



► Research Brief

July 2026

A rapid market assessment of the tourism sector

Key points

- Tourism contributed about 19.1 per cent of GDP and employed roughly 394,300 people (18.4 per cent of total employment) before 2019; the 2024 war caused arrivals to fall to 1.13 million — a 32.1 per cent drop from 2023 — and 21.5 per cent of establishments remained closed post-ceasefire, more than most other sectors.
- Both crises had comparable impacts on cost pressures and sales, with access to reliable energy the top barrier to new businesses, as energy now accounts for nearly half of operating costs for small hotels.
- The sector is geographically concentrated, with Beirut and Mount Lebanon accounting for over 60 per cent of hotels and restaurants while the South represents only around 3 per cent.
- Market research and analysis is the most critical skills gap, alongside acute shortages in logistics and transportation management— a skill area neither interviewed institution currently teaches.
- Up to 90 per cent of restaurant workers reportedly lack contracts, with average monthly wages (around 12 million LBP in 2023) below the August 2025 minimum wage of 28 million LBP, and 96 per cent of hotel and restaurant workers exceeding 40 working hours per week.
- Women represent only 18 per cent of the hotel and restaurant workforce versus 25 per cent of the overall labour force, while only 6 per cent of establishments employ persons with disabilities despite 19 per cent reporting readiness to do so
- Key entry points include ecotourism and community-based tourism clusters (e.g. Damour), digital hospitality and e-tourism training, and linking TVET graduates to local MSMEs through entrepreneurship and digital skilling.

► Sector overview

Tourism remains one of Lebanon's most important economic sectors and a major source of employment, foreign exchange earnings and local economic activity. Before the successive crises, the sector generated approximately 19.1 per cent of GDP and supported around 394,300 jobs, representing 18.4 per cent of total employment.¹ Tourist arrivals fell

¹ IDAL, "Sectors in Focus: Tourism", https://investinlebanon.gov.lb/en/sectors_in_focus/tourism.

dramatically from approximately 1.9 million visitors in 2019 to between 0.4 and 0.9 million during 2020–2021², while revenues declined by more than 70 per cent.³ Recovery began in 2022 and 2023, when arrivals reached 1.47 million and 1.67 million respectively and revenues recovered to approximately US\$5.3 billion and US\$4.4 billion. Nevertheless, these levels remained below the pre-crisis peak of approximately US\$8.7 billion recorded in 2018. Stakeholders estimated that roughly 20,000 tourism jobs were recovered during 2022–2023.⁴

► **Figure 1: Tourist arrivals and revenue by year, 2014–2023**



► Methodology

This chapter forms part of a comprehensive sectoral market assessment commissioned under the ENABLE programme, covering five priority sectors: agrifood, construction, garment production, tourism, and solid waste management. The analysis draws on a desk review of approximately 100 national reports and studies, complemented by 53 key informant interviews with policy-level institutions, private-sector actors, vocational training providers, and employers' and workers' organizations across all five sectors. Five focus group discussions — one per sector — were conducted with workers, with referrals facilitated through FENASOL and CGTL to ensure representation of unionized workers. The study followed a three-step process: sector selection based on GDP contribution, employment share, war impact, and recovery potential; sectoral market assessments examining post-war demand and supply dynamics; and intervention design based on the findings. Fieldwork and analysis were conducted between late 2024 and mid-2025, combining semi-structured interviews with thematic focus group discussions to triangulate institutional, enterprise, training-provider, and worker perspectives.

► Market trends

Recovery remains highly dependent on political stability, security conditions and destination promotion efforts. Tourism demand has also shifted significantly over the last five years. Domestic tourism, diaspora travel and lower-cost tourism

² WorldData. "Tourism in Lebanon – Number of Arrivals 1995–2023", <https://www.worlddata.info/asia/lebanon/tourism.php>; United Nations World Tourism Organization (UNWTO), *Yearbook of Tourism Statistics, Data 2016–2020*, 2022, <https://www.unwto.org/tourism-statistics>.

³ World Travel and Tourism Council, "Travel & Tourism Economic Impact Research (EIR)", <https://wtcc.org/Research/Economic-Impact>.

⁴ Maurice Matta, "Battling for Survival: Lebanon's Tourism Sector amid War and Crisis", *This is Beirut*, 20 November 2024, <https://thisisbeirut.com.lb/articles/1301610/battling-for-survival-lebanons-tourism-sector-amid-war-and-crisis>.

experiences have become increasingly important. Demand is increasingly concentrated in food tourism, cultural tourism, ecotourism, outdoor recreation and community-based tourism experiences. Rural guesthouses, agritourism initiatives and eco-lodges have expanded as visitors seek authentic and lower-cost experiences. Digital marketing, online booking systems and social media have become essential tools for visibility and customer acquisition.

► Impact of the economic crisis and conflict

The economic crisis and the conflict have had profound impacts on tourism enterprises. Rising operating costs, declining sales and difficulties paying wages were identified as the most severe effects of the economic crisis. The conflict further reduced visitor arrivals, increased business closures and disrupted supply chains. Arrivals declined to approximately 1.13 million in 2024, representing a fall of more than 32 per cent compared with 2023.⁵ Tourism enterprises also faced labour shortages as skilled workers migrated abroad in search of more stable employment opportunities. Energy costs, inflation and weak consumer confidence continue to constrain recovery.

► Tourism Value Chain

Tourism is deeply interconnected with many sectors of the Lebanese economy. Upstream activities include agriculture, fisheries, food processing, handicrafts, construction, utilities and financial services. Core tourism functions encompass transport, accommodation, restaurants, travel services and visitor attractions. Downstream impacts extend to retail trade, communications, maintenance services, cultural industries and local suppliers. Strengthening linkages between tourism enterprises and domestic suppliers would increase local value retention and broaden economic benefits.

► **Figure 2: Value-chain linkages of the tourism sector, Lebanon**

Value Chain Stage	Functions	Players
Inputs	<ul style="list-style-type: none"> Infrastructure Development Safety & security conditions Cultural & natural resources Provision of Facilities Human Capital Development & Training Regulatory Framework Investment climate and financing 	<ul style="list-style-type: none"> Hospitality and Tourism facilities (e.g. Restaurant, Museum, Beaches) Environmental protection officers Environmental protection officers
Tourism Product Development	<ul style="list-style-type: none"> Resource Assessment Concept & Experience Design Infrastructure & Facility Development Product Packaging Quality Standards & Certification Product Diversification 	<ul style="list-style-type: none"> Ecotourism Operators (e.g., Responsible Mobilities, Wild Lebanon) Travel agencies (e.g. Barakat, Nakhal...) Event planners and festival organizers (e.g. Mattise) Adventure guides
Marketing & Sales	<ul style="list-style-type: none"> Market Research Analysis Branding-Positioning 	<ul style="list-style-type: none"> Social media managers and content creators Digital marketing agencies

⁵ Blominvest Bank, "Tourism Activity Dropped by 32.13 per cent YoY in 2024", 2025, <https://blog.blominvestbank.com/52255/tourism-activity-dropped-by-32-13-yoy-in-2024/>.

	<ul style="list-style-type: none"> • Promotion & Advertising • Public Relations & Media Engagement • Trade Marketing & Partnerships 	<ul style="list-style-type: none"> • Travel agents and tour operators • PR professionals (local and international outreach)
Travel & Arrival Services	<ul style="list-style-type: none"> • Transportation • Visa facilitation and border entry services • Local Transfers • Reception Services • Baggage Handling and Porter Services • Travel Insurance • Accessibility Services 	<ul style="list-style-type: none"> • Airline staff (cabin crew) • Airport and seaport operations staff • Taxi and ride service drivers (e.g. Alo-taxi, Charlie-Taxi) • Car rental agents • Tour receptionists
Hospitality & Experience Delivery	<ul style="list-style-type: none"> • Accommodation • Food & Beverage Services • Cultural & Heritage Experiences • Recreation & Leisure • Shopping & Souvenirs • Wellness and medical tourism services 	<ul style="list-style-type: none"> • Hotel-guesthouse managers • Front desk staff and concierges • Chefs, kitchen assistants, and waiters • Tour guides and interpreters • Wellness workers (spa therapists, yoga instructors)
Post-Visit Engagement & Feedback	<ul style="list-style-type: none"> • Collecting visitor reviews • Follow-up marketing • Policy and service improvements based on feedback • Promotion via word-of-mouth and diaspora networks 	<ul style="list-style-type: none"> • Customer service representatives • Feedback and survey analysts • Community managers • Data analysts • Diaspora marketing specialists
Enablers (supporting all stages)	<ul style="list-style-type: none"> • Government institutions (Ministry of Tourism, Ministry of Culture, Ministry of Environment, MOIM Ministry of Interior and Municipalities, Municipalities / Unions of Municipalities), Local tourism boards, NGOs (e.g., Baalbeck Municipality Tourism Office, Jezzine Tourism Committee, Beyond Beirut...), Hospitality and Tourism Institutes (e.g., LIU, USJ, Ecole Hôtelière), Ministry of Education • Private sector and NGOs: Beyond Beirut, Association for the Protection of Jabal Moussa (APJM), Lebanese Mountain Trail Association (LMTA) • Development Partners: UNESCO Lebanon, UNDP (Sustainable tourism and rural development) . • End Users / Beneficiaries: Lebanese locals and diaspora 	

► Key constraints, recovery prospects & future employment potential

Stakeholders identified a number of structural constraints. Tourism enterprises remain highly exposed to imported inputs and foreign-exchange volatility. High energy costs and unreliable electricity increase operating expenses and reduce competitiveness. Access to finance remains constrained because of banking-sector weaknesses and low investor confidence. Tourism promotion is fragmented, coordination between national and local authorities remains weak, and administrative procedures continue to create barriers to investment. Political instability and negative international perceptions continue to affect visitor confidence.

The tourism sector retains nonetheless significant potential to contribute to economic recovery, employment creation and foreign-exchange generation. Stakeholders identified the strongest growth opportunities in ecotourism, cultural tourism, food tourism, rural tourism and digitally enabled tourism services. Recovery is expected to remain gradual and highly

dependent on political stability, security conditions and effective destination promotion. Greater diversification beyond Beirut and Mount Lebanon could support regional development while expanding employment opportunities.

► Skills development priorities

Employers reported shortages in digital marketing, market research, logistics management and customer-service competencies. Growing reliance on online booking systems and digital promotion has increased demand for digital skills. Sustainability-related competencies, including green hospitality practices and environmentally responsible tourism management, remain underdeveloped. Stakeholders also highlighted deficiencies in teamwork, communication, multitasking, problem-solving and leadership. Work-based learning remains uneven, with larger hotel chains generally providing more structured training than smaller enterprises.

► Inclusion, employment opportunities and job quality

Tourism can provide employment opportunities for youth, women and persons with disabilities, but significant barriers remain. Youth are concentrated in entry-level occupations but often face limited career progression. Women continue to encounter challenges linked to irregular working hours and care responsibilities at home, while persons with disabilities remain underrepresented because of accessibility barriers. Expanding work-based learning, apprenticeships and inclusive training programmes would strengthen labour-market participation.

Working conditions present notable decent-work deficits. Informality is widespread, limiting access to written contracts, social protection and legal safeguards. Wages remain low relative to living costs, and occupational safety and health practices vary across enterprises. Migrant workers face additional vulnerabilities linked to weaker labour protections and restricted mobility. Expanding work-based learning, apprenticeships and inclusive training programmes would strengthen labour-market participation across all groups.

► Strategic outlook and recommendations

The tourism sector retains significant potential to contribute to economic recovery, employment creation and foreign-exchange generation. Stakeholders identified opportunities in ecotourism, cultural tourism, food tourism, rural tourism and digitally enabled tourism services. Future interventions should focus on strengthening digital and green skills, improving labour-market information systems, expanding work-based learning and strengthening destination management. Greater coordination between public institutions, municipalities and tourism operators would improve competitiveness and support regional development. Stronger labour-law enforcement, occupational safety and health measures, social protection coverage and worker representation will be essential to ensure that future growth contributes to productive employment and decent work.

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AI Disclaimer

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