

## **EVOLUTION OF TOURISM PRE- AND POST-PANDEMIC: A CRITICAL ANALYSIS**

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**Abstract:** *The COVID-19 pandemic has disrupted global tourism, profoundly affecting international arrivals, revenues, and regional travel dynamics. This article critically analyzes the dimensions of the phenomenon based on key World Tourism Organization (UNWTO) reports, dated from 2010 to September and November 2024, to elucidate the trajectory of tourism's recovery. By comparing data trends, recovery patterns, and challenges, this study highlights the resilience and adaptability of the tourism sector while identifying disparities across regions and outlining lingering challenges that continue to shape the industry's post-pandemic landscape.*

**Keywords:** Tourism, recovery

**JEL classification:** N70, O11, Z31, Z32

### **Introduction**

The global tourism industry represents a cornerstone of economic activity, cultural exchange, and development. The onset of COVID-19 in 2020 triggered unprecedented disruptions, with international travel restrictions, economic downturns, and health concerns decimating the sector. This study analyzes recovery patterns, drawing on insights from the UNWTO's World Tourism Barometer issues from September and November 2024. The goal is to critically assess the sector's recovery trajectory and its implications for future resilience.

This investigation adopts a sophisticated and multifaceted methodological framework that intricately combines the principles of a structured literature review with an in-depth qualitative approach, placing significant emphasis on the meticulous analysis of secondary data sources. At the core of the study lies an examination of primary information derived from the United Nations World Tourism Organization (UNWTO)'s *World Tourism Barometer* reports, specifically the editions published in September and November of the year 2024. The methodological rigor is directed toward the systematic extraction and comprehensive analysis of pivotal data points, which serve as the foundation for uncovering salient trends, elucidating recovery trajectories, and addressing persisting challenges within the international tourism sector. To achieve these objectives, a comparative analytical framework has been employed to assess variations across regions and to evaluate the differential economic impacts arising from the ongoing recovery processes.

The methodology is structured around four interdependent pillars, each of which underpins the broader analytical objectives of the study: (1) Data Extraction: This stage involves the precise and targeted gathering of relevant metrics pertaining to international tourist arrivals, tourism-generated receipts, and the comparative performance of distinct geographical regions. By focusing on these key performance indicators, the study ensures that its findings are grounded in quantifiable and reliable data.

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(2) Trend Analysis: Through the application of advanced analytical techniques, this phase aims to discern and map recovery patterns as they unfold over time and across diverse regional contexts. By systematically identifying these patterns, the analysis sheds light on both the pace and the variability of recovery dynamics. (3) Thematic Focus: A central element of the methodology is its thematic emphasis, which is directed toward identifying and highlighting the critical drivers that facilitate recovery, as well as the persistent challenges and barriers that continue to impede progress within the tourism sector. This thematic exploration provides nuanced insights into the interplay between various influencing factors. (4) Critical Evaluation: The final component of the methodology entails a robust and reflective assessment of the broader implications of the study's findings. This critical evaluation focuses on the potential contributions of these findings to enhancing long-term resilience and sustainability within the global tourism industry, ensuring that the analysis remains forward-looking and strategically oriented.

By synthesizing these methodological components, the study aspires to provide a comprehensive and nuanced understanding of the recovery processes shaping the global tourism landscape in the post-crisis period. The integration of quantitative data extraction and qualitative thematic analysis underscores the study's commitment to producing insights that are both empirically robust and contextually relevant.

## **2. Literature review**

Before the onset of the COVID-19 pandemic, the tourism sector represented one of the most significant and dynamic drivers of economic growth worldwide, marked by a consistent upward trajectory in international tourist arrivals. Year after year, this expansion reflected the cumulative impact of various facilitating factors that underscored the sector's resilience and adaptability to shifting global conditions. Chief among these contributors were the rapid advancements in technology, which streamlined travel processes and enhanced the overall customer experience; the proliferation of affordable travel options, making tourism accessible to a broader demographic; and the emergence of robust tourism markets in developing economies, which injected fresh momentum into the global industry. Nevertheless, it is important to acknowledge that the pace and character of tourism development were not uniform across regions, with distinct variations shaped by local economic, cultural, and infrastructural contexts.

In the years leading up to the pandemic, the international tourism industry experienced unprecedented growth, reaching a milestone of 1.5 billion international tourist arrivals in 2019, as documented by the United Nations World Tourism Organization (UNWTO, 2020). This remarkable volume underscored the sector's position as a cornerstone of the global economy. The economic contribution of tourism during this period was equally impressive, with the industry accounting for 10.4% of the global Gross Domestic Product (GDP) and providing direct and indirect employment opportunities to 319 million individuals—equivalent to 10% of total global employment, according to the World Travel & Tourism Council (2019).

The catalysts for this global expansion were diverse and interwoven, reflecting both macroeconomic trends and sector-specific innovations. One pivotal factor was the increase in disposable income across many regions, which elevated the capacity of individuals and households to allocate resources toward leisure and travel. Concurrently, the democratization of air travel, spurred by the proliferation of low-cost carriers and competitive pricing strategies, significantly lowered barriers to entry for international travel. This development was complemented by the rise of digital platforms and the growing ubiquity of the internet, which revolutionized the ways in which travelers researched, planned, and booked their journeys. As Navio Marco J & all (2018) observe, these technological advancements not only enhanced efficiency but also empowered consumers with greater autonomy and choice, fostering a more inclusive and participatory tourism ecosystem.

In sum, the pre-pandemic global tourism landscape was characterized by remarkable growth and transformative innovation, driven by a convergence of economic, technological, and social factors. This period laid a robust foundation for the sector's role as a critical contributor to global development, while also highlighting regional disparities and areas for potential improvement in ensuring equitable and sustainable growth. The lessons and trends from this era remain highly relevant as the industry navigates the challenges and opportunities of the post-pandemic recovery phase.

### **2.1. Critical assessment of regional Trends Before the Pandemic**

*Europe:* As one of the premier global tourist destinations, Europe held a dominant position in the international tourism landscape, accounting for approximately 50% of global international arrivals in 2019, as noted by the UNWTO (2020). This unparalleled popularity was driven by the continent's exceptional combination of cultural and historical wealth, extensive and efficient transport networks, and its well-established, world-class tourism infrastructure. Iconic destinations such as France, Spain, and Italy consistently attracted the highest numbers of international tourists, celebrated for their artistic treasures, culinary delights, and scenic landscapes. Additionally, Central and Eastern Europe emerged as increasingly popular destinations, supported by the affordability of low-cost travel options and the allure of their relatively unexplored cultural and natural attractions. Gössling et al. (2018) highlight how this expansion diversified the regional tourism landscape, appealing to travelers seeking both traditional and novel experiences.

*North America:* The North American tourism industry was characterized by its unique duality: a robust domestic travel market within the United States and a significant volume of cross-border tourism between the U.S., Mexico, and Canada. Americans constituted a substantial proportion of inbound tourists to their neighboring countries, reflecting both proximity and shared cultural ties. A noteworthy trend in this region was the rise of the "experience economy," where travelers increasingly prioritized immersive and authentic engagements over traditional sightseeing activities. According to Pikkemaat et al. (2016), this shift was reflected in the growing demand for activities such as culinary tours, heritage site visits, and outdoor adventures, which allowed tourists to connect deeply with local cultures and environments.

*Asia:* The Asia-Pacific region experienced an extraordinary surge in outbound tourism, underpinned by the rapid economic growth of countries such as China, which emerged as one of the largest source markets for international travelers (Everett H. & all, 2018). Chinese tourists, in particular, became a pivotal driver of global tourism, with their preferences shaping the offerings of destinations worldwide. Furthermore, the expanding middle class in emerging economies such as India and those in Southeast Asia played a crucial role in fostering increased international tourism flows, particularly to destinations in Europe and North America. Gössling et al. (2018) emphasize the transformative impact of these developments, which not only enhanced the economic integration of the region with the global tourism market but also encouraged the diversification of tourism products and services to cater to new consumer segments.

*Africa:* Although tourism in Africa displayed consistent growth, the region's overall contribution to global tourism remained relatively modest compared to other continents. Sub-Saharan Africa, in particular, faced slower growth in international arrivals due to persistent challenges such as political instability, underdeveloped infrastructure, and limited global awareness of its diverse tourism offerings (WTO, 2019). Despite these hurdles, certain countries within the continent achieved notable successes. South Africa, Kenya, and Morocco stood out as key destinations, leveraging their distinctive natural and cultural assets to attract international visitors. South Africa's renowned wildlife safaris, Kenya's iconic national parks, and Morocco's rich cultural heritage, including its vibrant cities and historical landmarks,

exemplify the region's potential for tourism development. These growth areas underscore Africa's capacity to capitalize on its unique offerings, provided that infrastructural and political challenges are addressed effectively.

In sum, the global tourism landscape before the pandemic was marked by significant regional dynamics, with each continent contributing uniquely to the sector's growth. These variations underscore the interplay between local strengths, economic conditions, and evolving tourist preferences in shaping the global tourism ecosystem.

## **2.2. The Impact of the Pandemic on Global and Regional Tourism**

The COVID-19 pandemic triggered an unprecedented contraction in the global tourism sector, with its impacts varying considerably across regions. The implementation of stringent measures such as border closures, lockdowns, and public health protocols severely curtailed international travel, leading to dramatic declines in tourism activity. This disruption represented the most significant crisis in the history of modern tourism, reshaping the industry in both immediate and long-term ways.

The UNWTO (2021) documented a staggering 74% decline in international arrivals in 2020, marking the steepest drop ever recorded. The World Travel & Tourism Council (WTTC, 2020) further highlighted the economic fallout, estimating a loss of nearly \$4.5 trillion in global economic output. This decline was accompanied by severe job losses, disproportionately affecting workers in developing countries where tourism serves as a critical economic lifeline.

*Europe:* In Europe, where tourism contributes substantially to the economy, the pandemic's impact was particularly acute in major tourist destinations such as Spain, Italy, and France. In some regions of these countries, tourism accounted for more than 20% of GDP before the pandemic (UNWTO, 2020), making them especially vulnerable to the collapse of international travel. European governments responded proactively with measures designed to mitigate the economic damage. These included financial support packages aimed at stabilizing the tourism industry, the implementation of stringent health and safety guidelines, and campaigns promoting domestic tourism to offset the decline in international arrivals. A significant development was the introduction of the European Union's "Digital COVID Certificate," which facilitated safer and more streamlined travel within the bloc, thereby fostering a degree of regional mobility even amidst the global downturn (Sigala, 2020).

*North America:* In North America, the tourism sector faced an initial sharp decline, particularly in the U.S. and Canada, as international travel ground to a halt. However, domestic tourism showed signs of recovery during the latter stages of the pandemic. National parks in the U.S. emerged as popular destinations, offering socially distant outdoor experiences that aligned with public health recommendations (Vázquez, 2020). Concurrently, road trips gained renewed popularity, with many Americans choosing car travel over air travel due to concerns about virus transmission (Spanaki et al., 2021). This shift highlighted a growing preference for localized and adaptable travel experiences during periods of uncertainty.

*Asia:* The Asia-Pacific region experienced some of the most rigorous travel restrictions, with countries like China, Japan, and Australia imposing strict border controls that effectively halted international tourism. These measures were critical in managing the spread of COVID-19 but also led to significant economic challenges for the tourism-dependent economies in the region. Despite this, certain countries like Vietnam and Thailand launched "safe tourism" campaigns that emphasized enhanced health protocols, aiming to attract local and regional visitors in the absence of international arrivals. In Southeast Asia, where economies are heavily reliant on international tourism, the economic toll was severe, prompting calls for more sustainable and resilient tourism strategies in the post-pandemic era (Gössling et al., 2020).

*Africa:* The tourism sector in Africa, while already smaller in scale compared to other regions, faced considerable setbacks due to its dependence on international arrivals for wildlife safaris and cultural tourism. Countries such as Kenya and South Africa, which are renowned for their tourism offerings, saw substantial declines in visitor numbers. As a recovery strategy, governments across the continent encouraged domestic tourism, promoting local travel to sustain the industry. However, the region's recovery lagged behind others due to limited health infrastructure, constrained financial resources, and reduced global visibility of African tourism destinations (Liu et al., 2023).

In conclusion, the profound impacts of the COVID-19 pandemic on global tourism brought into sharp relief the sector's susceptibility to systemic disruptions and highlighted the pronounced disparities in regional resilience and adaptive capacity. While some regions succeeded in mitigating losses through a combination of domestic tourism promotion and innovative recovery strategies, the crisis illuminated the urgent necessity of long-term strategic planning to foster a more sustainable, equitable, and resilient global tourism framework.

The initial signs of recovery observed during 2021–2022 demonstrated the sector's inherent capacity for renewal, yet the post-pandemic tourism landscape has been marked by enduring transformations. These changes reflect a heightened emphasis on health and safety measures, widespread adoption of technological advancements, and a discernible shift in consumer behavior and preferences. Regional variations persist in shaping the evolution of tourism, driven by differing economic conditions, infrastructure capabilities, and cultural contexts.

The post-pandemic era has firmly established sustainability as a central theme within global tourism discourse and practice. The crisis underscored the inherent vulnerabilities of mass tourism models, drawing attention to their environmental, social, and economic repercussions. This realization has catalyzed a collective shift toward more sustainable and responsible practices, as stakeholders across the sector seek to balance growth with long-term viability (UNWTO, 2022). An increasing number of travelers are prioritizing eco-friendly options, seeking experiences that align with principles of environmental conservation, community empowerment, and cultural preservation (Chiawo D., 2023). Initiatives such as carbon-neutral travel packages, nature-based tourism, and support for local economies have gained traction, reflecting a broader commitment to greener tourism.

The pandemic also accelerated the adoption of digital tools and technologies across the tourism value chain, fundamentally reshaping how tourism services are delivered and consumed. Contactless check-ins, digital health passes, and automated customer service solutions have become standard, reflecting travelers' increased expectations for efficiency and safety. Virtual tourism experiences, which gained prominence during the pandemic as substitutes for physical travel, have now evolved into integral components of the tourism ecosystem. They offer not only accessibility but also opportunities for education and exploration of destinations in novel ways (Mirčetić, V., Mihić, M., 2023). Additionally, advancements in artificial intelligence (AI) are revolutionizing personalized marketing, enabling tourism providers to tailor their offerings based on individual preferences and behaviors, thereby enhancing customer satisfaction and loyalty.

Another significant trend reshaping the post-pandemic tourism landscape is the growing preference for local and wellness-oriented travel. In the wake of the pandemic, travelers have displayed a pronounced inclination toward destinations closer to home, driven by a combination of safety concerns, cost considerations, and a renewed appreciation for local cultures and environments. Wellness tourism, encompassing spa retreats, yoga workshops, and nature-based activities, has experienced substantial growth as individuals prioritize their health and well-being in travel decisions (Piatto Clerici A. et al 2023). Regions such as Europe and North America have witnessed a surge in demand for wellness-oriented experiences, which often emphasize mindfulness, relaxation, and connection with nature. These

trends reflect a broader societal shift toward holistic well-being, which is increasingly shaping consumer choices across the tourism spectrum.

In summary, the post-pandemic recovery of global tourism is not merely a return to pre-crisis norms, but a dynamic transformation characterized by sustainability, innovation, and evolving traveler preferences. As the sector continues to rebuild, the lessons of the pandemic offer an invaluable opportunity to create a tourism ecosystem that is more inclusive, resilient, and aligned with the principles of sustainable development. These changes signal a new chapter for global tourism, one defined by adaptability, responsibility, and a renewed focus on the well-being of both travelers and destinations.

### **2.3. Regional Post-Pandemic Tourism Evolution**

*Europe's* recovery from the devastating impacts of the COVID-19 pandemic has been significantly bolstered by coordinated regional efforts, such as the implementation of the EU Digital COVID Certificate. This initiative has facilitated safer and more seamless travel across member states, thereby fostering confidence among travelers and revitalizing the intra-regional tourism market. Southern European countries, including Greece, Italy, and Croatia, which are heavily dependent on international tourism, have strategically pivoted to promote domestic tourism and short-haul travel as a means of mitigating the effects of global travel restrictions. For instance, Greece and Croatia launched robust marketing campaigns emphasizing safe tourism, supported by comprehensive health protocols and flexible booking policies to reassure travelers (Sigala, 2020). Moreover, these nations leveraged their appeal as destinations offering outdoor, coastal, and culturally enriching experiences to attract a mix of domestic and regional visitors.

In *North America*, the recovery trajectory of the tourism sector has been shaped by evolving traveler preferences and the rise of hybrid travel models. In the United States, "workcations" — a blend of remote work and leisure travel — have gained significant popularity. This trend reflects a growing demand for destinations that combine relaxation with the ability to stay connected professionally. National parks, rural areas, and less densely populated destinations have emerged as key attractions, signaling a departure from the pre-pandemic focus on urban tourism (Jaiswal, R. & all 2024). Meanwhile, Canada has seen a heightened emphasis on eco-tourism, underscoring the country's commitment to sustainability. Nature-based experiences, including wildlife viewing, hiking, and exploration of protected natural reserves, have become central to Canada's tourism strategy, appealing to travelers seeking meaningful and environmentally conscious experiences (Piatto Clerici A. et al 2023).

The post-pandemic tourism landscape in *Asia* has been characterized by an intensified focus on domestic markets and regional tourism. Countries like Japan, China, and South Korea have actively promoted "staycations" to stimulate local tourism economies. These campaigns have encouraged citizens to explore their own countries, emphasizing convenience, safety, and affordability. In Thailand and other Southeast Asian nations, natural and cultural heritage has been spotlighted to draw domestic travelers, fostering appreciation for indigenous traditions and pristine environments (Gössling et al., 2020). Additionally, China has emerged as a leader in digital tourism innovations. The widespread adoption of virtual tours, live-streamed travel experiences, and AI-driven personalized itineraries highlights a growing demand for technology-integrated tourism experiences (Sustacha, 2024). This trend reflects a broader transformation in consumer behavior, driven by the pandemic's impact on mobility and digital connectivity.

The recovery of tourism in *Africa* has been slower relative to other regions, yet there are promising signs of resilience and adaptability. Countries such as Kenya, South Africa, and Namibia are strategically positioning themselves to attract high-income tourists by emphasizing luxury safaris and exclusive, nature-based travel experiences. These offerings leverage Africa's unparalleled biodiversity

and iconic wildlife while catering to travelers seeking privacy, safety, and immersion in unique environments. Recognizing the importance of sustainability, governments and private stakeholders across the continent are prioritizing eco-tourism initiatives aimed at conserving natural resources and promoting community-based tourism. For example, investments in conservation projects, renewable energy for lodges, and community-led tourism ventures are aligning economic recovery with environmental stewardship (Liu et al., 2023). These efforts not only enhance the resilience of African tourism but also position the region as a leader in sustainable and responsible travel.

In sum, the post-pandemic recovery of global tourism reveals diverse regional strategies shaped by local conditions, consumer preferences, and emerging trends. While Europe and North America have leveraged domestic tourism and eco-conscious initiatives, Asia has embraced technological integration, and Africa is focusing on sustainable luxury tourism. Together, these approaches signal an evolving tourism landscape marked by innovation, resilience, and a commitment to sustainable development.

### **3. Analysis of International Tourist Arrivals (2010-2024)**

#### **3.1 Overview of Global Trends (2010-2024)**

From 2010 to 2019, the global tourism industry experienced a decade of uninterrupted expansion, marked by an average annual growth rate of approximately 4% in international arrivals. This growth was fueled by economic development, technological advancements, and increasing global connectivity. However, the onset of the COVID-19 pandemic in 2020 abruptly disrupted this upward trajectory, causing a historic collapse in tourism activities. By 2024, the sector exhibited signs of robust recovery, with several regions either approaching or surpassing pre-pandemic levels, underscoring the resilience and adaptability of the global tourism industry.

#### **3.2. Regional Analysis**

##### *Europe:*

- *2010–2019:* As the world's most visited region, Europe consistently benefited from its diverse cultural and historical attractions, coupled with extensive transport networks and a high volume of intra-regional travel. Over this period, annual growth rates were steady, underpinned by a combination of established destinations like France and Italy and emerging subregions, including Central and Eastern Europe.
- *2020–2021:* The pandemic dealt a severe blow to European tourism, with international arrivals plummeting by 67% in 2020 and 59% in 2021, largely due to stringent travel restrictions and lockdowns. Iconic destinations saw unprecedented declines, with urban centers particularly affected.
- *2022–2024:* Recovery gained momentum in 2022, driven by robust domestic and intra-regional demand. By mid-2024, arrivals reached 99% of pre-pandemic levels, with Southern Europe exceeding 2019 numbers by 9%, thanks to strong performances from countries like Greece and Croatia. Events such as UEFA Euro 2024 further catalyzed the resurgence, emphasizing the role of large-scale gatherings in revitalizing tourism.

##### *Asia-Pacific:*

- *2010–2019:* The Asia-Pacific region emerged as a powerhouse in global tourism, fueled by rapid economic growth, urbanization, and the rise of a burgeoning middle class. Strategic investments in infrastructure and tourism promotion further solidified its position as a high-growth region.

- *2020–2021:* Among the hardest-hit regions, Asia-Pacific faced an 83% decline in arrivals in 2020, followed by a 74% drop in 2021. Countries like China and Japan implemented some of the strictest border controls, delaying recovery efforts.
- *2022–2024:* Despite gradual recovery, the region lagged behind others, reaching only 85% of 2019 levels by late 2024. Variability within the region was pronounced, with Southeast Asia (88% recovery) outperforming Northeast Asia (75%) due to prolonged restrictions in countries such as China. Thailand and Vietnam, however, demonstrated resilience by leveraging domestic tourism and safe travel campaigns.

*Americas:*

- *2010–2019:* The Americas experienced moderate but consistent growth, supported by strong intra-regional travel flows and a diverse range of attractions, from urban tourism hubs to natural wonders.
- *2020–2021:* The region saw arrivals decline by 68% in 2020 and 28% in 2021, with Central and South America facing significant challenges due to health crises and reduced air connectivity.
- *2022–2024:* By 2024, the Americas had recovered 97% of pre-pandemic levels, with robust domestic tourism in the United States and regional travel within the Americas driving growth. Central America and the Caribbean outperformed other subregions, surpassing 2019 arrivals by 19% and 9%, respectively. Destinations such as Mexico and the Dominican Republic benefited from proactive marketing and flexible entry policies.

*Africa:*

- *2010–2019:* Africa outpaced the global average in tourism growth during this period, bolstered by increased investments, improved air connectivity, and the rising appeal of its unique cultural and natural offerings.
- *2020–2021:* The pandemic caused arrivals to drop sharply by 72% in 2020 and 32% in 2021. Sub-Saharan Africa faced heightened challenges due to limited resources and health infrastructure.
- *2022–2024:* By 2024, Africa demonstrated exceptional resilience, with arrivals reaching 107% of 2019 levels. North Africa led the recovery, with arrivals 21% above pre-pandemic figures, driven by destinations such as Morocco and Egypt. Luxury safaris and eco-tourism initiatives also gained traction, reflecting the region's strategic pivot toward higher-value tourism.

*Middle East:*

- *2010–2019:* The Middle East solidified its reputation as a rising tourism hub, leveraging its rich cultural heritage, religious tourism opportunities, and major investments in infrastructure and mega-events.
- *2020–2021:* The region experienced a relatively smaller decline in arrivals (-57% in 2020) compared to others, due to sustained domestic and regional travel.
- *2022–2024:* By 2024, the Middle East emerged as the fastest-growing region, with arrivals 29% above 2019 levels. This extraordinary growth was driven by countries like Qatar and Saudi Arabia, which capitalized on mega-events such as the FIFA World Cup 2022 in Qatar and ambitious tourism initiatives aligned with Vision 2030 in Saudi Arabia. Investments in visa facilitation and luxury tourism further contributed to the region's strong performance.

**Key Insights**

1. *Resilience and Growth Potential:* Despite the severe disruptions caused by the pandemic, regions like the Middle East and Africa have demonstrated remarkable resilience, with arrivals



exceeding pre-pandemic levels. These trends underscore the importance of adaptive strategies and targeted investments.

2. *Lagging Recovery*: The Asia-Pacific region's slower recovery highlights the challenges posed by prolonged restrictions and uneven reopening policies. This lag indicates the need for cohesive regional coordination and sustained investments in rebuilding traveler confidence.
3. *Role of Events and Policies*: Global events such as the FIFA World Cup and UEFA Euro 2024 have played a pivotal role in accelerating tourism recovery, while policies like visa facilitation and flexible travel guidelines have proven crucial in attracting international visitors.

The recovery trajectory of global tourism showcases the sector's resilience while emphasizing the importance of innovation, sustainability, and collaboration to ensure long-term growth and stability.

### **3.2. Regional Insights: Pacific, Americas, Africa, and the Middle East Pacific**

The *Pacific region*, like many other parts of the world, faced unique challenges and opportunities in its recovery from the profound impacts of the COVID-19 pandemic. By late 2024, international arrivals to the region reached approximately 85% of pre-pandemic levels, underscoring a slower recovery trajectory compared to other regions.

Analyzing the Pacific Region, we identified the following challenges, recovery was hindered by prolonged border closures and stringent travel restrictions implemented during the early phases of the pandemic. These measures, though essential for health and safety, delayed the resumption of international travel and affected key markets. Additionally, the region's heavy dependence on long-haul tourism exposed vulnerabilities to shifts in global travel trends and air connectivity.

Despite these challenges, certain destinations within the Pacific showcased remarkable resilience. Fiji (+8%) capitalized on its reputation for hospitality and natural beauty by targeting luxury and eco-conscious travelers. Similarly, the Maldives (+19%) benefited from its exclusive tourism model, offering private villas, seclusion, and world-class luxury experiences. These niche offerings catered to post-pandemic travelers prioritizing safety and unique experiences.

Looking ahead, the Pacific region's recovery is expected to gain momentum as air connectivity improves and Chinese outbound tourism, a critical driver for the region, revives. Investments in infrastructure and targeted marketing campaigns aimed at high-value travelers are likely to support sustained growth.

*The Americas* demonstrated a steady and robust recovery, achieving 97% of pre-pandemic international arrivals by late 2024. This rebound underscores the region's adaptability and the strength of intra-regional travel.

U.S. travelers played a pivotal role in driving recovery, particularly in nearby destinations such as the Caribbean and Central America. El Salvador (+81%) and Curaçao (+48%) stood out as growth leaders, supported by strategic marketing efforts and improved connectivity.

Tourism revenues in major markets, including Mexico and the Dominican Republic, returned to pre-pandemic levels, reflecting strong demand and effective recovery strategies. Notably, the Caribbean's focus on diversifying its tourism products, including eco-tourism and cultural experiences, bolstered the region's appeal.

Despite these gains, persistent inflation and rising travel costs posed challenges, particularly for budget-conscious travelers. This economic pressure may have tempered the pace of recovery in certain markets, highlighting the need for affordable travel options and diversified offerings.

*Africa's tourism* sector emerged as a notable success story, with international arrivals exceeding pre-pandemic levels by 6% by late 2024. This performance underscores the growing global recognition of the continent's diverse tourism potential.

Visa facilitation initiatives, significant investments in tourism infrastructure, and successful marketing campaigns played a crucial role in driving recovery. Efforts to simplify travel processes and improve connectivity made the region more accessible to international tourists.

Countries like Tanzania (+49%), Morocco (+32%), and Kenya (+10%) experienced remarkable growth. Tanzania leveraged its iconic wildlife tourism, while Morocco capitalized on its unique blend of cultural heritage and modern attractions. Kenya's nature-based tourism offerings, including safaris and national parks, continued to attract eco-conscious travelers.

Looking forward, the diversification of Africa's tourism offerings presents a significant opportunity for sustained growth. Adventure tourism, cultural tourism, and community-based tourism are increasingly gaining traction, positioning Africa as a dynamic and multifaceted destination.

*The Middle East* emerged as the strongest-performing region globally, with international arrivals surpassing 2019 levels by an impressive 29% as of September 2024. This success highlights the region's proactive and strategic approach to tourism recovery and growth.

Qatar (+147%) and Saudi Arabia (+73%) were standout performers, driven by significant investments in mega-events, world-class infrastructure, and comprehensive visa reforms. Qatar leveraged its hosting of the FIFA World Cup 2022 to establish itself as a premier destination, while Saudi Arabia's Vision 2030 initiatives diversified its tourism offerings, encompassing religious, cultural, and adventure tourism.

The Middle East's focus on diversification has been a key factor in its success. Religious tourism in Saudi Arabia, including pilgrimages to Mecca and Medina, attracted millions of visitors, while sports tourism in Qatar and the UAE showcased the region's capacity to host global events.

The surge in international arrivals translated into increased tourism receipts, boosting regional economies. Outbound travel from the Middle East also experienced growth, reflecting the rising prosperity of the region's residents and their expanding role in global tourism markets.

Summarizing the Key Insights Across Regions, we identified firstly the resilience through specialization so destinations that focused on niche tourism products, such as luxury stays, eco-tourism, and cultural experiences, demonstrated stronger resilience and recovery, also the role of connectivity and policies, investments in air connectivity, visa facilitation, and marketing were instrumental in accelerating recovery across regions. While regions like the Middle East and Africa outperformed pre-pandemic levels, others, such as the Pacific, continued to face recovery challenges, underscoring the uneven impact of the pandemic.

These trends emphasize the need for sustained investment, innovation, and collaboration to ensure the long-term growth and sustainability of global tourism.

## **4.Recovery Dynamics**

### **4.1. International Tourist Arrivals**

By late 2024, international tourism demonstrated remarkable progress toward recovery, approaching pre-pandemic levels with a momentum that underscored the sector's resilience. Reports reveal that by September 2024, global international arrivals had reached 96% of 2019 levels, climbing further to 98% by November. This near-complete recovery reflects a combination of strategic efforts across regions and the enduring appeal of global travel.

Europe and the Middle East emerged as standout regions in this recovery trajectory. Europe, driven by robust intra-regional travel and eased restrictions, exceeded its pre-pandemic levels by 1% as of September. The Middle East outpaced all other regions, with arrivals surpassing 2019 figures by an impressive 29%, underscoring its strategic investments in tourism infrastructure, visa facilitation, and event-driven marketing. Meanwhile, other regions displayed varying levels of recovery, with Asia-Pacific showing significant progress yet lagging at 85%, largely due to prolonged restrictions in key markets.

Several interrelated factors have underpinned this global resurgence in tourism. Foremost among these has been the strength of regional demand, particularly in Europe, where intra-regional travel surged following the easing of restrictions. The pent-up desire for travel, coupled with the region's well-established transport networks, allowed for a rapid return to normalcy. Increased global air connectivity also played a critical role, with airlines restoring capacity and routes disrupted during the pandemic. This expanded access facilitated the movement of travelers across continents, further accelerating the sector's recovery.

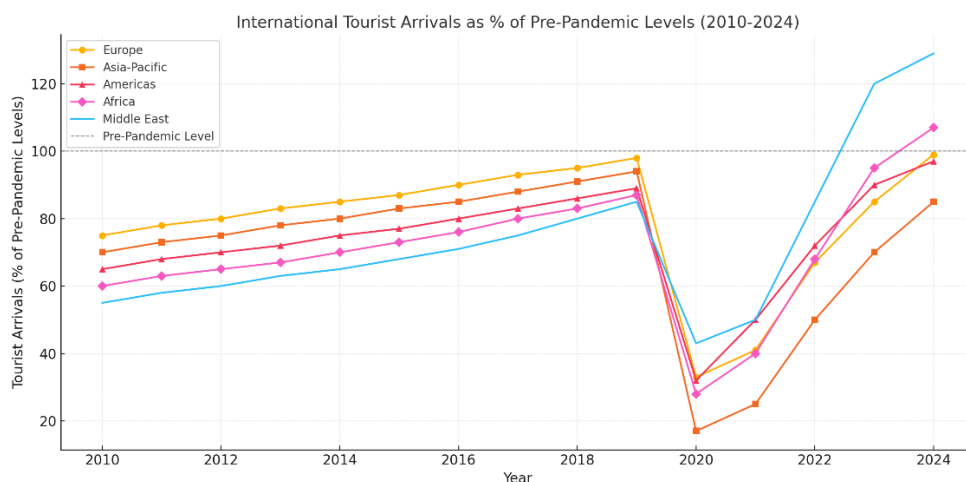
Policy interventions have also proven pivotal in catalyzing growth. Many destinations implemented visa facilitation measures, simplifying travel processes to attract international visitors. Targeted marketing campaigns, particularly in regions like the Middle East and Africa, highlighted unique tourism offerings and reassured potential travelers of safety and accessibility. The success of these initiatives demonstrates the importance of proactive governance in supporting the industry's rebound.

Another key driver of recovery has been the strategic use of events and diversified tourism offerings to stimulate interest and attract visitors. High-profile events such as UEFA Euro 2024 in Germany provided a significant boost to European tourism, drawing crowds and generating widespread international engagement. Simultaneously, cultural promotions and the expansion of niche tourism markets, including eco-tourism and heritage travel, enhanced the appeal of destinations globally. These diversified offerings align with evolving consumer preferences, emphasizing meaningful and sustainable travel experiences.

The recovery of international tourism by late 2024 thus reflects a complex interplay of factors, from pent-up demand and infrastructure improvements to effective policymaking and innovative event-driven strategies. While disparities in recovery remain, the overall trajectory points toward a more resilient and adaptive global tourism industry poised for sustained growth in the years ahead.

#### **4.2. Economic Contributions**

Despite challenges, international tourism receipts matched pre-pandemic levels in 2023, amounting to USD 1.8 trillion. Tourism direct GDP, constituting 3% of global GDP in 2023, reflects a near-complete recovery, albeit slightly below the 4% contribution in 2019.



**Figure no. 1 International Tourist Arrivals**

Source: Author's contribution, (pre-pandemic level 100%) based on United Nations World Tourism Organization statistics (<https://www.unwto.org>) 2010 (full data) - 2024 (preliminary data)

The global tourism recovery has illuminated significant regional disparities, reflecting the uneven pace at which destinations are rebounding from the pandemic's disruptions. While the overall trend points to an encouraging resurgence, the nuances of recovery vary considerably across regions. The Middle East and Africa have emerged as clear leaders, with some destinations surpassing pre-pandemic performance levels. In particular, Qatar and Saudi Arabia have achieved remarkable growth, with arrivals exceeding 2019 figures by over 100%. These gains highlight the effectiveness of strategic investments in infrastructure, high-profile events, and policy reforms aimed at enhancing accessibility and diversifying offerings. Africa, too, has shown resilience, particularly in North African nations such as Morocco, where focused marketing and increased connectivity have driven robust recovery.

In contrast, the Asia-Pacific region has faced notable challenges. Prolonged border closures and stringent travel restrictions during the pandemic's earlier phases created a lagging effect, particularly in Northeast Asia. By late 2024, the region's recovery remained incomplete, with international arrivals at approximately 75% of pre-pandemic levels. Southeast Asia performed comparatively better, driven by vibrant domestic tourism markets and the gradual return of Chinese outbound travelers. Nevertheless, the region's recovery underscores the long-term implications of uneven reopening policies and the critical role of consistent international mobility.

The Americas demonstrated solid progress, supported largely by strong intra-regional travel demand. In North America, domestic tourism flourished, with U.S. travelers bolstering nearby destinations such as Mexico and the Caribbean. However, despite these gains, the region's total arrivals have yet to fully match pre-pandemic figures, reflecting the persistent impact of inflationary pressures and evolving traveler preferences. Central America and the Caribbean, with their emphasis on nature-based and wellness tourism, have slightly outperformed their larger counterparts, but challenges remain in achieving sustained growth.

Several overarching challenges continue to impede the tourism sector's trajectory toward sustained recovery. Economic pressures are among the most significant, as high inflation, rising interest rates, and geopolitical tensions - particularly those stemming from the ongoing Russia-Ukraine conflict - dampen consumer confidence and increase operational costs for travel providers. These factors

exacerbate affordability concerns, limiting the accessibility of international travel for many potential tourists.

Climate-related risks have also emerged as a critical challenge, underscoring the need for the sector to adapt to a rapidly changing environmental landscape. The increasing frequency of extreme weather events not only disrupts travel plans but also threatens the long-term viability of many destinations. Moreover, growing awareness of sustainable travel practices is prompting a reevaluation of traditional tourism models, with both consumers and policymakers pushing for greater environmental accountability.

Structural issues within the industry further complicate recovery efforts. Workforce shortages in key markets have placed additional strain on hospitality and transport sectors, leading to service disruptions and reduced capacity. Elevated costs for transport and accommodation, driven by inflation and supply chain disruptions, compound these challenges, creating barriers for both operators and travelers. Addressing these issues requires coordinated action across stakeholders, with an emphasis on innovation, sustainability, and inclusivity.

In sum, while global tourism is steadily recovering, the disparities in regional performance and the persistent challenges facing the sector underscore the complexity of this process. Sustained growth will depend on addressing economic, environmental, and structural obstacles, as well as fostering collaboration and resilience across the industry. This transitional period offers an opportunity to reimagine tourism in a way that prioritizes equity, sustainability, and adaptability.

### **Conclusion**

The COVID-19 pandemic brought significant disruptions to the global tourism industry. While there was pre-existing growth and technological advancements, the pandemic reshaped consumer behavior and industry practices. As for the behavior of the tourist consumer, under the impact of various constraints, he chose holiday destinations closer to the residence, reduced the number of days of stay, but did not give up, in any way, to practice tourism. In this context, holiday providers have adapted to such demand.

Regional responses varied widely, with some regions recovering faster than others, reflecting differences in infrastructure, government policies, and local economic conditions. As the tourism sector continues its recovery, sustainability, digital innovation, and local tourism will likely define the future trajectory. Understanding the geographical nuances of post-pandemic tourism will be essential for developing strategies that ensure a more resilient and sustainable industry.

The COVID-19 pandemic highlighted the vulnerability of the tourism industry but also its resilience. By late 2024, international tourism had nearly rebounded to pre-pandemic levels, with regions like the Middle East showcasing remarkable growth. However, structural and external challenges necessitate a strategic pivot towards sustainable and inclusive tourism. Policymakers and industry stakeholders must leverage lessons from this recovery to build a more resilient future for global tourism.

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