

# Divergence of Trajectories of Inbound Tourism Recovery in the European and Asia-Pacific Regions

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**Abstract:** A comparative analysis of the dynamics and determinants of international inbound tourism flows in the European and Asia-Pacific regions during 2020–2024 revealed divergence of the trajectories of their recovery and development. The study is based on data from the UN Tourism, Eurostat, Statista, and national statistical services. Statistical analysis, comparative approach and market share calculation were used to assess the contribution of key leading countries and subregions to global tourist flows. The European Region, especially Western Europe, has shown a faster recovery, reaching and exceeding pre-pandemic levels, with a cumulative share of 38.76% of global arrivals in 2024. At the same time, Asia-Pacific countries have recovered unevenly, with their combined share declining from 16.61% (2020) to 13.4% (2024), partly due to a greater focus on domestic tourism (up to 86% of total flows) and persistent structural barriers. The study revealed a significant divergence in the post-crisis development of tourism: Europe retains leadership in inbound tourism due to diversification of supply and export orientation, while the Asia-Pacific region chiefly focuses on the domestic market. The results highlight the impact of structural factors, such as economic policies, infrastructure and the structure of tourism demand, on the resilience of tourism markets.


## 1 INTRODUCTION


A comparatively broad spectrum of indicators can be used to evaluate the contribution of tourism to the economic growth of countries and regions. It is especially important to analyse the situation in the context of the dynamics of changes in the values of the indicator of international tourist arrivals. Primarily, this statement is supported by the fact that the indicator simultaneously determines the presence and strength of the export potential of destinations in the service sector, as well as emphasizes global tourism trends and indirectly reflects a certain degree


of consumer loyalty to a particular area (UN Tourism Dashboard, 2024).

It is important to understand that it is appropriate to associate a large volume of tourist flows with the growth of regional budgets, expenditures on services in the hotel and transport sectors, as well as with changes in the geopolitical situation, the level of social tension, cultural and educational potential and infrastructure support. Which, in turn, implies that it is suitable to associate the dynamics of the inbound international tourist flows indicator with certain risks and factors. As risks are often associated with ensuring the legitimacy and security of the processes of implementing tourist activities, financial

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instability and seasonal fluctuations, the factor aspect is largely determined by the content and functional usefulness of the internal resource base, the availability of support for the tourism sector, geographical and climatic features, specifics of customs policy, relations with neighboring territories, etc.

## 2 MATERIALS AND METHODS

The basis of the study was a comparative analysis of the dynamics of international tourist arrivals in the European and Asia-Pacific regions. To ensure the reliability of the results, an integrated methodological approach was used, including statistical analysis of time series and comparative assessment of structural changes in tourism markets. Particular attention was paid to identifying the divergence of post-crisis recovery trajectories through determination of the shares of key countries and subregions in the global tourist flow.

The information base of the study is formed on the basis of aggregated data from international organizations and official statistical services. Systematized data from the United Nations World Tourism Organization (UN Tourism, formerly UNWTO) and the European Travel Commission is supplemented by national statistics of the leading countries on tourist arrivals in both regions. The comparative nature of the study required amalgamation of data from heterogeneous sources,

including Statista reports, relevant ministries of European states and tourism administrations of the countries in the Asia-Pacific region.

Principles of generalization and systematization made it possible to transform primary statistical data into comparative indicators that ensure representativeness of the analysis at the macro-regional level. Consistent application of the comparative method has created the basis for identifying persistent trends and structural differences in tourism development between regions in the post-pandemic period.

## 3 RESULTS AND DISCUSSION

The analysis of the indicator of international tourist arrivals is especially relevant from the point of view of identifying factors of influence and causes of changes in the rating of states in the international tourism market focusing on the geopolitical regions. For example, Europe can be considered one of these regions, since during the last couple of years there has been an increase in the key indicators characterizing progress. For example, in 2023, the European continent accounted for more than half of international tourist arrivals, while the total contribution of tourism to GDP amounted to about € 2 trillion. In 2024, the flow of tourists, mainly to Western Europe, amounted to about 747 million. Presently, experts predict creation of more than 24.6 million jobs in the tourism complex by the end

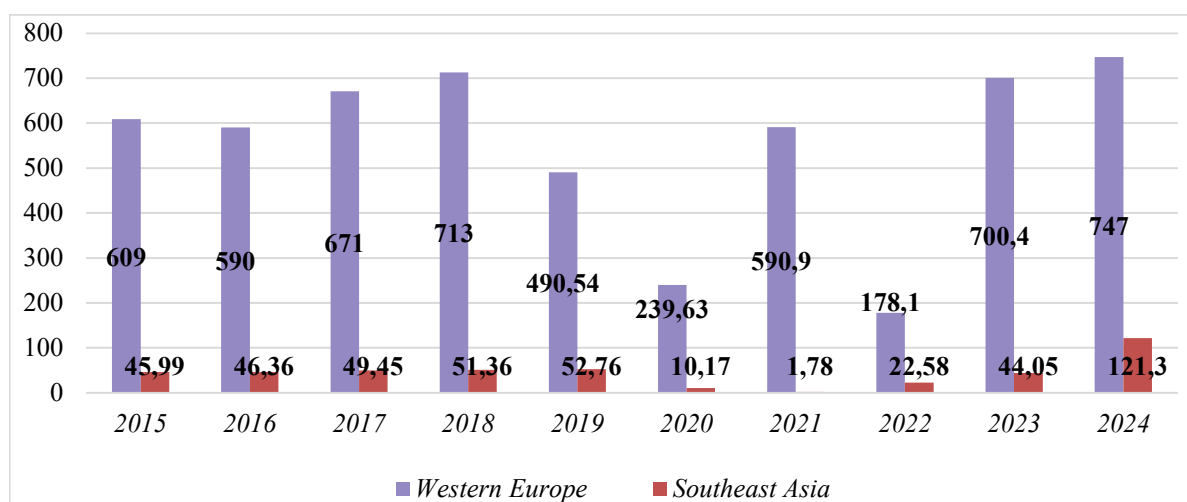


Figure 1: Volume of international tourist arrivals in Western Europe (million, 2015–2024)

Source: compiled by the authors based on the data of (ASEAN stats, 2024; EU Tourism Platform, 2024; European Travel Commission, 2016; European Travel Commission, 2019; European Travel Commission, 2025; Outbox, 2024; Statista, 2024b; UNWTO Annual Report 2016, 2016; UN Tourism, 2018)

of 2025, which will account for 11.5% of the total number of jobs in all sectors in Europe (Statista, 2024b). In addition, the European region is characterized by a high degree of regenerative and sustainable trends in the tourism industry. After the COVID-19 pandemic, the tourist complex of Europe has significantly recovered, which can be seen in the values of the key indicator in the western part of the continent, since in 2024 the number of tourist arrivals increased by 52.28% compared to 2019 (Figure 1). First of all, social and economic potential have a significant impact on the recovery of the tourism and hospitality sector, including in relation to meeting epidemiological and political challenges (Artal-Tur, Badillo-Amador, 2024; EU Tourism dashboard, 2024).

In the Asia-Pacific region, the flow of international tourists for 2024 increased by 21% compared to 2023. In part, such progress can be attributed to political measures, including strategic investments in the transport sector and changes in visa requirements (Basu-Das, Domingo, 2025; PATA, 2025). It should be noted that one of its developed subregions is Southeast Asia. Despite the fact that in comparison with Western Europe, the flow of tourists is relatively small in the aggregate, some countries show quite high values, which may indicate an increase in the attractiveness of territories over time. For example, Vietnam is the leader in terms of year-on-year growth, as evidenced by a 39.5% increase in tourist traffic in 2024, while Thailand by 2025 has shown a result that exceeds the targets set by the local government and has reached pre-pandemic levels (Outbox, 2024).

Predominantly, Western Europe is the territory absorbing the largest volumes of tourist flows and the most mass-oriented sub-region in this regard. In a sense, this is due to historical colonization, which influenced the formation of the resource component of this part of the region, cultural values, intellectual heritage, individualism, the desire for innovation and creation of an environment favorable for tourist development.

In part, the increased consumer interest in the territories of Western Europe and Southeast Asia can be confirmed by the data presented in the Figure 2.

Analyzing the chart, it should be noted that in 2024, the values of the indicator exceeded the pre-pandemic levels, which in a sense is justified by high performance in large sales markets. This fact is confirmed, among other things, by the foreign trade surplus of key EU players in 2024 amounting to about €150.1 billion. Moreover, specialists associate the growth in demand for visits to the Western Europe with the so-called deferred demand, gradual harmonization of cross-border trade and restoration of supply chains, taking into account the current circumstances, since the position of the continent in the development of global trade corridors, investment in intellectual infrastructure, politicization of the issue of decarbonization, and digital growth are the key factors in maintaining positions (Claight Corporation, 2025; EU, 2024; UN Tourism, 2025).

Drawing attention to the values of the indicator for Southeast Asia for this period, it is necessary to emphasize that despite the growth rates

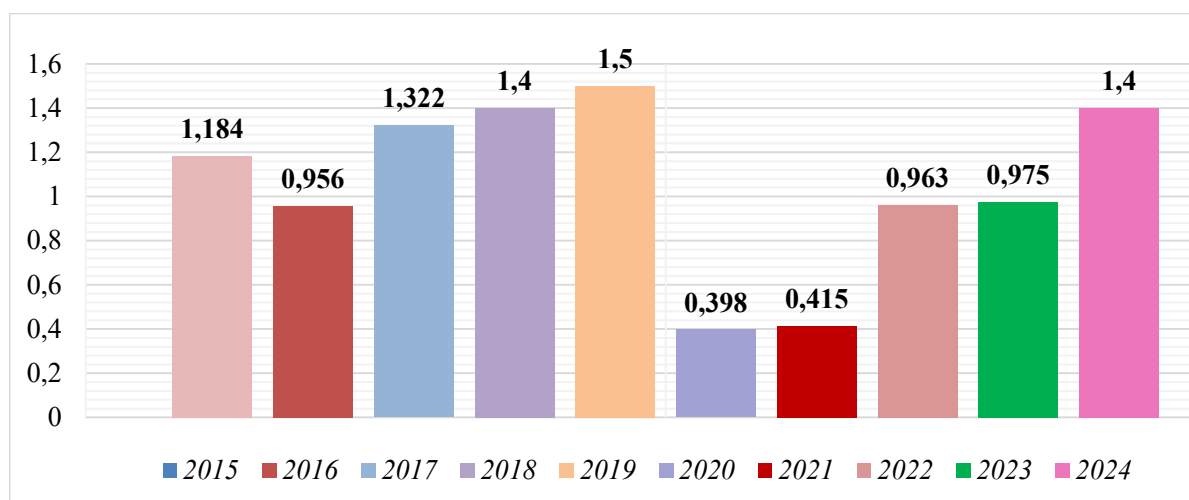


Figure 2: Evolution of tourist arrivals globally (million-billion, 2020–2024)

Source: compiled by the authors based on the data of (UN Tourism, 2016; UN Tourism, 2016; UN Tourism, 2018; UN Tourism, 2021; UN Tourism, 2024; UN Tourism, 2025; UN Tourism Dashboard, 2024, UNWTO, 2023; YPE FR, 2025)

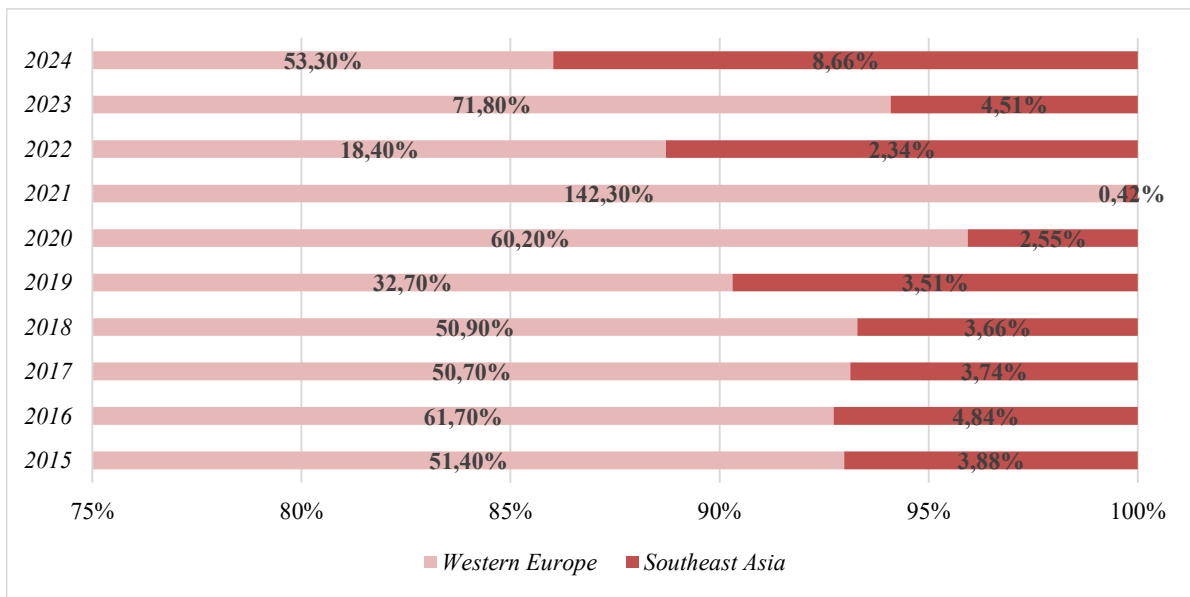


Figure 3: Western Europe and Southeast Asia shares in terms of the number of international tourist arrivals (%), 2015–2024  
Source: compiled by the authors.

of the tourism industry in individual countries, sustainable development is not observed, since the level of demand and the results of promoting the potential of each country in the subregion do not correlate. There is a fairly wide range of factors that explain the insufficient tourist growth, including (Kuchumov, 2024; Outbox, 2024; Statista, 2025b; UN Tourism, 2025):

- protracted recovery from the COVID-19 pandemic, as some countries have not reached the levels observed before the tipping point;
- growing tourist flows not guaranteeing parallel increase in consumer spending on tourist services;
- high level of prices for tourism-related services related to the transport sector and entertainment within the borders of some states, such as Singapore and Thailand;
- high expectations of local authorities within the borders of individual states;
- high dependence on exports;
- low standards of service and lack of qualified personnel;
- prevalence of the cultural and ideological component over the socioeconomic one in many aspects.

However, when assessing the growth of the European and Asian tourism complex, it is insufficient to analyze only the values of the main indicator, since the contribution of the subregion relative to global values is no less important. Accordingly, in order to calculate the shares

of Western Europe and Southeast Asia, as well as to derive data for further research of the issue in the context of measuring the indicator of international tourist arrivals, it is necessary to clarify the values of this parameter in the world equivalent. Thus, it was possible to draw up a diagram reflecting the global tourist flow during 2020–2024 (Figure 2).

Undeniably, first of all, it was revealed that over the past 5 years, the highest value of the indicator was observed in 2024, which indicates an almost complete recovery of the global tourism market after the COVID-19 pandemic. However, the latest available value does not exceed the pre-pandemic level, which can be partly explained by the slow lifting of customs restrictions and the relatively gradual growth of the level of mobility of the population in certain regions. Despite this fact, the results of the regeneration of the economies of many countries individually allow us to assert that tourism at the global level has stabilized as a whole (UN Tourism, 2025).

Having identified the values of tourist arrivals on a global scale, it is necessary to present a formula for calculating the indicator of the share of subregions in Europe and Asia in terms of the number of international arrivals:

$$ITF = (Ti) * 100 / T_w \quad (1)$$

where *ITF* (International Tourist Flow) denotes international tourist arrivals, while *(Ti)* is

Table 1: Number of international tourist arrivals in the leading European countries (million, 2020–2024)

No	Country	2020	2021	2022	2023	2024
1	<i>France</i>	41.68	48.4	79.4	100	100
2	<i>Spain</i>	18.9	31.2	71.6	85.1	94
3	<i>Italy</i>	25.2	26.8	49.81	67.9	71.2
4	<i>Poland</i>	15.95	9.7	15.95	36.2	36
5	<i>United Kingdom</i>	11.1	6.4	31.2	38	42.6
6	<i>Germany</i>	12.4	11.6	28.5	34.8	37.4
7	<i>Greece</i>	7.4	14.7	27.8	32.7	40.7
8	<i>Austria</i>	25	22.1	39.8	45.2	46.7
9	<i>Portugal</i>	4.2	6.3	22.3	26.5	53.3
10	<i>Croatia</i>	5.5	13.8	18.9	20.6	21.3

Source: compiled by the authors based on the data of (Austrian National Tourist Office, 2022, Campus France, 2023; Campus France, 2025; Croatia Week, 2025; Instituto Nacional de Estadística, 2022; Kontrafour, 2025; Office for National Statistics, 2023; Office for National Statistics, 2025; Road Genius, 2025b; Road Genius, 2025c; Statista, 2025a; Statistics Poland, 2025; World Data, 2025a)

the indicator of tourist arrivals within the boundaries of a certain country/region, and  $T_w$  is the global value of the indicator of international tourist flows in the global context.

This further made it possible to compile a diagram based on the calculated values of the indicator in Western Europe and Southeast Asia (Figure 3).

Considering the data in the figure, it should be noted that the share of Western Europe in the world indicator of tourist arrivals is significantly higher than the share of Southeast Asia for the specified period. In many respects, this can be argued for by the broader variety of cultures, diversification of the tourist market, and the range of recreational resources, while the position of Southeast Asia is due to a combination of factors, including insufficient funding for infrastructure development and the services (Romanova, 2021; Statista, 2024b). Moreover, demand is also affected by environmental instability due to progressive overtourism in some destinations, discriminatory attitudes towards tourist groups, the lack of well-developed tourism development strategies and rising prices (Kuchumov, 2024; Kamaluddin, Seniwati, 2024).

Assessing the prospects for evaluating the potential of regions more broadly, it is necessary to abstract from the analysis of data within the boundaries of sub-regions and focus on the local changes in the individual states. For instance, according to a number of information and statistical resources, it was possible to find a list of countries in the European and Asia-Pacific regions that can be designated as leaders in terms of tourist flows (Table 1, Table 2) (Korovina, 2025; Pitrelli, 2025; Reed, 2025; The Asian Affairs, 2025; UN Tourism, 2025). The table 1 reflects the information on tourist arrivals in the leading countries in terms of tourism development in Europe.

France and Spain are among the most popular tourist destinations. Taking into account the fact that the expenditure of consumers of tourist services in Spain is higher than in France, in recent years Spain has attracted more international tourists, whose expenditures exceed those of domestic tourists (EU Tourism Platform, 2024). Despite that, France was occupying consistently high ranks by this indicator as the number of destinations within the country is markedly different from that of the competing state, there is a trend towards strategic investment, an increase in the contribution of the cultural sector and sustainable practices in tourism. Examples include the Atout France agency, which has created a national platform to encourage professionals in the tourism sector to promote sustainable development measures, as well as the launch of special SNCF trains to reduce carbon dioxide emissions (Bassi, Martin, 2024; Atout France, 2024; Stickney, 2025). In addition, experts emphasize that the tourism industry in France makes a significant contribution to the economy of the country and the region, as tourism accounts for about 10% of the country's GDP. In addition, the country is distinguished by its high historical and cultural potential and a growing transport and logistics network (Statista, 2024a).

Croatia has the lowest value, as there are economic pressures in the country, which are supported by rising inflation and high road transport costs, geopolitical difficulties that are caused by persistent tensions within the region and increased competition against the improving capabilities of other European Union states (Emehet, 2025). In addition, there is a high probability that the statistics presented for this country are not reliable, since tourism is not defined for the country as a separate independent sector, including according

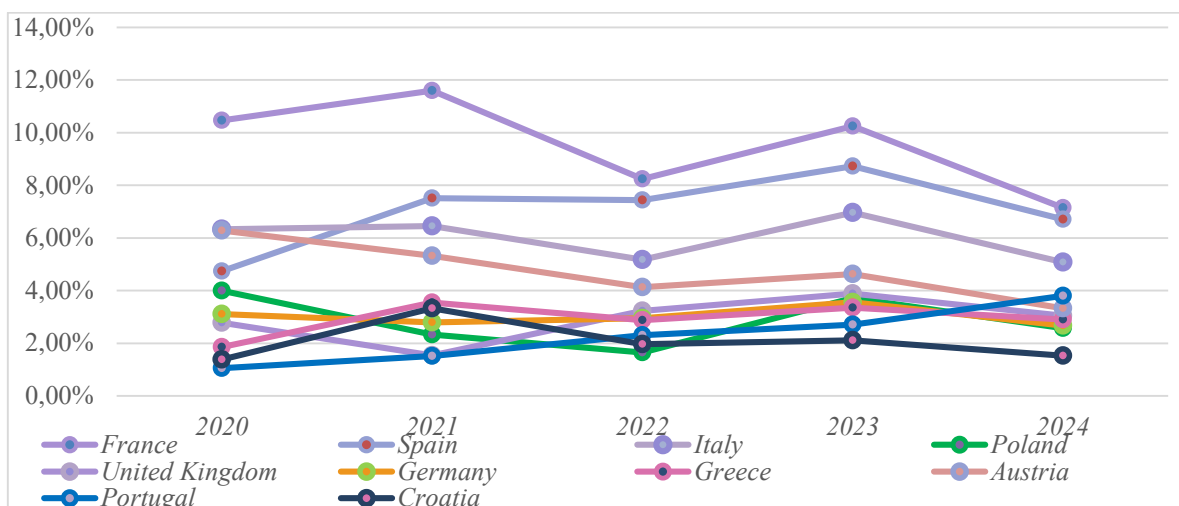


Figure 4: Share of countries in the European Region by international tourist arrivals (% , 2020–2024)

Table 2: Share of countries in the European Region in terms of international tourist arrivals (% , 2020–2024)

Country/Year	2020	2021	2022	2023	2024
<i>France</i>	10,47%	11,6%	8,24%	10,25%	7,14%
<i>Spain</i>	4,74%	7,51%	7,43%	8,72%	6,71%
<i>Italy</i>	6,33%	6,45%	5,17%	6,96%	5,08%
<i>Poland</i>	4%	2,33%	1,65%	3,71%	2,57%
<i>United Kingdom</i>	2,78%	1,54%	3,23%	3,89%	3,04%
<i>Germany</i>	3,11%	2,79%	2,95%	3,56%	2,67%
<i>Greece</i>	1,85%	3,54%	2,88%	3,35%	2,9%
<i>Austria</i>	6,28%	5,32%	4,13%	4,63%	3,33%
<i>Portugal</i>	1,05%	1,51%	2,31%	2,71%	3,8%
<i>Croatia</i>	1,38%	3,32%	1,96%	2,11%	1,52%

Source: compiled by the authors.

to the national sectoral classification system (Krešić, 2014).

Next, it is necessary to calculate the share of the European Union countries in terms of international tourist arrivals in order to analyze the actual contribution to the development of the global tourism complex (Figure 4).

An analysis of the dynamics of the shares of European countries in the global tourist flow (2020–2024) demonstrates the unevenness of the post-crisis recovery and the redistribution of competitive positions within the region. Despite the continued leadership of France and Spain, the most significant growth was shown by the Mediterranean destinations (Portugal, Greece), which indicates a shift in consumer demand towards sunny destinations with developed beach tourism. At the same time, large economies (Germany, Great Britain) and small specialized countries (Croatia) are losing their shares in the global market, which emphasizes their vulnerability to current challenges. The general trend indicates a structural transformation of the

European tourism market in the post-pandemic period.

Many experts note that the share of the European Union countries in the global indicator of international tourist arrivals makes it possible to determine the growth rate of globalization or the degree of recovery of states after the COVID-19 pandemic. Moreover, there is an opinion that globalization has manifested itself most aggressively during the last decade, which is partly justified by the decline in the effect of the "soft power", which has been a key advantage of many of the continent's leading countries. As the influence of major players in the political arena, including Russia, the United States, China and India, grew, the influence of European states noticeably decreased, which is confirmed by the actual circumstances. This leads to an increase in the relevance of exports of industrial products, markets for high-tech products and, on the contrary, a decrease in the need to promote the services market, which has inevitably affected the tourism complex at the present time (Antropov,

Table 3: Number of tourist arrivals in the leading Asian countries (thousand-million, 2020–2024)

No	Country	2020	2021	2022	2023	2024
1	Malaysia	4.3	0.134	10.07	20.14	25.02
2	Japan	4.1	0.245	3.83	25.07	36.87
3	China	27.2	31.98	25.25	35.5	32
4	India	2.74	7.0	6.19	9.23	9.66
5	Singapore	2.74	0.33	5.34	13.6	5.34
6	Indonesia	4.05	1.55	5.47	11.68	5.47
7	Vietnam	3.83	0.157	3.66	12.6	3.66
8	South Korea	2.52	0.967	3.2	11.03	16.37
9	UAE	8.08	11.48	14.36	17.15	18.72
10	Thailand	6.7	0.427	11.15	28	35.04

Source: compiled by the authors based on the data of (BPS-Statistics Indonesia, 2021; Department of Statistics Malaysia, 2022; Dubai, 2022; Dubai, 2023; Dubai, 2024; Government of India, 2021; JNTO, 2025; Moon, 2025; Road Genius, 2024; Road Genius, 2025a; Road Genius, 2025d; Road Genius, 2025e; Road Genius, 2025f; Singapore Tourism Board, 2022; Thai Websites, 2025; The Global Economy, 2020; The UAE, 2024; Trading Economics, 2025; Tourism Malaysia, 2021; Tourist Places Guide, 2025; Travel China Guide, 2025a; Travel China Guide, 2025b; Viet Nam National Authority of Tourism, 2023; World Data, 2025b; World Data, 2025c)

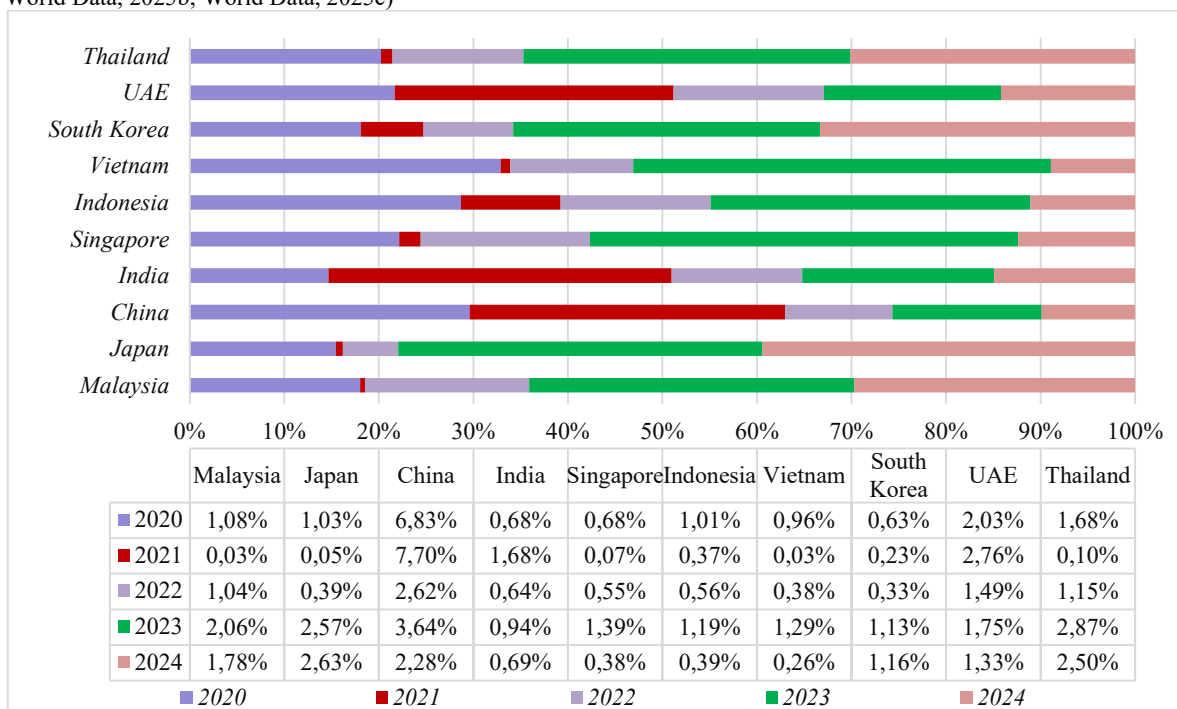


Figure 5: Share of countries in the Asia-Pacific region by the number of international arrivals (%), 2020–2024).

Source: compiled by the authors.

2022; Van, 2024; Trąpczyński et al., 2024). It follows that the aggregate share of states represented in the global indicator is only 38.76 per cent. Many European destinations are relatively expensive for foreign tourists, and their dependence on foreign tourist flows creates a situation of vulnerability to external shocks.

Turning to the experience of changes in tourist demand in the conditions of the leading countries of the Asia-Pacific region, it should be emphasized that some countries demonstrate higher values

of tourist arrivals from abroad in comparison with European countries included in the top five. Further, Table 3 was compiled, which reflects the data on the indicator for the period 2020–2024.

When considering the proposed information, it can be noted that the range in the values of the indicator within different states for the specified period of time is very wide. Such a lack of balance in the development of the tourist complex is most often associated with strikingly different regenerative abilities of the economies of countries,

regional differences, including general economic conditions, and the encouragement of global trends. Countries with higher GDP and economic stability attract the largest tourist flows, including tourism potential; among them are Thailand, the United Arab Emirates, Japan and Malaysia (International Monetary Fund, 2025).

In many ways, these states differ in their economic state, export diversification, and the diversity and attractiveness of tourist offers. Other states, on the contrary, in addition to insufficient investment in the tourism sector, are characterized by their socio-cultural specifics, since individualism, a tendency to uncertainty, and current policies have a certain impact on tourism practice (Thach et al., 2020; Yong, 2019).

For a more complete understanding of the structure of the contribution of states to the global indicator of international tourist arrivals, calculations were carried out according to the corresponding formula with their results displayed in the diagram above (Figure 5).

Analyzing the diagram, it should be noted that for 2024, the total share of the contribution to information on the proposed Asian countries was 13.4%, while in 2020 the aggregate value of the indicator for these countries was higher, 16.61%. There is an opinion that such indicators are due to the fact that the development of domestic tourism is more typical for the Asia-Pacific region than for Europe. In addition, the authorities of the states that are part of the region are focused on solving the problem of creating a balance between economic advantages and social justice, which in a certain sense affects the preservation of culture and the integrity of the environment. In this vein, trust in domestic tourists is higher than in travelers from outside the region (Bentley, 2024; Kuchumov et al., 2024).

Unlike the European region, where domestic tourism is developing steadily but slowly, the Asia-Pacific region assumes dynamic growth in this direction, which is confirmed by the emphasis on improving the quality of travel of local tourists, infrastructure development. In total, the predominance of intracontinental travel and the simultaneous slowdown in Western markets affect the dynamics of changes in the indicator of inbound tourism (Aggregate Intelligence, 2025).

## 4 CONCLUSIONS

The study clearly demonstrates the fundamental divergence in the ways of development of the tourism

markets of Europe and Asia in the post-crisis period. The European Region has not only regained but also strengthened its position as a global leader in inbound tourism, relying on a diversified supply and export orientation. At the same time, countries in the Asia-Pacific region have formed a qualitatively different recovery model, where domestic tourism has become a key stabilizing factor, compensating for the slower rate of return of international visitors.

The revealed differences are not conjunctural, but structural in nature, reflecting the deep specifics of economies, tourism policies and consumer preferences in each macro-region. The pandemic crisis acted as a catalyst that accelerated and reinforced these basic differences. The results highlight that the concept of tourism sustainability is not universal and is implemented through various institutional and market mechanisms. The further evolution of the global tourism market will be determined by the complex interaction of these two divergent trends: Europe's dominance in international tourism and the growing self-sufficiency of the Asian market based on its domestic demand.

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