



UN Tourism

World Tourism Barometer

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International tourist arrivals grew 5%
in January-March 2025



UN Tourism

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About the *World Tourism Barometer*

The *World Tourism Barometer* is a publication of the World Tourism Organization (UN Tourism) 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.

We welcome your comments and suggestions at: barom@unwto.org.

Data collection for this issue was closed mid-May 2025.

The next issue of the *World Tourism Barometer* with more comprehensive results is scheduled to be published in September 2025.

Pages 1–7 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. This release is available in English, while the Statistical Annex is provided in English, French and Spanish.

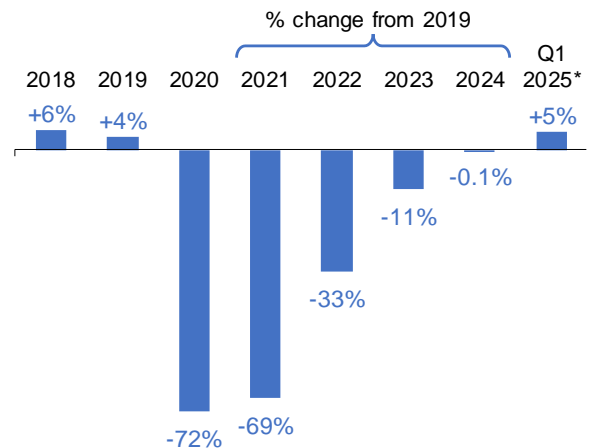


Key results

International tourist arrivals grew 5% in January-March 2025

- International tourist arrivals (overnight visitors) increased by 5% in the first quarter of 2025 (compared to the same period in 2024), or 3% above pre-pandemic year 2019.
- Over 300 million tourists travelled internationally in Q1 2025, about 14 million more than in the same period of 2024.
- Despite growing geopolitical and trade tensions, the start of 2025 saw robust and sustained travel demand, though results were mixed among regions and subregions.
- Africa (+9%) showed the strongest performance in Q1 2025 as compared to the first quarter of 2024, while the Americas, Europe (both +2%) and the Middle East (+1%) saw comparatively more modest results. Asia and the Pacific (+13%) continued to rebound strongly, though arrivals still remained slightly below pre-pandemic levels.
- Available data on international tourism receipts show strong visitor spending this early part of 2025, building on the strong momentum of 2024 with many destinations reporting solid growth in earnings.
- 2024 data on total export revenues from international tourism (receipts and passenger transport) have been revised upwards showing 11% growth (in real terms) over 2023 to reach a record USD 2.0 trillion. This is 15% above pre-pandemic levels.
- Looking ahead, the latest UN Tourism Confidence Index reflects cautious optimism for the period May-August 2025, with a score of 114 (on a scale from 0 to 200), down from 130 in the same period of 2024.
- Economic and geopolitical challenges continue to pose significant risks to the sustained performance of tourism and travelers' confidence. In this context, tourists are expected to continue seeking value for money according to the UN Tourism Panel of Experts.
- Despite global uncertainty, travel demand is expected to remain resilient. UN Tourism's January projection of 3% to 5% growth in international arrivals for 2025 remains unchanged.

International tourist arrivals (% change)

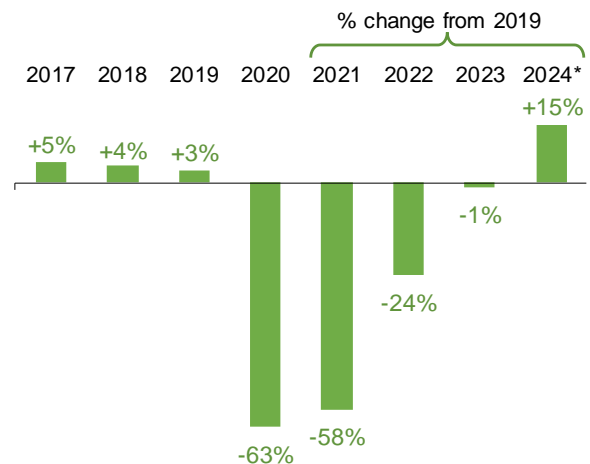


Source: UN Tourism (May 2025)

* Provisional data

Note: percentage change for 2021 to 2024 is relative to 2019

International tourism receipts (real % change)



Source: UN Tourism (May 2025)

* Provisional data

Note: percentage change for 2021 to 2024 is relative to 2019

Inbound tourism

International tourism shows sustained momentum at the start of 2025

- International tourist arrivals (overnight visitors) increased 5% in January-March 2025 compared to the same period in 2024, or 3% more than in pre-pandemic year 2019.
- This follows a landmark year in 2024, when international tourism fully recovered pre-pandemic levels to reach 1.5 billion.
- Over 300 million tourists travelled internationally in the first three months of 2025, about 14 million more than in the same months of 2024.
- Growth slowed after a strong start of the year, from 11% in January, to 3% in February and 2% in March (compared to 2024) though these results are partly due to the calendar effect, since Easter fell in April this year, instead of March in 2024.
- February also had one day less, compared to leap year 2024, partly affecting traveller numbers that month.
- Overall, the start of 2025 saw robust and sustained travel demand despite growing geopolitical and trade tensions, though results were mixed among regions and subregions.
- Africa showed the strongest performance in Q1 2025 compared to same period in 2024, while the Americas, Europe and the Middle East saw comparatively more modest results. Asia and the Pacific continued to rebound strongly, though arrivals remained slightly below pre-pandemic levels (-8% compared to 2019).
- Central and Eastern Europe rebounded strongly (+8% over 2024), especially Baltic destinations, though visitor numbers in the subregion still remain somewhat below 2019 levels.
- North Macedonia (+22%), Lithuania (+21%), Malta (19%), Latvia (16%), Finland (+15%) and Spain (+6%) showed robust performance among European destinations with available data for Q1 2025.
- **Africa** recorded 9% growth in international arrivals in Q1 2025, compared to 2024, exceeding pre-pandemic traveller numbers by 16%.
- The best performers in Africa according to available data for Q1 2025 include The Gambia (+46%), Morocco (+22%), Ethiopia (+7%) and South Africa (+6%).
- The **Americas** saw 2% more international arrivals in Q1 2025, with several destinations in South America (+13%) enjoying strong results during the Southern Hemisphere summer season.
- In the Americas, the best performers in Q1 2025 include Paraguay (+53%), Brazil and Chile (both +48%), as well as Ecuador (+17%). Mexico saw 6% more international arrivals in the first three months of 2025 compared to the previous year.
- The **Middle East** recorded 1% growth in Q1 2025 compared to Q1 2024, a more modest increase following the extraordinary performance in 2024. However, arrivals stood 44% above pre-pandemic levels this first quarter of 2025, the strongest regional results relative to 2019.
- Egypt (+21%), Jordan and Bahrain (both +9%) saw the highest growth in arrivals in the first quarter of 2025, according to available data for the Middle East.
- Arrivals in **Asia and the Pacific** grew 12% in Q1 2025, equivalent to 92% of pre-pandemic numbers (-8% from 2019), as the region continued to rebound rapidly. North-East Asia saw the strongest performance among world subregions this quarter, with 23% more international arrivals than in 2024, reaching 91% of pre-pandemic levels (-9% compared to 2019).

Africa shows solid results, while Asia and the Pacific rebounds strongly

- **Europe** welcomed 125 million international tourists in the first three months of the year, up 2% from Q1 2024, and 5% more than the same period before the pandemic.
- In Southern Mediterranean Europe arrivals increased 2%, reflecting growing demand for off-season travel to some destinations.

- Japan (+23%) continued to show solid results in Q1 2025 supported by the depreciation of the yen and growing visitor numbers from Europe and North America. Mongolia (+19%), the Republic of Korea (+14%) and Laos (+11%) also saw double-digit growth in arrivals as compared to 2024.
- Other industry indicators reflect the sector's robust performance in the first quarter of the year, with international air traffic (measured in RPKs) growing 8% in January-March 2025 versus Q1 2024 (or +6% over 2019) according to IATA. International air capacity (measured in ASKs) showed a 7% increase in the same period (+5% over 2024).
- Global occupancy rates in accommodation establishments reached 64% in March 2025, about the same level as in March 2024 (65%), based on STR data.
- See more industry indicators in the [UN Tourism Data Dashboard](#).

Strong growth in receipts across many destinations in early 2025

- Available data on international tourism receipts for Q1 2025 shows solid growth in visitor spending in many destinations, especially in Europe and Asia and the Pacific.
- Spain, the world's second largest tourism earner, reported 9% growth in January-February 2025 (compared to the same two months in 2024), after a remarkable 16% increase in the full year of 2024.
- Also in Southern Mediterranean Europe, Türkiye saw a 7% increase in Q1 2025, while Greece, Italy and Portugal all reported 4% growth in receipts.
- France recorded 6% growth in international tourism receipts in the first quarter, while Norway reported 20% and Denmark 11%.
- In Asia and the Pacific, Japan continued to enjoy a surge in receipts in Q1 (+34%), while Nepal (+18%), the Republic of Korea and Mongolia (both +14%) also recorded double-digit growth.
- The United States, the world's top tourism earner, reported 3% growth in January-March 2025, after an 14% increase in the year 2024.

Export revenues from tourism revised upwards to USD 2.0 trillion in 2024

- Revised data shows total export revenues from international tourism (receipts and passenger transport) growing by 11% (real terms) to reach a record USD 2.0 trillion in 2024, or 15% above pre-pandemic levels.
- This represents about 6% of the world's total exports of goods and services and 23% of global trade in services.
- International tourism receipts, the main component of tourism revenues, grew 11% to USD 1.7 trillion, also in real terms (adjusted for inflation and exchange rate fluctuations).
- This exceeds UN Tourism's preliminary estimates (January 2025) and reflects stronger-than-expected visitor spending in many destinations, mostly in Europe and the Americas, despite the fact that inflation in services continues to be higher than in the overall economy.
- Tourism inflation eased moderately to 8.0% in 2024 but still exceeded the 5.7% headline rate of inflation. (See methodology of new tourism inflation proxy in the section on international tourism receipts).
- Average spending remained at USD 1,170 per international trip in 2024 (constant dollars), above the pre-pandemic average of USD 1,000 per trip.
- Growth in receipts in 2024 was fueled by strong spending from large source markets such as the United Kingdom (+16% over 2023), Canada (+13%), the United States (+12%), Australia (+8%) and France (+7%). China, the world's top tourism spender saw outbound expenditure climbing 30% to USD 251 billion, about 3% above pre-pandemic levels.
- Other major markets reporting strong growth in spending last year include Saudi Arabia (+17%) which already saw remarkable growth in 2023, Spain (+14%), Belgium (+14%), Netherlands (+13%) and Austria (+11%).
- Available data for Q1 2025 point to robust spending from the United States (+8%), as well as France, Italy and the Republic of Korea (all +4%). In Taiwan (province of China) tourism expenditure grew by 30%, and in Brazil by 12%.

Economic and geopolitical headwinds continue to pose significant risks

- The latest Panel of Tourism Experts survey points to economic factors including weaker economic growth, high travel costs and the recent increase in tariffs as the main challenges that could impact international tourism in 2025.
- The increase in tariffs was ranked as the third major concern by the Panel in the May 2025 survey. Tariffs are taxes on imported goods and as such, can lead to higher consumer prices and thus put pressure on household consumption expenditure as well as disrupt global value chains.
- Uncertainty from growing geopolitical and trade tensions are also weighing on travel confidence. Lower consumer confidence was ranked fourth among the factors expected to affect tourism this year, while geopolitical risks (aside from ongoing conflicts) ranked fifth.
- According to the survey, tourists will continue to seek value for money but could also travel closer to home and make shorter trips to spend less, in response to elevated prices.
- While one third of survey respondents indicate little or no impact from trade tensions on tourism performance, some 25% expect some impact in the near future.
- IMF's latest World Economic Outlook (April 2025) shows weaker economic and trade prospects, partly due to the imposition of import tariffs by the US and resulting policy uncertainties. Despite falling global inflation, services inflation remains high by historical standards.
- On the upside, oil prices are expected to drop 15% in 2025 and 7% in 2026, partly the result of weaker demand, which may reduce transport and business costs. The depreciation of several currencies against the US dollar, such as the Japanese yen, the Turkish lira, the Egyptian pound or the Argentinian peso (due to a devaluation in late 2023), could continue to raise the price attractiveness of those and other destinations.
- Despite increased global uncertainty, travel demand is expected to remain resilient.
- UN Tourism's January 2025 projection of 3% to 5% growth in international arrivals for the year 2025 remains unchanged.

Cautious optimism for upcoming Northern Hemisphere summer season

- The latest UN Tourism Confidence Index reflects cautious optimism for the period May-August 2025 which includes the summer season in the Northern Hemisphere.
- On a scale of 0 to 200 (where 100 indicates equal expected performance), experts gave the period May-August 2025 a score of 114, down from 125 for January-April 2025, and below 130 for May-August 2024.
- Some 45% of Panel experts indicated better (40%) or much better (5%) prospects for this 4-month period, while 33% foresee similar performance than in the same period of 2024. Some 22% expect tourism performance to be worse.
- Experts highlighted the uncertainty and unpredictability derived from import tariffs and its potential impact on the economy and travel sentiment.

International Tourist Arrivals by (Sub)region

										Monthly data								
							Share	Change (%)		Change (%)								
	(millions)						(%)			2025 over 2024*				2025 over 2019*				
	2019	2020	2021	2022	2023	2024*	2024*	24/23*	24/19*		YTD	Jan.	Feb.	Mar.	YTD	Jan.	Feb.	Mar.
World	1466	408	461	976	1306	1465	100	12.2	-0.1	4.9	10.9	2.6	1.7	3.4	7.4	3.5	-0.2	
Advanced economies ¹	775	221	240	545	715	782	53.3	9.3	0.8	2.9	8.2	2.7	1.5	3.2	5.6	2.7	1.5	
Emerging economies ¹	691	187	221	430	591	683	46.7	15.7	-1.1	6.9	13.4	4.3	-2.1	3.7	9.0	4.3	-2.1	
By UNWTO regions:																		
Europe	743.9	240.8	302.8	610.7	710.2	755.7	51.6	6.4	1.6	1.9	4.3	1.8	0.1	5.1	6.4	6.0	3.2	
Northern Europe	82.1	23.7	21.9	67.1	79.0	85.2	5.8	8.0	3.8	0.1	-4.4	1.0	3.4	5.7	4.4	5.8	6.9	
Western Europe	205.2	83.5	87.6	182.8	207.9	215.7	14.7	3.8	5.1	0.0	7.0	-0.3	-5.2	6.9	12.2	6.0	3.4	
Central/Eastern Eur.	152.5	45.2	54.4	95.2	114.8	124.5	8.5	8.4	-18.3	7.7	9.5	8.2	5.5	-13.6	-12.9	-12.5	-15.4	
Southern/Medit. Eur.	304.2	88.4	138.9	265.5	308.5	330.3	22.5	7.0	8.6	1.6	2.9	1.0	1.2	14.8	15.3	18.5	11.6	
- of which EU-27	540.7	184.2	223.7	455.5	526.7	556.1	38.0	5.6	2.8	3.2	7.6	3.5	-0.5	8.4	9.9	9.9	6.1	
Asia and the Pacific	362.1	59.0	26.5	92.7	237.4	317.5	21.7	33.8	-12.3	12.2	25.3	4.9	7.1	-8.0	-1.1	-10.8	-12.1	
North-East Asia	170.3	20.3	10.9	20.5	94.9	144.9	9.9	52.6	-14.9	23.3	34.9	14.8	21.0	-8.6	-5.2	-11.1	-9.6	
South-East Asia	138.1	25.6	3.1	41.6	97.5	121.4	8.3	24.4	-12.1	7.0	23.0	-0.5	-0.8	-7.7	1.9	-12.1	-13.0	
Oceania	17.5	3.6	0.9	6.8	12.9	14.4	1.0	11.5	-17.4	-1.1	10.4	-7.9	-3.9	-15.5	-10.6	-19.2	-16.3	
South Asia	36.3	9.6	11.7	23.8	31.9	36.8	2.5	15.3	1.6	-3.9	7.1	-4.0	-15.9	-2.3	11.3	0.7	-19.3	
Americas	219.3	69.7	81.7	157.1	200.2	216.6	14.8	8.2	-1.2	2.2	7.0	1.8	-2.0	3.0	6.0	3.6	-0.4	
North America	146.6	46.5	57.2	101.9	126.6	137.3	9.4	8.4	-6.3	2.1	6.7	1.1	-1.2	-1.8	1.8	-1.9	-5.1	
Caribbean	26.1	10.4	14.5	23.6	28.2	29.9	2.0	5.9	14.6	-9.7	-7.8	-11.4	-9.8	0.1	1.6	0.3	-1.3	
Central America	10.9	3.1	4.7	9.3	11.5	12.9	0.9	12.1	18.2	-2.1	4.5	-2.5	-7.6	17.1	12.4	19.6	20.0	
South America	35.6	9.8	5.3	22.4	33.8	36.5	2.5	7.9	2.4	12.9	18.2	15.2	4.3	15.2	17.4	16.6	10.8	
Africa	68.8	18.9	19.9	47.2	65.1	73.9	5.0	13.5	7.4	9.4	10.5	6.9	10.9	15.8	15.9	19.4	12.4	
North Africa	25.6	5.6	6.6	19.1	26.9	31.3	2.1	16.3	22.1	10.5	10.1	7.6	13.9	35.9	36.0	44.3	28.6	
Subsaharan Africa	43.2	13.4	13.3	28.1	38.2	42.6	2.9	11.6	-1.3	8.6	10.8	6.3	8.6	4.3	5.8	5.0	2.1	
Middle East	71.6	19.4	30.5	68.0	93.4	101.2	6.9	8.3	41.3	0.8	6.6	-1.4	-3.0	43.7	54.9	50.5	26.9	
Memorandum ²																		
ASEAN	138.0	25.5	3.1	41.6	97.5	121.3	8.3	24.4	-12.1	7.0	14.5	22.6	18.7	-7.7	-14.1	-10.8	-12.6	
G20	1002	301	350	720	902	1002	68.4	11.1	0.0	5.2	6.0	11.0	12.4	5.5	-1.4	4.2	1.1	
GCC	47.7	13.4	18.3	47.8	68.1	75.6	5.2	11.1	58.5	-3.1	-0.1	0.7	2.2	51.7	67.2	58.3	60.8	
LDCs	34.2	9.8	7.5	17.1	27.3	31.2	2.1	14.5	-8.5	13.5	5.5	9.8	15.9	-2.9	-11.4	-7.8	-12.1	
LLDCs	50.2	12.1	13.1	31.9	44.5	50.0	3.4	12.4	-0.3	6.3	11.1	13.2	14.7	4.4	0.0	1.6	0.9	
SIDS	39.5	9.7	11.2	25.0	35.1	38.5	2.6	9.5	-2.6	-3.6	2.1	6.2	4.5	-5.7	-2.2	3.3	-0.5	

Source: World Tourism Organization (UN Tourism)

(Data as collected by UN Tourism, May 2025)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF).² 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 'A-2' for key to abbreviations and symbols.

For regularly updated data, please check the UN Tourism Dashboard: www.unwto.org/tourism-data/un-tourism-tourism-dashboard



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