Travel & Tourism Economic Impact 2025

Global Trends

August 2025

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Foreword

Travel & Tourism, as one of the world's largest economic sectors, is a key driver of exports and generator of global jobs and prosperity. So, it is wonderful to see that in 2024, demand for Travel & Tourism was stronger than it has ever been. The sector's GDP contribution grew 8.5% to reach $10.9 trillion, surpassing 2019 levels by 6%. Travel providers created 20.7 million new jobs, bringing the total to 357 million worldwide. International travellers continued shopping, exploring, and dining out, spending 11.6% more than the previous year, albeit still 1.3% below the pre-pandemic spending peak.

Every region saw a return to pre-pandemic levels of tourism activity. But the pace of growth varied. The Caribbean, where travel represents the largest share of the economy, experienced the fastest growth between 2019 and 2024, up 28.3% on its former peak. The Middle East continued to consolidate its recovery, with tourism's GDP up 16.1% since 2019. The Asia-Pacific region was the slowest to recover, largely due to weaker-than-anticipated growth in China.

In 2025, we expect this positive momentum to continue. The sector is transitioning from a state of recovery to a steadier state of growth. By the end of the year, we forecast that Travel & Tourism will support 14.4 million new jobs, while the sector's contribution to the global economy will have grown by approximately 6.7%. We also predict a record-breaking moment later this year when international visitor spending is set to rise by 10% compared with 2024, surpassing its previous 2019 peak by 8.6%.

There are challenges, however. The world is at an uncertain moment in history marked by growing geopolitical tensions and rising trade frictions. If these headwinds persist, they could disrupt tourism supply chains and suppress tourism demand.

There is, too, the ongoing threat of climate change and biodiversity loss. In 2023, global tourism accounted for around 6.5% of the world's greenhouse gas emissions, underscoring the critical need for continued sustainable innovation as Travel & Tourism expands. Coastal and marine destinations are the most vulnerable. At the World Travel & Tourism Council, we have always pushed for growth that is sustainable, in every sense. If we cannot preserve our most prized destinations, we cannot operate. Working with our members, we have developed projects over the years to catalyse and encourage sustainability-focussed action, from sharing data on our sector's environmental and social footprint to industry-led certifications like the Hotel Sustainability Basics.

Travel & Tourism continues to be resilient, however the sector needs to continue to stay ahead of the curve on key existential issues such as the future of the workforce, and the adoption of emerging technologies such as artificial intelligence to help the sector become more efficient, seamless and sustainable. WTTC will be addressing these issues and providing guidance and recommendations.

This report contains crucial data on the current state of the Travel & Tourism sector. For policymakers, it's a valuable benchmarking tool when planning effective strategies to support the sustainable growth of travel. For industry leaders, it provides hard evidence that can be used when weighing up investment opportunities in different parts of the world. And for researchers, this data is a rich academic resource to further the world's understanding of our sector and its future outlook.

Julia Simpson

Julia Simpson,
President & CEO,
World Travel & Tourism Council

Executive Summary

The Travel & Tourism Economic Impact 2025 Global Trends report provides a comprehensive overview of the Travel & Tourism (T&T) sector's recent performance and outlook. In 2024, despite ongoing geopolitical tensions and macroeconomic headwinds, the global sector once again demonstrated its resilience. Following years of recovery, the sector entered a growth phase, with its GDP contribution rising 6% above 2019 levels. Additionally, the sector supported 19 million more jobs globally compared to the pre-pandemic benchmark, underscoring its critical role in supporting livelihoods and generating prosperity.

Looking ahead, the report offers forecasts for the decade until 2035. The sector's GDP contribution in 2025 is projected to grow 6.7% year-over-year, while its employment contribution is expected to increase by an additional 14.4 million jobs.

Performance analysis of the sector by regions shows particularly strong growth in the Caribbean and the Middle East, where the sector's GDP contribution in 2024 increased 28.3% and 16.1% against 2019 levels, respectively. North America, on the other hand, is expected to record a fall in international visitor spending in 2025.

Select destinations have been highlighted that have achieved strong performances. This includes the incredible surge of inbound visitor spending in Morocco and booming business travel in Italy. Destinations that have underperformed relative to their potential have also been highlighted, such as the US and South Africa (struggling with weak international demand) and China (weak outbound travel). It illustrates different dynamics shaping the sector's recovery and growth across different markets.

Insights from WTTC Members and Knowledge Partners reveal key trends in the sector. Some notable developments include the rise of experiential tourism, growing adoption of AI-powered solutions, and changes in business travel. Additionally, the performances of various segments within Travel & Tourism are discussed, including short-term rentals, the hotel, and the cruise industries.

Lastly, the report contains league tables showing top 20 economies based on various Travel & Tourism indicators, including the sector's contribution to GDP, employment, domestic and international visitor spending, and capital investment.

ECONOMIC IMPACT 2025

The economic impact of global Travel & Tourism

	2019	2024	2025 Forecast
Travel & Tourism **GDP** (percentage share of global GDP)	10.5%	10.0%	10.3%
Travel & Tourism **Change In GDP**		– 2024 vs 2023 – +8.5% +$862BN GDP gain (+6.0% vs 2019)	– 2025 vs 2024 – +6.7% +$729BN GDP gain
Travel & Tourism **Jobs Supported**	337.7M 10.7% of global employment	356.6M 10.6% of global employment	371.0M 10.9% of global employment
Travel & Tourism **Change In Jobs**		– 2024 vs 2023 – +20.7M +6.2% (+5.6% vs 2019)	– 2025 vs 2024 – +14.4M +4.0%

1. Global Overview

1.1 TRAVEL & TOURISM IN 2024

In 2024, a mix of political, technological, and economic factors shaped the global economy. General elections took place in countries home to nearly half of the world's population and that created a climate of political uncertainty and anticipation. At the same time, the rapid rise in artificial intelligence capabilities and applications began to reshape industries, with the promise of enhanced productivity. This also sparked debates around regulations and ethics. Geopolitical tensions proved to be headwind for the global economy. Ongoing conflicts in Ukraine and Middle East, including attacks on shipping containers in the Red Sea, disrupted trade routes and destabilised global supply chains. Rates of inflation trended downwards but didn't return to central bank targets and thus, remained a persistent concern for policymakers. Emerging markets achieved strong growth rates, pushing the global economy upwards. The United States economy also experienced a resilient economic performance, buoyed by expansionary fiscal policy, increases in consumer spending, and a strong labour market. Consumer confidence saw a notable uptick, translating into higher consumer spending in many economies. Against this backdrop, the global economy experienced a "soft landing" as it grew 2.6%. Considering the cautious outlook at the beginning of 2024, the global economy proved to be resilient.

In 2024, consumer spending emerged as one of the key drivers behind this growth. With the removal of nearly all pandemic-related restrictions, elevated levels of accumulated savings, and improved labour market conditions, consumer confidence continued to rise from the lows during the pandemic. Consumers were willing to spend more on discretionary items such as travel. As a result, the global Travel & Tourism sector demonstrated a strong resurgence, strengthening the momentum of its post-pandemic recovery. Thus, the sector's total contribution to global GDP grew 8.5% annually, increasing from $10.1 trillion in 2023 to $10.9 trillion 2024.

Compared to the pre-pandemic benchmark of 2019 ($10.3 trillion), Travel & Tourism's total GDP contribution in 2024 reflects a 6% increase, indicating that the sector has entered a growth territory following years of lagging behind its pre-pandemic performance. Due to this impressive recovery, the sector has reasserted its value in the global economy, as its share of global GDP reached 10%.

The total contribution of Travel & Tourism doesn't just include its direct contribution. It also includes supply chain impacts and wage-induced impacts. Total contribution, unlike direct contribution, captures the true extent of the sector's impact, stretching beyond the interactions between travellers and businesses. Figure 1: Travel & Tourism's Total Contribution to GDP (2024) shows the size of the sector's economic contribution through all three channels, and it is clear that indirect and induced impacts of the sector are significant.

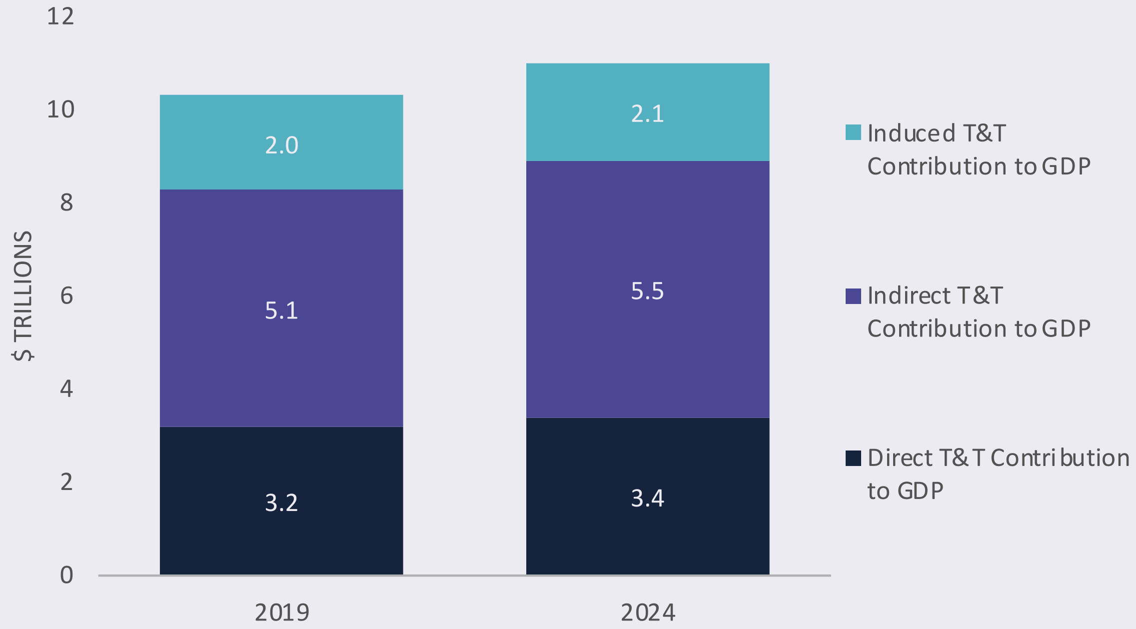


Figure 1: Travel & Tourism's Total Contribution to GDP (2024)

Along with contributing to GDP, Travel & Tourism plays a crucial role in supporting employment too. In 2024, the total number of jobs supported by the sector reached nearly 357 million. That's almost 19 million more jobs being supported by Travel & Tourism than in 2019. As a share, total employment supported by the sector in 2024 represented 10.6% of all employment globally.

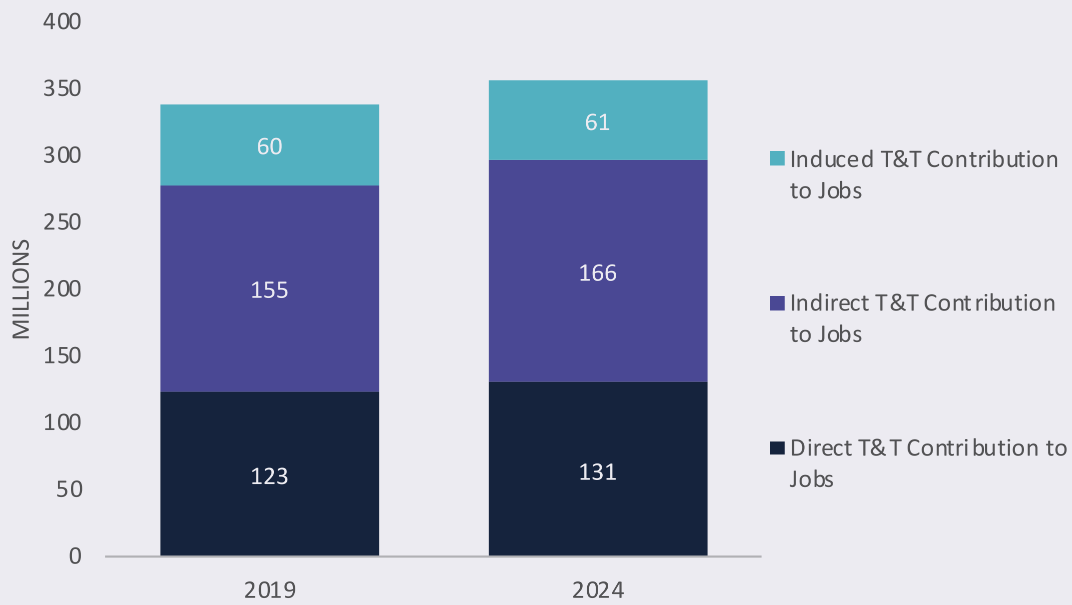


Figure 2: Travel & Tourism's Total Contribution to Jobs (2024)

Spending on travel can be categorised as either domestic visitor spending or international visitor spending depending on the origin of the traveller. It is vital to understand the trends within each category. As shown in Figure 4: Share of Total Travel & Tourism Spending (Domestic Visitors vs International Visitors), domestic visitors typically account for the majority of spending on travel and this share increased in the immediate years after COVID-19 due to restrictions on international travel. However, with the recovery in international visitor spending, the shares are gradually returning to pre-pandemic norms. In 2024, travellers spent $5.3 trillion on domestic travel, growing 5.4% over 2023 and 8.1% above 2019 levels. This represents a stronger rebound than spending by inbound visitors which reached $1.9 trillion in 2024. Although, inbound visitor spending increased 11.6% from 2023, it still remained 1.3% below the 2019 benchmark. Spending by international visitors is an injection into the economy and an essential form of export earnings. It accounted for 5.1% of total export of goods and services globally. This share increases to 13.7% if only considering export of services and excluding export of goods.

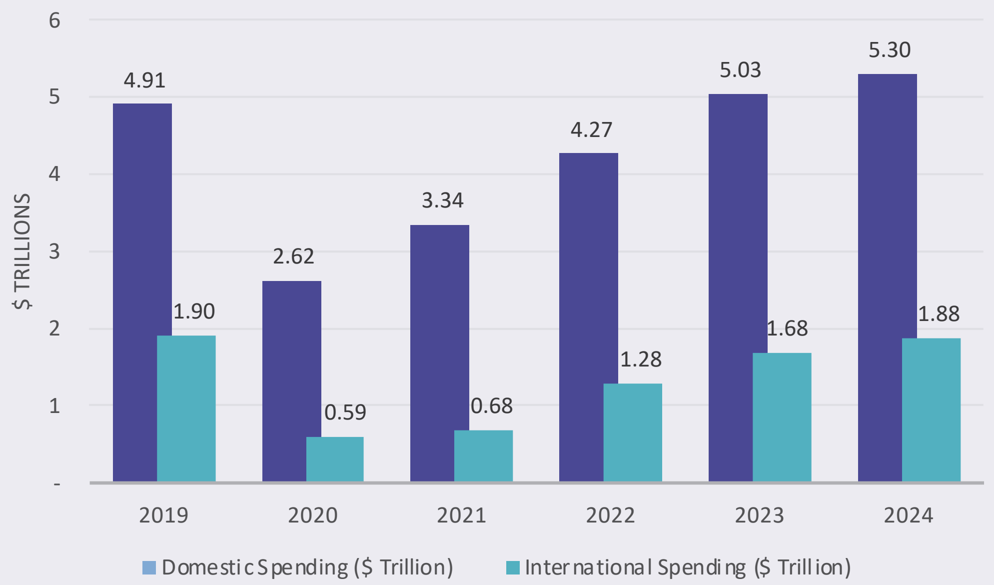


Figure 3: Travel & Tourism Spending (Domestic Visitors & International Visitors)

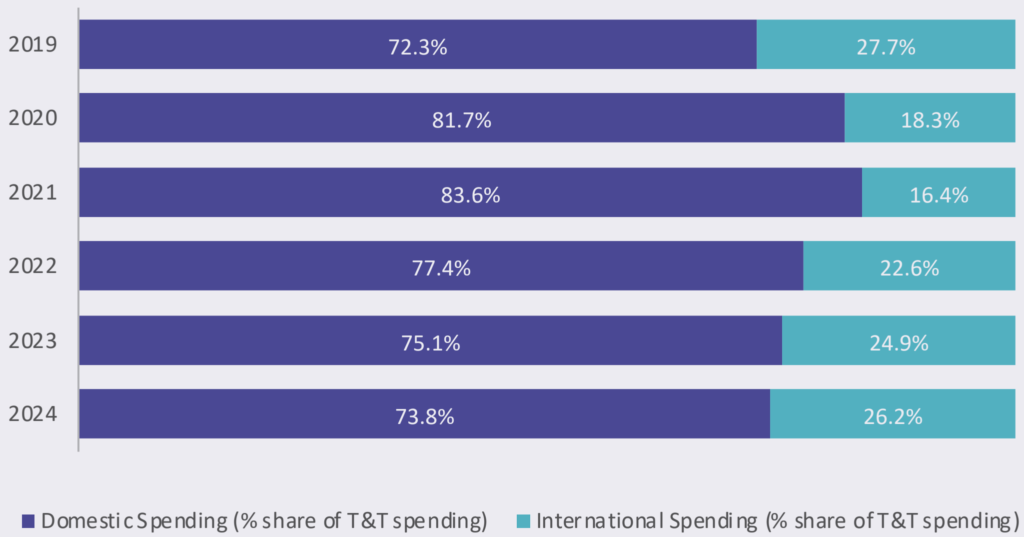


Figure 4: Share of Total Travel & Tourism Spending (Domestic Visitors vs International Visitors)

Traveller spending can also be broken down by purpose: leisure or business. In 2024, leisure travel expenditure totalled $5.74 trillion, growing 6.6% above the 2019 total. It accounted for nearly 80% of all spending on travel. The remaining 20% share came from business travellers who spent $1.44 trillion, a modest 1.4% increase over the pre-pandemic peak.

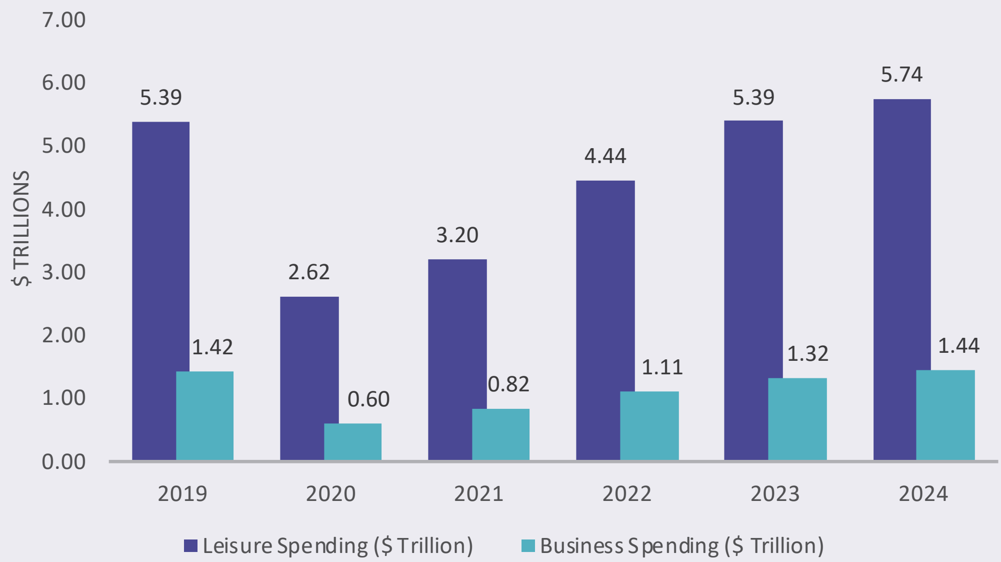


Figure 5: Travel & Tourism Spending (Leisure Travellers & Business Travellers)

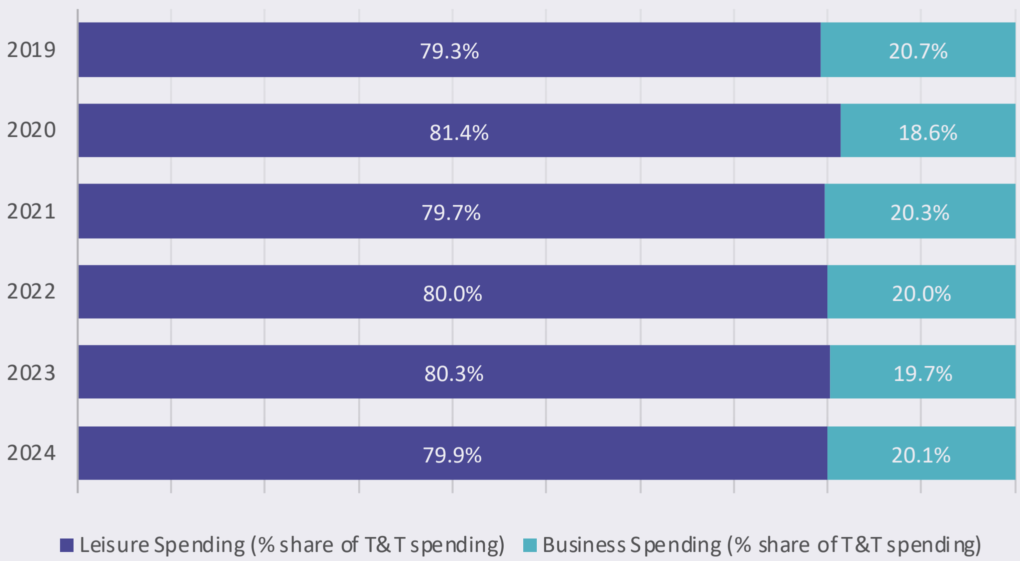


Figure 6: Share of Travel & Tourism Spending (Leisure Travellers vs Business Travellers)

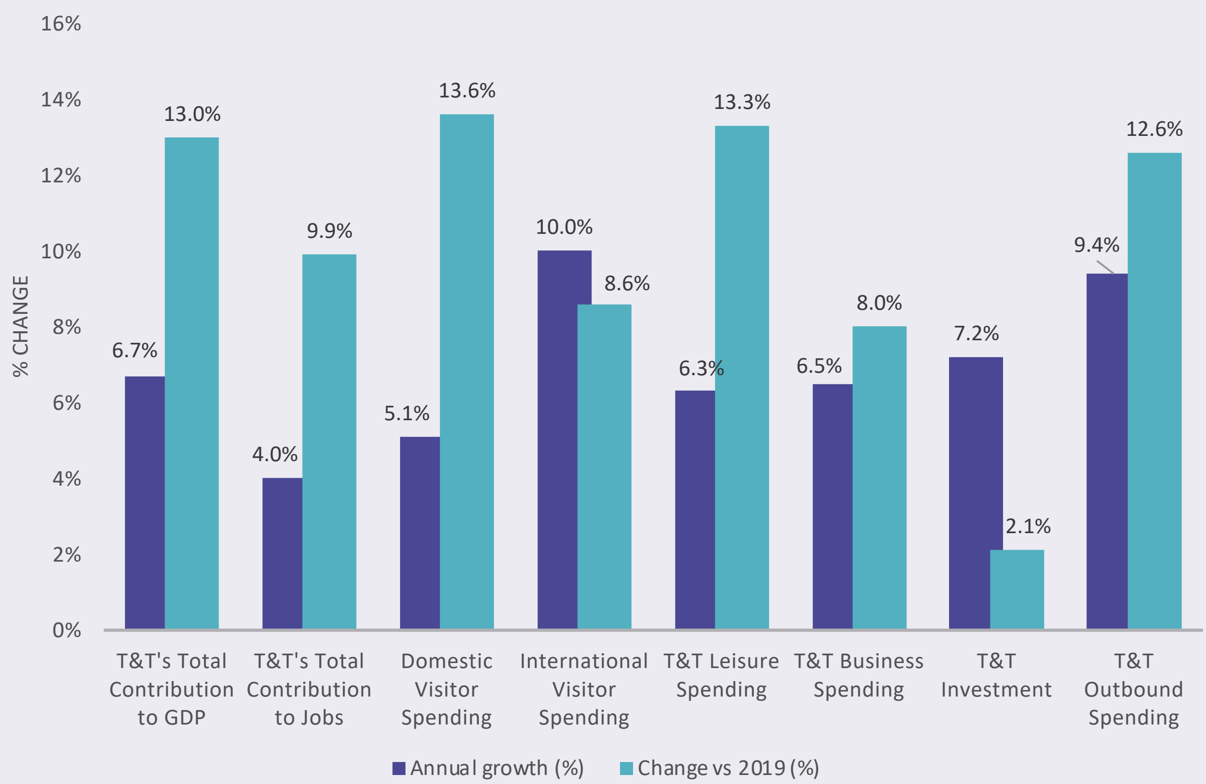
Besides these demand-side indicators, it is also equally important to understand supply-side indicators, especially Travel & Tourism related investment. This investment underlines confidence in the sector's potential to grow further in the future. In 2024, investment in Travel & Tourism grew 9.9% year-on-year, reaching $1.08 trillion or 3.8% of all investment in the overall global economy. Despite this growth, the total was still 4.8% below the 2019 level.

1.2 TRAVEL & TOURISM IN 2025 AND BEYOND (FORECAST)

In 2025 and the following years, uncertainties surrounding trade tariffs and rising geopolitical tensions could limit the sector's expansion.

The growth of Travel & Tourism's total contribution to GDP in 2025 is forecast to slow to 6.7%, gradually trending back to the average growth rate experienced in the years prior to the pandemic. However, this would still be a stronger growth rate than the 2.5% annual growth rate projected for the total economy. Consequently, the sector is set to contribute $11.7 trillion globally – equal to a 10.3% share of the world economy. The number of jobs supported by the sector is expected to increase by 14.4 million, lifting the sector's total contribution to employment to 371 million jobs. This would represent 10.9% share of all jobs in the entire global economy.

One projected milestone for 2025 is the complete recovery of spending by international visitors. In fact, it is forecast to grow 8.6% above the 2019 level, reaching nearly $2.1 trillion. At the same time, spending by domestic visitors is forecast to rise 13.6% above the 2019 level, with a projected spending of $5.6 trillion. In terms of annual growth, international and domestic visitor spending are forecast to grow 10% and 5.1% respectively.



Looking more long term, the sector's contribution to GDP is projected to record a compound annual growth rate (CAGR) of 3.5% between 2025 and 2035. This is faster than the 2.5% annual growth rate projected for the wider economy. This projected growth would lift the sector's total GDP contribution to $16.5 trillion by 2035 (or an 11.5% share). Jobs supported by the sector is also forecast to increase by 90.6 million in the next decade, meaning one in three new jobs projected for the global economy would be Travel & Tourism-supported. This growth would take the sector's share of overall employment to 12.5% by 2035 with a total of 462 million jobs.

The sector's expansion will be supported by steady annual rises in spending by both international and domestic visitors. These are projected to grow 3.4% per annum and 3.3% per annum, respectively.

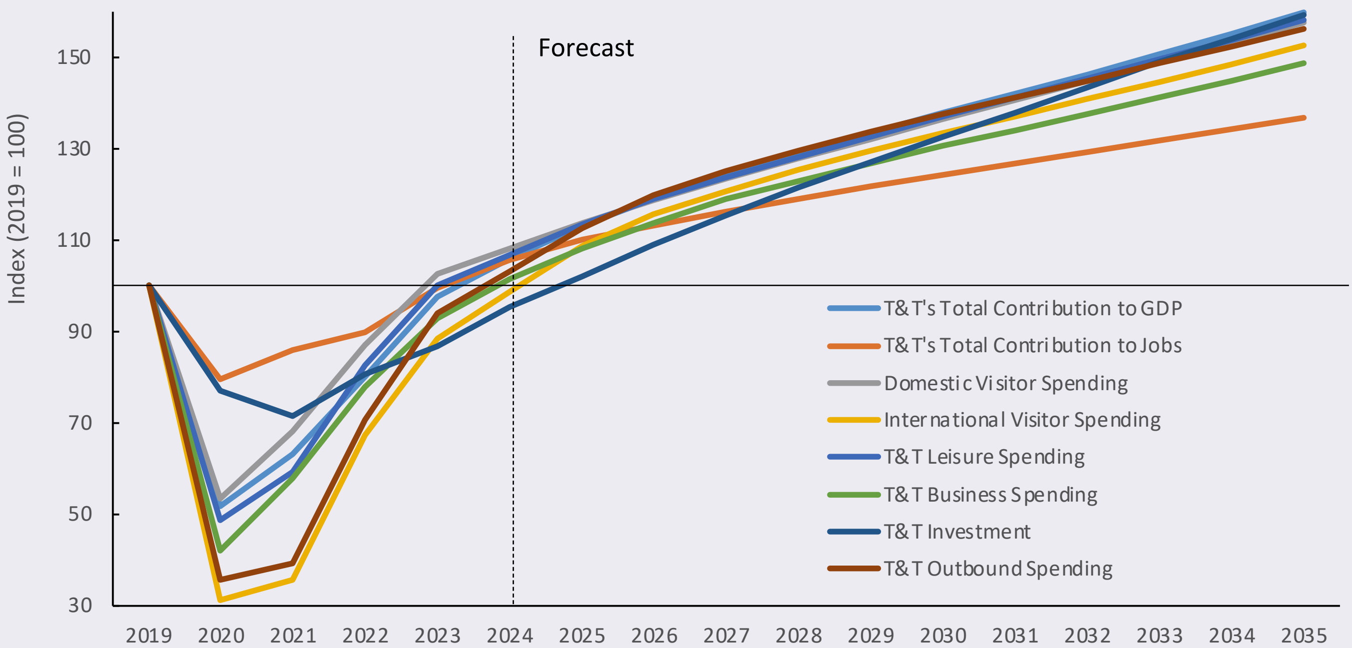


Figure 8: Forecast Growth for Travel & Tourism (Compared to 2019)

2. REGIONAL HIGHLIGHTS

This section of the report will provide detailed analysis of the Travel & Tourism sector's contributions and defining characteristics across different regions, countries, and economies.

2.1 AFRICA

With $211 billion in total GDP contribution, Travel & Tourism in Africa represented 7.8% of the regional economy in 2024. It grew 9.5% compared to 2023 and exceeded the 2019 level of GDP contribution by 9.8%. The sector also supported 27.9 million jobs across the continent, which represents a share of 5.6%.

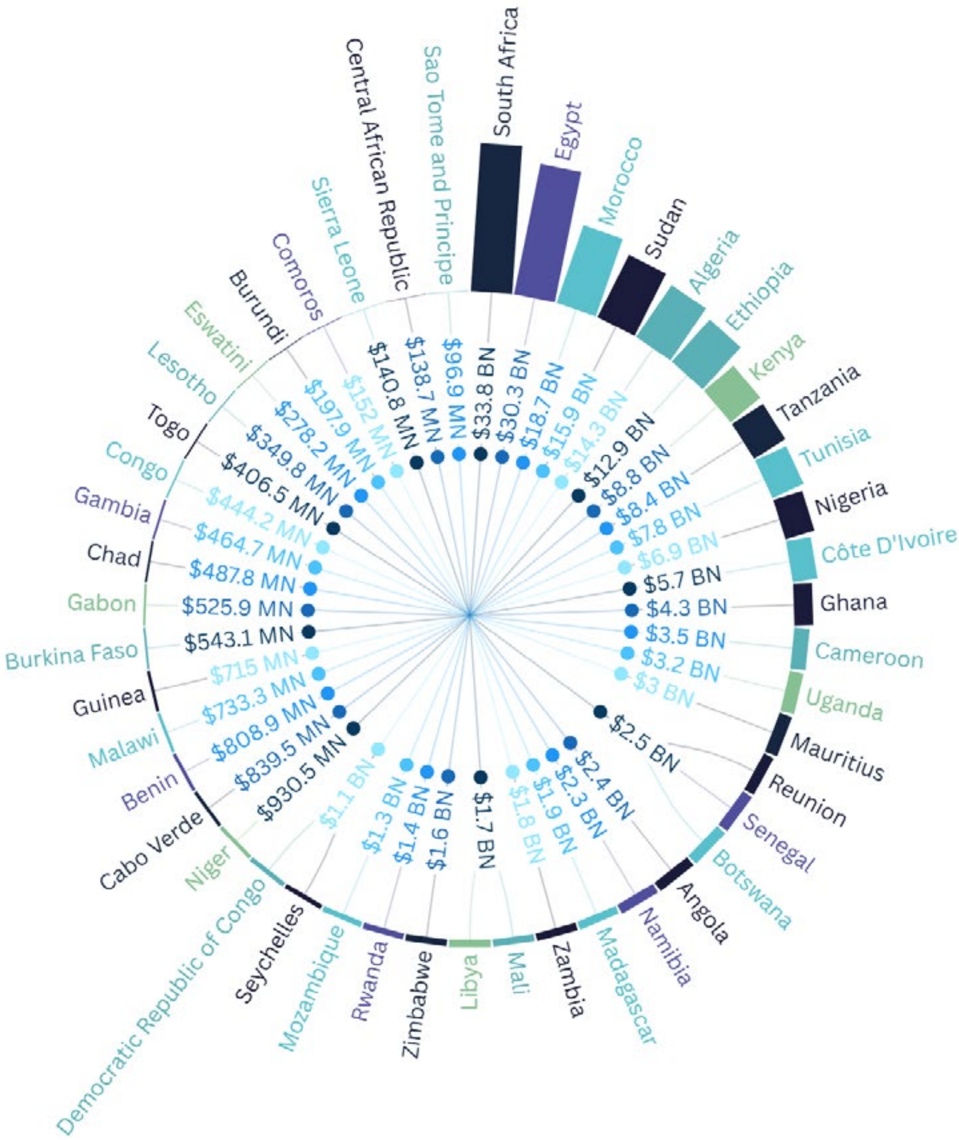


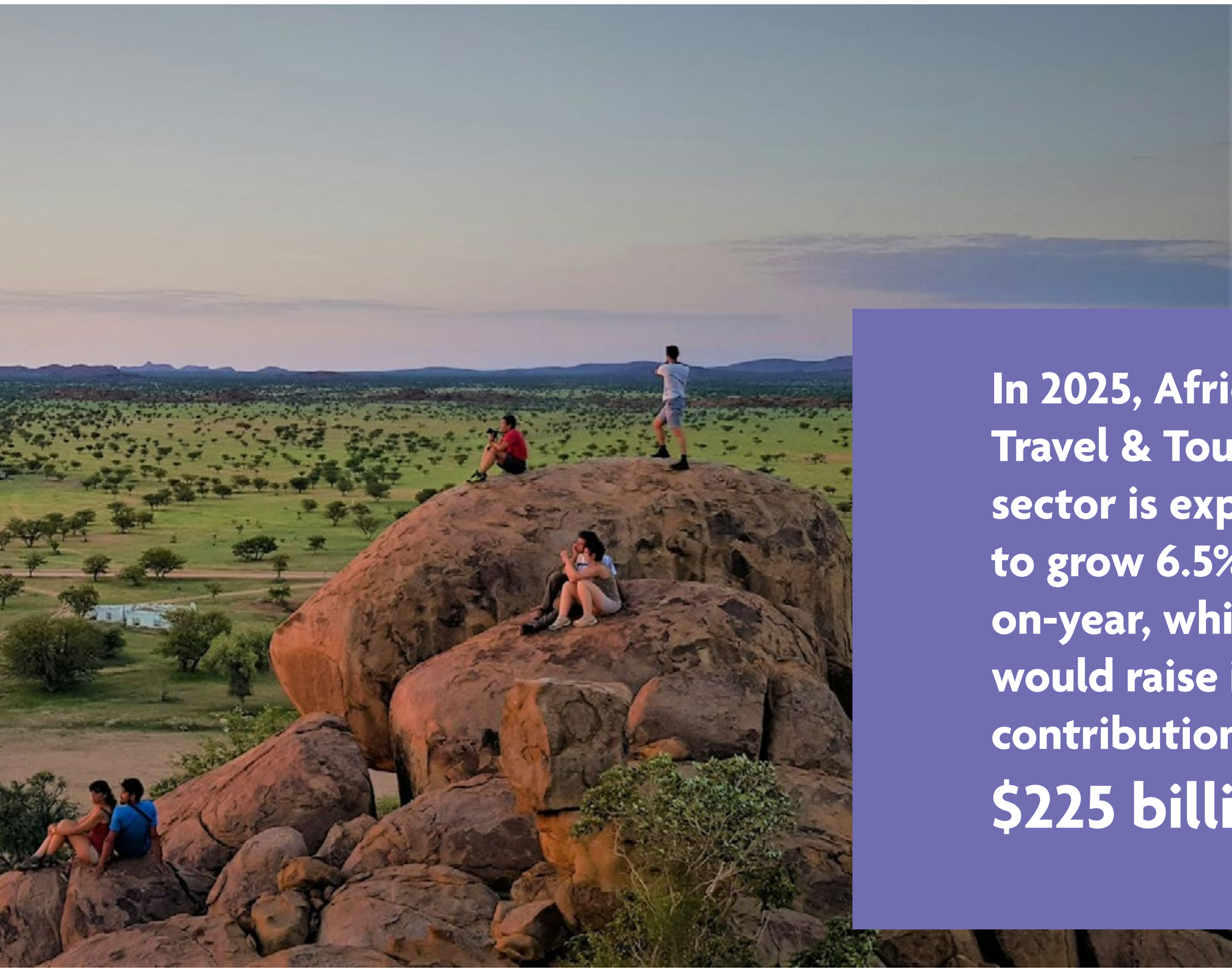
Figure 9: Travel & Tourism's Total Contribution to GDP in Africa (2024)

Domestic visitors in the continent spend more than visitors from non-African countries. In 2024, while domestic visitors spent $106.3 billion (7.1% increase from 2023), international visitors to the continent spent a total of $71.8 billion (13% increase from 2023). They surpassed their 2019 levels by 12.4% and 8.4%, respectively.

Post-pandemic growth wasn't equal across the continent, with the sector in North Africa outperforming that in Sub-Saharan Africa. In North Africa, Travel & Tourism enjoyed robust growth, supported by increases in spending by both domestic and international visitors. The sector's contribution to GDP in North Africa jumped 21.6% above the 2019 level and it supported 11.9% more jobs. On the other hand, Travel & Tourism's contribution to GDP in Sub-Saharan Africa was only 4.5% above the 2019 level, dragged down by inbound visitor spending that remained 2.6% below 2019 level. Many countries in Sub-Saharan Africa recorded strong annual growth in the sector's GDP contribution, but this was mainly recovery-driven growth as the sector in these countries was still smaller than in 2019. For instance, Sierra Leone's sector in 2023 was 20% smaller than its 2019 size and therefore, it grew 35% year-on-year (fastest in the region) in 2024. Conflicts, political uncertainty, poor infrastructure, and limited connectivity continue to impede the subregion despite having some of the most attractive tourism offerings.

In 2025, Africa's Travel & Tourism sector is expected to grow 6.5% year-on-year, which would raise its GDP contribution to $225 billion. The number of jobs it supports is forecast to increase by nearly 2 million and reach 29.8 million jobs. Spending by international and domestic visitors is expected to see steady annual growth of 8.2% and 5%, respectively.

Looking at the next decade, i.e., 2025 to 2035, the sector's contribution to Africa's GDP is forecast to grow 3.7% per year and support a total of 10.7 million additional jobs. This would take its GDP contribution to $322.9 billion (with a share of 7.7%) in 2035 and its employment contribution to 40.5 million (6.1% share).



In 2025, Africa's Travel & Tourism sector is expected to grow 6.5% year-on-year, which would raise its GDP contribution to $225 billion.

COUNTRY IN FOCUS: MOROCCO (INTERNATIONAL VISITOR SPENDING SOARS)

Morocco is a popular holiday destination in Africa, and it has the region's largest Travel & Tourism sector, behind South Africa and Egypt. The sector's contributions to GDP and jobs in 2024 were above their 2019 values, showing strong post-pandemic growth performance. Compared to 2019, the sector contributed 18.3% more in GDP and almost 108,000 more in employment.

One big factor behind the quick rebound in the sector's performance is the rise in international visitors. The country was relatively quick to reopen following pandemic-related restrictions. Morocco's Travel & Tourism sector is strongly reliant on international visitors as their spending accounted for nearly 70% of total travel spending in 2019. In 2020, international visitor spending fell by more than half and by 4% in 2021 but in 2022, it fully recovered to the pre-pandemic benchmark – making it one of the few markets in the region to achieve this milestone in 2022. In 2024, Morocco continued to attract more international visitors and became the most visited destination in Africa with 17.4 million international overnight visitors, around 2 million more visitors than Egypt which previously held that title in 2023 and 2022[1]. France was its biggest source market, followed by Spain, and then the United Kingdom. Seven out of Morocco's top 10 source markets were sending more tourists in 2024 than in 2019 (see Figure 11). Arrivals from Germany, the Netherlands, and China have yet to return to pre-COVID levels.

The government has actively supported tourism growth through investment and changes in regulations. In 2023, the Moroccan government announced the 2023-2026 Tourism Strategic Roadmap which aimed to boost international visitor numbers to 17.5 million by 2026[2]. The plan includes funding allocations to help achieve this goal. Morocco is already close to achieving this target, as evidenced by the surge in its popularity among foreign visitors.

International airline capacity in Morocco has also improved significantly, particularly capacity between Morocco and Western Europe. According to OAG, there were one million additional seats to Western Europe in winter 2024 compared to winter 2023. The largest additions were carried out by low-cost carriers, with Ryanair adding more than 325,000 seats and easyJet adding 195,000 seats[3].

The future for the country's sector looks positive. Between 2025 and 2035, the Travel & Tourism's contribution to GDP is forecast to grow 3.6% per year and support 327,000 new jobs.

1. Oxford Economics, June 2025. Global Travel Service database. Available at: https://data.oxfordeconomics.com/

2. Kingdom of Morocco, 2023. The Head of Government oversees the signing of a partnership framework agreement to implement the strategic roadmap for the tourism sector by 2026. Available at: https://www.maroc.ma/en/news/head-government-oversees-signing-partnership-framework-agreement-implement-strategic-roadmap-tourism

3. OAG, 2025. Morocco tourism: A closer look at growth trends. Available at: https://www.oag.com/blog/morocco-tourism-a-closer-look-at-growth-trends

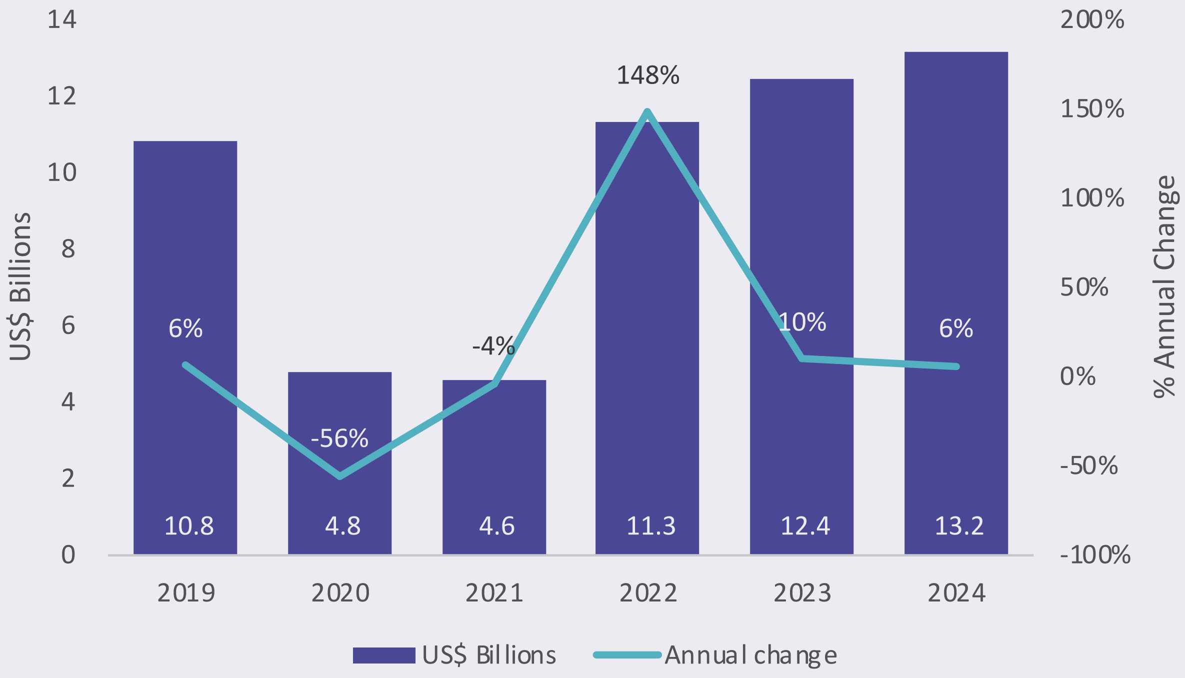


Figure 10: International Visitor Spending in Morocco (2019 - 2024)

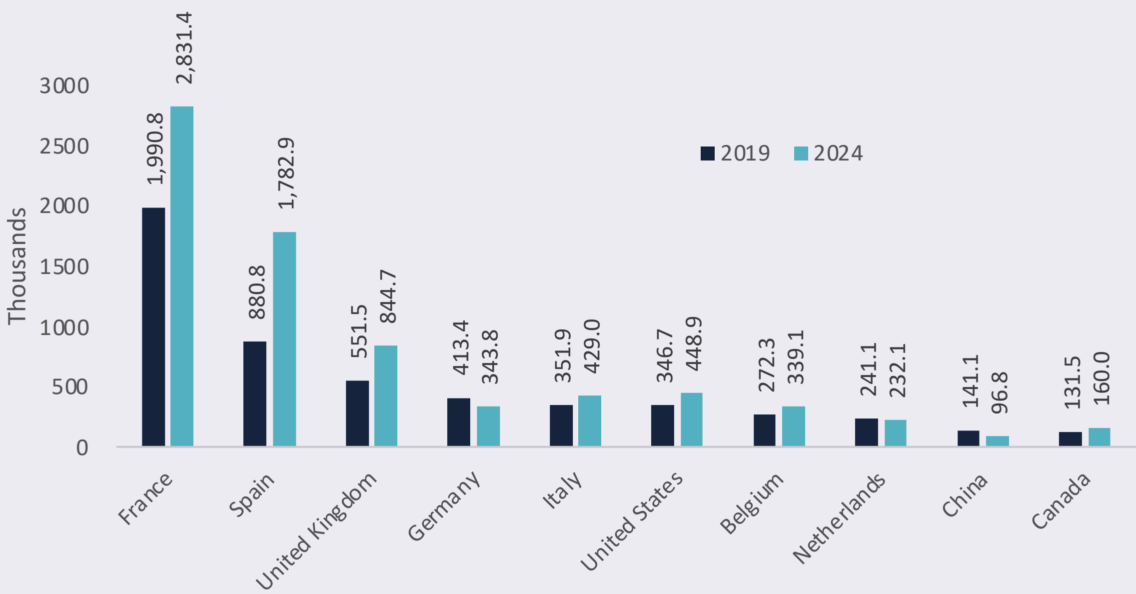


Figure 11: Top 10 Source Markets for International Visitors in Morocco (2024 vs 2019)

COUNTRY IN FOCUS: SOUTH AFRICA (WEAK INTERNATIONAL DEMAND)

South Africa is the largest economy on the African continent and it has the largest Travel & Tourism sector too. However, the sector has been slow to recover since the slump following the pandemic. In 2024, its GDP contribution remained 9.4% below the 2019 level and its employment contribution was 123,000 jobs short of 2019.

In 2025, while the sector's GDP contribution is expected to grow 6.6%, it is still forecast to fall short of the 2019 level by 3.4%. One key factor behind the sluggish recovery is weak demand from international visitors.

Spending by international visitors in 2024 was almost 30% below the pre-pandemic level. As a result, its share in total travel spending fell from 28% in 2019 to 21% in 2024. International visitor spending is projected to take until 2027 to recover fully to 2019 level.

South Africa recorded 10.2 million internatonal (overnight) visitors in 2019; almost 70% of them came from its six neighbouring countries. Among non-African source markets, the UK (with 437, 000 arrivals), the US (374, 000 arrivals), and Germany (323,000 arrivals) were the top three. While in 2024, international arrivals in South Africa increased 5.2% on an annual basis, they were still 1.3 million fewer than arrivals in 2019. Demand from key markets, particularly those in Europe, continued to display weakness (see Figure 12). Among South Africa's top fifteen source markets, only Mozambique and Zambia have recovered fully[4].

Between inbound leisure travel and inbound business travel, the latter has shown more resilience. In 2024, the number of foreign tourists that arrived in South Africa for business purposes was 3.1% below the pre-pandemic level. However, the deficit for foreign tourists arriving for leisure purposes was 13.1%.

While South Africa remains a key player in the region's Travel & Tourism landscape, it is crucial to step up policy efforts to boost international arrivals – especially from key European markets.

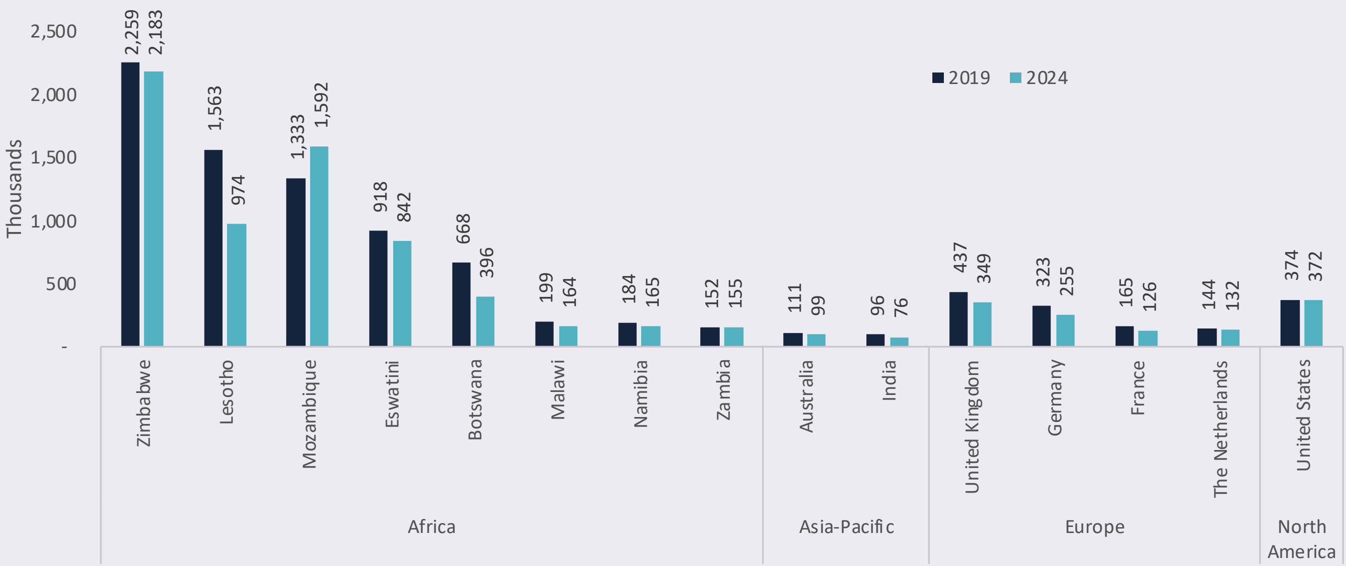


Figure 12: Overnight International Arrivals in South Africa (Top 15 Source Markets)

4. Oxford Economics, June 2025. Global Travel Service database. Available at: https://data.oxfordeconomics.com/

2.2 AMERICAS: THE CARIBBEAN

Travel & Tourism is one of the most vital sectors in the Caribbean as its total contribution of $81.4 billion in 2024 represented a 17.6% share of the regional economy. That's the highest proportion for the sector globally. The region's sector has also experienced the strongest post-pandemic growth, rising 28.3% above the 2019 level and 7.3% above 2023. The Dominican Republic has the largest Travel & Tourism sector in the region, followed by Cuba, and then Puerto Rico.

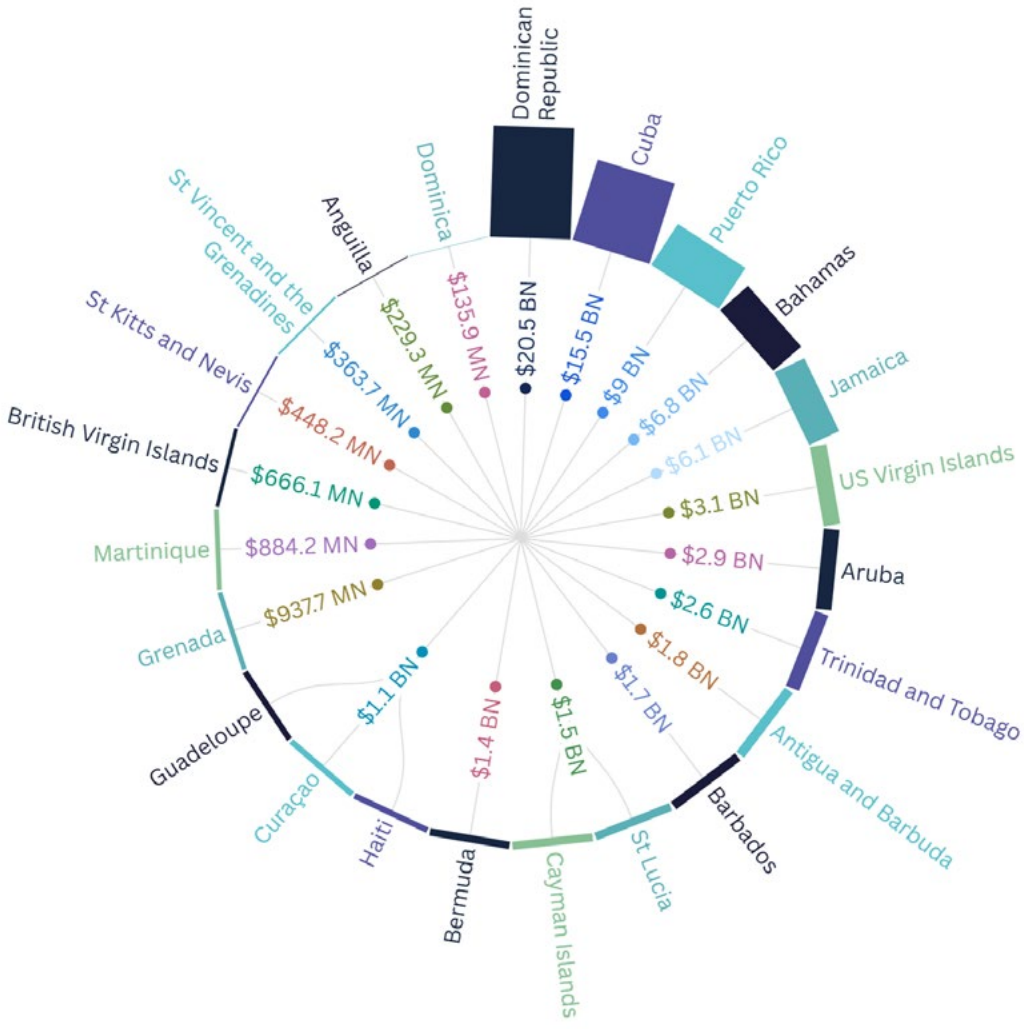


Figure 13: Travel & Tourism's Total Contribution to GDP in the Caribbean (2024)

Additionally, the sector is a key source of employment in the region, supporting a total of 2.9 million jobs or 15.7% of total employment in the Caribbean. The sector supported 158,000 more jobs in 2024 than in 2023.

The region's sector has a strong dependence on international visitors – more so than any other region. In 2024, inbound visitors spent $48.4 billion (7.7% more than in 2023), which made up nearly 76% of total travel spending in the Caribbean. Domestic visitors accounted for the remaining 24%, spending $15.6 billion (4.2% more than in 2023). Spending by both of these visitor categories was around 19% above their 2019 levels. In terms of source markets for international arrivals in the region, the United States remains at the top with 53% of all inbound arrivals originating there. The US was followed by Canada and then France with 10% and 4% shares in inbound arrivals to the Caribbean, respectively.

Travel & Tourism in the Caribbean is mostly supported by leisure activities with corporate travel accounting for only 10% of total spending.

The annual growth rate for Travel & Tourism's contribution to GDP in 2024 varied among Caribbean countries. It was highest at 38% in the British Virgin Islands. However, that is partly driven by a low base effect as its GDP contribution was still 27% below the 2019 level in 2023. Among countries that had already recovered to their 2019 levels, Grenada stands out as its sector recorded a further 35% annual increase in 2024. Conversely, the sector in St. Kitts and Nevis recorded a 10.9% annual decline, driven by a 15.2% drop in international visitor spending, which makes up the bulk of the country's travel earnings.

In 2025, Travel & Tourism's contribution to GDP in the Caribbean is expected to grow 5.7% while its employment contribution is forecast to jump by 3.7%.

Between 2025 and 2035, the sector's contribution to GDP is forecast to grow 2.6% per year, increasing the total to $111.5 billion by 2035. As a share of the regional economy, the sector is projected to account for 18.7% in 2035. The number of jobs supported by Travel & Tourism is also forecast to increase by 551,000 in the next decade, raising the total to 3.6 million by 2035.

In 2025, Travel & Tourism's contribution to GDP in the Caribbean is expected to grow 5.7%

COUNTRY IN FOCUS: THE DOMINICAN REPUBLIC (CRUISE-LED GROWTH)

The Dominican Republic is the second largest country in the Caribbean by land size, but it boasts the region's largest economy and the largest Travel & Tourism sector. In 2024, the sector's total contribution to the national economy, at $20.5 billion, grew 7.7% above the 2023 level and 19% above the 2019 level. The sector also supported 876,000 jobs in 2024, which is 41,000 more jobs compared to the previous year.

One big factor behind the strong post-pandemic growth of the country's Travel & Tourism sector is the incredible surge in demand from international visitors, whose spending (at $11.2 billion) accounted for nearly three-fourths of total travel spending. International visitor spending in 2024 was 9% higher than in 2023 and 17.6% higher than 2019.

The United States is the biggest source market for inbound arrivals. In 2019, there were almost 2.2 million US visitors to the Dominican Republic. By 2024, this increased by 51.7% to reach 3.3 million visitors. Inbound arrivals from Canada, the second largest source market, increased by 33.3% in the same period to reach 1.2 million. The largest increase in arrivals among the key source markets was the 216% rise in arrivals from Colombia, increasing from 106,000 in

2019 to 336,000 in 2024. However, the number of travellers from some European markets (France, Germany, and Spain) continued to lag their pre-pandemic levels[5].

Another significant achievement was the continued growth of the country's cruise industry. The Dominican Republic has invested heavily in expanding and improving its port infrastructure in order to accommodate more and larger ships. As a result, the number of cruise passengers to the country has doubled from 1.3 million in 2021 to 2.6 million in 2024. Latest data (see Figure 14: Cruise Passengers in the Dominican Republic) suggest an even higher number of cruise passengers for the first four months of 2025 compared to first four months in 2024.[6]

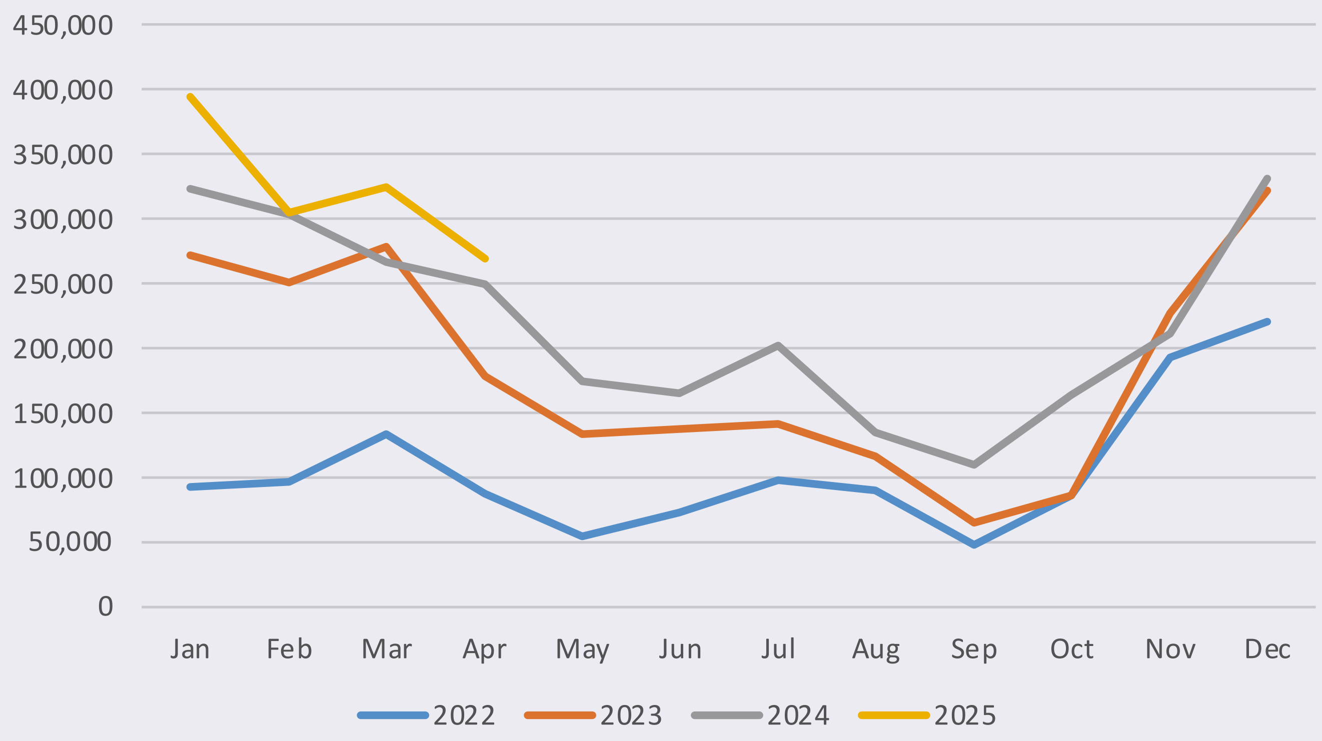


Figure 14: Cruise Passengers in the Dominican Republic

In 2025, Travel & Tourism's total contribution to GDP is expected to grow 3.3% year-on-year and the number of jobs supported is projected to increase by nearly 17,000.

5. Oxford Economics, June 2025. Global Travel Service database. Available at: https://data.oxfordeconomics.com/
6. Ministerio de Turismo de la República Dominicana (MITUR), n.d. Sistema de Información Turística (SITUR). Available at: https://situr.mitur.gob.do/.

2.3 AMERICAS: NORTH AMERICA

North America, comprising the US, Mexico, and Canada, has the second-largest Travel & Tourism sector globally, behind Asia-Pacific. This is due to the the sheer size of the sector in the US, which in fact accounted for almost 87% of the regional sector and 23.4% of the global sector in 2024.

The sector's total contribution to GDP in the region reached almost $3 trillion last year, growing 2% over the 2023 level and 8.3% above the pre-pandemic level, while its share of regional GDP was 8.9%. In terms of recovery among the three countries, Travel & Tourism in the US and Mexico surpassed the 2019 levels of GDP contribution (by 9.1% and 6.6%, respectively) whereas in Canada, it remained 2.9% below.

Figure 15: Travel & Tourism's Total Contribution to GDP in North America (2024)

Across North America, the sector supported 29.7 million jobs or 12.3% of all employment in 2024. This was 3.4 million jobs more than in 2019. Unlike the sector's GDP contribution, its employment contribution recovered completely in all three countries by 2024.

Domestic visitors play a key role in supporting Travel & Tourism in the region. Their spending accounted for a 88.1% share of total travel spending in 2024 while spending by international visitors accounted for an 11.9% share. Furthermore, the share of visitor spending held by international visitors has fallen from 15.1% in 2019. This highlights the different post-pandemic growth trends between the two visitor types. In 2024, while spending by domestic visitors increased 12.4% above the 2019 level, spending by international visitors still remained 15% below its 2019 figure.

Expectations for 2025 remain muted, with demand projected to weaken. As a result, the sector's GDP contribution is forecast to grow by a modest 1.2% year-over-year. This is the slowest forecast annual growth for 2025 among all regions, and is significantly below the 6.7% growth forecast for the global sector, with the downward drag coming primarily from the anticipated decrease in international visitor numbers.

COUNTRY IN FOCUS: US (WEAK INTERNATIONAL ARRIVALS OUTLOOK)

The Travel & Tourism sector in the US is the largest globally. Its contribution to GDP in 2024 increased 9.1% above the 2019 level while its contribution to employment grew 15.4% over the 2019 level.

However, there are still pockets of weakness because the sector's recovery was supported entirely by a resilient domestic market. Domestic travellers in the US spent nearly $1.5 trillion in 2024, which was 13.8% higher than their spending in 2019. Spending by international visitors, on the other hand, continues to lag behind – down 16.7% from the 2019 value.

The international travel market in the US depends heavily on its North American neighbours. In 2019, there were 20.7 million overnight visitors from Canada and 18.3 million from Mexico. Together, they accounted for a 49.2% share of all arrivals into the USA. In 2024, there were 479,000 fewer travellers from Canada and 1.3 million fewer travellers from Mexico.

Among other source markets, the slow return of travellers from Northeast Asia is particularly evident. Last year, arrivals from Japan, China, and South Korea were 50.9%, 42.5%, and 26% down respectively, compared to 2019. Chinese tourists are well-known for their high spending power. Typically, they spend around $10,445 on a US trip, much higher than many other travellers[7]. Therefore, fewer number of travellers from China has a disproportionately large impact on total international visitor spending. There are some bright spots, nevertheless. For instance, travel from India is now higher than in 2019. So, is travel from Italy and Colombia. Between 2025 and 2028, the United States will host a number of major international events. This includes the inaugural FIFA

7. Kelleher, S.R., 2023. The decline in Chinese tourists has cost the U.S. $20 billion. Forbes. Available at: https://www.forbes.com/sites/suzannerowankelleher/2023/08/22/decline-chinese-tourists-cost-us-20-billion/.

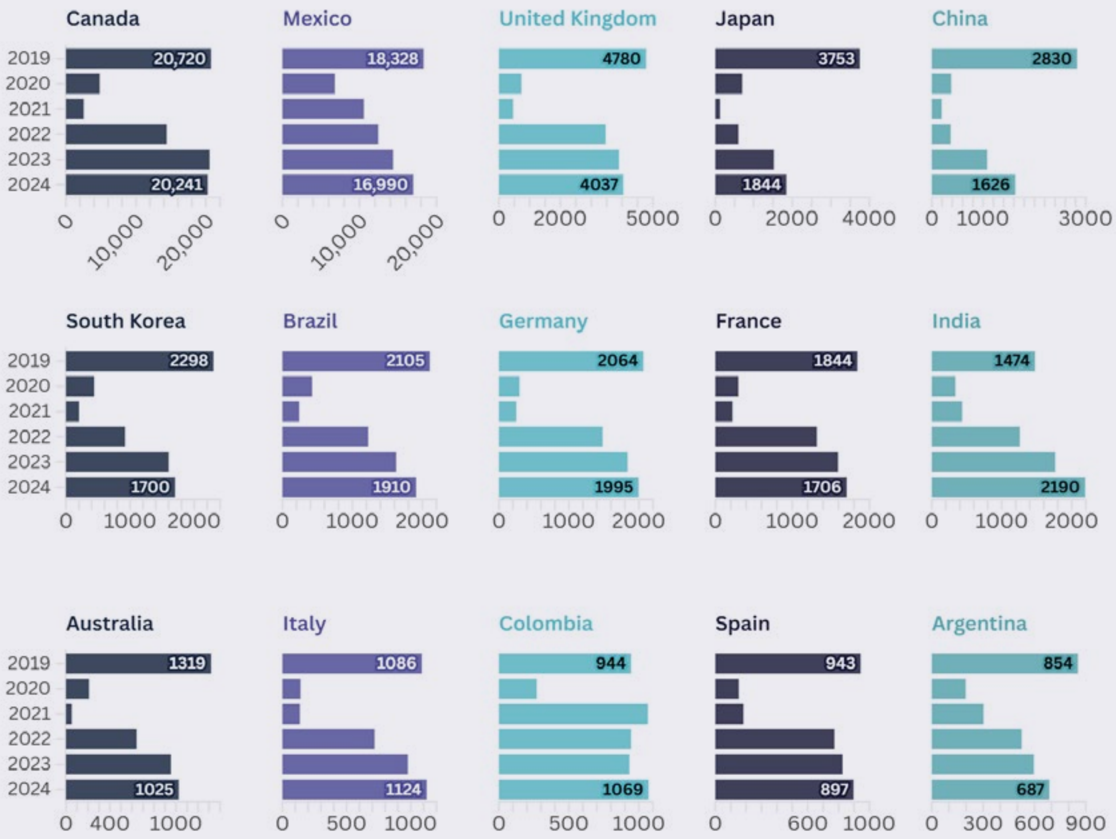


Figure 16: International Arrivals in the US (Top 15 Source Markets)

Club World Cup in 2025, FIFA World Cup in 2026 (hosted in partnership with Canada and Mexico), and the Summer Olympic and Paralympic Games in 2028. These events, along with the regular annual events hosted in the USA, can boost international visitor spending. However, there are other factors that are expected to dampen demand.

International visitor spending in the US is projected to decline by 6.9% in 2025, the only economy that is projected to experience such a decrease. International visitor spending is not expected to return to 2019 level until 2031. Visitor numbers from Canada, the US's largest source market, are forecast to fall 20.2% and visitor arrivals from Mexico are projected to drop 5.1%. This weak outlook is primarily driven by change in sentiments, which are being influenced by the recent trade policies.

Economically, tariffs could result in slower growth in source market economies which, in turn, could have some negative impact on their outbound travel to the US.

Improving trade balance has been one of the primary reasons for the introduction of recent trade tariffs by the new administration. Travel & Tourism, which is among the largest service exporters for the US economy, can be a source of export earnings and trade surplus[8]. Before the pandemic, the sector ran a surplus, i.e., spending by international visitors in the US was larger than the spending by outbound visitors. It reached as high as $73 billion in 2013. However, since the pandemic, as international visitor numbers slumped, the sector has been running a deficit. Therefore, the government should step up efforts to attract more foreign visitors and help the sector return to surplus territory. Recommendations include addressing travel access, increasing funding for agencies that market the US as a destination, and alleviating concerns about travel to the country.

8. U.S. Census Bureau, 2025. U.S. international trade in goods and services—April 2025 (FT 900). Washington, DC: U.S. Census Bureau. Available at: https://www.census.gov/foreign-trade/Press-Release/current_press_release/ft900.pdf.

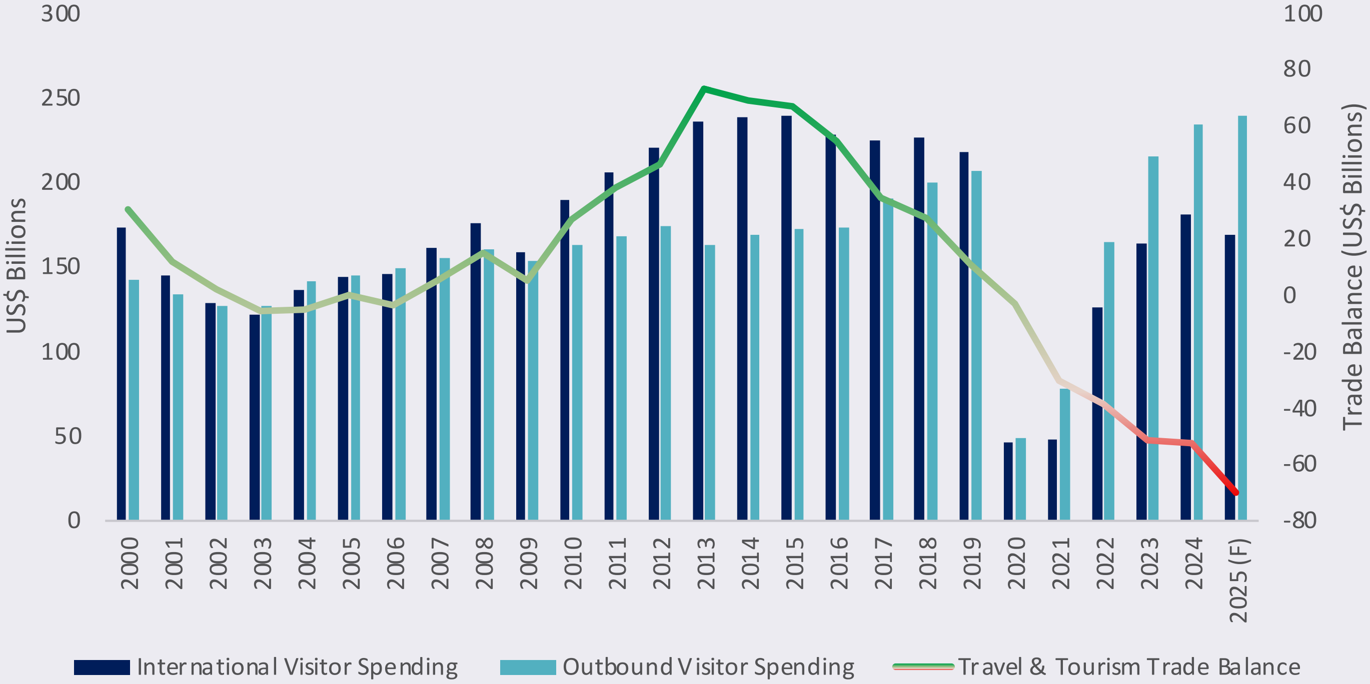


Figure 17: Trade Balance in Travel & Tourism - Inbound Visitor Spending vs Outbound Visitor Spending

In the next decade, 2025 to 2035, the Travel & Tourism sector's contribution to North America's economy is forecast to increase 2.3% per year, resulting in a $3.8 trillion contribution to GDP by 2035. Employment supported by the sector is projected to increase by 4.7 million in the same period; by 2035, it is set to reach 35 million jobs, representing 13.6% of total employment in the economy.

2.4 AMERICAS: CENTRAL & SOUTH AMERICA

The Travel & Tourism sector, in 2024, accounted for 7.5% of the economy in Central & South America with a total contribution of $358.7 billion to GDP. This is 4.8% above 2023 and 9.1% above 2019 levels. The sector's share of jobs was slightly higher at 8%, supporting 17.5 million jobs across the region.

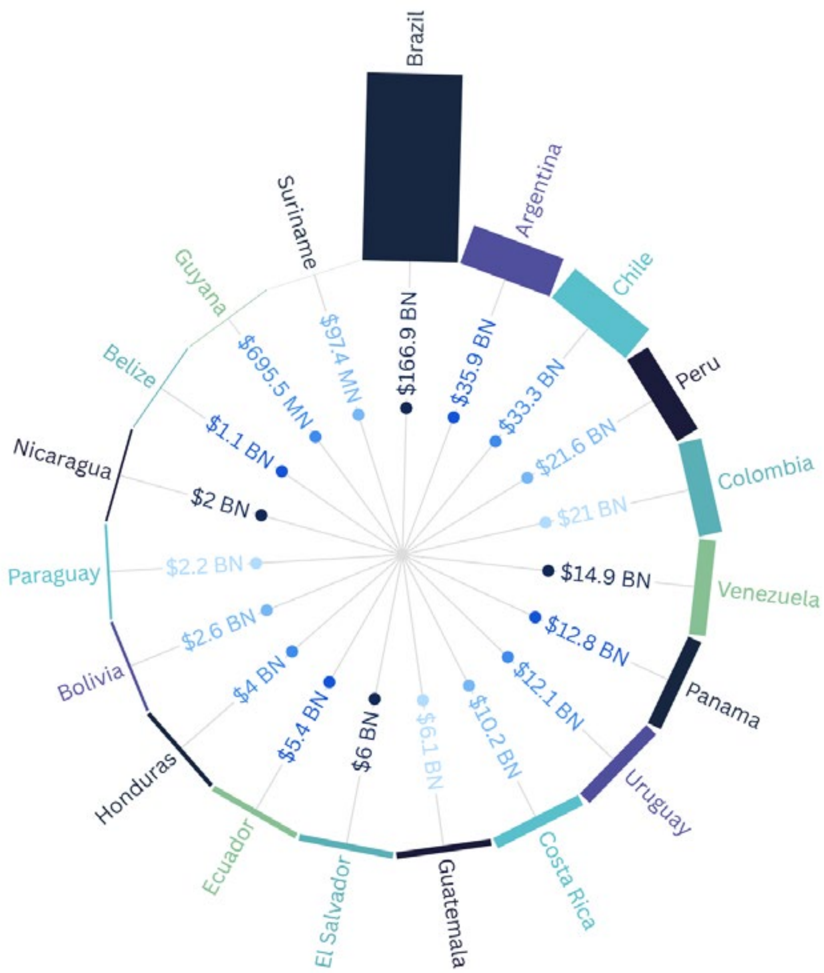


Figure 18: Travel & Tourism's Total Contribution to GDP in Central & South America (2024)

Spending by domestic visitors, which accounted for a 77.3% share of total travel spending, had already recovered completely in 2022. In 2024, it increased 4.1% above the 2023 level and 13.3% above the 2019 level, reaching $205.7 billion. Spending by international visitors also recorded post-pandemic growth, rising 5.5% over the 2019 level to reach $60.4 billion.

Business travel was one of the few weak spots in the region as it remained 1.3% lower than the 2019 level whereas spending on leisure travel increased 14% above the pre-pandemic benchmark.

COUNTRY IN FOCUS: BRAZIL (POTENTIAL FOR HIGHER INTERNATIONAL ARRIVALS)

Brazil has the largest economy in Central & South America and the largest Travel & Tourism sector too, with a sector contribution to GDP of $166.9 billion in 2024. The sector also supported 8.1 million jobs in the country. As a share of the wider economy, the sector's GDP contribution accounted for a 7.7% share while its employment contribution accounted for a marginally higher share of 7.9%. Both of these indicators have recorded strong post-pandemic growth, surpassing their 2019 levels by 10.7% and 5%, respectively.

Despite this positive story, one key area for improvement remains international visitor spending. Domestic visitors make up 94% of total travel spending while $7.2 billion spent by international visitors makes up a meagre 6%. Brazil sits 51st in the world ranking of visitor exports in absolute terms and 175th in ranking for its share of international visitor spending. The share is much smaller than some of its competitors in the Americas region (Figure 19: Share of Travel & Tourism Spending in 2024). For instance, in Mexico, the share stood at 14.7% and in neighbouring Colombia, the share was 64.8%.

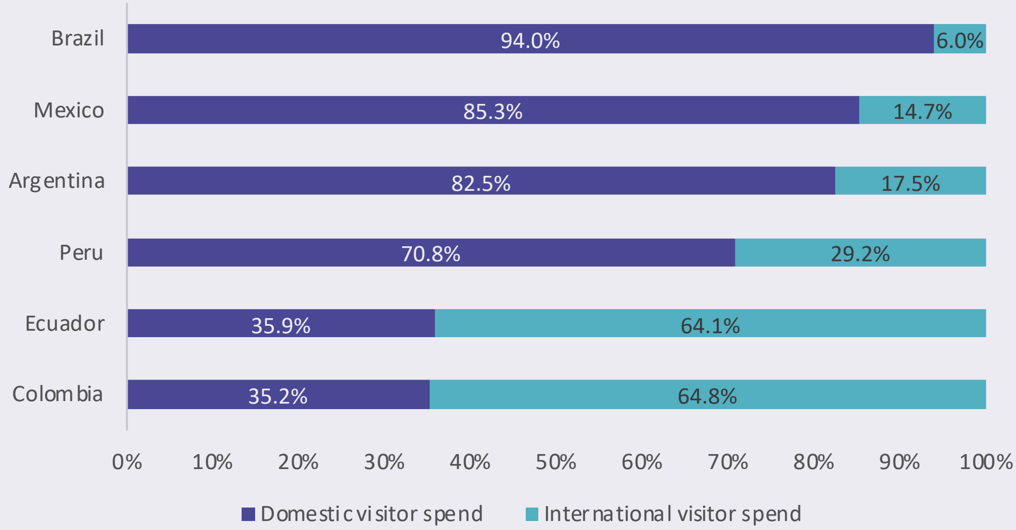


Figure 19: Share of Travel & Tourism Spending in 2024 (Domestic Visitor vs International Visitor)

The low share of international visitors in Brazil is puzzling given its immense potential for attracting foreign visitors. From the lush Amazon rainforest with its rich biodiversity to the Christ the Redeemer statue in Rio de Janeiro – one of the seven Wonders of the World. To the east lies a long coastline along the Atlantic Ocean dotted with beautiful and prolific beaches. Brazil also has a rich history and culture that is a strong draw for travellers. Despite these and other rich tourism offerings, the country welcomed only 6.7 million international overnight visitors. That's less than half the 15.8 million international visitors that Spain's Canary Islands welcomed in 2024.

There are several factors stifling demand from international travellers. There's the lack of diversification in terms of source markets. More than half of international arrivals in Brazil originate within Central & South America; Asia-Pacific accounts for very little share. As of July 2025, there's only one direct flight service between China and Brazil, operated by Air China and it only flies twice a week. Therefore, the country could benefit from promotion in new markets and increasing connectivity with these markets.

Domestic air connectivity may also be holding back international travel, despite having the largest aviation market in the region. Brazil is the fifth largest country in the world by land size and to reach as many tourist destinations as possible in short span of time, domestic air connectivity is vital. Currently, domestic air connectivity is only favourable for travel between major cities. Regional or more remote destinations don't enjoy air access and thus require land transport which can be time-consuming. Language barriers are also a concern with limited travel sector employees who are bilinngual or multilingual. Providing tourists services in multiple languages can make travel easier and technology can help more in this regard[9].

In 2025, Travel & Tourism in the region is expected to grow 3.7% year-on-year, adding 714,500 more jobs to regional employment numbers. Business travellers are projected to spend 6.4% more than in 2019.

The long-term projection, although pointing to continued growth, is weaker than the global average. Travel & Tourism's contribution to GDP is forecast to grow 2.4% per year between 2025 and 2035, compared to the 3.5% annual growth forecast for the global sector.

2.5 ASIA-PACIFIC

Of the 357 million jobs supported by Travel & Tourism globally in 2024, nearly 55% (196 million) were in Asia-Pacific. This jobs figure for the region's sector was 5.6% above its 2023 level and 4.5% above its 2019 level. Comparatively, the recovery for the sector's total contribution to GDP was weaker. In 2024, the sector contributed $3.1 trillion to GDP, which grew 17.4% above the previous year but only 0.4% above the 2019 benchmark, making it the slowest rate of recovery among all regions. The sector in China, the largest Travel & Tourism sector in the region and the second largest worldwide, was still 4.8% smaller compared to 2019.

The drag on the sector's recovery in Asia-Pacific came from international visitor spending that still lagged 2.8% behind the 2019 level despite a 30.3% year-over-year increase. Domestic visitor spending rose slightly above pre-pandemic levels, exceeding the benchmark by just 3.3%. While this was enough to bring the sector back to parity with 2019, it fell short of the stronger performance recorded in other regions.

9. The Rio Times, 13 June 2025. The Reality Behind Brazil's Tourism Record: A Giant's Struggle for Global Tourists. Available at: https://www.riotimesonline.com/the-reality-behind-brazils-tourism-record-a-giants-struggle-for-global-tourists/.

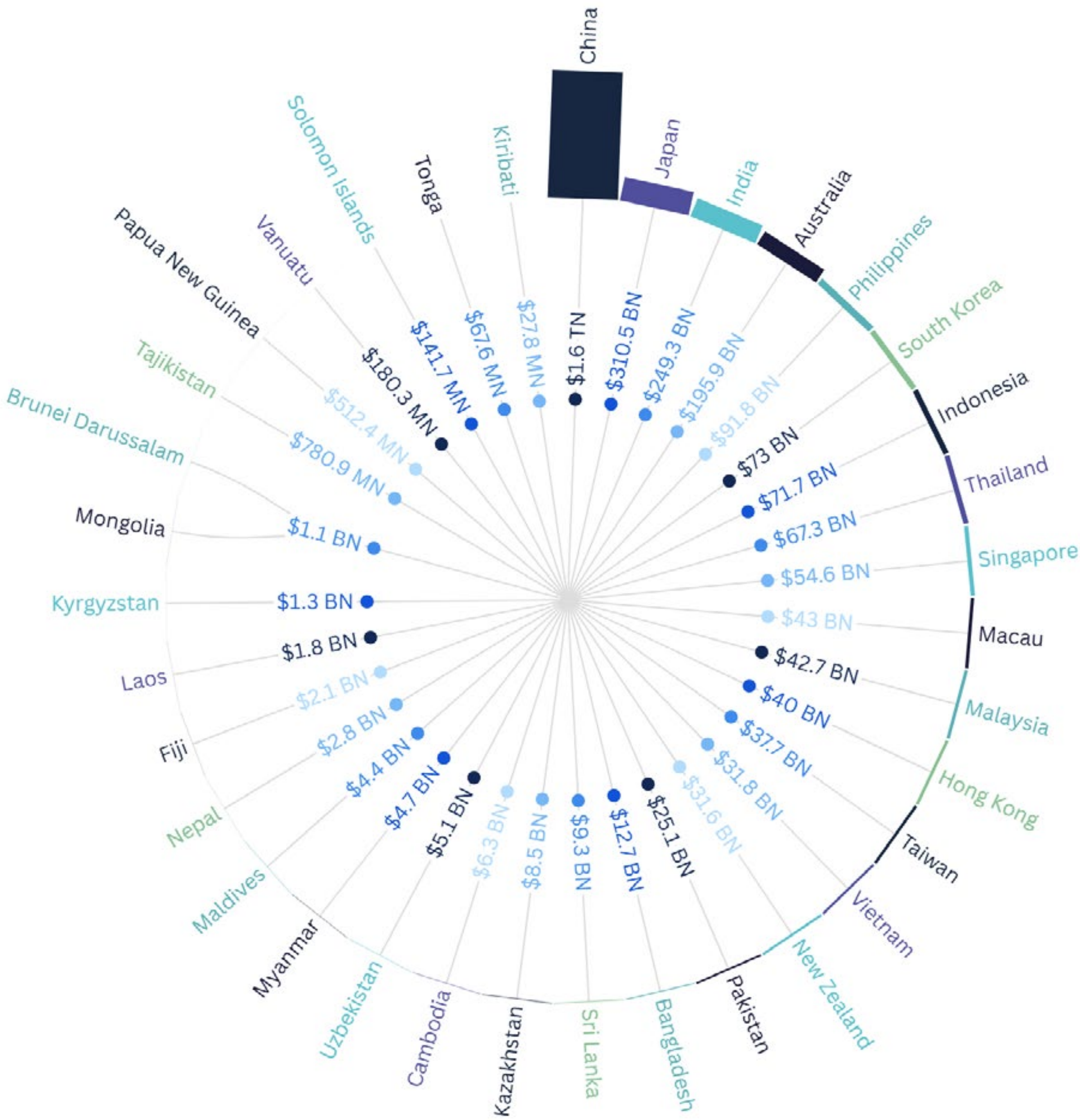


Figure 20: Travel & Tourism's Total Contribution to GDP in Asia-Pacific (2024)

COUNTRY IN FOCUS: CHINA (IMPORTANCE OF CHINESE OUTBOUND TRAVEL)

Before the pandemic, China was the largest source of outbound travel spending globally. Chinese travellers spent a total of $228.1 billion on travel to foreign destinations in 2019, more than $206.8 billion spent by US outbound travellers. Outbound travel spending has been sluggish in its recovery, remaining 2.2% below the 2019 level in 2024. For Southeast Asia, this has impacted the sector's recovery due to its reliance on Chinese visitors.

For example: Thailand. The country welcomed almost 11 million Chinese travellers in 2019, and their spending accounted for 40% of total inbound visitor spending. Weak recovery of air connectivity with China and safety concerns have dissuaded the Chinese from travelling to Thailand like in the past. In 2024, there were almost 4.3 million fewer Chinese tourists despite new visa-free arrangements.

This has been one of the key factors behind the slow recovery of international visitor spending in Thailand which trailed its 2019 value by 21%.

Vietnam faced similar consequences with 2.1 million fewer Chinese visitors compared to 2019 when their spending accounted for 55% of total visitor exports. In 2024, as a result, international visitor spending in Vietnam remained 5.6% below the 2019 level.

Cambodia, Indonesia, Philippines, Myanmar, and Laos have also failed to attract 2019 levels of Chinese tourists. However, Malaysia bucks this trend, welcoming more Chinese tourists than in 2019 and its total earnings from international visitors increased 6.4% above the pre-pandemic level. The bilateral visa-waiver agreement between the country and China has certainly helped in this regard.

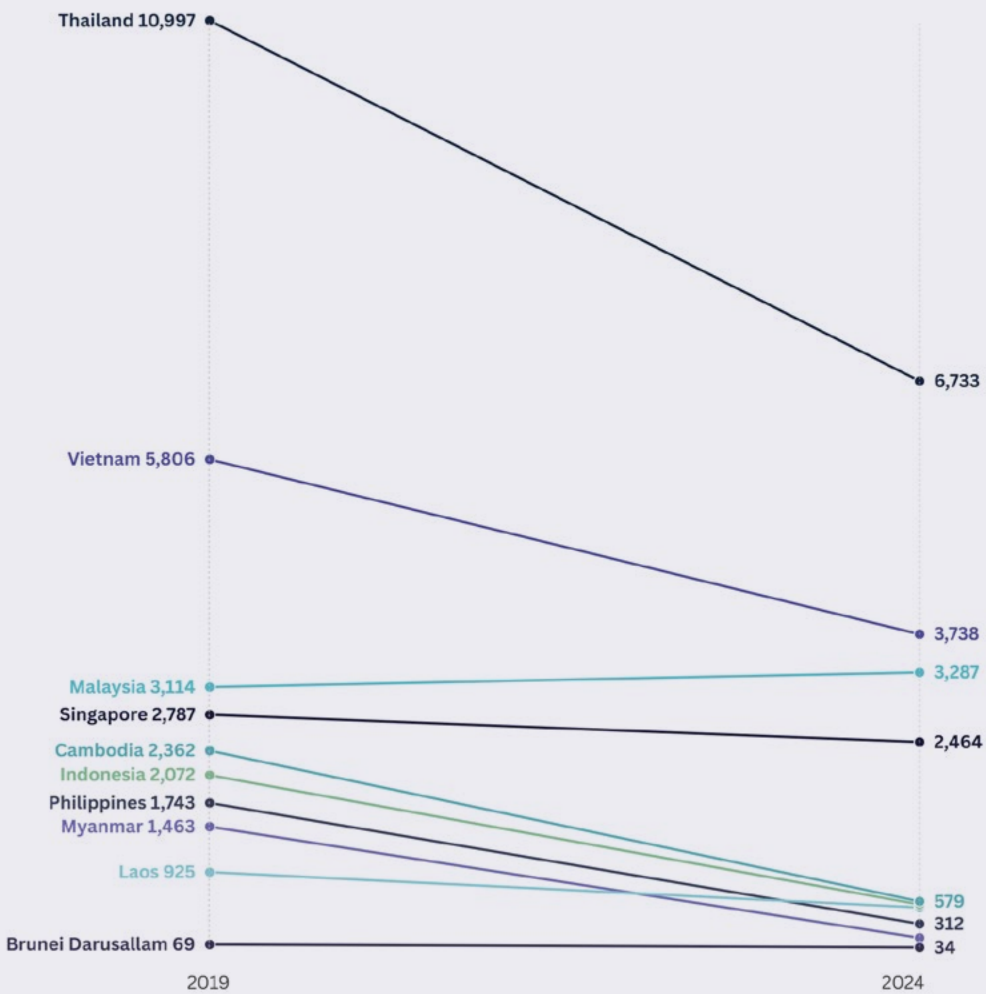


Figure 21: Chinese Arrivals (Overnight) in Southeast Asian Countries in thousands (2024 vs 2019)

COUNTRY IN FOCUS: INDIA (STRONG DOMESTIC MARKET)

India is the most populous nation in the world with over 1.4 billion people, and its economy is the fifth largest. GDP per capita in the country has increased tangibly, boosting consumption. Demand for Travel & Tourism has benefitted from this development, particularly, domestic travel which is experiencing a boom. In 2024, Indian domestic travellers spent $185.6 billion, growing 22.2% above 2019, which helped boost the sector's total contribution to GDP by 19.9% compared to the pre-pandemic benchmark.

In the beginning of the previous decade, domestic Travel & Tourism expenditure was slow to grow, increasing 0.3% in 2014 and 1.7% in 2015. The speed of growth picked up thereafter before COVID-19 temporarily stalled progress. Since 2022, however, demand for domestic travel has roared back. In the next decade, domestic visitor spending is projected to grow at an impressive annual rate of 6.9% – the third highest globally. As a result, India's global ranking in domestic travel spending, having increased from ninth in 2014 to sixth in 2024, is expected to rise further to reach fourth position by 2035 (see Figure 22: Ranking of Domestic Visitor Spending (2014, 2024, and 2035).

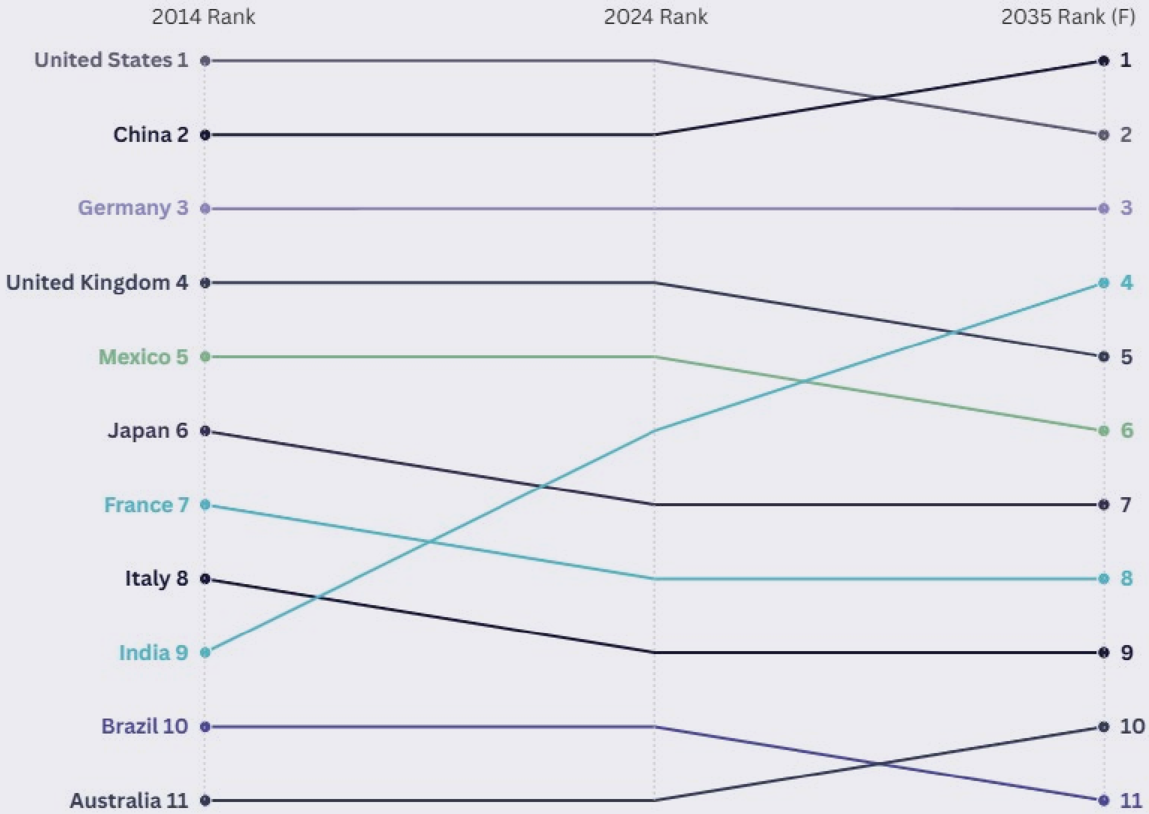


Figure 22: Ranking of Domestic Visitor Spending (2014, 2024, and 2035)

The continued improvement in domestic air connectivity has supported this boom as it reduces travel times considerably. According to IATA, domestic air transport connectivity index score for India in 2024 exceeded the 2019 level by 19.6% as 136.1 million passengers took a domestic flight[10].

In 2025, Asia-Pacific's Travel & Tourism sector is forecast to grow nearly 13% and support 6.9 million additional jobs. International visitor spending is projected to exceed the 2019 level by 11.4%. Hong Kong, SAR is projected to have the fastest annual growth at 40.7%, followed by Cambodia at 32.4%. However, these elevated growth rates are more indicative of a rebound from 2019 levels than true underlying growth. Of the economies that had recovered fully in 2024, the Central Asian country of Tajikistan is expected to have the fastest growth rate in 2025, increasing its sector's contribution to GDP by almost 15%, thanks to strong domestic demand.

In the coming decade, the region's sector is forecast to have the fastest compound annual growth rate (at 5.7%) of all regions, which would result in a GDP contribution of $6 trillion by 2035. The number of jobs supported by the sector is also forecast to rise by 52.7 million, accounting for more than half of the 90.6 million additional jobs projected to be supported globally by the Travel & Tourism sector between 2025 and 2035.

2.6 EUROPE

Europe is home to some of the world's most popular destinations, attracting travellers from all across the globe. The Travel & Tourism sector plays an important role in the European economy and European lives. In 2024, the sector contributed $2.7 trillion to the regional economy, which was 9.6% of its total gross domestic product. Germany, the United Kingdom, and France had the three largest sectors in the region and all of these countries have large domestic bases.

Overall, the sector had recovered completely in 2023. In 2024, it continued to build on this with a 5% annual growth, exceeding the 2019 level of GDP contribution by 6.3%. Malta and Azerbaijan had the fastest annual growth rates (for 2024) at 20.4% and 17%, respectively. It is particularly impressive for Malta's sector given that in 2023, its GDP contribution was already 11% above the pre-pandemic benchmark. Azerbaijan, on the hand, was 33% below its 2019 level in 2023. Among the prominent destinations in the region, the Netherlands has yet to return to its pre-COVID-19 level.

The number of jobs supported by the sector in Europe, at 39.4 million, accounted for 9.9% of all employment. This represents an increase of 4.9% from 2023 and 1.4% from 2019.

10. International Air Transport Association (IATA), June 2025. Aviation in India. Available at: https://www.iata.org/en/iata-repository/publications/economic-reports/aviation-in-india/

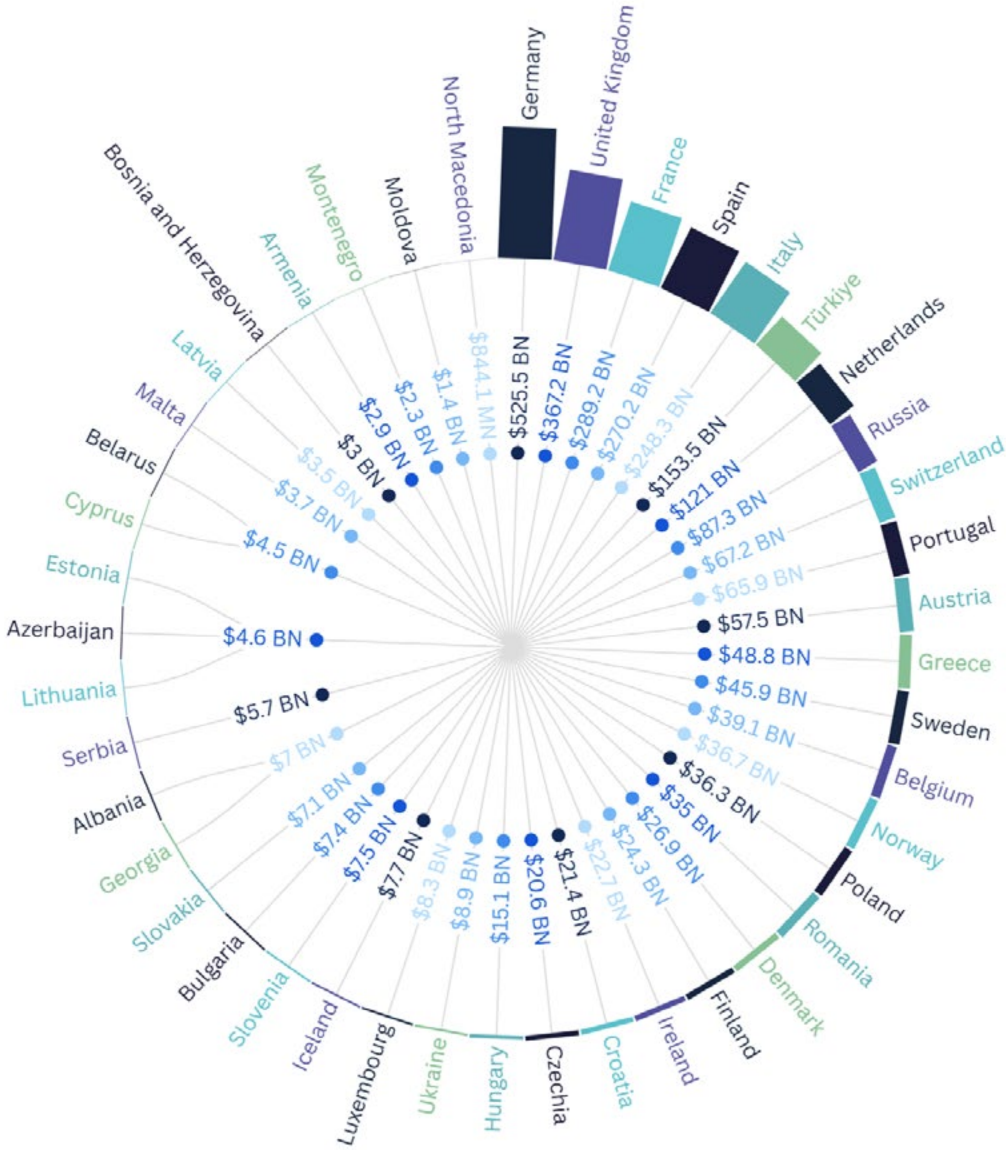


Figure 23: Travel & Tourism's Total Contribution to GDP in Europe (2024)

Crucially, international visitor spending was on par with its 2019 level in 2024 as inbound travellers spent $758.7 billion, an increase of 3.4% over the 2023 level. Spending by domestic visitors accounted for 66.8% of the total travel spending in 2024 while spending by inbound visitors accounted for the remaining 33.2%. In many countries, the dependence on foreign visitors is even greater. For instance, in Cyprus, 90.2% of total travel spending came from international visitors. In Greece, a popular destination, the international visitor spending share was 67.2%. As for the breakdown between leisure and business travel, the former makes up for an 81.8% share while the latter makes up an 18.2% share.

COUNTRY IN FOCUS: ITALY (BUSINESS TRAVEL IS BOOMING)

In 2024, Travel & Tourism contributed $248.3 billion to the Italian economy and supported 3.1 million jobs. In a country where the youth unemployment rate is high, the sector represents an important source of employment for young Italians. Young workers made up 9.2% of direct Travel & Tourism employment in 2023, far higher than their 5.1% share in the overall economy[11]. Therefore, the sector's post-pandemic growth of 4% above the 2019 level is a welcome development. One of the reasons behind the Travel & Tourism's growth is the strength of business travel in Italy.

Italy, in 2024, attracted the seventh highest business travel spending globally as corporate visitors spent $30.8 billion, growing 4.7% above 2023 and 18.1% above the 2019 pre-pandemic level.

This includes expenditure by domestic and inbound business travellers. In comparison, spending by leisure travellers in the country was only slightly above (1.4%) the 2019 level. As a consequence, share of business travel in total travel spending has improved from 14% in 2019 to 15.9% in 2024.

Business travel has also supported the inbound travel segment. In 2024, there were 59 million international tourists in Italy, 5.5 million fewer than in 2019. Out of these tourists, only those visiting the country for business purposes saw growth over 2019 – exceeding it by 9.1% with almost 11 million corporate visitors[12].

The MICE (Meetings, Incentives, Conferences, and Exhibitions) industry has enjoyed increased demand in recent years. According to recent research report, there were almost 370,000 conferences and events in Italy in 2024, which was 8.2% more than in 2023. The number of attendees also jumped year-on-year[13].

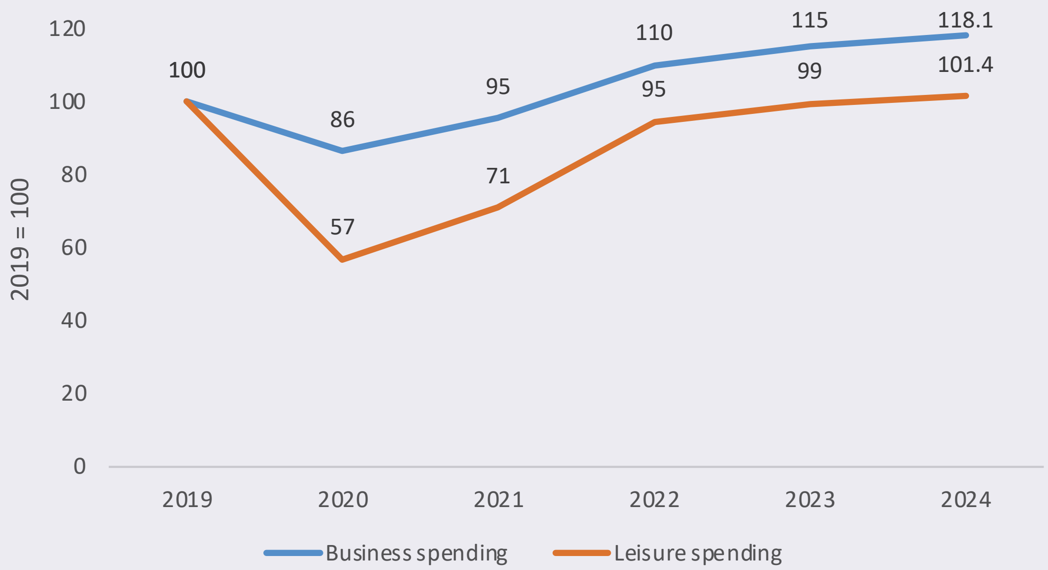


Figure 24: Business Spending vs Leisure Spending in Italy (Index = 2019)

11. World Travel & Tourism Council (WTTC). Environmental & Social Research (ESR). Available at: https://wttc.org/research/environmental-social.

12. Oxford Economics, June 2025. Global Travel Service database. Available at: https://data.oxfordeconomics.com/.

13. Töre, V.Ö., 2025. Unveiling Italy's €11.7 billion meetings industry impact. FTN News, 27 June. Available at: https://ftnnews.com/travel-news/mice/unveiling-italys-e117billionmeetingsindustryimpact/.

COUNTRY IN FOCUS: UK (INBOUND TRAVEL SHOWING WEAKNESS)

The UK is an established destination for international tourists but in recent years, it has struggled to attract as many visitors as it did in the past. Although international arrivals in 2024 finally surpassed 2019 levels, their total spending, at $51.7 billion, remained short by 5.3%.

The composition of inbound arrivals has changed, too. Figure 25 shows origin markets that had the highest shortfalls in 2024, compared to 2019. Many of them are long-haul Asian countries. For instance, the number of Chinese travellers to the UK in 2024 remained 46.2% below 2019 level and there were 42.1% fewer Japanese tourists.

Their absence is noticeable since their spending per trip is higher than the average inbound tourist in the UK. In 2019, a Chinese tourist spent £1,937 per visit on average[14] while a Japanese tourist spent £1,036[15]. In comparison, the overall average spending per visit was roughly £700[16].

Several factors have slowed the return of international visitors to the UK. Persistent inflation and the cost-of-living crisis in many source markets have prompted travellers to visit more affordable destinations, like those in Southern and Eastern Europe. As per the World Economic Forum's (WEF) Travel & Tourism Development Index, the UK ranked 113th out of 119 countries in terms of Price Competitiveness[17], which looks at cost of travelling and operating in a country. The score has fallen from 3.35 in 2019 to 2.74 in 2024, suggesting the UK has become more expensive. This is further exacerbated by lack of VAT-free shopping, growing taxes on businesses, and high Air Passenger Duty (APD).

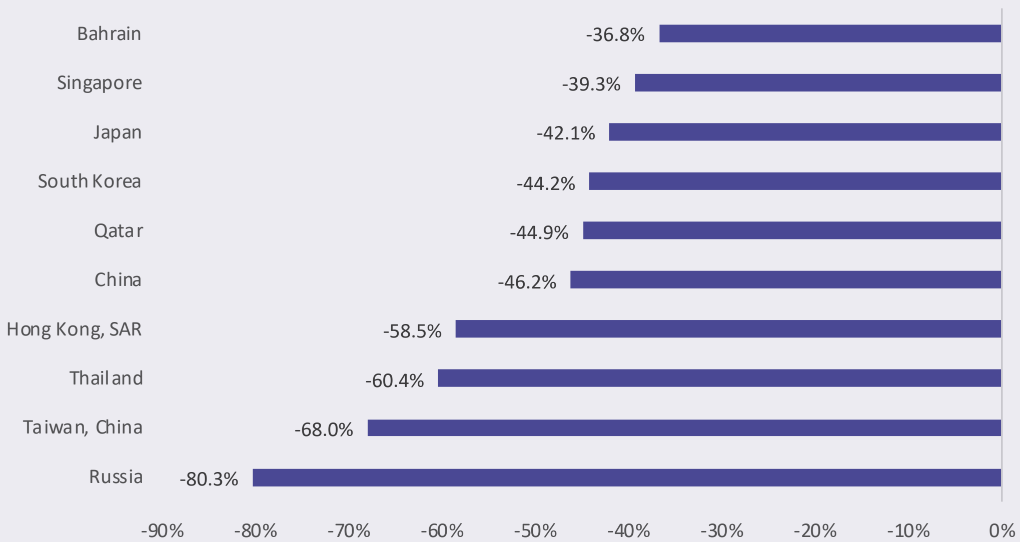
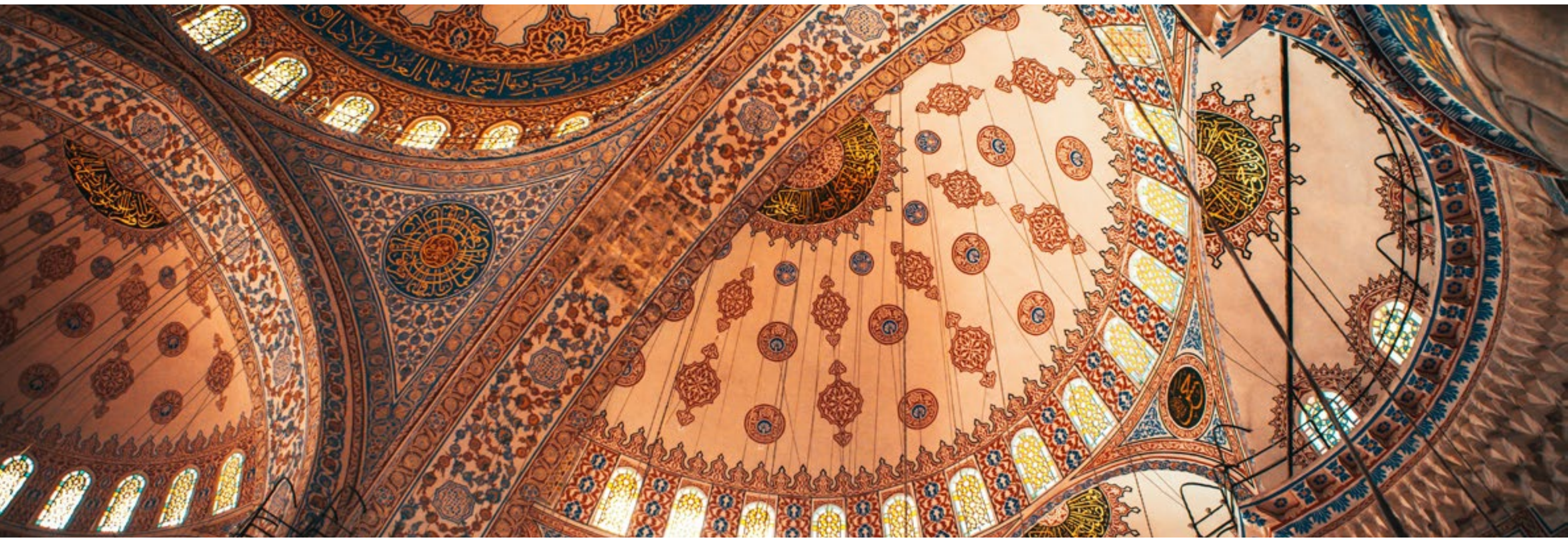


Figure 25: Largest Declines in Overnight International Arrivals in the UK (2024 vs 2019)

14. VisitBritain, n.d., China Market snapshot: Visitor Profile. Available at: https://www.visitbritain.org/media/2720/download?attachment.
15. VisitBritain, 2023. Japan Market Profile 2022. Available at: https://www.visitbritain.org/sites/ind/files/2023-07/japan_market_profile_2022.pdf.
16. Office for National Statistics, May 2020. Travel trends: 2019. Available at: https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2019.
17. World Economic Forum, 2024. Travel & Tourism Development Index 2024. Available at: https://www.weforum.org/publications/travel-tourism-development-index-2024/.

In 2025, the sector's contribution to GDP in Europe is expected to increase 5.1% year-over-year. Several countries are forecast to record a full recovery to 2019 levels of GDP contribution by the sector, including Finland, the Netherlands, and Poland. The sector is set to support an additional 280,000 jobs across the region.

Over the next decade, the sector is projected to grow 2% per year, which would be the slowest annual growth rate out of all the regions. However, it is stronger than the 1.4% annual growth rate projected for the wider European economy. Along with the GDP contribution growth, the sector-supported employment is expected to rise by 8.2 million jobs between 2025 and 2035.



2.7 MIDDLE EAST

The Middle East's Travel & Tourism sector has achieved the second-highest post-pandemic growth globally, behind the Caribbean. In 2024, the sector's total contribution to GDP reached $341.9 billion, representing a 7% growth over 2023 and 16.1% growth over 2019. Saudi Arabia has the region's largest sector with GDP contribution of $107.5 billion, follwed by the United Arab Emirates at $70.1 billion. Both countries have demonstrated strong resilience to the pandemic shock: the UAE's sector fully recovered by 2022, while Saudi Arabia reached full recovery in 2023. In contrast, conflict-affected markets in the region, such as Lebanon and Israel, remained far behind pre-pandemic levels.

In 2024, Travel & Tourism also supported 7.3 million jobs across the Middle East, which is an increase of 406,000 jobs compared to the 2023 level and just over 724,000 jobs compared to the 2019 level. Nearly three-fourths of this post-pandemic increase in sector-supported jobs occurred in Saudi Arabia.

International visitor spending is crucial to the region's sector. In 2024, international tourists spent $172.2 billion (7.8% increase from 2023), while domestic visitors spent $105.3 billion (7.4% increase from 2023). Spending by both of these visitor categories exceeded the 2019 levels. Travel & Tourism investment in the Middle East reached $84.5 billion in 2024, growing 9.7% above the 2019 level – the strongest growth rate among all regions. Many Gulf countries are prioritising the expansion of the sector and thus have invested substantially. Some countries are already enjoying returns on these investments. In Kuwait, international visitor spending in 2024 doubled compared to 2019 (fifth highest post-pandemic growth) and in Qatar, international visitor spending surpassed 2019 level by 54.5%.

In 2025, conflicts in the region are expected to dampen demand for travel, though the impact will likely remain limited to directly affected areas. Despite this, Travel & Tourism's GDP contribution is expected to grow 7.4% compared to 2024, driven in part by a robust 10.9% growth for Saudi Arabia's sector.

In the next decade (2025 to 2035), the sector's contribution to GDP is projected to increase at an annual rate of 3.6%, which is faster than the 2.6% annual growth rate projected for the wider economy in the Middle East. This would take GDP contribution to $522.4 billion, or 11.5%, of the regional economy. Jobs, at the same time, are forecast to increase by 2.2 million, taking total sector-supported jobs to 9.9 million.

Travel & Tourism would support nearly 1 in 10 jobs in the Middle East in 2035.

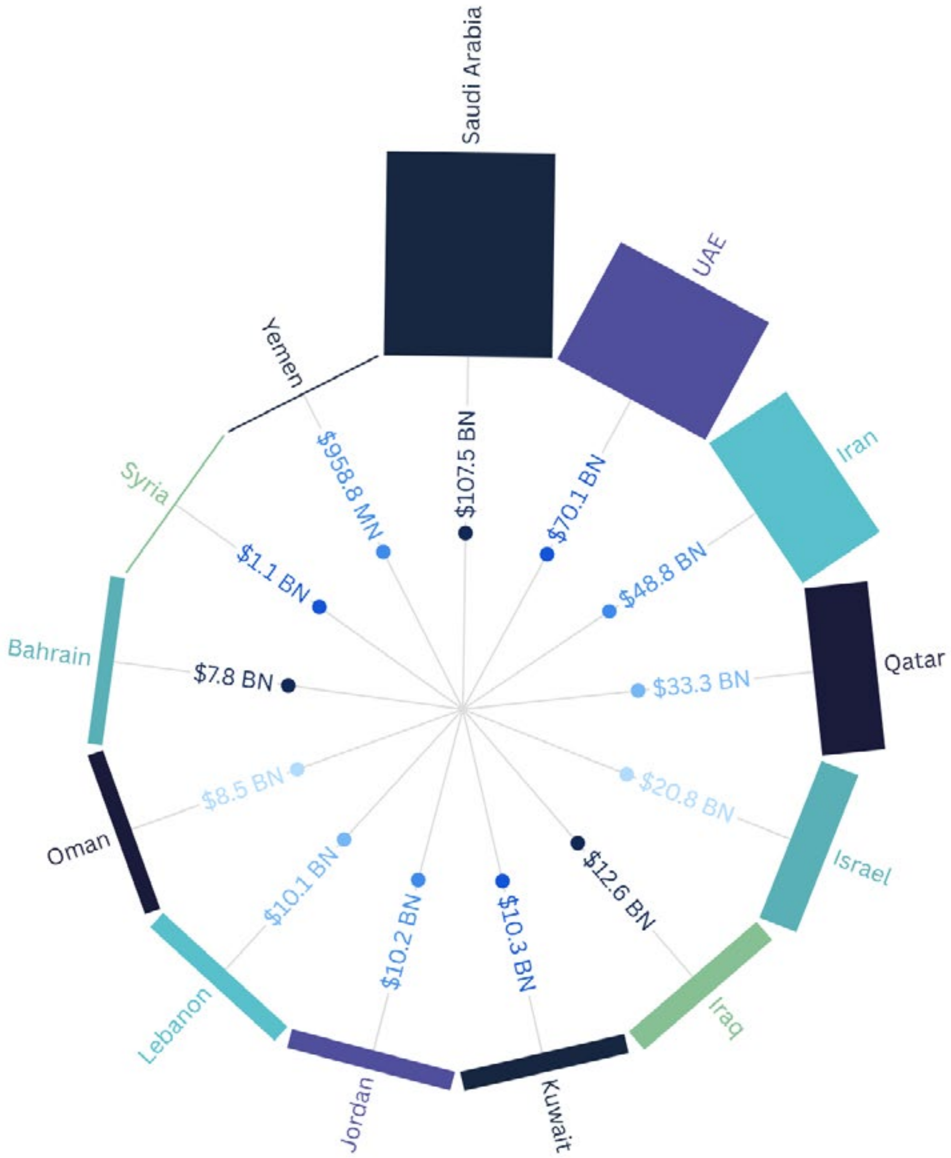


Figure 26: Travel & Tourism's Total Contribution to GDP in Middle East (2024)

COUNTRY IN FOCUS: OMAN (A BALANCED SECTOR)

The Sultanate of Oman lies on the Arabian Peninsula. It's a popular choice among travellers due it its offer of Arabian culture, diverse landscapes, and warm hospitality. Furthermore, Oman performs strongly on safety for travellers, scoring 6.35 on WEF TTDI pillar for Safety and Security, placing it 16th globally[18].

The Travel & Tourism sector in Oman has enjoyed healthy post-pandemic growth. In 2024, its total contribution to GDP was $8.5 billion, surpassing the 2019 level by 8.4%. In the same year, the sector supported upwards of 212,000 jobs, representing 7.7% of all employment. This too exceeded the pre-pandemic level. Visitor spending is also well-balanced as the distribution between international visitors and domestic visitors is fairly even with 51.7% share and 48.3% share, respectively. The distribution between leisure travel and business travel is also more balanced than the Middle East and the world averages. Business travellers accounted for 34.4% share of total travel spending in Oman, compared to 16.1% share in the Middle East and 20.1% globally.

Oman's sector has a positive outlook. In the decade between 2025 and 2035, the sector's contribution to GDP is forecast to grow 4.1% each year, which would outstrip the Middle East average of 3.6% CAGR and the world average of 3.5% CAGR. This forecast growth is also stronger than the 2.2% annual growth rate projected for the country's total economy. In addition, international visitor spending in Oman is forecast to increase 5.2% per year over the next decade.

This strong outlook is supported by the country's Vision 2040 strategy, of which sustainable tourism growth is a key focus. The strategy includes increased destination promotion and investment targets for infrastructure to support increased visitor numbers. Travel & Tourism investment is forecast to increase 7.2% per year between 2025 and 2035, the 3rd highest in the Middle East.

COUNTRY IN FOCUS: UAE (IMPORTANCE OF POLICY SUPPORT)

The Travel & Tourism sector in the UAE has enjoyed strong post-pandemic growth following a brief dip in 2020. In 2024, the sector contributed $70 billion in GDP, accounting for 13% of the overall economy. This is 26% higher than in 2019. The sector's contribution to jobs increased 18.2% compared to 2019, reaching nearly 900,000.

The sector's growth was supported by strong demand from international visitors, whose spending made up nearly four-fifths of total travel spending. In 2024, inbound visitors spent $59.2 billion, growing 30.4% since 2019. In the same period, spending by domestic visitors increased 41%.

18. World Economic Forum, 2024. Travel & Tourism Development Index 2024. Available at: https://www.weforum.org/publications/travel-tourism-development-index-2024/.

This dominant growth of the country's Travel & Tourism sector is a result of its diverse tourism offerings. The UAE blends modern attractions such as the Burj Khalifa and the Louvre Abu Dhabi with cultural heritage and natural attractions from deserts to beaches. It also attracts visitors through various international business and leisure events such as the Abu Dhabi Grand Prix and Arabian Travel Market (ATM).

However, diverse tourism offerings are not the only driving factors behind the sector's strong growth in the UAE. Supportive policy measures, including those under the UAE Tourism Strategy 2031[19] have played critical role, too. Careful investments have been made to improve infrastructure to ensure the capacity needed to welcome more travellers. According to the WEF TTDI, the UAE ranks second highest globally in terms of physical infrastructure and tourism offerings.

In addition to investments, the UAE has eased its visa policies, facilitating an easier traveller journey. It now offers a free 48-hour transit visa, a five-year multi-entry tourist visa, and visa-on-arrival for more than 80 nationalities. It is also set to implement a unified tourist visa, along with other Gulf Cooperation Council (GCC) countries, that enables travellers to visit these countries with a single visa[20].

COUNTRY IN FOCUS: SAUDI ARABIA (PRIMED FOR FURTHER GROWTH)

Saudi Arabia's Travel & Tourism sector is set to experience the strongest growth in the region in the next decade, reaching $203 billion by 2035. That would mean an annual growth of 5.5% between 2025 and 2035, twice the projected growth rate for the broader Saudi economy. Over the same period, the number of jobs supported by the sector is expected to increase by 900,000, bringing the total sector-supported employment to 3.6 million by 2035.

This robust outlook is driven by a comprehensive and ambitious national strategy[21], strong government support, and significant investment. Some of the key enablers of this growth include:

- Clear policy direction: The sector has been recognised as a strategic pillar of Vision 2030, and the introduction of the National Tourism Strategy has set clear goals and plans to accelerate the growth.
- Institutional framework: The establishment of specialised government bodies such as the Ministry of Tourism and the Saudi Tourism Authority (STA) has strengthened governance and oversight, ensuring the sustainable development of the sector.
- Visa facilitation: The Kingdom has introduced and expanded visa programmes (including the eVisa programme), boosting accessibility and making it significantly easier for travellers to visit Saudi Arabia.
- Human capital development: Initiatives, such as the 'Tourism Trailblazers'[22] programme, have been set up to equip the Saudi workforce with world-class skills in hospitality and destination management.
- Investment: In 2024, investment in Travel & Tourism reached $52.8 billion, 3rd highest globally and represented a 16.2% share of overall investment in the economy. Over the next decade, investment is predicted to grow at an annual rate of 4.9%, above the global average of 4.5%. The government has also invested substantially to support the growth of the sector and between 2025 and 2035, government spending in the sector is forecast to increase 5.6% each year, more than double the global average of 2.4%.

19. UAE Government, 2022. UAE Tourism Strategy 2031. Available at: https://u.ae/en/about-the-uae/strategies-initiatives-and-awards/strategies-plans-and-visions/tourism/uae-tourism-strategy-2031.
20. ET Online, 3 July 2025. What the Middle East's Schengen-style GCC Unified Visa means for travellers. Available at: https://economictimes.indiatimes.com/nri/visit/what-the-middle-easts-schengen-style-gcc-unified-visa-means-for-travellers/articleshow/122225919.cms.
21. Ministry of Tourism (Kingdom of Saudi Arabia). National Tourism Strategy. Available at: https://mt.gov.sa/about/national-tourism-strategy.
22. Arab News, 12 June 2022. Saudi tourism ministry to invest $100 m on one of the largest training programs in the sector: top official. Available at: https://www.arabnews.com/node/2100886/business-economy.

3. Voices of The Sector

As the Travel & Tourism sector continues to expand, it faces few challenges, including overcrowding[23] at certain destinations - often the result of underinvestment and poor planning – and the shortage of skilled workers. Alongside this growth, the sector is also set to undergo continuous transformation. This section explores emerging trends shaping the sector, including insights from select WTTC Members and Knowledge Partners. Their first-hand perspectives offer credible and timely views on the evolving landscape of the global Travel & Tourism sector.

3.1 AI IS DRIVING TRANSFORMATION IN TRAVEL & TOURISM (AMADEUS)

Artificial intelligence has been transforming the Travel & Tourism sector for over a decade, starting with operations research that revolutionised flight scheduling, airport resource management, and passenger disruption handling. Today, generative AI (GenAI) is reshaping the traveller experience from start to finish. GenAI-driven chatbots provide natural and intuitive interactions, enriching each stage of the travel journey.

Amadeus has already introduced AI-supported product innovations. Examples include:

- **Cytric Easy AI Assistant**: A GenAI tool that helps business travellers search for flights and hotels using natural language all while ensuring policy compliance.
- **Amadeus Advisor**: A GenAI chatbot for hoteliers using natural language to extract insights from business intelligence data on average daily rates, room nights, and revenue pipeline.
- **Amadeus Virtual Airport Operations Centre**: A digital platform that enables seamless collaboration between airport entities through AI-driven coordination and resource management.
- **Amadeus Hey!**: A conversational AI solution that enhances post-trip engagement for travellers, improving personalisation and targeting for travel providers.

23. WTTC, July 2025. Managing Destination Overcrowding: A Call to Action from the Travel & Tourism Private Sector. Available at: https://researchhub.wttc.org/product/destination-stewardship-2025.

To accelerate innovation and ensure responsible deployment, businesses in the sector must maintain strategic partnerships with technology providers. Amadeus, for instance, partners with Microsoft and Google Cloud which provide access to advanced foundation models, cloud infrastructure, and productivity tools like Microsoft 365 Copilot and Azure OpenAI Service.

Ethical and effective integration of AI is critical and Travel & Tourism companies should adopt governance structures that ensure policy compliance, alignment with ethical standards, and industry regulations like the EU AI Act.

Business travel and events are also being reshaped by advancements in artificial intelligence, particularly with the emergence of Agentic AI - systems that are capable of independently executing tasks and optimising outcomes. In 2025, AI-delivered personalisation and real-time solutions are expected to dominate, reducing friction in corporate travel. AI allows businesses to focus on strategic goals. Its impact extends beyond individual trips; it can support broader practices like strategic event planning and attendee engagement.

By combining automation, personalisation, and data-driven management, Agentic AI transforms travel into a streamlined and value-focused process. These innovations signify a shift in the way businesses approach corporate travel and event planning, fostering efficiency, productivity, and employee satisfaction at every level.

3.2 SHIFTING CONSUMER BEHAVIOUR AND PREFERENCES (EXPEDIA GROUP)

Sports tourism is expected to be popular in 2025, and it has the potential to create massive opportunities in the sector and transform how people travel. According to Expedia Group, sports tourism represents 10% of global tourism spending and is projected to reach $1.3 trillion by 2032. Sports fans are quite mobile – 44% of them travel internationally for events and the share is even higher (56%) among younger generations, i.e., 16–34-year-olds.

Another traveller trend that is expected to gain popularity is 'Detour Destinations', which involves combining lesser-known spots with bucket-list favourites, mainly to avoid crowds. For example, travellers may visit Girona, taking a detour from Barcelona. Miyako in Japan is also gaining traction as an ideal alternative to more crowded island destinations Okinawa[24].

When looking at how travellers get inspiration, digital media – such as content creators, and influencers on social media – continue to rise in significance. For younger generations, it is often the most important source of inspiration. More than half (62%) of consumers find trip inspiration on social platforms, a stark increase from 35% in 2022 and 73% have booked travel based on an influencer's recommendation[25]. To keep up with this trend, many Travel & Tourism businesses are introducing new features on their platforms.

Expedia launched Travel Shops in 2024 to help inspire travellers, and it has nearly tripled the number of creators since launch. Expedia also recently launched Expedia Trip Matching[26] on Instagram – a first-of-its-kind feature that allows travellers to share travel reels found on Instagram directly with Expedia to get personalised recommendations and itineraries, and book seamlessly – all without leaving Instagram. It bridges the gap between social discovery and real-world booking using agentic AI.

24. Expedia Group, 2025. Expedia Summer Travel Outlook Reveals Surge in Short-Haul Hotspots and Off-Peak Getaways. Available at: https://www.expedia.com/newsroom/expedia-summer-travel-outlook-reveals-surge-in-short-haul-hotspots-and-off-peak-getaways/.
25. Expedia Group, 2025. Traveler Value Index. Available at: https://www.expediagroup.com/investors/news-and-events/financial-releases/news/news-details/2025/Travel-Priorities-Reinvented-Expedia-Groups-2025-Traveler-Value-Index-Signals-a-Shift-in-Consumer-Priorities/
26. Expedia Group, 2025. Expedia Trip Matching. Available at: https://www.expedia.com/tripmatching.

3.3 STRATEGIC BUSINESS TRAVEL (CWT)

In 2025, business travel and events are more strategic than ever. One of the clearest trends is the sharpened focus on return on investment (ROI) – but with a broader definition. It's not just the immediate financial returns; "return on objectives" (ROO) as a complementary metric is also gaining traction. This trend recognises that not every corporate trip results in a signed contract, but may help build trust, strengthen culture, or accelerate innovation. As more stakeholders – from finance to HR – become involved in travel decisions, they're asking: "What strategic goal did this trip support?"

This demand for clarity is fuelling investment in better data and integration. Companies want to link travel activity to Customer Relationship Management (CRM), HR, and sustainability systems to understand not just the cost, but also the outcomes. It is about connecting the dots between travel, business performance, and even employee retention.

Here, companies are deploying AI to support this approach. CWT has AI-powered solutions across its suite of products and services that enable clients to summarise data changes, their causes, and KPI impacts – empowering fast and informed decisions.

Travel policies are also being reimagined to support physical and mental health – through smarter scheduling, greater flexibility, and adequate recovery time. At the same time, with rising risks such as extreme weather and geopolitical tensions, traveller safety remains a top priority. Today, that means more than emergency response – it includes proactive risk assessment, location-specific alerts, and around-the-clock support.

Put simply, business travel in 2025 is about achieving business outcomes in a way that's purposeful, measurable, and aligned with both people and planet.

3.4 EXPERIENCE-LED TRAVEL (TRIPADVISOR)

There has been an incredible uptick in experience-led travel, and it is becoming the main reason to book a trip. It is shaping the way in which we think about travel today and especially, how we will think about travel tomorrow. The 2025 Tripadvisor Trendcast highlights three trends that are experience-centred, and they share a picture of what the future of travel will look like:

Nano Neighbourhoods:

As travel normalises again post-pandemic, a paradox is emerging: the world feels smaller, and people want to explore it more deeply. Travellers want to immerse themselves in the places they're visiting, focussing on slowing down and living like locals. For example: the neighbourhood attraction pages of the Centro Historico de Sevilla and the 798 Art Zone in Beijing doubled their pageviews on Tripadvisor. Slow travel isn't just an eco-friendly alternative to flying or a different approach to travel FOMO; it is a new way of travelling, slowing down to find the stuff you can't get in the guidebooks.

Beauty Voyagers:

Younger travellers are seeking unique beauty treatments and rituals they can't get anywhere else and they're building their entire trips around these. They are travelling to Morocco, where hotel spas incorporate centuries-old ingredients such as black soap and argan oil. They're visiting South Korea where ginseng and snail mucin use are as common as daily sunscreen use. The share of mentions for treatments on Tripadvisor is on the rise (+389% year-on-year in bookings for head spas, and +433% year-on-year in bookings of red-light therapies) as are beauty bookings (+400% for skincare experiences in 2024 compared to 2023).

Sports Trek:

Travellers are craving fun and sports and concerts are driving them. Tripadvisor pages mentioning sporting events grew 219% faster than the average attraction pages in 2024. Whether it's about chasing quiet moments on a paddleboard, watching niche sports (+329% bookings for curling activities in the last two years) or travelling cross-continent to cheer a team on, travellers are going all in. Sport events and e-sport tournaments are now launching pads for deeper exploration of host cities and cultures. Tripadvisor saw a 92% increase in international clicks to book Forth Worth, Texas when the Fortnite World Championship took place there.

3.5 EVOLVING SHORT-TERM RENTAL LANDSCAPE (LIGHTHOUSE)

The global short-term rental (STR) segment reached an estimated $201.6 billion in gross bookings in 2024, underscoring its growing influence in the Travel & Tourism sector. As we move into 2025, the STR market continues to evolve, marked by robust growth, shifting traveller preferences, and a wave of regulatory changes.

According to Lighthouse data, the global STR supply expanded by 9% year-over-year from December 2023 to December 2024, with guest capacity at record highs. Growth was led by Asia (+22%) and Africa (+25%), while Europe and Latin America each posted solid 9% gains. North America saw a more modest 3% increase, reflecting a mature market.

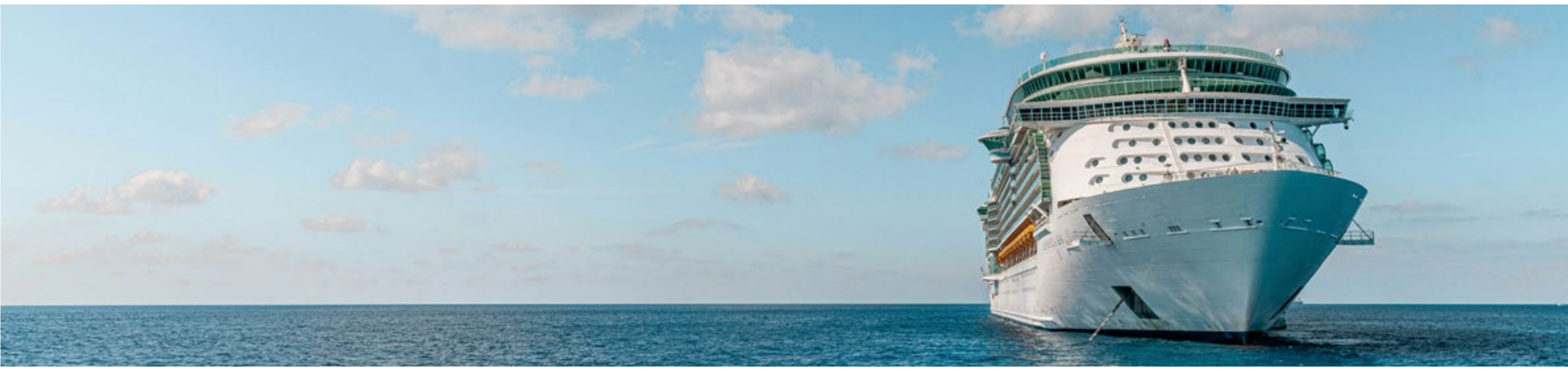
Demand remains strong, with global occupancy rates up 4% YoY in Q1 2025, surpassing pre-pandemic levels in several key markets. Major events have played a significant role in boosting STR performance: Paris saw a 15% YoY increase in occupancy during the 2024 Olympics, while Miami experienced a 12% spike during Art Basel. These events not only drove higher occupancy but also pushed average daily rates (ADR) up by 10% - 18% in host cities.

Popular destinations in 2025 include perennial favourites like Lisbon, Barcelona, and Miami, with notable growth occurring in emerging markets. Cape Town and Bali, for example, both saw over 20% YoY increases in listings (from December 2023 through December 2024), while Tokyo's STR supply surged by 18% ahead of major international events. Rural and secondary destinations, such as Portugal's Algarve and Mexico's Oaxaca, are also gaining traction as travellers seek unique, less crowded experiences.

The sector is also navigating significant regulatory changes as cities and countries respond to overcrowding and community concerns. In 2024, Barcelona banned new STR licenses, Greece imposed a freeze on new permits, and the UK and Italy introduced stricter rules. These measures are prompting operators to innovate and engage more closely with local communities.

Other trends include the rise of mid-term stays (28+ days) as remote work continues to influence travel habits. In fact, mid-term stays now account for 18% of all STR bookings globally - a 5% YoY increase.

Operators who adapt to these trends and invest in data-driven insights (real-time pricing technology, competitor intelligence, and benchmarking tools) and focus on guest experience will be best positioned for ongoing success.



3.6 TRENDS IN THE CRUISE INDUSTRY (CRUISE LINES INTERNATIONAL ASSOCIATION) (CLIA)

Although the cruise industry accounts for only 2% of the global Travel & Tourism sector, it remains one of the most dynamic and resilient industries. Its steady rise is fuelled by strong demand, particularly from Gen X and Millennials. It has also been very successful in attracting new customers.

According to CLIA's 2025 State of the Cruise Industry[27] report, 31% of cruise passengers over the past two years were first-timers. These new-to-cruise travellers are drawn by the opportunity to visit multiple destinations, variety, convenience, and the value cruise holidays offer – from family-friendly adventures to high-end cultural experiences.

The popularity of cruising is also reflected in high satisfaction rates and strong repeat intent. A remarkable 82% of past cruisers say they plan to cruise again, which is a higher proportion than December 2019 levels. A quarter of cruisers sail two or more times a year while 14% cruise twice a year. Multi-generational cruising is also gaining traction, with nearly a third of guests sailing with three or more generations. These further cement cruise holidays as a versatile option for all ages.

Expedition and exploration cruises are emerging as the fastest-growing subsegments with a 22% year-on-year increase in passengers seeking these voyages in 2024 compared to 2023. This trend highlights the evolving tastes of travellers who seek immersive, off-the-beaten-path experiences.

The cruise industry's impact extends beyond passengers. According to CLIA, cruise supports 1.6 million jobs and contributes over $168 billion to the global economy. As the industry grows – projected to reach 37.7 million passengers in 2025 – it continues to pursue net-zero emissions by 2050, in line with the International Maritime Organization (IMO) target. Examples of cruise line initiatives include ordering fuel-flexible ships, piloting alternative fuels like advanced forms of methanol and biofuels, investing in onshore power supply (OPS) infrastructure, and partnering with ports and governments on emissions planning. By 2028, half of all new ship capacity is specified to be able to use alternative fuels, and over 70% of ships collectively owned and operated by CLIA member cruise lines will be able to plug in at cruise ports where OPS is available (up from the current share of over 61%), enabling ships to turn off engines for significant emissions reduction while docked.

Overall, cruising is evolving rapidly, with cruise lines embracing innovation, partnering with other organisations to find ways to reduce environmental impacts, and offering cruise experiences that tap into diverse traveller preferences. This is making it one of the most forward-looking, resilient industries within the wider Travel & Tourism sector.

27. Cruise Lines International Association (CLIA), 2025. 2025 State of the Cruise Industry Report. Available at: https://cruising.org/resources/state-cruise-industry-report-2025.

3.7 TRENDS IN THE HOTEL INDUSTRY (STR)

The growing demand for global Travel & Tourism reflects a strong appetite for both leisure and business travel, reinforcing the sector's resilience. According to STR, a CoStar Group Company, occupancy rates have risen across most regions, except China, where headwinds persist.

In Europe, total traveller volumes had largely rebounded to pre-pandemic levels by the close of 2023, although the recovery was initially weighted toward the leisure travel segment, particularly favouring Southern European destinations. Tourism remains a cornerstone of Europe's economy, and occupancy patterns provide a compelling indicator. By 2024, many of Europe's most popular markets achieved occupancy rates nearing or exceeding 80%. Strong inbound leisure demand, especially from US travellers, has further propelled the luxury hotel segment, supporting robust average daily rate (ADR) performance across the continent. This trend has continued into 2025, although some markets are seeing moderation in ADR growth.

Regional performance is expected to remain uneven in 2025. The Middle East is poised for robust growth, underpinned by sustained demand in the UAE markets. However, Saudi Arabia faces short-term performance pressures as its hotel industry absorbs a dramatic surge in supply, with room inventory set to double over the decade, driven by ambitious investments aligned with Vision 2030. Meanwhile, the Asia-Pacific region is also expected to deliver strong growth, fuelled by the ongoing recovery of Chinese outbound travel, supported by recent visa facilitation measures and improving consumer confidence.

Europe, after a boost in 2024 from events like the Paris Olympics and Taylor Swift's Eras Tour, will likely shift to more moderate growth. The Americas also anticipate slower progress as resort markets adjust to reduced discretionary spending.

Ultimately, local dynamics – such as source market strength, new hotel supply, alternative accommodation competition, and event calendars – will shape performance in 2025. Despite ongoing economic uncertainty, one thing remains clear: consumers continue to prioritise travel, offering a strong foundation for sustained global growth.

4.League Tables

4.1 TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP, $ BILLIONS

Rank	Economy	2024
1	United States	2,558.4
2	China	1,644.3
3	Germany	525.5
4	United Kingdom	367.2
5	Japan	310.5
6	France	289.2
7	Mexico	274.4
8	Spain	270.2
9	India	249.3
10	Italy	248.3
11	Australia	195.9
12	Brazil	166.9
13	Türkiye	153.5
14	Canada	123.1
15	Netherlands	121.0
16	Saudi Arabia	107.5
17	Philippines	91.8
18	Russia	87.3
19	South Korea	73.0
20	Indonesia	71.7

Rank	Economy	2025 (Forecast)
1	United States	2,575.5
2	China	1,904.5
3	Germany	541.9
4	United Kingdom	383.1
5	Japan	324.3
6	France	297.9
7	Spain	283.0
8	Mexico	281.0
9	India	268.7
10	Italy	257.9
11	Australia	207.9
12	Brazil	167.6
13	Türkiye	159.8
14	Canada	133.4
15	Netherlands	129.8
16	Saudi Arabia	119.3
17	Philippines	102.6
18	Russia	95.0
19	Indonesia	80.1
20	Thailand	79.7

4.2 TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP, % ANNUAL CHANGE

Rank	Economy	Annual change (2024)
1	Vanuatu	174.3%
2	Lebanon	136.6%
3	Solomon Islands	73.8%
4	Myanmar	61.9%
5	British Virgin Islands	38.0%
6	Tonga	37.2%
7	Sierra Leone	35.1%
8	Grenada	35.0%
9	Brunei Darussalam	33.2%
10	Philippines	27.6%
11	Thailand	27.3%
12	Malaysia	24.6%
13	Libya	24.3%
14	Sri Lanka	24.2%
15	Botswana	23.1%
16	China	22.7%
17	Côte D'Ivoire	21.9%
18	Syria	20.6%
19	Malta	20.4%
20	Madagascar	19.5%

Rank	Economy	Annual change (2025, forecast)
1	Hong Kong, SAR	40.7%
2	Cambodia	32.4%
3	Azerbaijan	32.0%
4	Suriname	31.6%
5	Haiti	31.0%
6	Sri Lanka	28.7%
7	Dominica	24.6%
8	Botswana	24.2%
9	Kazakhstan	24.1%
10	Bulgaria	24.0%
11	Hungary	22.1%
12	Israel	21.2%
13	Vanuatu	20.6%
14	British Virgin Islands	19.5%
15	Thailand	18.5%
16	St Vincent and the Grenadines	18.4%
17	Macau, SAR	18.2%
18	Mongolia	18.0%
19	Cameroon	17.3%
20	Slovakia	17.2%

4.3 TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP, % SHARE OF WHOLE ECONOMY

Rank	Economy	% Share of Economy (2024)
1	Antigua and Barbuda	81.4%
2	Macau, SAR	78.6%
3	Aruba	68.4%
4	Grenada	67.8%
5	Maldives	61.0%
6	St Lucia	59.8%
7	US Virgin Islands	59.7%
8	Seychelles	51.5%
9	Bahamas	44.7%
10	Anguilla	41.0%
11	St Kitts and Nevis	37.8%
12	British Virgin Islands	36.8%
13	Fiji	36.6%
14	Cuba	35.7%
15	Jamaica	32.9%
16	Belize	32.0%
17	Curaçao	30.7%
18	St Vincent and the Grenadines	30.7%
19	Cabo Verde	30.1%
20	Montenegro	28.4%

Rank	Economy	% Share of Economy (2025)
1	Macau, SAR	88.8%
2	Antigua and Barbuda	84.1%
3	Grenada	67.9%
4	Aruba	67.1%
5	Maldives	63.9%
6	St Lucia	62.7%
7	US Virgin Islands	59.7%
8	Seychelles	54.4%
9	Bahamas	46.9%
10	British Virgin Islands	43.3%
11	Anguilla	42.9%
12	St Kitts and Nevis	41.3%
13	Sudan	40.0%
14	Cuba	37.7%
15	Fiji	37.6%
16	St Vincent and the Grenadines	35.3%
17	Jamaica	34.0%
18	Belize	32.7%
19	Cabo Verde	31.8%
20	Curaçao	30.5%

4.4 TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP, % CHANGE FROM 2019

Rank	Economy	2024 vs 2019
1	Cuba	232.4%
2	Guyana	107.0%
3	El Salvador	63.5%
4	Qatar	56.8%
5	Gambia	54.2%
6	Albania	52.8%
7	Iran	51.4%
8	Grenada	45.0%
9	Maldives	43.7%
10	Laos	43.2%
11	Bahrain	37.7%
12	Nicaragua	37.1%
13	Yemen	36.8%
14	Türkiye	36.3%
15	Ethiopia	35.6%
16	Puerto Rico	34.7%
17	Malta	34.1%
18	Portugal	33.3%
19	Egypt	32.1%
20	Jordan	30.0%

Rank	Economy	2025 vs 2019 (Forecast)
1	Cuba	257.3%
2	Guyana	130.1%
3	El Salvador	69.5%
4	Gambia	61.0%
5	Qatar	60.8%
6	Albania	58.1%
7	Maldives	56.3%
8	Iran	54.3%
9	Grenada	50.6%
10	Laos	49.3%
11	Nicaragua	47.8%
12	Jordan	47.7%
13	Ethiopia	44.1%
14	Malta	43.5%
15	Bahrain	43.4%
16	Türkiye	41.9%
17	Yemen	41.7%
18	Libya	39.8%
19	Puerto Rico	39.7%
20	Tajikistan	39.6%

4.5 TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT, MILLIONS

Rank	Economy	2024
1	China	82.08
2	India	46.26
3	United States	20.38
4	Indonesia	12.91
5	Philippines	11.22
6	Brazil	8.05
7	Thailand	8.01
8	Mexico	7.70
9	Germany	6.15
10	Vietnam	6.08
11	Japan	5.91
12	Pakistan	4.87
13	United Kingdom	4.24
14	Russia	3.62
15	Ethiopia	3.47
16	Türkiye	3.23
17	Italy	3.08
18	Spain	3.02
19	France	2.97
20	Nigeria	2.79

Rank	Economy	2025 (Forecast)
1	China	83.36
2	India	48.16
3	United States	20.60
4	Indonesia	13.68
5	Philippines	11.67
6	Thailand	8.40
7	Brazil	8.21
8	Mexico	7.89
9	Germany	6.45
10	Japan	6.39
11	Vietnam	6.32
12	Pakistan	5.03
13	United Kingdom	4.52
14	Russia	3.85
15	Ethiopia	3.60
16	Türkiye	3.29
17	Nigeria	3.22
18	Italy	3.20
19	Spain	3.18
20	France	3.05

4.6 DOMESTIC VISITOR SPENDING, $ BILLIONS

Rank	Economy	2024
1	United States	1,490.5
2	China	815.5
3	Germany	458.8
4	United Kingdom	236.9
5	Mexico	206.0
6	India	185.6
7	Japan	164.9
8	France	154.4
9	Italy	133.2
10	Brazil	112.3
11	Australia	110.5
12	Spain	90.1
13	Netherlands	83.7
14	Canada	69.9
15	Philippines	63.4
16	Russia	53.4
17	Türkiye	41.0
18	Saudi Arabia	39.3
19	Thailand	33.4
20	Switzerland	30.1

Rank	Economy	2025 (Forecast)
1	United States	1,506.4
2	China	967.5
3	Germany	461.9
4	United Kingdom	242.1
5	Mexico	209.9
6	India	200.8
7	Japan	171.5
8	France	156.6
9	Italy	135.3
10	Australia	113.9
11	Brazil	113.2
12	Spain	92.2
13	Netherlands	85.5
14	Canada	75.7
15	Philippines	70.8
16	Russia	54.7
17	Saudi Arabia	43.3
18	Türkiye	42.0
19	Thailand	34.7
20	Switzerland	30.6

4.7 INTERNATIONAL VISITOR SPENDING, $ BILLIONS

Rank	Economy	2024
1	United States	181.2
2	China	139.6
3	Spain	116.4
4	France	78.7
5	Türkiye	75.0
6	Italy	60.0
7	United Arab Emirates	59.2
8	Japan	52.9
9	United Kingdom	51.7
10	Germany	49.1
11	Thailand	47.9
12	Saudi Arabia	41.8
13	India	36.8
14	Mexico	35.6
15	Portugal	34.6
16	Singapore	32.4
17	Macau, SAR	32.3
18	Austria	28.6
19	Qatar	26.1
20	Switzerland	25.9

Rank	Economy	2025 (Forecast)
1	United States	168.7
2	China	144.1
3	Spain	123.0
4	France	81.6
5	Turkey	78.6
6	Italy	65.6
7	United Arab Emirates	62.2
8	Thailand	62.2
9	Germany	61.7
10	United Kingdom	55.0
11	Japan	54.6
12	Saudi Arabia	53.3
13	Hong Kong, SAR	41.8
14	Mexico	39.6
15	India	38.8
16	Macau, SAR	38.8
17	Singapore	36.1
18	Portugal	35.9
19	Austria	33.1
20	Greece	28.4

4.8 INTERNATIONAL VISITOR SPENDING, % CHANGE FROM 2019

Rank	Economy	2024 vs 2019
1	Guyana	357.9%
2	Cuba	226.5%
3	Eswatini	191.3%
4	El Salvador	114.0%
5	Kuwait	101.3%
6	Gambia	90.2%
7	Yemen	76.3%
8	Laos	68.1%
9	Albania	66.4%
10	Qatar	54.5%
11	Japan	53.5%
12	Grenada	51.3%
13	Iraq	49.0%
14	Puerto Rico	45.5%
15	Bahrain	37.9%
16	Maldives	37.2%
17	Ethiopia	36.2%
18	Egypt	36.1%
19	Colombia	35.1%
20	Uzbekistan	34.5%

Rank	Economy	2025 vs 2019 (Forecast)
1	Guyana	364.4%
2	Cuba	272.3%
3	Eswatini	200.5%
4	El Salvador	122.7%
5	Kuwait	117.3%
6	Gambia	93.9%
7	Yemen	83.3%
8	Laos	70.9%
9	Albania	70.5%
10	Qatar	60.6%
11	Japan	58.5%
12	Grenada	54.6%
13	Iraq	54.2%
14	Puerto Rico	53.1%
15	Maldives	48.5%
16	Ethiopia	46.5%
17	Saudi Arabia	44.5%
18	Bahrain	44.1%
19	Egypt	43.8%
20	Serbia	41.8%

4.9 TRAVEL & TOURISM CAPITAL INVESTMENT, $ BILLIONS

Rank	Economy	2024
1	United States	235.9
2	China	166.7
3	Saudi Arabia	52.8
4	France	51.7
5	India	47.5
6	Germany	42.7
7	Japan	30.6
8	United Kingdom	29.4
9	Spain	26.5
10	Australia	25.6
11	Indonesia	20.4
12	Singapore	20.3
13	Brazil	19.4
14	Mexico	15.4
15	Türkiye	12.9
16	Canada	12.8
17	Italy	12.4
18	South Korea	10.7
19	Netherlands	10.5
20	Iran	10.4

Rank	Economy	2025 (Forecast)
1	United States	245.2
2	China	184.9
3	Saudi Arabia	57.9
4	India	53.2
5	France	52.1
6	Germany	44.6
7	Japan	32.2
8	United Kingdom	30.8
9	Spain	27.8
10	Australia	27.1
11	Singapore	23.2
12	Indonesia	22.4
13	Brazil	20.0
14	Mexico	15.5
15	Canada	13.8
16	Türkiye	13.3
17	Italy	13.1
18	Netherlands	12.9
19	South Korea	11.3
20	Ireland	11.0

4.10 GROWTH FORECAST FOR 2025 - 2035

T&T's Total Contribution to GDP (Forecast)		
Rank	**Economy**	**CAGR (2025 - 2035)**
1	Vanuatu	9.2%
2	China	7.0%
3	Haiti	6.9%
4	India	6.4%
5	Madagascar	6.4%
6	Vietnam	6.3%
7	Myanmar	6.2%
8	Angola	5.7%
9	Paraguay	5.6%
10	Saudi Arabia	5.5%
11	Pakistan	5.3%
12	Thailand	5.3%
13	Cambodia	5.3%
14	Azerbaijan	5.3%
15	Israel	5.2%
16	Nigeria	5.2%
17	Tajikistan	5.2%
18	Papua New Guinea	5.1%
19	Guinea	4.9%
20	Congo	4.9%

T&T's Total Contribution to Employment (Forecast)		
Rank	**Economy**	**2035 vs 2025 (Thousands)**
1	China	19,834
2	India	15,767
3	Indonesia	3,204
4	United States	2,861
5	Philippines	2,472
6	Nigeria	2,169
7	Viet Nam	1,813
8	Thailand	1,740
9	Brazil	1,536
10	Mexico	1,491
11	Pakistan	1,264
12	Germany	1,192
13	Russia	1,133
14	United Kingdom	1,003
15	Egypt	963
16	Japan	960
17	Ethiopia	934
18	Saudi Arabia	902
19	Malaysia	859
20	Spain	700

GLOSSARY
KEY DEFINITIONS

TRAVEL & TOURISM
Relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

ECONOMIES
This term is used because the scope of the research covers not only countries but also specific territories/states.

DIRECT CONTRIBUTION TO GDP
GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within an economy less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

DIRECT CONTRIBUTION TO EMPLOYMENT
The number of direct jobs within Travel & Tourism. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

TOTAL CONTRIBUTION TO GDP
GDP generated directly by the Travel & Tourism sector plus its indirect and induced impacts (see below).

TOTAL CONTRIBUTION TO EMPLOYMENT
The number of jobs generated directly in the Travel & Tourism sector plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

VISITOR EXPORTS
Spending within the economy by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

DOMESTIC TRAVEL & TOURISM SPENDING
Spending within an economy by that economy's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

GOVERNMENT INDIVIDUAL SPENDING
Spending by government on Travel & Tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services (eg national parks).

INTERNAL TOURISM CONSUMPTION
Total revenue generated within an economy by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

BUSINESS TRAVEL & TOURISM SPENDING
Spending on business travel within an economy by residents and international visitors.

LEISURE TRAVEL & TOURISM SPENDING
Spending on leisure travel within an economy by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

INDIRECT CONTRIBUTION
The contribution to GDP and jobs of the following three factors:

- **CAPITAL INVESTMENT**: Includes capital investment spending by all industries directly involved in Travel & Tourism. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.

- **GOVERNMENT COLLECTIVE SPENDING:** Government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.

- **SUPPLY CHAIN EFFECTS:** Purchases of domestic goods and services directly by different industries within Travel & Tourism as inputs to their final tourism output.

INDUCED CONTRIBUTION
The broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

Travel & Tourism Economic Impact 2025: Global Trends

METHODOLOGICAL NOTE

WTTC has an ongoing commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008). This involves the benchmarking of our data to official, published TSAs, including for economies which are reporting data for the first time, as well as existing economies reporting an additional year's data. New TSAs incorporated this year include Argentina, Ethiopia, Romania and Türkiye bringing our total of economies in our benchmarking dataset to 76. Our TSA benchmarked economies cover around 90% of global direct T&T GDP.

WTTC coverage includes data and reports on 184 individual economies and 28 regions, sub-regions and economic and geographic groups.

ECONOMIC AND GEOGRAPHIC GROUPS

APEC (ASIA-PACIFIC ECONOMIC COOPERATION)
Australia, Brunei Darussalam, Canada, Chile, China, Hong Kong SAR China, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russia, Singapore, Taiwan China, Thailand, USA, Vietnam.

COMMONWEALTH[1]
Anguilla, Antigua and Barbuda, Australia, Bahamas, Bangladesh, Barbados, Belize, Bermuda, Botswana, Brunei Darussalam, Cameroon, Canada, Cayman Islands, Cyprus, Dominica, Eswatini, Fiji, Gambia, Ghana, Grenada, Guyana, India, Jamaica, Kenya, Kiribati, Lesotho, Malawi, Malaysia, Maldives, Malta, Mauritius, Mozambique, Namibia, New Zealand, Nigeria, Pakistan, Papua New Guinea, Rwanda, Seychelles, Sierra Leone, Singapore, Solomon Islands, South Africa, Sri Lanka, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Tanzania, Togo, Tonga, Trinidad and Tobago, Uganda, UK, UK Virgin Islands, Vanuatu, Zambia.

G7
Canada, France, Germany, Italy, Japan, UK, USA.

G20
African Union, Argentina, Australia, Brazil, Canada, China, European Union, France[2], Germany[2], India, Indonesia, Italy[2], Japan, Mexico, Russia, Saudi Arabia, South Africa[3], South Korea, Türkiye, UK, USA.

GCC (GULF COOPERATION COUNCIL)
Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE.

OAS (ORGANIZATION OF AMERICAN STATES)
Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Panama, Paraguay, Peru, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay, Venezuela.

OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)
Australia, Austria, Belgium, Canada, Chile, Colombia, Costa Rica, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, Türkiye, UK, USA.

(OIC) ORGANISATION OF ISLAMIC COOPERATION4
Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei, Burkina Faso, Cameroon, Chad, Comoros, Côte d'Ivoire, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Lebanon, Libya, Malaysia, Maldives, Mali, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Qatar, Saudi Arabia, Senegal, Sierra Leone, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Türkiye, UAE, Uganda, Uzbekistan, Yemen.

PACIFIC ALLIANCE
Chile, Colombia, Mexico, Peru.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)
Angola, Botswana, Comoros, Democratic Republic of Congo (DRC), Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Tanzania, Zambia, Zimbabwe.

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1. This includes data for Overseas British Territories, but there is no data for Nauru, Samoa and Tuvalu
2. Included in European Union
3. Included in African Union
4. No data for Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Palestine, Somalia or Turkmenistan

ECONOMIC IMPACT REPORTS

REGIONS, SUB REGIONS & COUNTRIES/ECONOMIES

WORLD

REGION	SUB REGION	COUNTRY & ECONOMY
AFRICA	NORTH AF-	Algeria
		Egypt
		Libya
		Morocco
		Tunisia
	SUB-SAHARAN	Angola
		Benin
		Botswana
		Burkina Faso
		Burundi
		Cameroon
		Cabo Verde
		Central African Republic
		Chad
		Comoros
		Congo
		Côte d'Ivoire
		Democratic Republic of Congo
		Eswatini
		Ethiopia
		Gabon
		Gambia
		Ghana
		Guinea
		Kenya
		Lesotho
		Madagascar
		Malawi
		Mali
		Mauritius
		Mozambique
		Namibia
		Niger
		Nigeria
		Réunion
		Rwanda
		Sao Tome and Principe
		Senegal
		Seychelles
		Sierra Leone
		South Africa
		Sudan
		Tanzania
		Togo
		Uganda
		Zambia
		Zimbabwe
AMERICAS	CARIBBEAN	Anguilla
		Antigua and Barbuda
		Aruba
		Bahamas
		Barbados
		Bermuda
		British Virgin Islands
		Cayman Islands
		Cuba
		Curaçao[1]
		Dominica
		Dominican Republic
		Grenada
		Guadeloupe
		Haiti
		Jamaica
		Martinique
		Puerto Rico
		St Kitts and Nevis
		St Lucia
		St Vincent and the Grenadines
		Trinidad and Tobago
		US Virgin Islands
	CENTRAL AND SOUTH AMERICA[2]	Argentina
		Belize
		Bolivia
		Brazil
		Chile
		Colombia
		Costa Rica
		Ecuador
		El Salvador
		Guatemala
		Guyana
		Honduras
		Nicaragua
		Panama
		Paraguay
		Peru
		Suriname
		Uruguay
		Venezuela
	NORTH	Canada
		Mexico
		USA
ASIA-PACIFIC	NORTHEAST ASIA	China
		Hong Kong SAR, China
		Japan
		Macau SAR, China
		Mongolia
		South Korea
		Taiwan, China
	CENTRAL	Kazakhstan
		Kyrgyzstan
		Tajikistan
		Uzbekistan
	OCEANIA	Australia
		Fiji
		Kiribati
		New Zealand
		Papua New Guinea
		Solomon Islands
		Tonga
		Vanuatu
	SOUTH ASIA	Bangladesh
		India
		Maldives
		Nepal
		Pakistan
		Sri Lanka
	SOUTHEAST ASIA (ASEAN)	Brunei Darussalam
		Cambodia
		Indonesia
		Laos
		Malaysia
		Myanmar
		Philippines
		Singapore
		Thailand
		Vietnam
EUROPE	EUROPEAN UNION	Austria
		Belgium
		Bulgaria
		Croatia
		Cyprus
		Czechia
		Denmark
		Estonia
		Finland
		France
		Germany
		Greece
EUROPE	EUROPEAN UNION	Hungary
		Ireland
		Italy
		Latvia
		Lithuania
		Luxembourg
		Malta
		Netherlands
		Poland
		Portugal
		Romania
		Slovakia
		Slovenia
		Spain
		Sweden
	OTHER EUROPE	Albania
		Armenia
		Azerbaijan
		Belarus
		Bosnia and Herzegovina
		Georgia
		Iceland
		Moldova
		Montenegro
		North Macedonia
		Norway
		Russia
		Serbia
		Switzerland
		Türkiye
		UK
		Ukraine
MIDDLE EAST		Bahrain
		Iran
		Iraq
		Israel
		Jordan
		Kuwait
		Lebanon
		Oman
		Qatar
		Saudi Arabia
		Syria
		United Arab Emirates
		Yemen

1. Referred to as Former Netherlands Antilles in previous WTTC reports.
2. Referred to as Latin America in previous WTTC reports.

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Together with Oxford Economics, WTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting 357 million jobs and generating 10% of global GDP in 2024. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 184 economies around the world. In addition to individual country fact sheets, and fuller country reports, WTTC produces a world report highlighting global trends and 27 further reports that focus on regions, sub-regions and economic and geographic groups.

To download reports or data, please visit: ResearchHub.WTTC.org

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