

EUROPE'S TOURISM DISPLAYS A STRONG REBOUND, BUT REMAINS UNEVEN ACROSS THE REGION

- International tourist arrivals to Europe were just 3.2% below 2019 levels based on year-to-date data
- However, recovery remains uneven, with 65% of reporting destinations still below pre-pandemic levels of foreign arrivals
- Full tourism recovery is expected in 2024, a year earlier than expected, amid persistent inflation and geopolitical instability

Brussels, 7 November: Following a summer of strong tourism demand, international tourist arrivals to Europe are only 3.2% below 2019 levels, and nights are down by 1.3% for the January-September period. The rebound is being driven by resilient intra-European travel and the influx of US tourists benefitting from favourable exchange rates. This is according to the latest edition of the *'European Tourism Trends & Prospects'* quarterly report released today by the European Travel Commission (ETC), which provides an overview of Europe's tourism performance over the summer months and its implications on the outlook for the shoulder season.

Year-to-date data show that around 1 in 3 reporting destinations have surpassed 2019 levels of foreign arrivals. Europe's recovery was mostly driven by Southern European and Mediterranean destinations, notably Serbia (+15%), Montenegro (+14%), Portugal (+11%), Türkiye (+8%), Malta, and Greece (both +7%). However, around 65% of reporting destinations are still below pre-pandemic figures. Slower recoveries are particularly evident among Eastern European countries neighbouring Russia and Ukraine, and those that are normally reliant on Russian travellers. The Baltic countries have registered the sharpest declines: Estonia (-27%), Latvia (-30%), and Lithuania (-33%).

Commenting following the publication of the report, **Miguel Sanz, ETC's President**, said: *"Despite persistent economic and geopolitical challenges, it is encouraging to observe the ongoing rebound of European tourism. However, we must acknowledge that the true measure of tourism success extends beyond the number of visitors and nights spent at a destination. It is essential to also consider and evaluate its impact on nature, local businesses, and the resident population. As Europe's tourism industry recovers, we should strive to develop innovative, sustainable metrics to better define its overall health and progress."*

Full tourism recovery is in sight despite persistent inflation and geopolitical instability

European travel recovery remained resilient during the summer season, even amid significant challenges posed by increased inflation, high costs of living, extreme weather events and airline strikes.

Persistent geopolitical instability continues to have repercussions on Europe's tourism outlook. The ongoing war in Ukraine still affects arrivals figures in Eastern Europe and the developing conflict in Israel poses risks going into the shoulder season, especially for destinations such as France, Türkiye and Romania which are popular with Israeli travellers.

Nevertheless, foreign arrivals to Europe are expected to continue recovering by the end of 2023, albeit at a slower pace, reaching 91% of pre-pandemic levels for the whole year. Forecasts suggest that international tourist arrivals in Europe will reach 2019 levels by 2024, a year earlier than initially predicted. Meanwhile, European airports are close to reaching a complete recovery in passenger demand. Based on ACI Europe's August traffic report, passenger traffic across the European airport network is down by just 3.4% compared to the same period in 2019.

Tourists favour affordability and off-peak travel

Despite increased financial pressures, consumers continue to prioritise travel spending over other discretionary expenses. However, due to high prices, tourists are now placing a greater emphasis on value for money when considering tourism products and experiences.

In particular, an increasing number of holidaymakers are opting for destinations that are perceived as more affordable. Lower prices and favourable exchange rates are driving the tourism recovery in destinations such as Türkiye and Bulgaria,

while popular package holiday destinations such as Portugal and Spain are also experiencing high demand. Generally, Europeans are considering a wider range of destinations than in the pre-pandemic period, with Türkiye, Montenegro, Albania, and Croatia being the top performers for overnight stays relative to 2019 levels.

Furthermore, travellers are increasingly employing a number of tactics to lower the overall cost of their holiday. Many are opting to book their transportation and accommodation well in advance or considering off-peak trips in the shoulder season. Package holidays are also increasing in popularity as these afford the traveller confidence that all essential costs are already accounted for.

The summary report can be downloaded from ETC's corporate website under the following link: <https://etc-corporate.org/reports/european-tourism-2023-trends-prospects-q3-2023/>

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Note to editors

The **European Travel Commission** (ETC) represents the national tourism organisations of Europe. Established in 1948, ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to promote Europe in third markets. Its 35-member tourism boards work together to build the value of tourism for all the diverse European destinations through cooperation in sharing best practice, market intelligence and promotion. For more information, visit www.etc-corporate.org and follow [@ETC_Corporate](https://twitter.com/ETC_Corporate).

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