlights - 2023 Edition**  
The Impact of COVID-19 on Tourism (2020–2022)



**Yearbook of Tourism Statistics (2017-2021)**



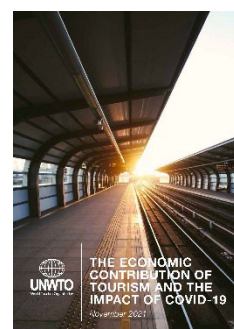
**Compendium of Tourism Statistics (2017-2021)**



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**Exploring Health Tourism (2018)**



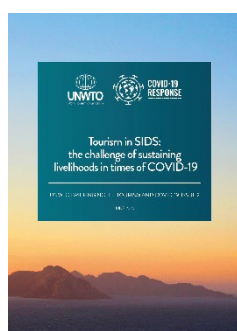
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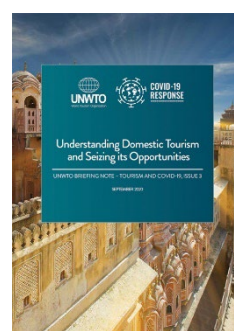
**European Union Tourism Trends (2018)**



**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)**



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