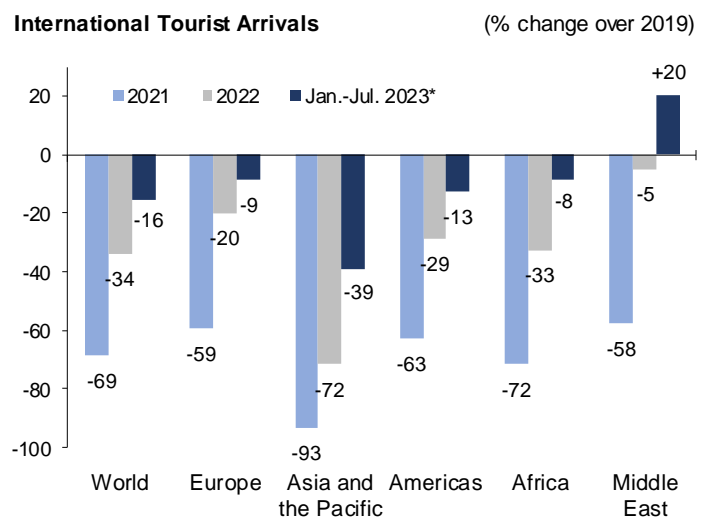


International tourism recovered 84% of pre-pandemic levels through July 2023

- 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.



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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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 coordination of the Executive Director, Zoritsa Urosevic, and 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-September 2023.

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

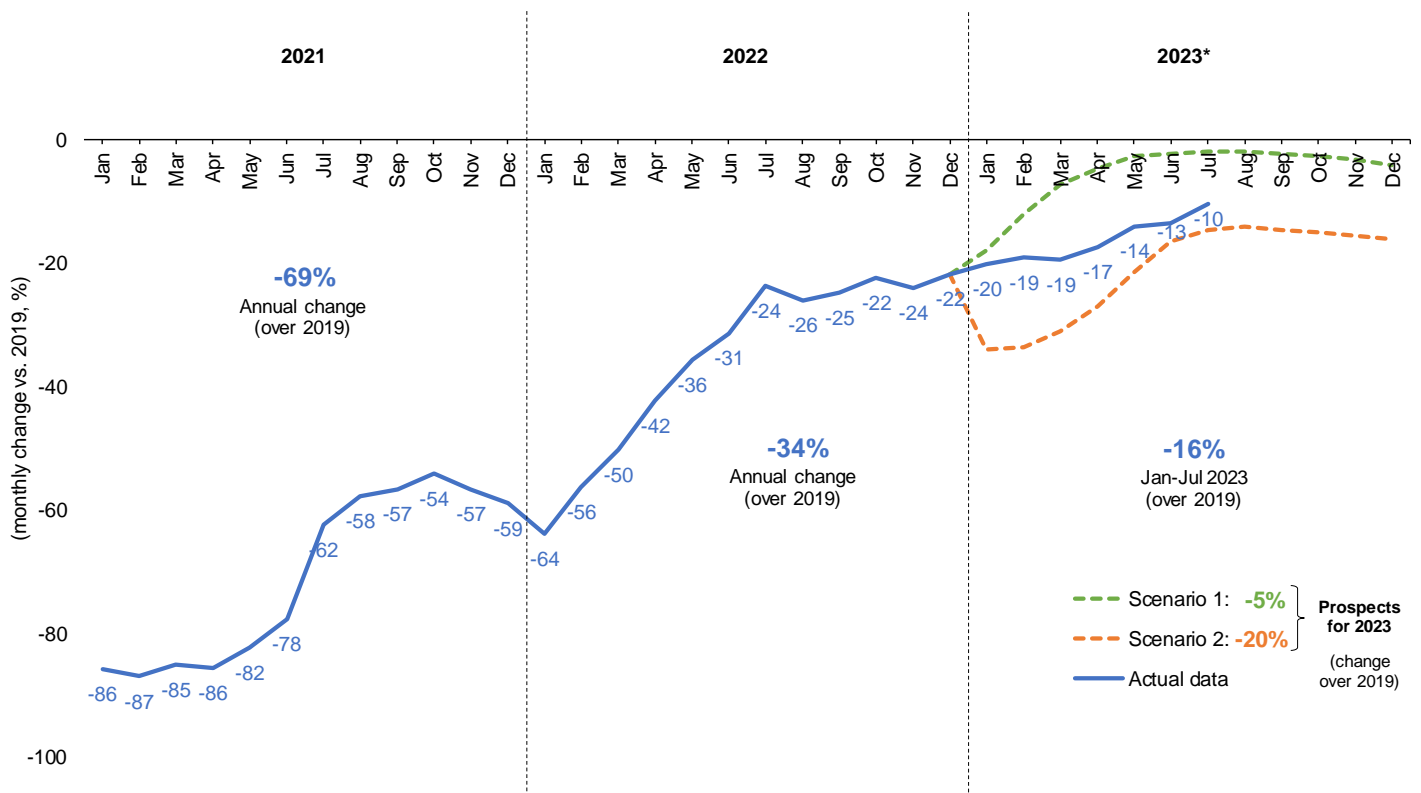
Pages 1-6 of this document constitute the Excerpt of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English,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

Inbound tourism

International tourism maintains strong momentum with 84% recovery up to 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 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-crisis 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 tourism 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, slightly above the 66% rate in August 2022 (based on STR data).

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 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 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 accommodation 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.
- 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 rate 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 ²	vs. 2019		2023 versus 2022 ²					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	33	26	17	-15.6	-19.5	-14.8	-13.5	-10.4
Advanced economies ¹	775	221	240	540	55.7	-71.5	8.9	124.7	-69.0	-30.3	38.0	76	40	20	15	-13.1	11.2	7.7	-12.7	-8.5
Emerging economies ¹	688	186	218	429	44.3	-73.0	17.1	96.9	-68.3	-37.6	49.4	85	28	35	20	-18.6	-17.6	-12.1	-14.4	-13.1
<i>By UNWTO regions:</i>																				
Europe	742.1	239.6	301.3	594.9	61.4	-67.7	25.7	97.5	-59.4	-19.8	20.3	51	15	9	5	-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	11	5	1	-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	9	1	-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	25	21	12	-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	17	12	11	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	52	13	6	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	455	197	149	135	-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	562	483	563	565	736	-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	273	↑	190	117	90	-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	179	490	113	81	71	-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	38	100	16	5	-4	-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	22	20	19	-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	22	21	20	-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	9	7	4	-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	19	19	23	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	40	30	29	-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	47	34	17	-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	181	63	39	14	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	33	27	20	-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	41.5	64	37	56	3	20.3	25.8	18.0	38.4	10.3
<i>Memorandum³</i>																				
ASEAN	138.5	25.4	3.2	48.5	5.0	-81.6	-87.2	↑	-97.7	-65.0	↑	↑	190	117	90	-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	70	23	18	11	-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	69	46	89	0	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	181	91	56	53	-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	143	54	36	23	-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	163	109	42	29	23	3.8	-2.2	6.7	7.7	13.7

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, September 2023)

* 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,

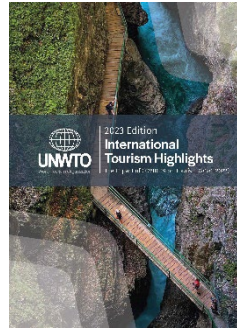
LDCs: Least Developed Countries, LLDCs: Landlocked Developing Countries, SIDS: Small Island Developing States. (See Methodological Notes)

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

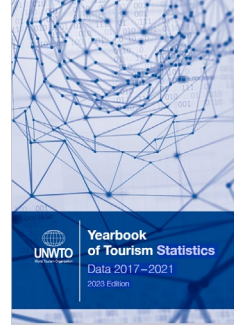
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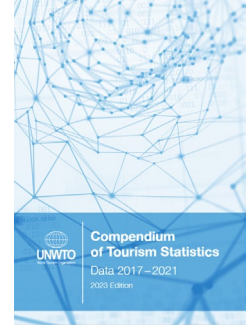
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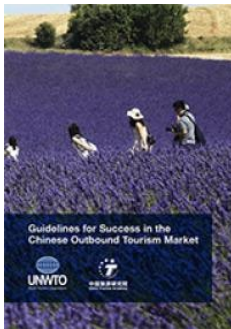
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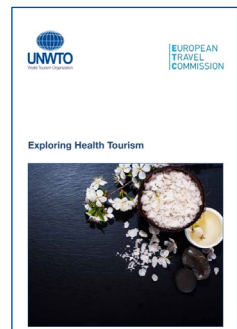
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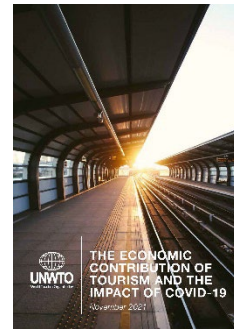
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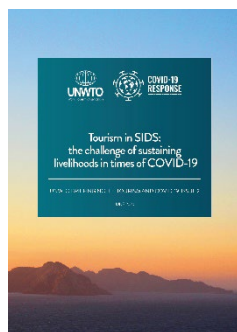
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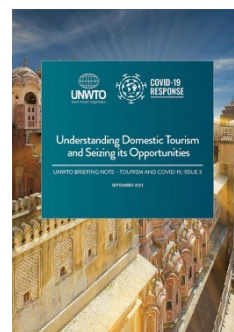
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