WORLD TOURISM TRENDS AND OUTLOOK

Understanding changes to react and adapt

17th UNWTO/PATA Forum on Tourism Trends and Outlook, Guilin, China, 26 October 2023

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Looking back…
The worst crisis ever
Impact of coronavirus pandemic on tourism, 2020, 2021 and 2022

International tourist arrivals
% change (vs 2019)
- 2019: 1.5 billion
- 2020: 407 million (-72%)
- 2021: 456 million (-69%)
- 2022: 963 million (-34%)

Export revenues from tourism¹
real % change (vs 2019)²
- 2019: USD 1.8 trillion
- 2020: USD 0.7 trillion (-62%)
- 2021: USD 0.8 trillion (-59%)
- 2022: USD 1.3 trillion (-34%)

Tourism direct GDP (TDGDP)
nominal % change (vs 2019)
- 2019: USD 3.3 trillion
- 2020: USD 1.5 trillion (-54%)
- 2021: USD 1.7 trillion (-47%)
- 2022: USD 2.5 trillion (-24%)

 Combined loss (vs 2019)
- 2020, 2021 and 2022: USD 2.6 trillion
- 2020, 2021 and 2022: USD 4.2 trillion

Source: World Tourism Organization (UNWTO)

¹ Revenues include international tourism receipts and passenger transport fares.
² In local currencies and constant prices.

Data as of June 2023
Changes in traveler behavior during the pandemic

**Closer**
Domestic tourism saw a faster recovery in many markets since people tended to travel closer. Travelers went for ‘staycations’ or vacations close to home.

**More responsible**
Sustainability, authenticity and localhood: travelers believe in the importance of creating a positive impact on local communities, increasingly searching for authenticity.

**Get away**
Nature and rural tourism including road trips have emerged as popular travel choices due to travel limitations during the pandemic and the quest for open-air experiences.

**Adaptation**
- Last-minuted bookings
- Flexible cancellation policies
- Uncertain environment, volatility
International tourist arrivals

(% change vs. 2019)

Source: UNWTO (Sept. 2023)

* Provisional data
Recovery of international tourist arrivals

Percentage of 2019 levels recovered in Jan-Jul 2023 (%)*

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage recovered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle East</td>
<td>120%</td>
</tr>
<tr>
<td>Africa</td>
<td>92%</td>
</tr>
<tr>
<td>Europe</td>
<td>91%</td>
</tr>
<tr>
<td>Americas</td>
<td>87%</td>
</tr>
<tr>
<td>World</td>
<td>84%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>61%</td>
</tr>
</tbody>
</table>

Percentage not recovered: 39%

Source: UNWTO (Sept. 2023)
* Provisional data
International tourist arrivals: World (millions)

Source: UNWTO (Sept. 2023)
* Provisional data
International tourist arrivals and receipts

(yearly % change)

Arrivals

Receipts¹

Source: UNWTO (Sept. 2023)

* Provisional data

¹ Real change (local currencies at constant prices).
Recovery of international tourism receipts, 2022

Percentage of 2019 levels recovered in 2022 (%)*

* Real terms (provisional data)

Source: UNWTO (Sept. 2023)
The UNWTO Tourism Recovery Tracker compiles all the relevant data in one place, giving governments and the private businesses the ability to track the recovery of tourism at global and regional level, alongside information on the top destinations for international tourism.

**SELECT AN AREA**
- Home
- Overview
- By Region
- By Top 10 Destinations
- By Top 10 Source Markets
- Compare indicators
- Compare regions
- Restriction-free destinations

**OTHER UNWTO DASHBOARDS**
- International Tourism
- International Tourism and COVID-19
- UNWTO/IATA Easy Travel
- COVID-19: Measures to Support Travel and Tourism

**Methodological Notes**
- Availability of data

**18/10/2023**
Last update
### Indicator-Source

<table>
<thead>
<tr>
<th>Region/Source</th>
<th>Type</th>
<th>YTD (%)</th>
<th>Latest monthly data (%)</th>
<th>Data available</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Searches - Sojern</td>
<td>2. Accommodation</td>
<td>471 %</td>
<td>396 %</td>
<td>Sep 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Hotel Bookings - Sojern</td>
<td>2. Accommodation</td>
<td>103 %</td>
<td>70 %</td>
<td>Sep 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Occupancy Rates - STR</td>
<td>2. Accommodation</td>
<td>69 %</td>
<td>69 %</td>
<td>Sep 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Travel Sentiment - TCI RESEARCH</td>
<td>1. Tourism - general</td>
<td>34 %</td>
<td>37 %</td>
<td>Sep 2023</td>
<td>Compared to previous year</td>
</tr>
<tr>
<td>Short-term rentals - AirDNA</td>
<td>2. Accommodation</td>
<td>45 %</td>
<td>23 %</td>
<td>Aug 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Seat capacity - domestic - IATA</td>
<td>3. Air transport</td>
<td>6 %</td>
<td>11 %</td>
<td>Jul 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Passenger Demand - domestic - IATA</td>
<td>3. Air transport</td>
<td>3 %</td>
<td>9 %</td>
<td>Jul 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Passenger Demand - International - IATA</td>
<td>3. Air transport</td>
<td>-14 %</td>
<td>-10 %</td>
<td>Jul 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Int. Tourist Arrivals - UNWTO</td>
<td>1. Tourism - general</td>
<td>-16 %</td>
<td>-10 %</td>
<td>Jul 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Seat capacity - International - IATA</td>
<td>3. Air transport</td>
<td>-15 %</td>
<td>-11 %</td>
<td>Jul 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Actual Air Reservations - ForwardKeys</td>
<td>3. Air transport</td>
<td>-40 %</td>
<td>-32 %</td>
<td>Sep 2023</td>
<td>Compared to 2019</td>
</tr>
<tr>
<td>Travel Search - Accommodation - Google</td>
<td>2. Accommodation</td>
<td>-74 %</td>
<td>-84 %</td>
<td>Sep 2023</td>
<td>Compared to previous year</td>
</tr>
<tr>
<td>Travel Search - Flights - Google</td>
<td>3. Air transport</td>
<td>-84 %</td>
<td>-84 %</td>
<td>Sep 2023</td>
<td>Compared to previous year</td>
</tr>
</tbody>
</table>
Looking ahead
International tourist arrivals, 2020-2022 and Scenarios for 2023 (monthly % change over 2019)


* Actual data for 2023 is preliminary and based on estimates for destinations which have not yet reported results.
When do you expect international tourism to return to 2019 levels in your country?

Source: UNWTO Panel of Experts Survey (Sept. 2023)
When do you expect international tourism to return to 2019 levels in your country?

UNWTO Panel of Experts Survey

Percentage of responses by world region

- **World**
  - 2025 or later: 37%
  - 2024: 47%
  - 2023: 15%
  - Already achieved: 27%

- **Africa**
  - 2025 or later: 20%
  - 2024: 36%
  - 2023: 15%
  - Already achieved: 28%

- **Americas**
  - 2025 or later: 21%
  - 2024: 36%
  - 2023: 36%
  - Already achieved: 15%

- **Asia Pacific**
  - 2025 or later: 50%
  - 2024: 41%
  - 2023: 3%
  - Already achieved: 6%

- **Europe**
  - 2025 or later: 11%
  - 2024: 36%
  - 2023: 19%
  - Already achieved: 34%

- **Middle East**
  - 2025 or later: 25%
  - 2024: 75%
  - 2023: 0%
  - Already achieved: 0%

Source: UNWTO Panel of Experts Survey (Sept. 2023)
What are the main factors weighing on the recovery of international tourism?

Source: UNWTO Panel of Experts Survey (Sept. 2023)
Key factors for the future of tourism

Digitalization & innovation
The digitalization of destinations and companies, including the use of big data + The creation of tourism experiences and processes in line with new market trends (diversification of markets and segments).

Whole of government approach + PPC
Coordination of all levels of government in the planning and management of tourism and public/private/community partnerships.

Talent and education
Investment in talent, education and skills development.

Sustainability
People – Planet – Prosperity – Partnerships : Alignment with the SDGs. Step up measurement and reporting.
Xie Xie!