



WORLD
TRAVEL &
TOURISM
COUNCIL

TRAVEL & TOURISM ECONOMIC IMPACT 2024



POLAND



FOR E W O R D

2024 to break all records

I'm delighted 2023 was another strong year for Travel & Tourism. That was, in part, thanks to the restarting of flights from China, with outbound travellers swelling numbers. The sector contributed almost \$10 trillion in value to the global economy and has almost returned to pre-pandemic levels, trailing the 2019 peak by 4%. This success came in the midst of a year of rising geopolitical tensions and economic uncertainties – yet more proof of the sector's resilience.

Let's look more closely at the figures. Globally, the sector contributed to **9.1% of global GDP**. It is a major employer providing jobs in some of the world's poorest countries. Last year, the Travel & Tourism workforce grew by 27.4 million to employ **330 million people**, almost reaching its pre-pandemic high. International spending increased by 33.1% to \$1.63 trillion, just 14% below 2019 levels. Domestic spending, meanwhile, increased by more than 18% to reach almost \$5 trillion, surpassing 2019 levels. Leisure spending surged by 21.2% to \$5.3 trillion, while business expenditure saw a 22.4% increase to reach \$1.3 trillion, with both closely approaching levels seen in 2019. This tells us that whether travellers holiday in their own country or abroad, or travel for business purposes, they are spending more.

Travel & Tourism recovered to 2019 levels in almost all regions around the world, including North, Central and South America, Africa, the Middle East and Europe.

Asia-Pacific, where COVID-19 restrictions were more severe, fully re-opened in 2023 and we can predict its return to 2019 levels this year.

We can predict a record-breaking 2024. The sector's global economic contribution is set to reach an all-time high of **\$11.1 trillion**, which will generate one in every ten dollars worldwide. The sector is also expected to support nearly **348 million jobs**, an increase of 13.6 million jobs on its 2019 record. International visitor spending is expected to come close to its peak, reaching \$1.89 trillion, while domestic tourists will spend more than in any previous year.

The future is very bright. That does not mean there are no risks, whether it is geopolitical instability or stubborn inflation. Furthermore, growth brings with it an added responsibility to do so inclusively and sustainably. In 2022, the WTTC began tracking and reporting the environmental and social impact of Travel & Tourism. The research proved that the decoupling of greenhouse gas emissions from the sector's growth has begun. This is good but we need to do more. The sector must decarbonise faster, whether it is through sustainable fuels for aviation and cruise or electric vehicles, and we must also protect the natural world upon which our future depends. And while Travel & Tourism already provides considerable opportunities for women, young people and some of the world's most marginalised people, we need to ensure this increases.

The sector's growth in 2024 and beyond will depend on the actions we take now. We need to continue to improve connectivity, whether it is through transport or telecoms infrastructure, and we must address the labour and skills shortages affecting so many businesses globally. Artificial Intelligence (AI) is evolving quickly and we must take advantage, whether it is making travel smoother, more efficient or creating a sector tailored to the needs of every traveller.

We trust that this report and its accompanying data will support policymakers, industry professionals and individuals engaged in the evolution of travel. It aims to help shape a future for the sector that emphasises sustainability and inclusion.

Julia Simpson
President & CEO
World Travel & Tourism Council

ECONOMIC IMPACT 2024

THE ECONOMIC IMPACT OF GLOBAL TRAVEL & TOURISM

2019	2023	2024 (Projections)
Travel & Tourism GDP (percentage share of global GDP)		
10.4%	9.1%	10.0%
Change in Travel & Tourism GDP		
-48.4% -2020 vs 2019 - -\$5.0 trillion GDP loss	+23.2% -2023 vs 2022 - +\$1.9 trillion GDP gain	+12.1% -2024 vs 2023 - +\$1.2 trillion GDP gain
Jobs supported by Travel & Tourism		
334m 10.5% of global employment	330m 10% of global employment	348m 10.4% of global employment
Change in Travel & Tourism Jobs		
-69.5m -2020 vs 2019 - (-20.8%) Lost Jobs	+27m -2023 vs 2022 - (+9.1%) New jobs	+18m -2024 vs 2023 - (+5.5%) New jobs

THE ECONOMIC IMPACT OF TRAVEL & TOURISM

MAY 2024

FOREWORD

- 1 2024 ANNUAL RESEARCH: Key Highlights
 - 3 DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM
 - 4 TRAVEL & TOURISM'S CONTRIBUTION TO GDP
 - 5 TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT
 - 6 VISITOR EXPORTS AND INVESTMENT
 - 7 DIFFERENT COMPONENTS OF TRAVEL & TOURISM
 - 8 ECONOMY RANKINGS: Absolute Contribution, 2023
 - 9 ECONOMY RANKINGS: Relative Contribution, 2023
 - 10 ECONOMY RANKINGS: Real Growth, 2023
 - 11 ECONOMY RANKINGS: Long term Growth, 2024-2034
 - 12 SUMMARY TABLES: Estimates & Forecasts
 - 13 THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: Real 2023 Prices
 - 14 THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: Nominal Prices
 - 15 THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: Real 2023 Prices (USD)
 - 16 THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: Nominal Prices (USD)
 - 17 THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: Growth
 - 18 Glossary
 - 19 Methodological Note
 - 20 Regions, Sub-Regions & Countries/Economies
-



Global Data

	 Total GDP contribution:		 Total Travel & Tourism jobs:	
2019	10.4% (of Total Economy) USD 10.33TN	Change in 2020: -48.4%	334 MN =10.5% (Share of Global Jobs)	Change in 2020: -69.5 MN -20.8%
2023	9.1% USD 9.90TN	Annual Change: +23.2% (-4.1% vs 2019) Economy Change YoY= 2.7%	330 MN =10.0%	Annual Change: +9.1% (-1.4% vs 2019)
2024 (E)	10.0% USD 11.10TN	Annual Change: +12.1% (7.5% vs 2019) Economy Change YoY= 2.2%	348 MN =10.4%	Annual Change: +5.5% (4.1% vs 2019)
2034 (F)	11.4% USD 16.00TN	CAGR ² (2024 - 2034): 3.7% Economy CAGR (2024 - 2034): 2.4%	449 MN =12.2%	New Jobs (2034 vs 2024): 101.1 MN

Poland Key Data

2019	4.9% (of Total Economy) PLN 150.7BN (USD 35.9BN)	Change in 2020: -48.1%	860.4 (000s) =5.3% (Share of Total Jobs)	Change in 2020: -14.8%
2023	4.1% PLN 141.3BN (USD 33.6BN)	Annual Change: -0.7% (-6.2% vs 2019) Economy Change: +0.7%	839.4 (000s) =4.9%	Annual Change: +4.0% (-2.4% vs 2019)
2024 (E)	4.4% PLN 155.4BN (USD 37.0BN)	Annual Change: +9.9% (3.1% vs 2019)	859.8 (000s) =5.0%	Annual Change: +2.4% (-0.1% vs 2019)
2034 (F)	5.0% PLN 217.5BN (USD 51.8BN)	CAGR (2024 - 2034): +3.4% Economy CAGR (2024 - 2034): +2.1%	994.7 (000s) =6.0%	New Jobs (2034 vs 2024): 134.9 (000s)

Poland Visitor Spending

2019	2023	2024 (E)	2034 (F)
 International Visitor Spending:			
PLN76.2BN (USD 18.1BN) 4.7% of total exports	PLN68.3BN (USD 16.3BN) Annual Change: -8.6% (-10.4% vs 2019)	PLN73.9BN (USD 17.6BN) Annual Change: 8.3% (-3.0% vs 2019)	PLN110.5BN (USD 26.3BN) 4.5% of total exports CAGR (2024 - 2034): 4.1%
 Domestic Visitor Spending:			
PLN39.1BN (USD 9.3BN)	PLN38.8BN (USD 9.2BN) Annual Change: 9.3% (-0.9% vs 2019)	PLN42.5BN (USD 10.1BN) Annual Change: 9.6% (8.7% vs 2019)	PLN55.3BN (USD 13.2BN) CAGR (2024 - 2034): 2.7%

Domestic Spending International Spending



% share of total spending

Leisure Spending Business Spending



% share of total spending

Inbound Arrivals³:

2019	2023
1. Germany 26%	1. Germany 23%
2. United Kingdom 8%	2. Ukraine 13%
3. Ukraine 7%	3. United Kingdom 9%
4. United States 5%	4. United States 7%
5. Russian Federation 4%	5. Czechia 5%
Rest of world 50%	Rest of world 43%

Outbound Departures³:

2019	2023
1. Italy 10%	1. Italy 9%
2. United Kingdom 8%	2. United Kingdom 9%
3. Spain 7%	3. Türkiye 8%
4. Germany 6%	4. Spain 7%
5. Ukraine 6%	5. Germany 7%
Rest of world 63%	Rest of world 59%

Note: All figures shown for 2024 are estimates (E) and for 2034 are forecast projections (F). Data for additional Travel & Tourism indicators are available in the full report. For more details, visit <https://researchhub.wttc.org>.

1. All values are in constant 2023 prices & exchange rates. As reported in March 2024.

2. CAGR= Compound Annual Growth Rate

3. Source: Oxford Economics, national sources and UN Tourism (formerly UNWTO)

DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM

Travel & Tourism is an important economic activity in most economies around the world. As well as its direct economic impact, the industry has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. But WTTC recognises that Travel & Tourism's total contribution is much greater, and aims to capture its indirect and induced impacts through its annual research.



DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular economy on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

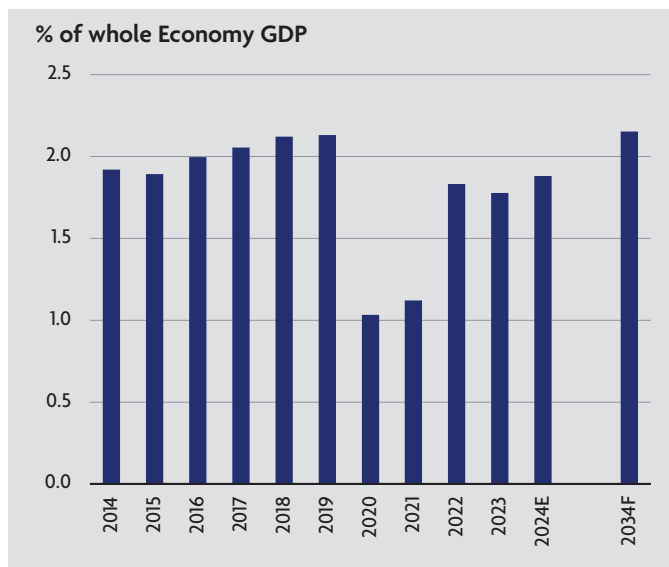
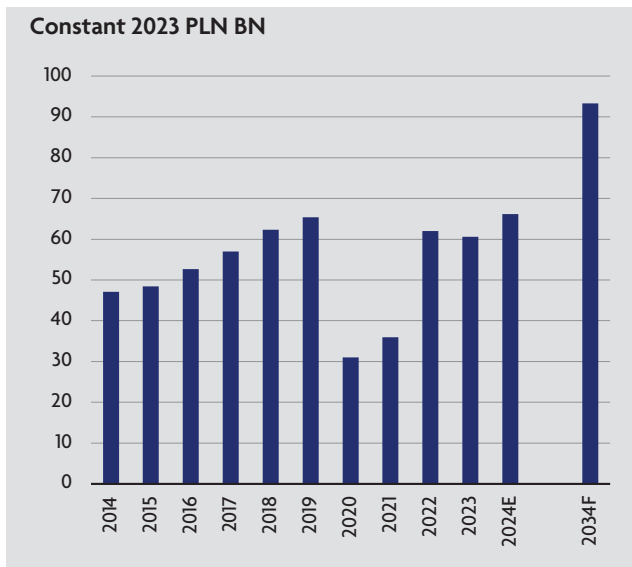
The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.

TRAVEL & TOURISM'S CONTRIBUTION TO GDP¹

The direct contribution of Travel & Tourism to GDP in 2023 was PLN60.6bn (1.8% of GDP). This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 3.5% pa to PLN93.3bn (2.2% of GDP) from 2024 to 2034.

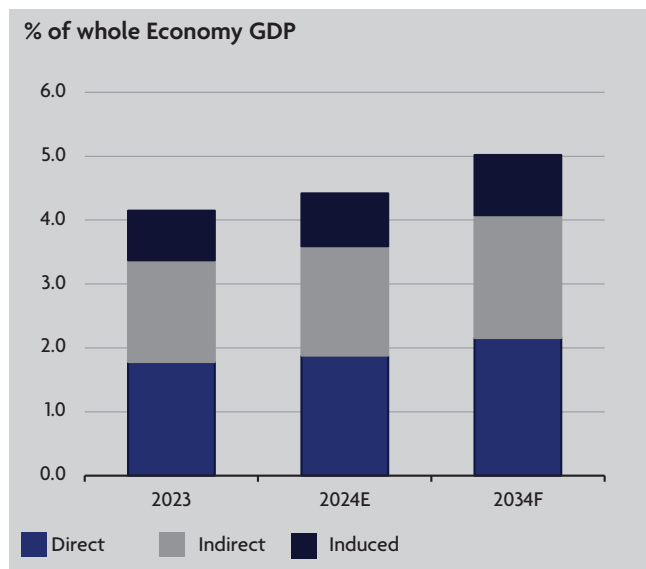
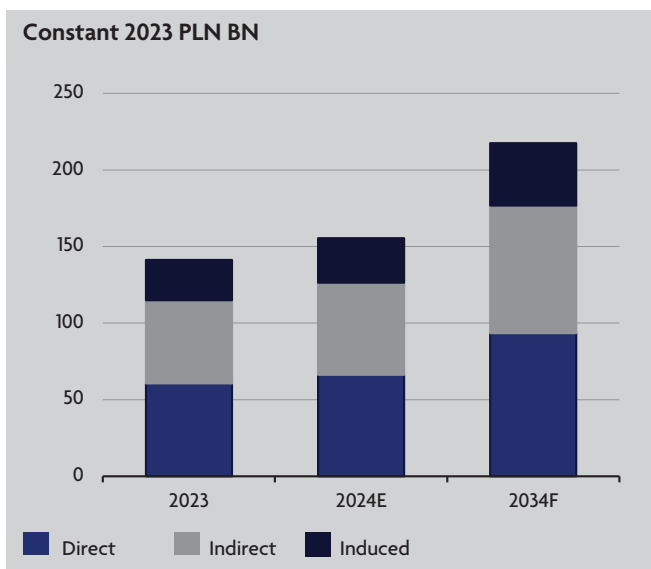
Poland: Direct Contribution of Travel & Tourism to GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 3) was PLN141.3bn in 2023 (4.1% of GDP).

It is forecast to rise by 3.4% pa to PLN217.5bn from 2024 to 2034 (5.0% of GDP).

Poland: Total Contribution of Travel & Tourism to GDP



¹ All values are in constant 2023 prices & exchange rates

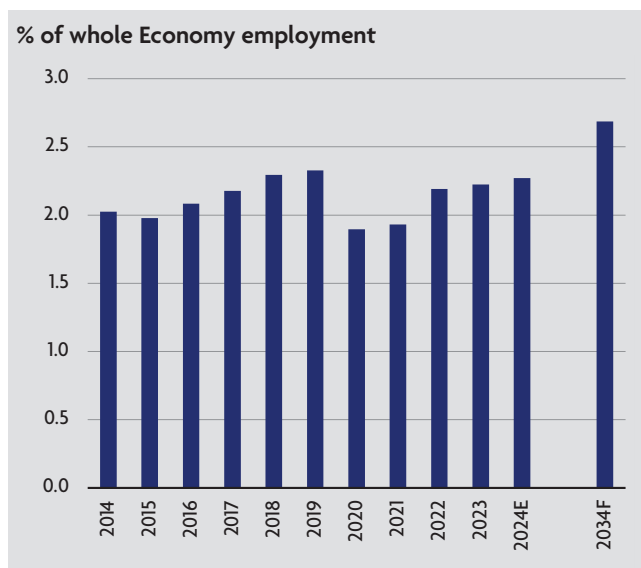
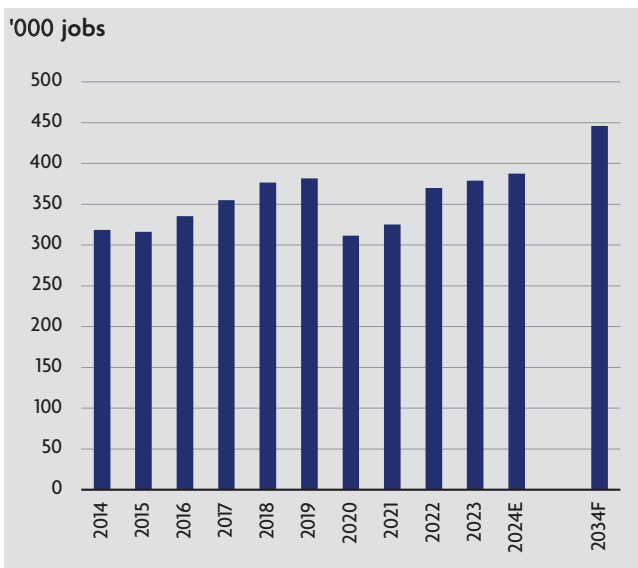
E - Estimate, F - Forecast

TRAVEL & TOURISM'S CONTRIBUTION TO EMPLOYMENT

Travel & Tourism generated 378,941 jobs directly in 2023 (2.2% of total employment). This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2034, Travel & Tourism will account for 446,032 jobs directly (2.7% of total employment), an increase of 1.4% pa from 2024.

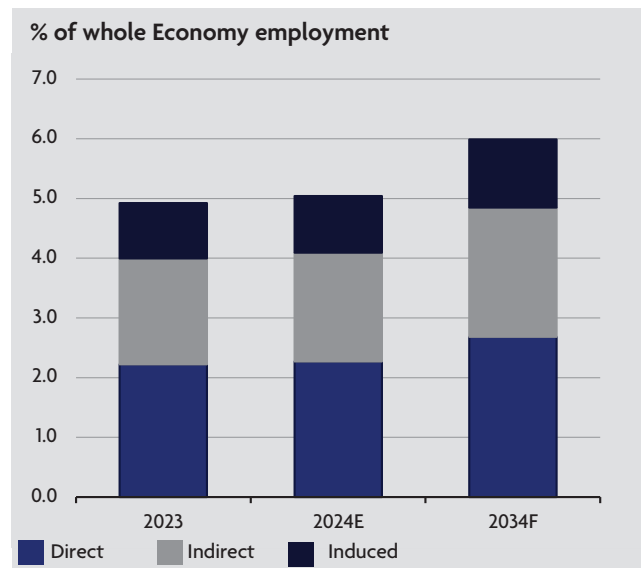
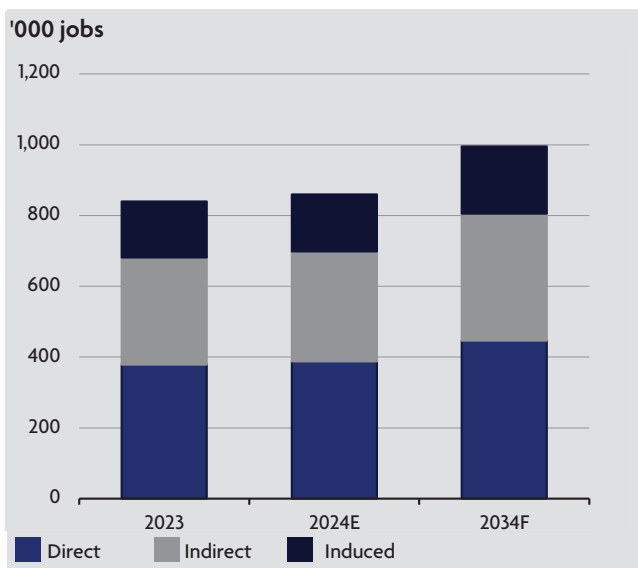
Poland: Direct Contribution of Travel & Tourism to Employment



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 3) was 839,399 jobs in 2023 (4.9% of total employment).

By 2034, Travel & Tourism is forecast to support 994,702 jobs (6.0% of total employment), an increase of 1.5% pa since 2024.

Poland: Total Contribution of Travel & Tourism to Employment



E - Estimate, F - Forecast

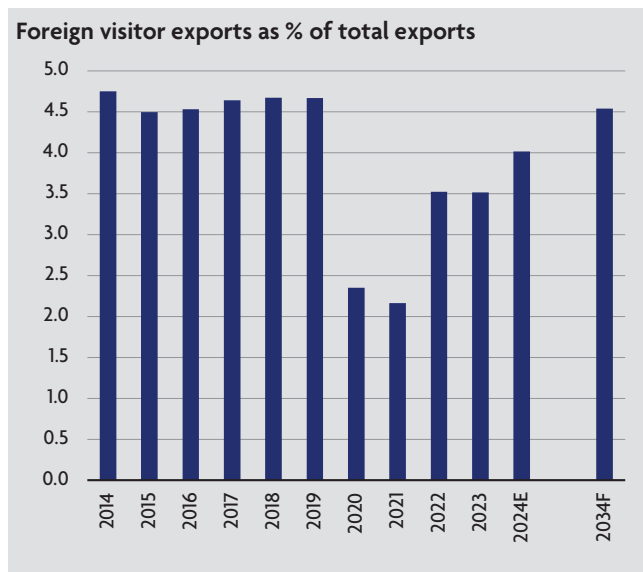
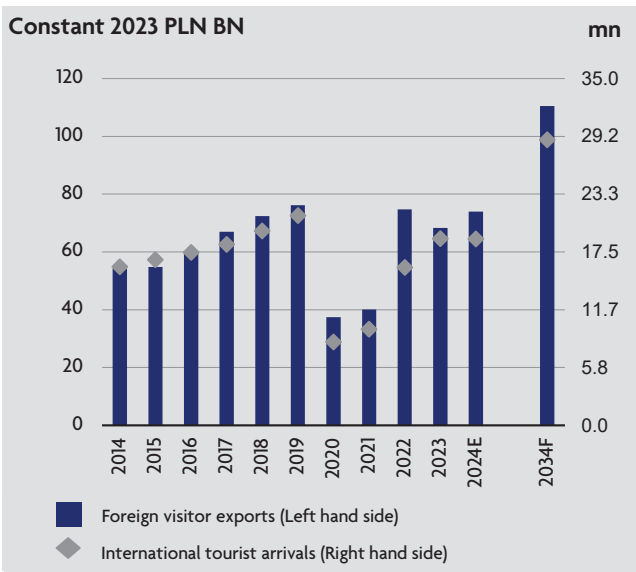
VISITOR EXPORTS AND INVESTMENT¹

VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2023, Poland generated PLN68.3bn in visitor exports.

By 2034, international tourist arrivals are forecast to total 28,807,000, generating expenditure of PLN110.5bn, an increase of 4.1% pa since 2024.

Poland: Visitor Exports and International Tourist Arrivals

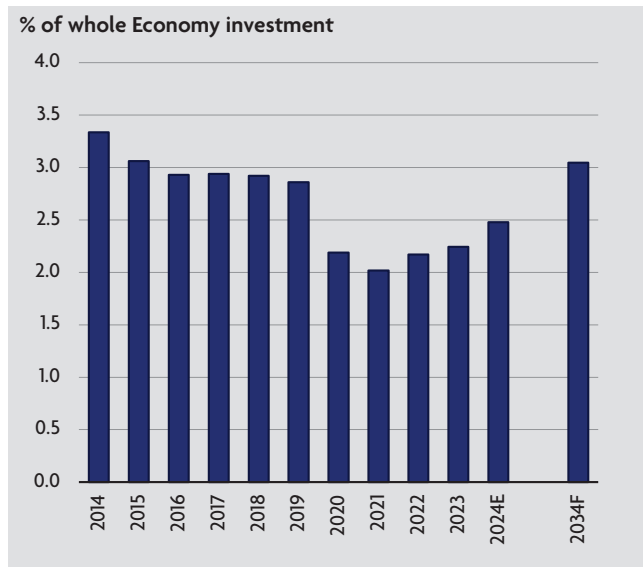
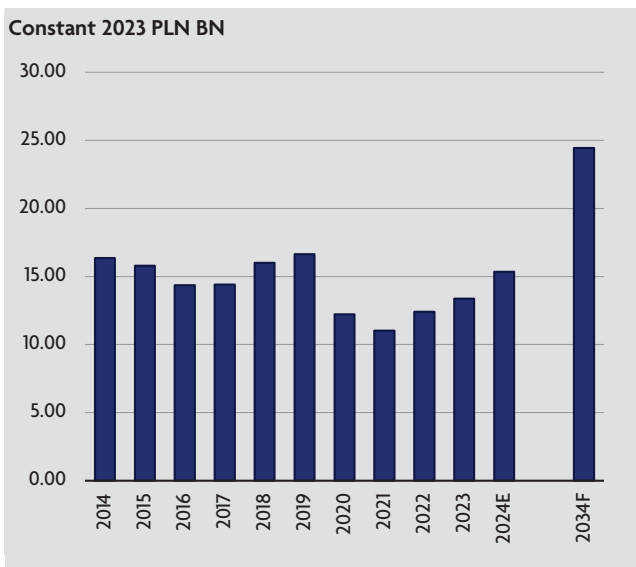


INVESTMENT

Travel & Tourism is expected to have attracted capital investment of PLN13.4bn in 2023.

Travel & Tourism's share of total national investment is expected to be 3.0% in 2034.

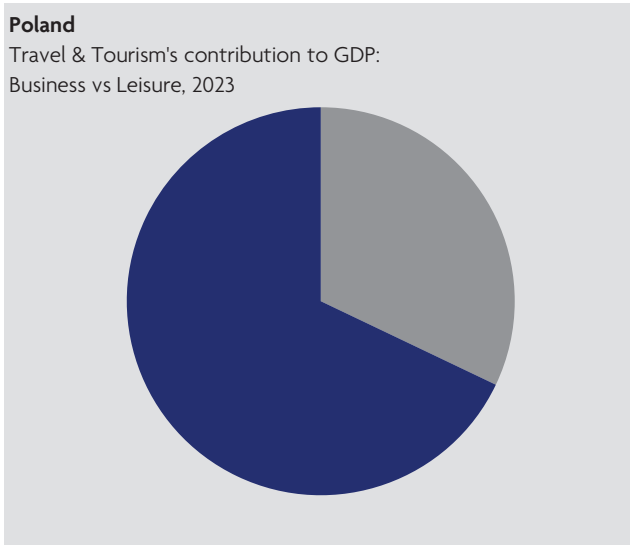
Poland: Capital Investment in Travel & Tourism



¹All values are in constant 2023 prices & exchange rates

E - Estimate, F - Forecast

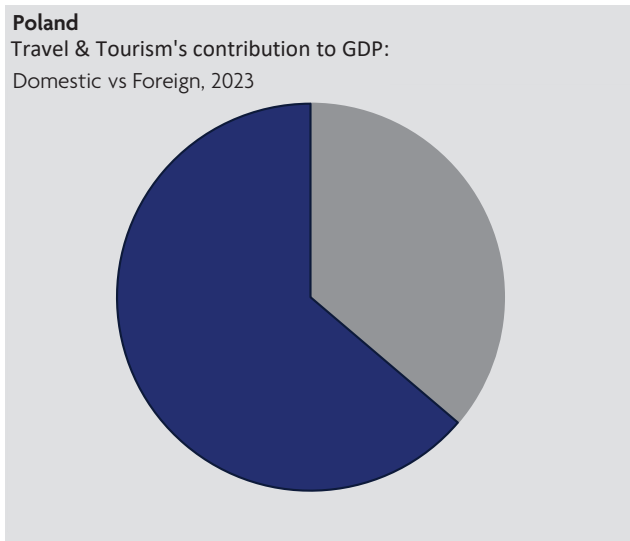
DIFFERENT COMPONENTS OF TRAVEL & TOURISM¹



Leisure travel spending (inbound and domestic) generated 67.9% of total internal spending in 2023 (PLN72.7bn) compared with 32.1% for business travel spending (PLN34.3bn).

Leisure travel spending is expected to rise by 3.9% pa to PLN116.7bn from 2024 to 2034.

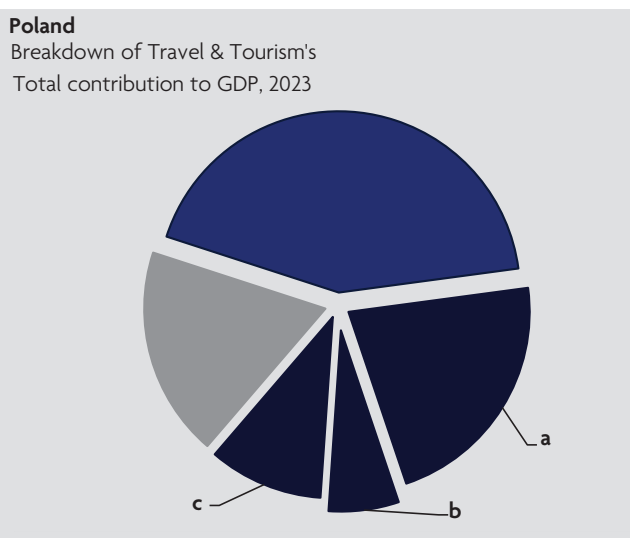
Business travel spending is expected to rise by 2.9% pa to PLN49.1bn from 2024 to 2034.



Domestic travel spending generated 36.2% (PLN38.8bn) of total internal spending in 2023 compared with 63.8% (PLN68.3bn) for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to rise by 2.7% pa to PLN55.3bn from 2024 to 2034.

Visitor exports are expected to rise by 4.1% pa to PLN110.5bn from 2024 to 2034.



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 3.

The total contribution of Travel & Tourism to GDP is twice as large as its direct contribution.

¹ All values are in constant 2023 prices & exchange rates

ECONOMY RANKINGS: ABSOLUTE CONTRIBUTION, 2023

Travel & Tourism's Direct Contribution to GDP		2023 (US\$bn)
3	Germany	179.9
	European Union Average	26.3
	World Average	16.5
36	Poland	14.4
45	Czechia	9.1
57	Romania	5.6
83	Ukraine	2.5
94	Belarus	1.9
99	Lithuania	1.7
101	Latvia	1.6
104	Estonia	1.5
115	Bosnia-Herzegovina	0.9

Travel & Tourism's Direct Contribution to Employment		2023 '000 jobs
9	Germany	3,194.6
	World Average	1,305.7
38	Poland	378.9
56	Czechia	222.1
78	Romania	143.7
85	Ukraine	126.9
89	Belarus	118.3
126	Latvia	43.7
135	Bosnia-Herzegovina	30.2
144	Lithuania	23.6
151	Estonia	17.8
	European Union Average	15.0

Travel & Tourism Investment		2023 (US\$bn)
6	Germany	39.1
	European Union Average	6.8
	World Average	5.5
30	Romania	5.5
42	Poland	3.2
55	Czechia	2.1
85	Ukraine	0.6
87	Estonia	0.6
89	Latvia	0.6
100	Lithuania	0.4
102	Belarus	0.4
104	Bosnia-Herzegovina	0.4

Travel & Tourism's Total Contribution to GDP		2023 (US\$bn)
3	Germany	487.6
	European Union Average	65.7
	World Average	47.9
35	Poland	33.6
51	Romania	19.7
54	Czechia	18.2
76	Ukraine	7.4
97	Belarus	4.2
101	Lithuania	4.0
104	Estonia	3.7
108	Latvia	3.3
117	Bosnia-Herzegovina	2.4

Travel & Tourism's Total Contribution to Employment		2023 '000 jobs
9	Germany	6,185.0
	World Average	1,607.4
46	Poland	839.4
59	Romania	573.1
73	Czechia	413.0
86	Ukraine	357.8
99	Belarus	281.7
135	Bosnia-Herzegovina	89.5
138	Latvia	80.6
144	Lithuania	63.8
145	Estonia	63.6
	European Union Average	32.3

Visitor Exports		2023 (US\$bn)
10	Germany	42.7
	European Union Average	18.8
29	Poland	16.3
	World Average	8.8
49	Czechia	7.4
55	Romania	5.7
95	Lithuania	1.7
96	Estonia	1.7
102	Bosnia-Herzegovina	1.4
103	Latvia	1.4
109	Belarus	1.1
118	Ukraine	0.8

The tables on pages 8-11 provide brief extracts from the full WTTC Economic League Table Rankings, highlighting comparisons with competing destinations as well as with the world and regional average. Averages are simple cross-economy averages. The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

ECONOMY RANKINGS: RELATIVE CONTRIBUTION, 2023

Travel & Tourism's Direct Contribution to GDP		2023 % share
65	Germany	4.1
	European Union Average	3.9
72	Estonia	3.8
73	Latvia	3.6
77	Bosnia-Herzegovina	3.4
	World Average	2.8
98	Czechia	2.7
100	Belarus	2.7
125	Lithuania	2.2
151	Poland	1.8
159	Romania	1.6
165	Ukraine	1.4

Travel & Tourism's Direct Contribution to Employment		2023 % share
39	Germany	7.0
	European Union Average	5.2
63	Latvia	4.9
72	Czechia	4.5
	World Average	3.7
96	Bosnia-Herzegovina	3.5
123	Estonia	2.5
128	Belarus	2.5
138	Poland	2.2
154	Romania	1.7
155	Lithuania	1.7
163	Ukraine	1.1

Travel & Tourism Contribution to Total Capital Investment		2023 % share
66	Estonia	6.0
68	Romania	5.9
73	Latvia	5.5
84	Bosnia-Herzegovina	4.6
	European Union Average	4.5
98	Germany	4.0
	World Average	3.6
136	Ukraine	2.6
144	Belarus	2.4
149	Czechia	2.3
150	Lithuania	2.3
153	Poland	2.2

Travel & Tourism's Total Contribution to GDP		2023 % share
57	Germany	11.0
	European Union Average	9.7
74	Estonia	9.2
	World Average	9.1
78	Bosnia-Herzegovina	8.8
95	Latvia	7.5
123	Belarus	5.9
130	Romania	5.6
135	Czechia	5.5
140	Lithuania	5.2
163	Poland	4.1
165	Ukraine	4.0

Travel & Tourism's Total Contribution to Employment		2023 % share
55	Germany	13.5
	European Union Average	11.1
79	Bosnia-Herzegovina	10.5
	World Average	10.0
95	Estonia	9.1
96	Latvia	9.1
105	Czechia	8.3
131	Romania	6.7
142	Belarus	5.9
156	Poland	4.9
160	Lithuania	4.5
166	Ukraine	3.2

Visitor Exports Contribution to Exports		2023 % share
76	Bosnia-Herzegovina	10.4
110	Estonia	5.4
	World Average	5.3
	European Union Average	5.3
120	Latvia	4.8
132	Romania	4.1
144	Poland	3.5
147	Czechia	3.1
153	Lithuania	2.9
161	Belarus	2.1
163	Germany	2.0
167	Ukraine	1.6

ECONOMY RANKINGS: REAL GROWTH, 2023

Travel & Tourism's Direct Contribution to GDP		2023 % growth
World Average		21.3
72	Czechia	18.2
82	Ukraine	16.5
97	Lithuania	14.5
141	Belarus	8.0
143	Germany	7.8
European Union Average		7.4
168	Latvia	2.9
176	Romania	0.6
178	Estonia	0.2
180	Poland	-2.3
182	Bosnia-Herzegovina	-3.0

Travel & Tourism's Direct Contribution to Employment		2023 % growth
28	Ukraine	11.5
World Average		9.0
European Union Average		5.5
136	Germany	5.1
141	Bosnia-Herzegovina	4.7
151	Romania	4.0
163	Belarus	3.4
173	Estonia	2.6
175	Poland	2.4
177	Latvia	2.0
182	Czechia	1.5
183	Lithuania	1.4

Travel & Tourism Investment		2023 % growth
43	Estonia	22.9
56	Latvia	21.0
79	Lithuania	15.6
World Average		13.0
European Union Average		9.1
150	Belarus	7.9
151	Poland	7.8
161	Germany	7.1
168	Romania	6.5
172	Czechia	5.9
173	Ukraine	5.9
178	Bosnia-Herzegovina	5.4

Travel & Tourism's Total Contribution to GDP		2023 % growth
World Average		23.2
72	Czechia	17.5
88	Lithuania	15.2
100	Ukraine	13.7
135	Germany	9.0
European Union Average		8.4
149	Belarus	7.3
155	Latvia	6.0
169	Estonia	3.7
174	Romania	3.2
181	Poland	-0.7
182	Bosnia-Herzegovina	-1.9

Travel & Tourism's Total Contribution to Employment		2023 % growth
10	Ukraine	15.5
World Average		9.1
60	Romania	8.3
86	Estonia	7.0
European Union Average		6.5
114	Bosnia-Herzegovina	5.8
138	Germany	5.0
150	Latvia	4.6
161	Poland	4.0
164	Czechia	3.9
178	Belarus	2.6
183	Lithuania	2.3

Visitor Exports		2023 % growth
61	Czechia	35.6
World Average		33.1
86	Lithuania	22.8
119	Germany	13.8
European Union Average		11.5
135	Belarus	9.7
160	Latvia	3.0
161	Ukraine	3.0
167	Romania	-1.9
172	Estonia	-4.0
178	Bosnia-Herzegovina	-8.6
179	Poland	-8.6

ECONOMY RANKINGS: LONG TERM GROWTH, 2024 - 2034

Travel & Tourism's Direct Contribution to GDP		2024 - 2034 % growth
28	Ukraine	5.5
39	Estonia	5.0
87	Lithuania	4.0
97	Bosnia-Herzegovina	3.8
World Average		3.7
106	Czechia	3.6
113	Poland	3.5
141	Belarus	2.8
154	Latvia	2.5
European Union Average		2.2
162	Romania	2.1
180	Germany	1.7

Travel & Tourism's Total Contribution to GDP		2024 - 2034 % growth
24	Ukraine	5.6
51	Estonia	4.8
96	Bosnia-Herzegovina	3.9
99	Lithuania	3.9
World Average		3.7
107	Czechia	3.6
118	Poland	3.4
143	Belarus	2.7
150	Romania	2.6
156	Latvia	2.5
European Union Average		2.2
179	Germany	1.7

Travel & Tourism's Direct Contribution to Employment		2024 - 2034 % growth
3	Ukraine	6.7
30	Estonia	3.8
62	Lithuania	3.0
World Average		2.5
117	Czechia	2.1
138	Bosnia-Herzegovina	1.8
150	Romania	1.5
159	Poland	1.4
European Union Average		1.3
166	Latvia	1.3
177	Belarus	1.0
185	Germany	0.3

Travel & Tourism's Total Contribution to Employment		2024 - 2034 % growth
1	Ukraine	8.0
35	Estonia	3.7
85	Lithuania	2.7
World Average		2.6
128	Bosnia-Herzegovina	2.0
136	Czechia	1.8
156	Poland	1.5
European Union Average		1.3
165	Romania	1.3
166	Latvia	1.3
181	Belarus	1.0
185	Germany	0.2

Travel & Tourism Investment		2024 - 2034 % growth
7	Ukraine	10.6
70	Belarus	5.5
World Average		5.1
94	Bosnia-Herzegovina	4.8
95	Poland	4.8
115	Lithuania	4.2
119	Estonia	4.0
137	Romania	3.5
European Union Average		3.2
148	Czechia	3.2
149	Latvia	3.2
169	Germany	2.2

Visitor Exports		2024 - 2034 % growth
4	Ukraine	12.5
51	Estonia	5.9
73	Lithuania	4.8
World Average		4.5
87	Czechia	4.5
89	Germany	4.4
90	Bosnia-Herzegovina	4.4
101	Poland	4.1
European Union Average		3.4
141	Latvia	2.8
147	Belarus	2.7
169	Romania	1.9

SUMMARY TABLES: ESTIMATES & FORECASTS

Poland	2023	2023	2024E	2034F		
	USDbn ¹	% of total	Growth ²	USDbn ¹	% of total	Growth ³
Direct contribution to GDP	14.4	1.8	9.2	22.2	2.2	3.5
Total contribution to GDP	33.6	4.1	9.9	51.8	5.0	3.4
Direct contribution to employment ⁴	378.9	2.2	2.3	446.0	2.7	1.4
Total contribution to employment ⁴	839.4	4.9	2.4	994.7	6.0	1.5
Visitor exports	16.3	3.5	8.3	26.3	4.5	4.1
Domestic spending	9.2	1.1	9.6	13.2	1.3	2.7
Leisure spending	17.3	2.1	9.3	27.8	2.7	3.9
Business spending	8.2	1.0	7.7	11.7	1.1	2.9
Capital investment	3.2	2.2	14.6	5.8	3.0	4.8

¹2023 constant prices & exchange rates; ²2024 real growth adjusted for inflation (%); ³2024-2034 annualised real growth adjusted for inflation (%); ⁴'000 jobs

European Union	2023	2023	2024E	2034F		
	USDbn ¹	% of total	Growth ²	USDbn ¹	% of total	Growth ³
Direct contribution to GDP	710.2	3.9	4.8	929.0	4.4	2.2
Total contribution to GDP	1,773.1	9.7	4.9	2,315.8	10.9	2.2
Direct contribution to employment ⁴	10,933.3	5.2	4.2	12,966.2	6.2	1.3
Total contribution to employment ⁴	23,531.1	11.1	4.3	28,016.8	13.4	1.3
Visitor exports	507.4	5.3	9.6	775.1	6.7	3.4
Domestic spending	1,036.2	5.7	2.0	1,229.9	5.7	1.5
Leisure spending	1,279.6	7.0	4.2	1,659.9	7.8	2.2
Business spending	264.0	1.4	5.8	345.1	1.6	2.1
Capital investment	183.2	4.5	7.4	270.7	5.5	3.2

¹2023 constant prices & exchange rates; ²2024 real growth adjusted for inflation (%); ³2024-2034 annualised real growth adjusted for inflation (%); ⁴'000 jobs

Worldwide	2023	2023	2024E	2034F		
	USDbn ¹	% of total	Growth ²	USDbn ¹	% of total	Growth ³
Direct contribution to GDP	3,059.3	2.8	10.9	4,865.7	3.5	3.7
Total contribution to GDP	9,899.3	9.1	12.1	15,998.6	11.4	3.7
Direct contribution to employment ⁴	120,812.2	3.7	5.3	162,759.0	4.4	2.5
Total contribution to employment ⁴	329,600.6	10.0	5.5	448,996.5	12.2	2.6
Visitor exports	1,632.6	5.3	15.9	2,945.0	7.4	4.5
Domestic spending	4,968.5	4.6	9.3	7,608.8	5.4	3.4
Leisure spending	5,296.0	4.9	10.7	8,501.0	6.1	3.8
Business spending	1,305.2	1.2	12.2	2,053.2	1.4	3.4
Capital investment	1,013.2	3.6	10.7	1,843.7	5.0	5.1

¹2023 constant prices & exchange rates; ²2024 real growth adjusted for inflation (%); ³2024-2034 annualised real growth adjusted for inflation (%); ⁴'000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and services. Domestic spending, as well as leisure and business spending, is expressed relative to whole economy GDP. Investment spending is expressed relative to whole economy investment.

E - Estimate, F - Forecast

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: REAL 2023 PRICES

Poland (PLNbn, real 2023 prices)	2018	2019	2020	2021	2022	2023	2024E	2034F
1. Visitor exports	72.4	76.2	37.5	40.1	74.7	68.3	73.9	110.5
2. Domestic expenditure (includes government individual spending)	37.6	39.1	17.1	23.5	35.5	38.8	42.5	55.3
3. Internal tourism consumption (= 1 + 2)	110.0	115.3	54.5	63.6	110.2	107.0	116.4	165.7
4. Purchases by tourism providers, including imported goods (supply chain)	-47.7	-50.0	-23.5	-27.6	-48.2	-46.4	-50.2	-72.4
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	62.3	65.3	31.0	36.0	62.0	60.6	66.2	93.3
Other final impacts (indirect & induced)								
6 Domestic supply chain	37.4	39.2	18.6	21.6	37.2	36.3	39.7	56.0
7. Capital investment	16.0	16.6	12.2	11.0	12.4	13.4	15.3	24.4
8. Government collective spending	12.5	13.3	10.2	11.3	15.1	15.3	16.5	21.6
9. Imported goods from indirect spending	-11.5	-12.0	-7.1	-7.5	-11.0	-10.7	-11.4	-18.5
10. Induced	26.8	28.2	13.3	16.6	26.6	26.4	29.1	40.7
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	143.5	150.7	78.2	89.0	142.3	141.3	155.4	217.5
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	376.6	381.6	311.2	325.0	369.9	378.9	387.6	446.0
13. Total contribution of Travel & Tourism to employment	848.1	860.4	732.8	744.2	806.8	839.4	859.8	994.7
14. Other indicators								
Expenditure on outbound travel	46.9	47.3	24.5	25.0	36.3	39.3	43.0	64.9
Leisure spending	73.8	76.6	34.6	38.3	76.3	72.7	79.4	116.7
Business spending	36.2	38.7	19.9	25.2	33.9	34.3	37.0	49.1

E - Estimate, F - Forecast

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES

Poland (PLNbn, nominal prices)	2018	2019	2020	2021	2022	2023	2024E	2034F
1. Visitor exports	52.4	56.8	29.2	32.9	67.6	68.3	78.6	157.8
2. Domestic expenditure (includes government individual spending)	27.2	29.2	13.3	19.2	32.1	38.8	45.2	78.9
3. Internal tourism consumption (= 1 + 2)	79.6	86.0	42.4	52.1	99.7	107.0	123.9	236.7
4. Purchases by tourism providers, including imported goods (supply chain)	-34.5	-37.3	-18.3	-22.6	-43.6	-46.4	-53.4	-103.4
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	45.1	48.7	24.1	29.5	56.1	60.6	70.4	133.3
Relative contribution (% whole economy)	2.1	2.1	1.0	1.1	1.8	1.8	1.9	2.2
Other final impacts (indirect & induced)	27.0	29.2	14.5	17.7	33.7	36.3	42.2	79.9
6. Domestic supply chain								
7. Capital investment	11.6	12.4	9.5	9.0	11.2	13.4	16.3	34.9
8. Government collective spending	9.0	9.9	7.9	9.2	13.7	15.3	17.6	30.9
9. Imported goods from indirect spending	-8.3	-8.9	-5.5	-6.2	-10.0	-10.7	-12.1	-26.5
10. Induced	19.4	21.0	10.3	13.6	24.1	26.4	30.9	58.1
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	103.8	112.4	60.9	73.0	128.8	141.3	165.3	310.6
Relative contribution (% whole economy)	4.9	4.9	2.6	2.8	4.2	4.1	4.4	5.0
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	376.6	381.6	311.2	325.0	369.9	378.9	387.6	446.0
Relative contribution (% whole economy)	2.3	2.3	1.9	1.9	2.2	2.2	2.3	2.7
13. Total contribution of Travel & Tourism to employment	848.1	860.4	732.8	744.2	806.8	839.4	859.8	994.7
Relative contribution (% whole economy)	5.2	5.3	4.5	4.4	4.8	4.9	5.0	6.0
14. Other indicators								
Expenditure on outbound travel	33.9	35.2	19.1	20.5	32.9	39.3	45.8	92.8
Leisure spending	53.4	57.1	26.9	31.4	69.0	72.7	84.5	166.6
Business spending	26.2	28.8	15.5	20.7	30.7	34.3	39.4	70.1

E - Estimate, F - Forecast

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and UN Tourism formerly (UNWTO). Historical data for concepts has been benchmarked to match reported TSA data where available.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: REAL 2023 PRICES (USD)

Poland (USDbn, real 2023 prices)	2018	2019	2020	2021	2022	2023	2024E	2034F
1. Visitor exports	17.2	18.1	8.9	9.5	17.8	16.3	17.6	26.3
2. Domestic expenditure (includes government individual spending)	8.9	9.3	4.1	5.6	8.4	9.2	10.1	13.2
3. Internal tourism consumption (= 1 + 2)	26.2	27.4	13.0	15.1	26.2	25.5	27.7	39.4
4. Purchases by tourism providers, including imported goods (supply chain)	-11.3	-11.9	-5.6	-6.6	-11.5	-11.1	-12.0	-17.2
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	14.8	15.6	7.4	8.6	14.8	14.4	15.8	22.2
Other final impacts (indirect & induced)								
6 Domestic supply chain	8.9	9.3	4.4	5.1	8.9	8.7	9.4	13.3
7. Capital investment	3.8	4.0	2.9	2.6	3.0	3.2	3.7	5.8
8. Government collective spending	3.0	3.2	2.4	2.7	3.6	3.6	3.9	5.1
9. Imported goods from indirect spending	-2.7	-2.8	-1.7	-1.8	-2.6	-2.5	-2.7	-4.4
10. Induced	6.4	6.7	3.2	4.0	6.3	6.3	6.9	9.7
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	34.2	35.9	18.6	21.2	33.9	33.6	37.0	51.8
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	376.6	381.6	311.2	325.0	369.9	378.9	387.6	446.0
13. Total contribution of Travel & Tourism to employment	848.1	860.4	732.8	744.2	806.8	839.4	859.8	994.7
14. Other indicators								
Expenditure on outbound travel	11.2	11.2	5.8	5.9	8.6	9.4	10.2	15.5
Leisure spending	17.6	18.2	8.2	9.1	18.2	17.3	18.9	27.8
Business spending	8.6	9.2	4.7	6.0	8.1	8.2	8.8	11.7

E - Estimate, F - Forecast

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: NOMINAL PRICES (USD)

Poland (USDbn, nominal prices)	2018	2019	2020	2021	2022	2023	2024E	2034F
1. Visitor exports	14.5	14.8	7.5	8.5	15.2	16.3	19.8	47.8
2. Domestic expenditure (includes government individual spending)	7.5	7.6	3.4	5.0	7.2	9.2	11.4	23.9
3. Internal tourism consumption (= 1 + 2)	22.0	22.4	10.9	13.5	22.4	25.5	31.2	71.7
4. Purchases by tourism providers, including imported goods (supply chain)	-9.5	-9.7	-4.7	-5.9	-9.8	-11.1	-13.4	-31.3
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	12.5	12.7	6.2	7.6	12.6	14.4	17.7	40.4
Relative contribution (% whole economy)	2.1	2.1	1.0	1.1	1.8	1.8	1.9	2.2
Other final impacts (indirect & induced)	7.5	7.6	3.7	4.6	7.6	8.7	10.6	24.2
6. Domestic supply chain								
7. Capital investment	3.2	3.2	2.4	2.3	2.5	3.2	4.1	10.6
8. Government collective spending	2.5	2.6	2.0	2.4	3.1	3.6	4.4	9.4
9. Imported goods from indirect spending	-2.3	-2.3	-1.4	-1.6	-2.2	-2.5	-3.1	-8.0
10. Induced	5.4	5.5	2.6	3.5	5.4	6.3	7.8	17.6
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	28.8	29.3	15.6	18.9	28.9	33.6	41.6	94.1
Relative contribution (% whole economy)	4.9	4.9	2.6	2.8	4.2	4.1	4.4	5.0
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	376.6	381.6	311.2	325.0	369.9	378.9	387.6	446.0
Relative contribution (% whole economy)	2.3	2.3	1.9	1.9	2.2	2.2	2.3	2.7
13. Total contribution of Travel & Tourism to employment	848.1	860.4	732.8	744.2	806.8	839.4	859.8	994.7
Relative contribution (% whole economy)	5.2	5.3	4.5	4.4	4.8	4.9	5.0	6.0
14. Other indicators								
Expenditure on outbound travel	9.4	9.2	4.9	5.3	7.4	9.4	11.5	28.1
Leisure spending	14.8	14.9	6.9	8.1	15.5	17.3	21.3	50.5
Business spending	7.3	7.5	4.0	5.4	6.9	8.2	9.9	21.2

E - Estimate, F - Forecast

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008)* developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and UN Tourism formerly (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: GROWTH

Poland Growth ¹ (%)	2018	2019	2020	2021	2022	2023	2024E	2034F ²
1. Visitor exports	8.1	5.3	-50.8	7.0	86.3	-8.6	8.3	4.1
2. Domestic expenditure (includes government individual spending)	11.8	4.1	-56.4	37.5	51.2	9.3	9.6	2.7
3. Internal tourism consumption (= 1 + 2)	9.3	4.8	-52.7	16.5	73.4	-2.9	8.8	3.6
4. Purchases by tourism providers, including imported goods (supply chain)	9.4	4.8	-52.9	17.3	74.6	-3.6	8.2	3.7
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	9.3	4.9	-52.5	16.0	72.4	-2.3	9.2	3.5
Other final impacts (indirect & induced)	9.3	4.9	-52.5	16.0	72.4	-2.3	9.2	3.5
6. Domestic supply chain								
7. Capital investment	11.1	4.0	-26.5	-9.8	12.5	7.8	14.6	4.8
8. Government collective spending	6.0	6.7	-23.5	10.6	33.8	1.1	8.2	2.7
9. Imported goods from indirect spending	9.5	4.3	-40.8	6.3	46.4	-3.1	6.9	5.0
10. Induced	9.1	5.0	-52.9	25.4	60.0	-0.7	9.9	3.4
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	9.1	5.0	-48.1	13.7	60.0	-0.7	9.9	3.4
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	6.1	1.3	-18.4	4.4	13.8	2.4	2.3	1.4
13. Total contribution of Travel & Tourism to employment	6.0	1.5	-14.8	1.6	8.4	4.0	2.4	1.5
14. Other indicators								
Expenditure on outbound travel	4.5	0.8	-48.1	1.9	45.4	8.3	9.4	4.2
Leisure spending	6.9	3.9	-54.8	10.8	99.0	-4.7	9.3	3.9
Business spending	14.5	6.8	-48.4	26.5	34.4	1.3	7.7	2.9

E - Estimate, F - Forecast

¹2018-2024 real annual growth adjusted for inflation (%); ²2024-2034 annualised real growth adjusted for inflation (%)

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 a country 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 country 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 a country by that country'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 a country 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 a country by residents and international visitors.

LEISURE TRAVEL & TOURISM SPENDING

Spending on leisure travel within a country 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.

OTHER INDICATORS

OUTBOUND EXPENDITURE

Spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

INTERNATIONAL TOURIST ARRIVALS

The number of arrivals of international overnight visitors (tourists) to the country.

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 country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New TSAs incorporated this year include Aruba, Kenya, Namibia, North Macedonia, Papua New Guinea and Uganda, bringing our total of countries and economies in our benchmarking dataset to 72. Our TSA benchmarked countries cover around 90% of global direct T&T GDP.

WTTC coverage includes data on 185 countries and economies, and reports on 27 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, Russian Federation, Singapore, Taiwan China, Thailand, USA, Vietnam.

COMMONWEALTH¹

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 Union², Argentina, Australia, Brazil, Canada, China, European Union, France³, Germany³, India, Indonesia, Italy³, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa⁴, 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, Nicaragua⁵, 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, South Korea, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland, Türkiye, UK, USA.

(OIC) ORGANISATION OF ISLAMIC COOPERATION⁶

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.

OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), Nauru, New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

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.

1 This includes data for Overseas British Territories, but there is no data for Nauru, Samoa and Tuvalu

2 This union of 55 member states received full G20 membership status in September 2023. It is included in 2023 data

3 Included in European Union

4 Included in African Union

5 Nicaragua left the OAS in November 2023. It is included in 2023 data

6 no data for Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Palestine, Somalia or Turkmenistan

ACKNOWLEDGEMENTS

EDITORS

Nejc Jus

Director of Research
World Travel & Tourism Council

Jonathan Mitcham

Senior Research Analyst
World Travel & Tourism Council

Chok Tsering

Research Analyst
World Travel & Tourism Council

DESIGN

World Travel & Tourism Council

IMAGES

Cover, P3-4: James Wheeler, Unsplash
P2: Hert Niks, Unsplash

Contributing data to the WTTC Economic Impact Model:



STR is part of the CoStar Group (NASDAQ: CSGP) which is a leading provider of online real estate marketplaces, information, and analytics in the property markets. Founded in 1987, CoStar Group conducts expansive, ongoing research to produce and maintain the largest and most comprehensive database of real estate information. CoStar is the global leader in commercial real estate information, analytics, and news, enabling clients to analyse, interpret and gain unmatched insight on property values, market conditions and availabilities.

STR provides premium data benchmarking, analytics, and marketplace insights for the global hospitality industry.

To learn more, visit: [STR.com](https://www.str.com)



ForwardKeys was founded in 2010 on the premise that businesses dependent on international travellers – such as tourism organisations, hotels and retailers – would make better strategic decisions if they knew who was travelling where, when and for how long. The self-funded company, therefore, developed the most comprehensive database of air travel bookings in the industry, offering detailed information on traveller profiles.

Yet ForwardKeys is more than just a consultancy to the aviation industry. In recent years, it has evolved to become a travel intelligence specialist, able to provide insight into not only the flow of international travellers but also their behaviour and preferences at their destination.

ForwardKeys, on a mission to predict travellers' impact. Learn more about the data solutions and visit: [ForwardKeys.com/Products](https://www.forwardkeys.com/products)



The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism.

WTTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading private sector Travel & Tourism businesses.

Together with Oxford Economics, WTTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting 330 million jobs and generating 9.1% of global GDP in 2023. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 185 economies around the world. In addition to individual country fact sheets, and fuller country reports, WTTTC 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.WTTTC.org



Assisting WTTTC to Provide Tools for Analysis, Benchmarking, Forecasting and Planning.

Oxford Economics is a leader in global forecasting and quantitative analysis. Our worldwide client base comprises more than 2,000 international corporations, financial institutions, government organisations, and universities.

Headquartered in Oxford, with offices around the world, we employ close to 600 staff, including over 425 economists and analysts. Our best-in-class global economic and industry models and analytical tools give us an unmatched ability to forecast external market trends and assess their economic, social and business impact.

For more information, visit: OxfordEconomics.com



WORLD
TRAVEL &
TOURISM
COUNCIL



WTTC STRATEGIC PARTNERS



GLOBAL  rescue

وزارة السياحة
Ministry of Tourism
Kingdom of Saudi Arabia 

© World Travel & Tourism Council: Travel & Tourism Economic Impact 2024. All rights reserved.

The copyright laws of the United Kingdom allow certain uses of this content without our (i.e. the copyright owner's) permission. You are permitted to use limited extracts of this content, provided such use is fair and when such use is for non-commercial research, private study, review or news reporting. The following acknowledgment must also be used, whenever our content is used relying on this "fair dealing" exception: "Source: World Travel and Tourism Council: Travel & Tourism Economic Impact 2024. All rights reserved."

If your use of the content would not fall under the "fair dealing" exception described above, you are permitted to use this content in whole or in part for non-commercial or commercial use provided you comply with the Attribution, Non-Commercial 4.0 International Creative Commons Licence. In particular, the content is not amended and the following acknowledgment is used, whenever our content is used: "Source: World Travel and Tourism Council: Travel & Tourism Economic Impact 2024. All rights reserved. Licensed under the Attribution, Non-Commercial 4.0 International Creative Commons Licence." You may not apply legal terms or technological measures that legally restrict others from doing anything this license permits.