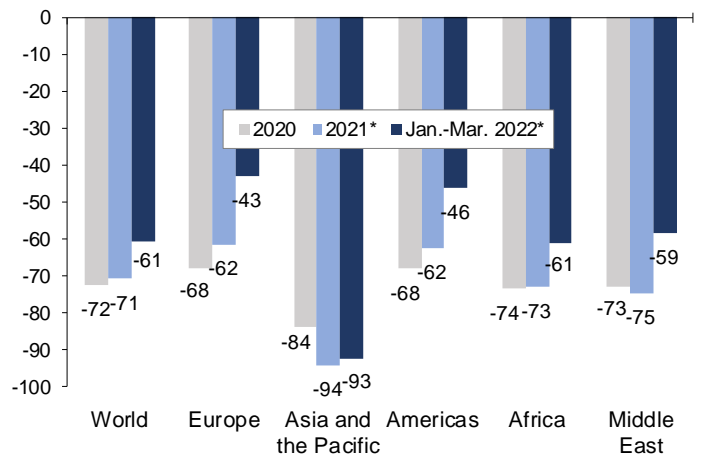




Tourism recovery gains momentum as restrictions ease and confidence returns

- International tourism continued to recover from the COVID-19 crisis at a strong pace in January-March 2022. Destinations welcomed almost three times as many international tourist arrivals (overnight visitors) as in the same period of 2021, with Europe leading the rebound.
- International arrivals increased 182% year-on-year in Q1 2022 to an estimated 117 million international arrivals compared to 41 million in Q1 2021. Of the extra 76 million international arrivals, about 47 million were recorded in March.
- Despite the strong rebound experienced in Q1 2022, international tourism remained 61% below 2019 levels.
- International arrivals improved from -66% in January 2022 (over 2019) to -61% in February and -56% in March, as more countries eased travel restrictions and Omicron-related disruptions decreased.
- By region, Europe (+280%) welcomed almost four times as many international arrivals as in Q1 2021, while in the Americas (+117%) arrivals more than doubled. However, arrivals were still 43% and 46% below 2019 levels respectively.
- The Middle East (+132%) and Africa (+96%) also saw strong growth in Q1 2022 over 2021, but remained 59% and 61% below 2019 respectively. Asia and the Pacific recorded 64% increase but stood at -93% compared to 2019.
- By subregion, the Caribbean (-26%) and Southern and Mediterranean Europe (-27%) showed the fastest recovery towards 2019 levels, with international tourism recovering more than 70% of pre-crisis levels.
- The ongoing recovery can also be seen in outbound tourism spending, with expenditure from France reaching 80% of pre-crisis levels in Q1 2021 and German spending grew to 65%.
- The gradual recovery of international tourism is expected to continue throughout 2022, as more destinations ease or lift restrictions and pent-up demand is unleashed.
- The latest UNWTO Confidence Index survey indicates that 81% of tourism professionals see better prospects for 2022 and that a higher number of experts (48%) now see a potential return of international arrivals to 2019 levels in 2023.
- Based on the latest results, UNWTO revised its outlook for 2022, with international arrivals now expected to reach 55% to 70% of 2019 levels.

International Tourist Arrivals (% change over 2019)



Source: UNWTO

* Provisional data



The World Tourism Organization (UNWTO) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

UNWTO's membership includes 160 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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About the *UNWTO World Tourism Barometer*

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this *UNWTO World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

This report was prepared by the **UNWTO Tourism Market Intelligence and Competitiveness Department**, under the supervision of Sandra Carvão, Chief of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian and Javier Ruescas.

For more information including copies of previous issues, please visit: www.e-unwto.org/loi/wtobarometereng.

We welcome your comments and suggestions at barom@unwto.org.

Data collection for this issue was closed mid-May 2022.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published in July 2022.

Pages 1-7 of this document constitute the Excerpt of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

Inbound tourism

International arrivals up 182% in January-March 2022, as more destinations eased restrictions

- International tourism continued to recover from the COVID-19 crisis at a strong pace in the first quarter of 2022, with particularly robust performance in February (-61%) and March (-56%).
 - Destinations worldwide welcomed an estimated 117 million international tourist arrivals – almost three times the value of Q1 2021. Of the extra 76 million international arrivals in the first three months of 2022, about 47 million international arrivals were recorded in March.
 - World arrivals nearly tripled in January-March 2022 (+182%) compared to the same period of 2021, with Europe leading growth – the region accounted for 50 million of the 76 million additional international arrivals recorded in Q1 2022.
 - Despite the strong rebound experienced in Q1 2022 compared to the weak start of 2021, international tourism remained 61% below 2019 levels.
- subregions, arrivals recovered to nearly 75% of 2019 levels, with some destinations reaching or exceeding pre-pandemic levels.
- Among the destinations with available data, destinations with the best performance in January-March 2022 were: Saint Marteen (+19%), US Virgin Islands (+12%), Ethiopia (+7%), Andorra (-1%), San Marino (0%), Puerto Rico and Albania (-3%), Turks and Caicos, Bulgaria, and El Salvador (-7%), Dominican Republic (-9%) and Tukey (-10%).
 - The ongoing recovery can also be seen in outbound tourism, with spending from France climbing to -19% in Q1 2022 compared to 2019 levels, while German spending stood at -35%. Among smaller source markets, expenditure from Portugal rose to -18% and that of Denmark to -21% compared to the same quarter of 2019.

Europe and Americas continue to lead the recovery

- All world regions enjoyed a significant rebound in the first three months of 2022, though from weak levels at the start of 2021. Europe and the Americas continued to post by far the strongest growth the first quarter of 2022 in absolute terms compared to 2021. The Middle East also saw a robust increase in relative terms.
- Europe (+280%) welcomed almost four times as many international arrivals as in the first three months of 2021, with results boosted by strong intra-regional demand. In the Americas (+117%) arrivals more than doubled. However, arrivals were still 43% and 46% below 2019 levels in Europe and the Americas respectively.
- The Middle East (+132%) and Africa (+96%) also saw strong growth in Q1 2022 over 2021, but remained 59% and 61% below 2019 levels respectively.
- Asia and the Pacific recorded a 64% increase in January-March 2022 but stood at -93% compared to 2019, as several destinations remained closed to non-essential travel.
- By subregion, the Caribbean (-26%) and Southern and Mediterranean Europe (-27%) showed the fastest recovery towards 2019 levels. In both

International receipts per arrival up in 2021

- Total export revenues from international tourism (including passenger transport receipts) amounted to US\$ 713 billion in 2021, up 4% from 2020, though 61% down from 2019, a better result than that of arrivals (-71%) due to a significant increase in spending per trip – from an average US\$ 1,000 in 2019 to US\$ 1,400 in 2021.

Stronger than expected recovery ahead but downside risks remain

- International tourism is expected to continue its gradual recovery in 2022, as more destinations ease or lift travel restrictions and pent-up demand is unleashed. As of 1 June, 46 destinations (of which 31 are in Europe) had no COVID-19 related restrictions in place. In Asia, an increasing number of destinations started to ease travel restrictions (please see UNWTO/IATA Destination Tracker: Easy Travel: <https://www.unwto.org/tourism-data/unwto-iata-destination-tracker>)
- Key capacity and booking indicators confirm this trend. Air bookings from mid-March to Mid-May showed rising demand for intra-European travel and for flights from the US to Europe, according to ForwardKeys.

- In April, international air capacity across the Americas, Africa, Europe and the Middle East reached or was close to 80% of pre-crisis levels, as per ICAO (please see UNWTO Recovery Tracker - <https://www.unwto.org/tourism-data/unwto-tourism-recovery-tracker>).
- The latest UNWTO Confidence Index returned to the levels of 2019 for the first time since the start of the pandemic and prospects for the Northern Hemisphere summer season are upbeat.
- The Russian offensive on Ukraine which started on 24 February seems to have had a limited direct impact on overall results so far, although it is disrupting travel in Eastern Europe, mostly in countries near the conflict area.
- However, a challenging economic environment coupled with the military offensive of the Russian Federation on Ukraine pose a downside risk to the ongoing recovery of international tourism.
- The conflict is causing a major economic impact globally by exacerbating already high oil prices and overall inflation, and disrupting international supply chains, which results in higher transport and accommodation costs for the tourism sector. Inflation and workforce shortages are growing challenges to consolidate the recovery.

International Tourist Arrivals by (Sub)region

	Share			Change (%)			Monthly/quarterly data series											
	(million)			(%)			Change (%)*											
	2019	2020*	2021*	2021*	20/19	21/20*	21/19*	2022 over 2021					2022 over 2019					
								YTD	Q1	Jan.	Feb.	Mar.	YTD	Q1	Jan.	Feb.	Mar.	
World	1466	405	427	100	-72.3	5.3	-70.9	182.2	182.2	138.7	213.9	196.3	-60.8	-60.8	-65.9	-60.4	-56.4	
Advanced economies ¹	777	218	225	52.8	-71.9	3.4	-71.0	318.0	318.0	236.3	370.3	349.3	-57.5	-57.5	-64.2	-56.0	-53.2	
Emerging economies ¹	689	187	201	47.2	-72.8	7.6	-70.7	107.4	107.4	85.7	126.8	111.9	-63.8	-63.8	-67.5	-64.5	-59.7	
<i>By UNWTO regions:</i>																		
Europe	745.0	238.5	286.8	67.2	-68.0	20.2	-61.5	279.7	279.7	217.4	303.1	313.5	-42.9	-42.9	-50.7	-40.5	-38.6	
Northern Europe	83.5	23.3	20.8	4.9	-72.1	-10.8	-75.1	254.7	254.7	187.2	263.8	309.8	-64.7	-64.7	-70.2	-64.2	-60.3	
Western Europe	204.2	79.8	72.4	17.0	-60.9	-9.3	-64.6	425.4	425.4	340.5	482.7	447.1	-48.8	-48.8	-55.8	-45.5	-46.0	
Central/Eastern Eur.	153.3	47.1	54.7	12.8	-69.3	16.2	-64.3	142.7	142.7	122.0	142.1	161.9	-48.4	-48.4	-54.1	-47.8	-43.5	
Southern/Medit. Eur.	304.0	88.3	138.9	32.5	-70.9	57.3	-54.3	322.9	322.9	242.1	362.2	359.3	-26.5	-26.5	-36.1	-22.3	-22.7	
- of which EU-27	540.3	181.4	209.5	49.1	-66.4	15.5	-61.2	363.7	363.7	272.5	395.2	418.2	-41.2	-41.2	-49.4	-38.9	-36.7	
Asia and the Pacific	360.1	59.1	20.7	4.8	-83.6	-65.0	-94.3	64.5	64.5	45.3	101.5	60.7	-92.6	-92.6	-92.9	-93.7	-91.4	
North-East Asia	170.3	20.3	11.3	2.7	-88.1	-44.1	-93.3	-16.5	-16.5	-14.0	22.7	-33.2	-95.6	-95.6	-94.5	-96.6	-95.6	
South-East Asia	138.6	25.5	3.0	0.7	-81.6	-88.1	-97.8	146.7	146.7	121.8	132.4	181.4	-95.7	-95.7	-96.1	-96.4	-94.6	
Oceania	17.5	3.6	0.7	0.2	-79.4	-80.0	-95.9	639.0	639.0	294.3	564.5	↑	-89.7	-89.7	-93.1	-92.3	-83.6	
South Asia	33.7	9.7	5.6	1.3	-71.1	-42.4	-83.4	148.4	148.4	135.3	142.2	163.8	-67.9	-67.9	-72.5	-70.9	-60.3	
Americas	219.3	69.8	82.4	19.3	-68.2	18.0	-62.4	117.5	117.5	98.4	150.1	110.7	-46.4	-46.4	-52.5	-45.3	-41.5	
North America	146.6	46.5	57.0	13.4	-68.3	22.8	-61.1	98.2	98.2	77.2	123.2	99.8	-44.5	-44.5	-47.6	-44.8	-41.5	
Caribbean	26.3	10.3	15.0	3.5	-60.7	44.6	-43.2	112.9	112.9	121.8	156.4	79.0	-26.1	-26.1	-34.3	-19.0	-25.3	
Central America	10.9	3.1	4.9	1.1	-71.6	58.1	-55.2	182.7	182.7	182.3	245.4	145.6	-34.1	-34.1	-47.1	-29.2	-24.4	
South America	35.4	9.9	5.5	1.3	-72.0	-44.5	-84.5	278.2	278.2	198.3	301.7	345.4	-70.0	-70.0	-77.3	-69.4	-61.5	
Africa	68.1	18.0	18.4	4.3	-73.6	2.4	-72.9	95.8	95.8	68.0	116.7	106.4	-61.1	-61.1	-65.5	-58.2	-59.4	
North Africa	25.6	5.6	6.1	1.4	-78.2	10.3	-76.0	46.4	46.4	0.7	82.7	61.8	-73.3	-73.3	-78.6	-64.3	-76.5	
Subsaharan Africa	42.5	12.4	12.3	2.9	-70.8	-1.1	-71.1	116.3	116.3	97.2	133.3	121.3	-55.4	-55.4	-60.0	-55.3	-50.6	
Middle East	73.0	19.8	18.5	4.3	-72.8	-6.4	-74.6	131.7	131.7	88.4	137.3	173.3	-58.5	-58.5	-62.8	-61.7	-51.7	

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, May 2022)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.

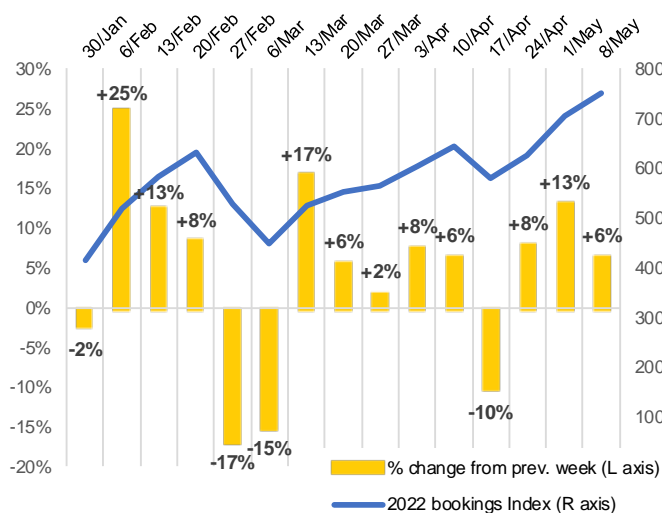
See box in page 'Annex-1' for explanation of abbreviations and symbols used

For regularly updated data, please check the *UNWTO Tourism Recovery Tracker*: <https://www.unwto.org/unwto-tourism-recovery-tracker>

Impact of the Russian offensive in Ukraine on international tourism (update)

- The Russian military offensive in Ukraine is a human tragedy that is causing great suffering and impacting millions of livelihoods. The conflict also represents an important risk for the post-pandemic recovery of international tourism by disrupting travel in parts of Europe, undermining traveler confidence and adding pressure to already high oil prices. By contrast, the latest flight and booking data reflects a limited direct impact on overall results.
- The shutdown of Ukrainian and Russian airspace after the invasion on 24 February 2022, as well as the ban on Russian carriers by EU countries have disrupted international travel in some Northern and Eastern European destinations and caused detours in long-haul flights between Europe and East Asia.
- The most affected destinations so far (aside from Russia and Ukraine) are the Republic of Moldova with a 69% drop in number of flights from 24 February to 11 May 2022 (compared to 2019), Slovenia with a 42% drop, Latvia 38% and Finland 36%, according to Eurocontrol data.
- Travel demand briefly declined after the invasion on 24 February 2022, with intra-European flight bookings dropping by 15% and 17% respectively the weeks ending on 27 February and 6 March respectively. US flight bookings to European destinations also fell 26% during the first of those weeks, according to ForwardKeys data.
- However, travel demand soon picked up, with bookings of intra-European flights and US flights to Europe rising steadily through the middle of May. Russian bookings also recovered to some extent from the lows of late February, though demand in all cases remains below 2019 levels. European flights continued growing after a brief pause in March and international arrivals in the region climbed from -51% in January to -39% in March, compared to 2019.
- Despite this improvement, the conflict poses an ongoing threat to the recovery by exacerbating already high oil prices, adding to overall inflation and disrupting international supply chains, which all result in higher transport and accommodation costs for the tourism sector.

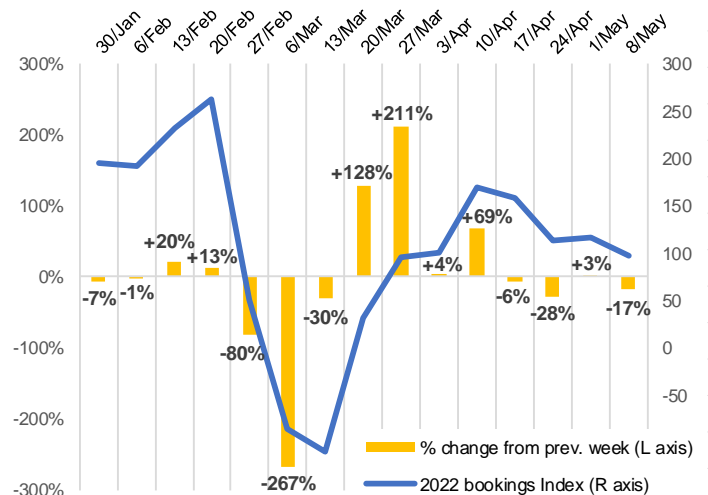
Air bookings of intra-European travel, Jan. to May 2022 (index)*



Source: compiled by UNWTO from ForwardKeys data

* Bookings made from week ending 30 Jan to 8 May 2022 (100 = 2 Jan. 2022)

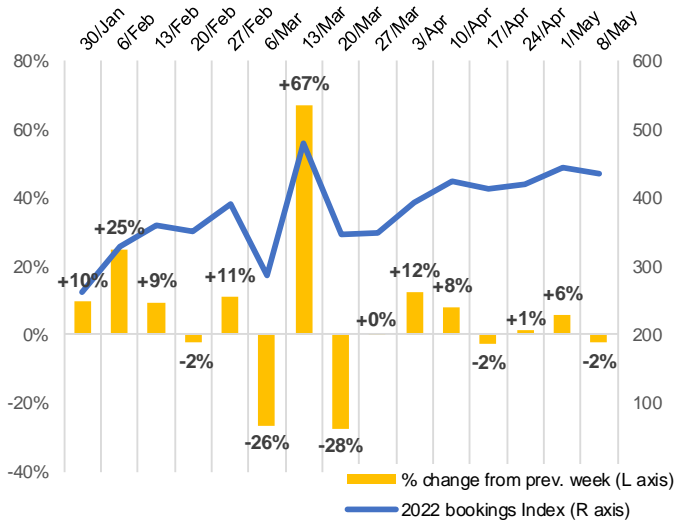
Air bookings of Russian outbound travel, Jan. to May 2022 (index)*



Source: compiled by UNWTO from ForwardKeys data

* Bookings made from week ending 30 Jan to 8 May 2022 (100 = 2 Jan. 2022)

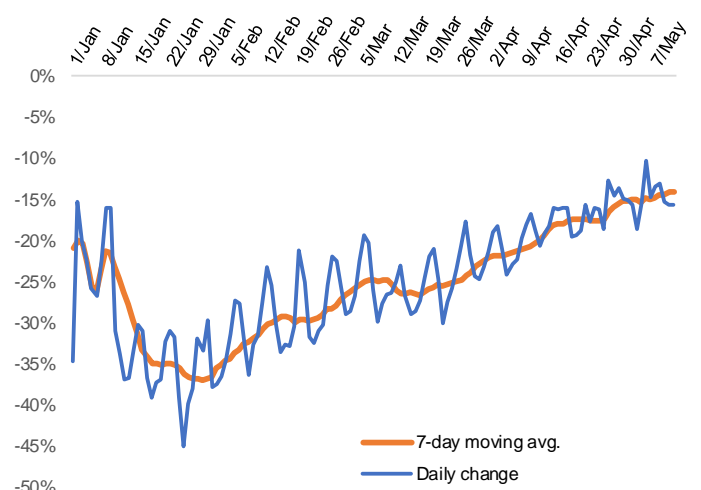
Air bookings from Jan. to May 2022 for US travel to Europe (index)*



Source: compiled by UNWTO from ForwardKeys data

* Bookings made from week ending 30 Jan to 8 May 2022 (100 = 2 Jan. 2022)


European flights from 1 January to 11 May 2022 (% change vs 2019)*



Source: compiled by UNWTO from Eurocontrol data (covering 41 countries)


* Daily change and 7-day moving average versus equivalent days of 2019

06/06/2022
Last update




UNWTO TOURISM RECOVERY TRACKER


As tourism slowly restarts in an increasing number of countries, the World Tourism Organization (UNWTO) has developed the **first comprehensive tourism recovery tracker worldwide**, monitoring a number of relevant indicators throughout the recovery of tourism.




OVERVIEW




MONTHLY DATA
BY REGIONS



MONTHLY DATA
BY TOP 10 DESTINATIONS



MONTHLY DATA
BY TOP 10 SOURCE MARKETS



COMPARE INDICATORS

Methodology

Availability of data