



UN Tourism

# World Tourism Barometer

Volume 22, Issue 2 - May 2024 (EXCERPT)

**International tourism reached 97%  
of pre-pandemic levels in Q1 2024**



## 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](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-May 2024.

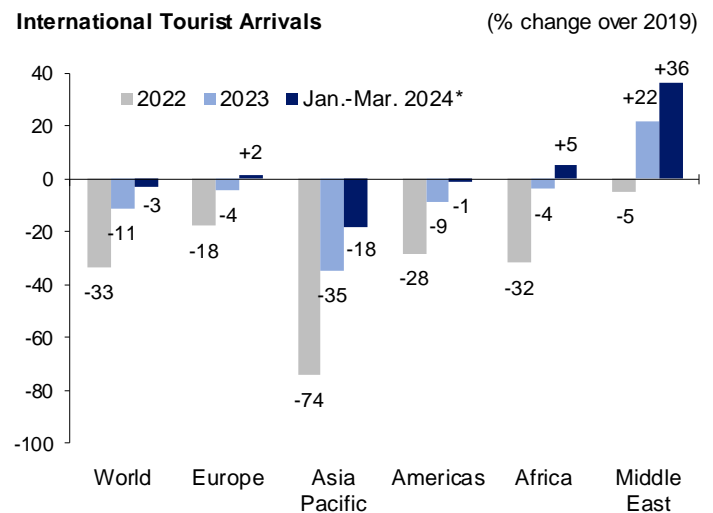
The next issue of the *World Tourism Barometer* with more comprehensive results is scheduled to be published in September 2024.

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](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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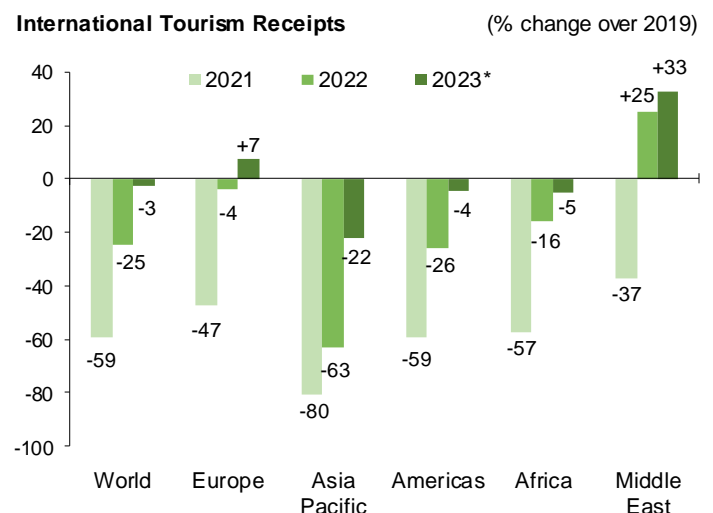
## International tourism reached 97% of pre-pandemic levels in the first quarter of 2024

- International arrivals (overnight visitors) reached 97% of 2019 levels in the first quarter of 2024, reflecting an almost complete recovery of pre-pandemic numbers.
- An estimated 285 million tourists travelled internationally in the first three months of 2024, about 20% more than in the same period of 2023. These results were boosted by continued strong demand, the opening of Asian markets, as well as by enhanced air connectivity and visa facilitation.
- The Middle East saw the strongest relative growth, with international arrivals exceeding by 36% pre-pandemic levels in Q1 2024. Europe exceeded pre-pandemic levels for the first time in a quarter (+1% from Q1 2019).
- Africa welcomed 5% more arrivals in the first quarter of 2024 than in Q1 2019, while the Americas practically reached pre-pandemic numbers (99%).
- Arrivals in Asia and the Pacific recovered 82% of pre-pandemic levels in Q1 2024, after recovering 65% in 2023.
- By subregions, North Africa saw the strongest performance with 23% more international arrivals in Q1 2024 than before the pandemic, followed by Central America (+15%), the Caribbean and Western Europe (both +7%).
- Total export revenues from international tourism, including both receipts and passenger transport, reached USD 1.7 trillion in 2023, about 96% of pre-pandemic levels in real terms (i.e. excluding inflation).
- Tourism direct GDP recovered pre-pandemic levels in 2023, reaching an estimated USD 3.3 trillion, equivalent to 3% of global GDP.
- The latest UN Tourism Confidence Index shows positive prospects for the period May-August 2024, though economic and geopolitical headwinds continue to pose significant challenges to the complete recovery of international tourism and confidence levels.



Source: UN Tourism

\* Provisional data



Source: UN Tourism

\* Provisional data

## Inbound tourism

### *International tourism starts on a strong note with a 20% increase in the first quarter of 2024*

- An estimated 285 million tourists travelled internationally in the first three months of 2024, about 20% more than in the same period of 2023.
- International arrivals reached 97% of 2019 levels in the first quarter of 2024, reflecting an almost complete recovery of pre-pandemic numbers. This follows a particularly strong 2023, when arrivals reached 89% of pre-pandemic numbers.
- This performance is in line with UN Tourism's projection for 2024 which points to a full recovery of pre-pandemic levels in 2024, with arrivals growing 2% above 2019 levels.
- Results were boosted by continued strong demand, enhanced air connectivity and visa facilitation. According to the latest Tourism Visa Openness report by UN Tourism (Sustainable Development of Tourism Department, May 2024, [www.e-unwto.org/doi/10.18111/9789284425044](http://www.e-unwto.org/doi/10.18111/9789284425044)), destinations' openness to international travel has rebounded to pre-pandemic levels following the lifting of COVID-19 related travel restrictions.
- The robust performance of international tourism can also be seen in the **UN Tourism Confidence Index** which reached 130 points (on a scale of 0 to 200) for the period January-April, above the expectations (122) expressed for this period in mid-January.

### *The Middle East continued to see the strongest relative growth in arrivals, while Africa and Europe exceeded pre-pandemic levels*

- The **Middle East** saw the strongest relative growth, with international arrivals exceeding pre-pandemic levels by 36% in Q1 2024, or 4% above Q1 2023. This follows an extraordinary performance in 2023, when the Middle East became the first world region to recover pre-pandemic numbers (+22%).
- Several destinations in the region enjoyed extraordinary results, among which Qatar (+177%) and Saudi Arabia (+98%).
- **Europe**, the world's largest destination region, exceeded pre-pandemic levels for the first time in a quarter (+1% from Q1 2019) with 120 million international tourists in the first three months of the year, backed by robust intra-regional demand.
- Some of the strongest results in Europe were reported by Albania (+121% over 2019) where arrivals more than doubled Serbia (+43%), Bulgaria (+38%), Malta (+37%), Norway (+34%) and Andorra (+30%).
- Among the larger destinations, Türkiye recorded 29% more arrivals, Portugal 26% and Greece 25%. Spain exceeded by 13% its pre-pandemic numbers in Q1 2024, while France saw 11% more arrivals, after reaching the 100 million visitor mark in 2023.
- **Africa** welcomed 5% more arrivals in the first quarter of 2024 than in Q1 2019, and 14% more than in Q1 2023.
- Tanzania (+53%), Morocco (+32%) and Algeria (+17%) all exceeded their 2019 numbers in the first three months of 2024.
- **The Americas** practically recovered pre-pandemic numbers in the first quarter of 2024, with arrivals reaching 99% of 2019 levels, backed by solid intra-regional demand. Strong travel from the United States benefitted destinations in Central America and the Caribbean in particular.
- El Salvador (+90%), Curaçao (+45%), Turks and Caicos (+42%), Guatemala (+41%), Colombia (+32%), the Dominican Republic (+24%) and Puerto Rico (+21%), were among the strongest performers in Q1 2024.
- International tourism is experiencing a rapid recovery in **Asia and the Pacific** where arrivals reached 82% of pre-pandemic levels in Q1 2024, after recovering 65% in the year 2023 when most destinations started re-opening to international visitors.
- All Asian subregions saw strong growth this first quarter, with South Asia recovering 93% of pre-pandemic levels, South-East Asia 89% and Oceania 85%. While North-East Asia is still lagging somewhat behind with a 73% recovery, the subregion saw

arrivals more than double in the first three months of 2024 compared to the same period last year.

- Among the best performers in Asia and the Pacific were Maldives (+25%), Mongolia (+14%), Fiji (+13%), Samoa (+4%) and Vietnam (+3%). Japan saw 6% more international arrivals, reflecting the sustained recovery of inbound tourism to the destination and a very favourable exchange rate of the yen for inbound travel.
- While official data is still pending for China, Trip.com pointed that significant growth was recorded in international and inbound travel during the Lunar New Year travel period (10 to 17 February), based on bookings data. Both inbound and outbound travel increased tenfold, fuelled by more relaxed visa policies, particularly to and from Asia Pacific destinations. This was accompanied by an increase in expenditure, particularly on flights.
- Strong demand for outbound travel was reported by several large source markets. Germany and the United States spent 37% and 33% more on outbound travel respectively, while Italy spent 29% more. Outbound expenditure from France increased 5% through February.
- The performance of industry indicators also reflects this recovery. According to the [UN Tourism Recovery Tracker](#), both international air capacity and passenger demand recovered around 98% of 2019 levels through February 2024 (IATA). Global occupancy rates in accommodation establishments reached 65% in March 2024, about the same level as in March 2023 (66%) based on STR data.

#### **North Africa and Central America saw the strongest performance among subregions**

- By subregions, North Africa saw the strongest performance with 23% more international arrivals in Q1 2024 than before the pandemic, followed by Central America (+15%), the Caribbean and Western Europe (both +7%). Southern Mediterranean Europe exceeded pre-pandemic levels by 1%, while South America virtually reached 2019 levels.
- Northern Europe recovered 98% of pre-pandemic levels, while Sub-Saharan Africa and North America both recovered 96%.

#### **Total export revenues from international tourism reached US\$ 1.7 trillion in 2023, with the Middle East and Europe exceeding pre-pandemic levels.**

- **International tourism receipts** reached USD 1.5 trillion in 2023, up 28% in real terms (local currencies and constant prices) from 2022, driven by the important rebound in international travel.
- As a result, receipts recovered pre-pandemic levels in nominal terms, but reached 97% of those levels in real terms, after adjusting for inflation (-3% compared to 2019).
- **Total export revenues from international tourism**, including both receipts and passenger transport, reached USD 1.7 trillion in 2023, about 96% of pre-pandemic levels in real terms (-4% versus 2019).
- By regions, Europe generated the highest receipts in 2023, with destinations earning USD 660 billion, exceeding pre-pandemic levels by 7% in real terms. Receipts in the Middle East climbed 33% above 2019 levels.
- The Americas recovered 96% of its pre-pandemic earnings in 2023 and Africa 95%.
- Asia and the Pacific earned 78% of its pre-crisis receipts, a remarkable result when compared to its 65% recovery in arrivals last year.
- According to available data, several destinations around the world achieved remarkable results in terms of receipts in the first quarter of 2024 (in nominal terms) as compared to 2019, including Serbia (+127%), Türkiye (+82%), Pakistan (+72%), Tanzania (+62%), Portugal (+61%), Romania (+57%), Japan (+53%), Mongolia (+50%), Mauritius (+46%) and Morocco (+44%).
- Many destinations have seen growth in receipts exceeding the increase in their arrivals, reflecting a higher average spending per trip and partly due to the effect of inflation. Favourable exchange rates have also benefitted the price competitiveness of several destinations.
- **Tourism direct GDP** recovered pre-pandemic levels in 2023, reaching an estimated USD 3.3 trillion, equivalent to 3% of global GDP.

### ***Strong travel demand expected in the Northern Hemisphere summer season***

- International tourism is expected to recover completely in 2024 backed by strong demand, enhanced air connectivity and the continued recovery of China and other major Asian markets.
- The latest **UN Tourism Confidence Index** shows positive prospects for the upcoming summer season, with a score of 130 for the period May-August 2024 (on a scale of 0 to 200), reflecting more upbeat sentiment than earlier this year.
- Some 62% of tourism experts participating in the Confidence survey expressed better (53%) or much better (9%) expectations for this 4-month period, covering the Northern Hemisphere summer season, while 31% foresee similar performance as in 2023.
- Europe will be the scenario of two major international sports events during summer. Paris will host the 2024 Summer Olympics in July and August, right after the UEFA EURO in Germany during June and July.

### ***Challenges remain ahead***

- According to the UN Tourism Panel of Experts, **economic and geopolitical headwinds** continue to pose significant challenges to the sustained recovery of international tourism and confidence levels. Despite some improvement, persisting inflation, high interest rates, volatile oil prices and disruptions to trade continue to translate into high transport and accommodations costs.
- Uncertainty derived from the Russian aggression against Ukraine, the Hamas-Israel conflict and other mounting geopolitical tensions, are also important downside risks for international tourism.
- IMF's latest World Economic Outlook (April 2024) points to a steady but slow economic recovery, though mixed by region. Global growth could remain at 3.2% in 2024 and 2025, the same as in 2023, while inflation is expected to decline slowly.

- Tourists are expected to continue to seek **value for money** and **travel closer to home** in response to elevated prices and the overall economic challenges, while extreme temperatures and other weather events could impact the destination choice of many travellers. The impact of extreme weather events is increasingly mentioned by the UN Tourism Panel of Experts as a growing concern for the sector.
- As international tourism continues to recover and expand, fuelling economic growth and employment around the world, governments will need to continue adapting and enhancing their management of tourism at the national and local level to ensure communities and residents are at the center of this development.

## International Tourist Arrivals by (Sub)region

	(millions)					Share				Change (%)				Change (%)							
						2023*		vs. previous year <sup>2</sup>		vs. 2019		2024 versus 2023 <sup>3</sup>		2024 versus 2019							
	2019	2020	2021	2022	2023*	2023*	20/19	21/20	22/21	23/22*	21/19	22/19	23/19*	YTD	Jan.	Feb.	Mar.	YTD	Jan.	Feb.	Mar.
<b>World</b>	<b>1465</b>	<b>406</b>	<b>459</b>	<b>975</b>	<b>1300</b>	<b>100</b>	<b>-72.3</b>	<b>13.1</b>	<b>112.2</b>	<b>33.4</b>	<b>-68.6</b>	<b>-33.5</b>	<b>-11.2</b>	<b>19.8</b>	<b>18.7</b>	<b>21.2</b>	<b>19.6</b>	<b>-2.9</b>	<b>-4.8</b>	<b>-1.1</b>	<b>-2.8</b>
Advanced economies <sup>1</sup>	776	221	240	546	718	55.3	-71.5	8.9	127.1	31.6	-69.0	-29.6	-7.4	6.7	17.6	20.3	21.8	-0.7	-3.8	0.5	1.0
Emerging economies <sup>1</sup>	689	186	219	429	582	44.7	-73.1	18.1	95.9	35.6	-68.2	-37.8	-15.6	20.0	19.8	22.2	17.2	-5.1	-5.6	-2.7	-6.7
<i>By UNWTO regions:</i>																					
<b>Europe</b>	<b>742.4</b>	<b>239.4</b>	<b>300.9</b>	<b>609.5</b>	<b>709.4</b>	<b>54.6</b>	<b>-67.7</b>	<b>25.7</b>	<b>102.5</b>	<b>16.4</b>	<b>-59.5</b>	<b>-17.9</b>	<b>-4.4</b>	<b>10.4</b>	<b>4.7</b>	<b>9.3</b>	<b>16.2</b>	<b>1.5</b>	<b>-0.8</b>	<b>2.0</b>	<b>3.0</b>
Northern Europe	82.1	23.7	21.9	67.1	79.7	6.1	-71.1	-7.8	206.6	18.8	-73.3	-18.3	-2.9	5.1	-4.5	6.1	13.4	-1.8	-6.6	-0.6	1.3
Western Europe	205.2	83.5	87.6	182.8	208.3	16.0	-59.3	4.9	108.6	14.0	-57.3	-10.9	1.6	12.7	5.5	9.3	22.4	7.2	4.9	6.5	9.6
Central/Eastern Eur.	150.9	43.8	52.6	94.1	112.4	8.6	-71.0	20.0	78.8	19.5	-65.2	-37.7	-25.5	6.8	6.0	7.5	6.9	-21.7	-23.0	-21.2	-20.8
Southern/Medit. Eur.	304.2	88.4	138.9	265.5	308.9	23.8	-71.0	57.1	91.2	16.3	-54.4	-12.7	1.5	11.8	6.9	11.2	16.2	0.6	11.4	14.0	10.7
- of which EU-27	539.2	182.8	222.3	454.3	527.3	40.6	-66.1	21.6	104.4	16.1	-58.8	-15.7	-2.2	12.2	6.9	9.7	18.8	5.1	2.2	5.2	7.2
<b>Asia and the Pacific</b>	<b>362.7</b>	<b>58.9</b>	<b>26.6</b>	<b>93.3</b>	<b>237.2</b>	<b>18.2</b>	<b>-83.7</b>	<b>-54.8</b>	<b>250.4</b>	<b>154.2</b>	<b>-92.7</b>	<b>-74.3</b>	<b>-34.6</b>	<b>60.8</b>	<b>69.7</b>	<b>67.6</b>	<b>47.6</b>	<b>-18.1</b>	<b>-20.5</b>	<b>-15.4</b>	<b>-18.4</b>
North-East Asia	170.3	20.3	10.9	20.5	94.4	7.3	-88.1	-46.4	88.9	360.7	-93.6	-88.0	-44.5	110	146	119	81	-26.6	-31.1	-23.9	-24.7
South-East Asia	138.6	25.5	3.3	42.3	99.0	7.6	-81.6	-86.9	↑ 134.1	↑ 134.1	-97.6	-69.5	-28.6	44.0	44.6	51.8	36.4	-11.2	-12.4	-9.7	-11.3
Oceania	17.5	3.6	0.8	6.8	12.9	1.0	-79.4	-78.9	791.9	90.5	-95.7	-61.3	-26.2	31.5	33.5	37.8	23.8	-14.8	-19.3	-12.4	-13.1
South Asia	36.3	9.6	11.7	23.8	30.9	2.4	-73.5	21.6	103.5	30.0	-67.8	-34.4	-14.8	19.9	29.3	26.4	4.3	-7.0	-2.6	-1.6	-17.1
<b>Americas</b>	<b>219.3</b>	<b>69.7</b>	<b>81.8</b>	<b>157.2</b>	<b>200.2</b>	<b>15.4</b>	<b>-68.2</b>	<b>17.2</b>	<b>92.2</b>	<b>27.4</b>	<b>-62.7</b>	<b>-28.3</b>	<b>-8.7</b>	<b>10.6</b>	<b>8.6</b>	<b>11.7</b>	<b>11.5</b>	<b>-1.0</b>	<b>-2.0</b>	<b>0.8</b>	<b>-1.5</b>
North America	146.6	46.5	57.2	101.9	127.0	9.8	-68.3	23.1	78.2	24.6	-61.0	-30.5	-13.4	9.7	8.4	11.8	9.2	-4.8	-4.5	-2.8	-6.7
Caribbean	26.1	10.4	14.5	23.6	28.1	2.2	-60.1	39.5	62.3	19.5	-44.4	-9.7	7.8	8.9	6.9	9.4	10.1	7.4	7.0	8.9	6.5
Central America	10.9	3.1	4.7	9.3	11.5	0.9	-71.6	51.1	97.6	23.9	-57.1	-15.3	4.9	19.1	17.2	20.7	19.4	15.4	5.8	21.2	20.5
South America	35.6	9.8	5.3	22.4	33.6	2.6	-72.6	-45.2	319.3	49.9	-85.0	-37.1	-5.6	11.6	7.5	10.6	17.9	-0.2	-3.0	-0.5	3.6
<b>Africa</b>	<b>69.0</b>	<b>18.8</b>	<b>19.9</b>	<b>47.0</b>	<b>66.3</b>	<b>5.1</b>	<b>-72.7</b>	<b>5.4</b>	<b>136.6</b>	<b>41.2</b>	<b>-71.2</b>	<b>-31.9</b>	<b>-3.9</b>	<b>12.6</b>	<b>11.6</b>	<b>15.4</b>	<b>11.2</b>	<b>5.4</b>	<b>5.3</b>	<b>10.1</b>	<b>1.2</b>
North Africa	25.6	5.6	6.6	19.1	27.0	2.1	-78.2	17.9	190.8	41.4	-74.4	-25.4	5.4	11.2	8.7	17.9	7.3	23.3	24.6	34.1	12.9
Subsaharan Africa	43.4	13.3	13.3	27.9	39.3	3.0	-69.5	0.2	109.9	41.0	-69.4	-35.8	-9.5	13.7	13.5	13.4	14.2	-4.7	-4.3	-3.7	-6.2
<b>Middle East</b>	<b>71.3</b>	<b>19.4</b>	<b>30.2</b>	<b>67.8</b>	<b>87.0</b>	<b>6.7</b>	<b>-72.8</b>	<b>55.9</b>	<b>124.5</b>	<b>28.3</b>	<b>-57.7</b>	<b>-4.9</b>	<b>22.0</b>	<b>3.6</b>	<b>11.0</b>	<b>4.5</b>	<b>-3.7</b>	<b>36.1</b>	<b>36.9</b>	<b>42.5</b>	<b>29.5</b>
<i>Memorandum<sup>3</sup></i>																					
ASEAN	138.6	25.5	3.3	42.3	99.0	7.6	-81.6	-86.9	↑ 134.1	↑ 134.1	-97.6	-69.5	-28.6	44.0	44.6	51.8	36.4	-11.1	-12.4	-9.7	-11.3
G20	1000	300	348	719	901.1	69.3	-70.0	16.1	106.4	25.3	-65.2	-28.1	-9.9	18.1	13.9	18.7	21.3	-1.1	-3.7	0.4	-0.1
GCC	47.7	13.4	18.3	47.7	61.7	4.7	-71.9	36.3	160.8	29.3	-61.7	0.0	29.3	5.0	14.1	5.1	-3.5	48.0	47.8	54.8	41.7
LDCs	34.4	9.8	7.5	16.9	27.6	2.1	-71.4	-23.7	124.8	63.7	-78.2	-51.0	-19.7	20.7	24.3	18.9	19.1	-16.6	-14.3	-16.2	-19.0
LLDCs	50.4	12.0	12.7	31.8	43.4	3.3	-76.2	5.8	150.1	36.3	-74.8	-36.9	-14.0	6.7	7.4	4.6	7.8	-12.7	-13.1	-11.9	-13.1
SIDS	43.7	10.4	13.5	29.3	41.1	3.2	-76.3	29.6	117.7	40.1	-69.2	-33.0	-6.1	14.9	13.1	16.8	14.9	-0.6	-3.5	1.5	0.2

Source: World Tourism Organization (UN Tourism)

(Data as collected by UN Tourism, May 2024)

\* 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 *UN Tourism Recovery Tracker*: <https://www.unwto.org/unwto-tourism-recovery-tracker>



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