

## EUROPEAN TOURISM DRAWS CLOSE TO PRE-PANDEMIC LEVELS IN 2023

- Foreign tourist arrivals to Europe were 1.6% below 2019 figures in the final quarter of 2023
- Inflationary pressures did not deter travel enthusiasm last year, despite significant increases in costs across the aviation and accommodation sectors
- Chinese arrivals to Europe displayed a moderate recovery in 2023, standing at 67% below 2019 levels

**Brussels, 13 February:** Towards the end of 2023, European tourism continued its robust recovery, nearing pre-pandemic levels despite inflationary pressures. Across reporting destinations, **foreign tourist arrivals** stand at **1.6% below** 2019 figures, with **nights 0.6% below**, showcasing a resilient travel demand across the continent – a trend which is expected to continue into 2024. This is according to the latest edition of the **‘European Tourism Trends & Prospects’** quarterly report released today by the European Travel Commission (ETC), which looks at the region’s tourism performance and economic indicators over the last months of 2023.

The recovery is fuelled by strong intra-European travel, primarily from Germany, France, and the Netherlands. Long-haul arrivals are also bouncing back, but at a slower pace and showing significant variations between regions such as the Asia-Pacific and North America.

Commenting following the publication of the report, **Miguel Sanz, ETC’s President**, said: *“The high travel demand seen in 2023 provided a significant boost to European economies and will help improve the balance sheets of tourism companies, which were hard hit by travel restrictions. However, the return to pre-pandemic levels will also put pressure to accelerate the sustainable transition of the travel industry.”*

*“We are working to develop new indicators monitoring social and environmental factors that will contribute to producing tourism strategies to measure not only the growth of the industry but also its impact on the environment, local communities, and businesses”,* he added.

### Good value-for-money destinations in high demand

European travel remained resilient in the last months of 2023, with two-thirds of destinations reporting either a full recovery or recording arrivals and/or overnights within 10% of pre-pandemic levels. Among these, **Southern European destinations** continue to be the frontrunners, boosted by favourable weather extending into the shoulder season. Serbia saw the largest surge in arrivals (+15%), alongside Portugal (+11%), Montenegro (+10%), Türkiye (+9%), and Malta (+8%). They are also popular destinations for all-inclusive holidays and more affordable travel costs, which has been key to attracting price-conscious travellers.

Other countries also achieved a significant rebound compared to 2019: **Iceland** saw a 12% increase in arrivals even amidst volcanic eruptions, while **the Netherlands** grew tourist nights by 16% despite a smaller 2% rise in arrivals, indicating longer stays.

In contrast, **Eastern European destinations** bordering Russia experienced a slower rebound, with countries like Lithuania (-32%), Latvia (-29%), Estonia (-27%), and Finland (-24%) lagging behind.

### Tourism resilient amidst economic inflation

The rebound in both arrivals and nights across Europe is occurring against the backdrop of inflation affecting both the industry and tourists alike. In Q4 2023, inflation surged by 23% compared to 2019 levels, with particularly pronounced increases seen in tourism-related expenses such as **international flights (+49%), package holidays (+47%), and hotel prices (+35%)**. These higher prices have strained household finances, but they have not deterred the majority of those who wish to travel.

Pricing pressures eased slightly over the latter months of 2023 compared to the previous quarter for tourism-related costs but remain significantly elevated relative to pre-pandemic levels.

### **Uneven long-haul recovery to Europe**

While **Chinese tourists** represented 13% of Europe's long-haul arrivals in 2019, their return since China's reopening has been slow but steady. Chinese arrivals in 2023 stand at 67% below pre-pandemic levels, compared to the 22% average for all other long-haul source markets.

Aside from capacity bottlenecks, Chinese travellers have remained risk-averse over the past year, swaying more towards domestic travel. European destinations can anticipate seeing further rebound from this market in 2024, predicted to reach 39% below 2019 figures. It is also expected that generational changes and social media influences will increasingly reshape Chinese travel preferences, sparking a shift towards luxury and more authentic experiences.

On the contrary, **North American markets**, such as the US and Canada, have seen significant recovery. Two-thirds of European destinations have reported growth in arrivals and/or overnights from the US, while over half have seen the same for Canada. Moreover, American and Canadian airlines announced developments in combined flight-rail booking systems for Europe, offering a more sustainable travel option when moving around the region.

*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-q4-2023/>*

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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 36-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](http://www.etc-corporate.org) and follow [@ETC\\_Corporate](https://twitter.com/ETC_Corporate).

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