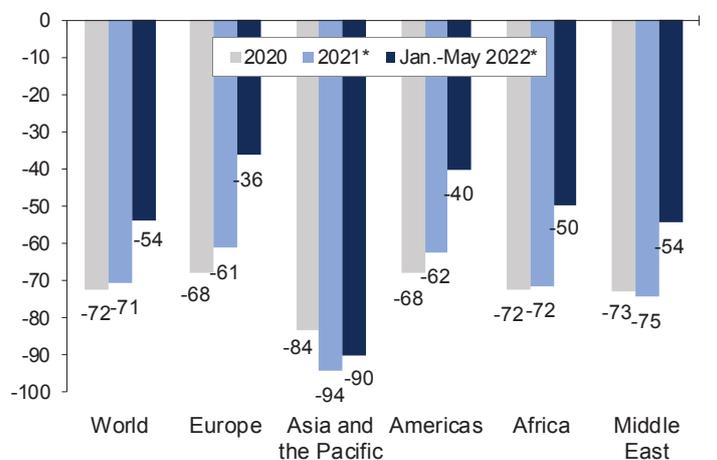




International tourism consolidates its strong recovery despite growing challenges

- International tourism saw a strong rebound in the first five months of 2022, with arrivals reaching almost half (46%) the levels of the same period of 2019.
- International tourist arrivals (overnight visitors) more than tripled (+221%) in January-May 2022 over 2021, but remained 54% below 2019 levels.
- Nearly 250 million international trips were recorded worldwide through May 2022. This compares with the 77 million arrivals seen in the same months of 2021.
- By regions, Europe and the Americas continued to lead the recovery. Europe welcomed more than four times as many international arrivals as in the first five months of 2021 (+350%). In the Americas (+112%) arrivals more than doubled. Despite the strong rebound, arrivals remained 36% and 40% below 2019 levels in Europe and the Americas respectively.
- The Middle East (+157%) and Africa (+156%) also saw strong growth in January-May 2022 over 2021 but remained 54% and 50% below 2019 levels respectively. Asia and the Pacific saw arrivals almost double (+94%), though numbers were still 90% below 2019, as some borders remained closed to non-essential travel.
- By subregions, the Caribbean (-18%) and Central America (-27%) showed the fastest recovery towards 2019 levels, along with Southern Mediterranean Europe, Western Europe and Northern Europe.
- Tourism expenditure from France climbed to -15% in January-May 2022 compared to 2019, while German spending stood at -23%, Italy at -27% and the United States at -31%. Spending from India, Saudi Arabia and Qatar exceeded pre-pandemic levels.
- Strong tourism demand during the Northern Hemisphere summer season is expected to consolidate these positive results, particularly as more destinations ease or lift travel restrictions. However, mounting economic and geopolitical challenges continue to pose a risk to recovery.
- UNWTO's forward-looking scenarios published in May 2022 point to international arrivals reaching 55% to 70% of pre-pandemic levels in 2022. Scenarios by region show Europe (65% to 80% of 2019 levels) and Americas (63% to 76%) recording the best tourism results in 2022. In Africa and the Middle East arrivals could reach about 50% to 70% of pre-pandemic levels, while in Asia and the Pacific they would remain at 30% of 2019 levels in the best-case scenario, due to stricter policies and restrictions.

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 at the end of July 2022.

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

Pages 1-6 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 more than tripled (+221%) in January-May 2022, but remained 54% below 2019 levels

- International tourism continued to show a strong and steady recovery in January-May 2022, with arrivals reaching almost half (46%) the levels of the same five months of 2019.
- International tourist arrivals (overnight visitors) saw a strong rebound in the first five months of 2022, despite important economic, health and geopolitical challenges.
- International arrivals more than tripled (+221%) in January-May 2022, compared to the same period of 2021, but remained 54% below 2019 levels.
- Nearly 250 million international trips were recorded worldwide in the first five months of the year, more than three times the number of arrivals recorded in the same period of 2021 (77 million).
- Europe accounted for over 60% (154 million) of the 250 million international arrivals recorded in January-May 2022.
- April and May showed a particularly stronger performance, though compared to weak results in the same months last year. In April and May 2022, arrivals stood at -49% and -46% respectively versus 2019, climbing above 50% of 2019 levels for the first time since the beginning of the pandemic.
- An estimated 127 million international arrivals were recorded in April and May combined, over three times the numbers seen in the same two months of 2021.
- International arrivals improved from -65% in January 2022 (over 2019) to -49% in April and -46% in May, as an increasing number of countries eased travel restrictions.

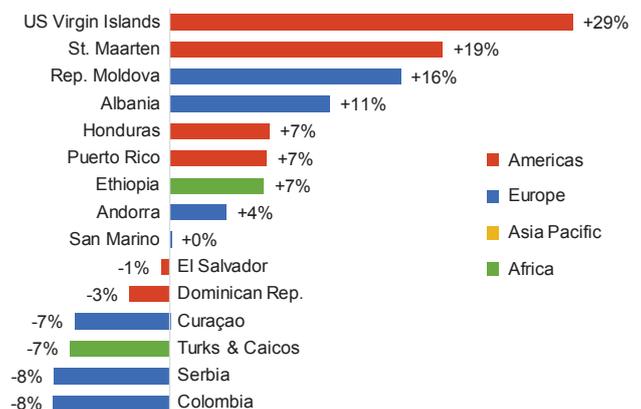
Europe and Americas continue to lead the recovery

- All world regions enjoyed a significant rebound in the first five months of 2022, led by Europe and the Americas which boasted the strongest results. Arrivals in those regions reached 64% and 60% of 2019 levels respectively.
- Europe (+350%) welcomed more than four times as many international arrivals as in the first five months of 2021, with results boosted by strong intra-regional demand, the removal of all travel restrictions in a

growing number of countries and increasing visitors from the US market. Arrivals in Europe showed a particularly robust performance in April (+458%), reflecting a busy Easter period. In the Americas (+112%) arrivals more than doubled in January-May 2022. However, arrivals were still 36% and 40% below 2019 levels in Europe and the Americas respectively.

- The Middle East (+157%) and Africa (+156%) also saw robust growth in January-May 2022 over 2021, but remained 54% and 50% below 2019 levels respectively. Asia and the Pacific (+94%) saw arrivals almost double in January-May 2022, but stood at -90% compared to 2019, as some borders remained closed to non-essential travel. However, a recent easing of restrictions can be seen in results for April and May, in particular in South Asia
- Several subregions around the world reached 70% to 80% of their pre-pandemic levels this five-month period. The Caribbean (-18%) and Central America (-27%) showed the fastest recovery towards 2019 levels. Southern Mediterranean Europe (-31%), Western Europe (-32%) and Northern Europe (-35%) also posted strong results.
- Among destinations reporting data for international arrivals in the first three to five months of 2022, those exceeding pre-pandemic levels were: US Virgin Islands (+29%), Saint Maarten (+19%), the Republic of Moldova (+16%), Albania (+11%), Honduras, Puerto Rico, Ethiopia (both +7%), Andorra (+4%) and San Marino (0%).

Best-performing destinations in January-May 2022*
International tourist arrivals (% change over 2019)

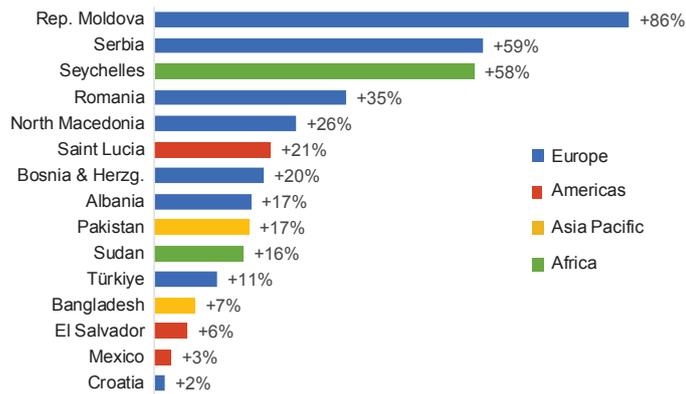


Source: UNWTO

(Data as of July 2022)

* Based on a limited sample of destinations with available data for the first 3 to 5 months of 2022.

Best-performing destinations in terms of earnings, January-May 2022*
International tourism receipts (real % change over 2019)



Source: UNWTO (Data as of July 2022)
* Based on a limited sample of destinations with available data for the first 3 to 5 months of 2022.

- In terms of international tourism receipts, Republic of Moldova (+86%), Serbia (+59%), Seychelles (58%), Romania (+35%), North Macedonia (+26%), Saint-Lucia (+21%), Bosnia and Herzegovina (+20%), Albania, Pakistan (both 17%), Sudan (+16%), Türkiye (+11%), Bangladesh (+7%), El Salvador (+6%), Mexico (+3%), Croatia (+2%) and Portugal (+1%) all exceeded pre-pandemic levels in January-May 2022.
- The ongoing recovery can also be seen in outbound tourism spending from major source markets. Expenditure from France climbed to -15% in January-May 2022 compared to 2019 levels, while German spending stood at -23%, Italy at -27% and the United States at -31%. Spending from India (+7%), Saudi Arabia (+9%) and Qatar (+17%) exceeded pre-pandemic levels.

Tourism continues to consolidate results amid mounting global challenges

- Strong tourism demand during the Northern Hemisphere summer season is expected to consolidate results, as more destinations ease or lift travel restrictions and pent-up demand is unleashed. As of 22 July, 62 destinations (among which 39 in Europe) have no COVID-19 related restrictions in place and an increasing number of destinations in Asia started to ease travel restrictions (<https://www.unwto.org/tourism-data/unwto-iata-destination-tracker-easy-travel>).
- The sector's rebound seems to be overcoming important adversities, mostly due to huge pent-up demand built up during the pandemic.

- According to the International Civil Aviation Organization (ICAO), the overall reduction in international air capacity in 2022 will be limited to 20% to 25% of seats offered by airlines as compared to 2019.
- Robust performance is also reflected in hotel occupancy rates. Based on data from STR, global occupancy rates in June climbed to 66% in June 2022, from 43% in January 2022.
- The appreciation of the US dollar and the parity with the euro, reached for the first time in two decades could favour the competitiveness of destinations in the Euro area with regard to the US market.
- However, stronger than expected demand is in turn creating important operational and workforce challenges, while the war in Ukraine, high inflation and rising interest rates, as well as fears of an economic slowdown continue to pose a downside risk to the recovery of international tourism through the remainder of 2022.
- IMF's July 2022 Update of the World Economic Outlook points to a slowdown in the global economy from 6.1% in 2021 to 3.2% in 2022 and a further 2.9% in 2023.
- Higher-than-expected inflation and rising interest rates can translate into higher travel costs and weigh on consumer spending.
- In view of the evolution of the pandemic, UNWTO continues to work closely with the World Health Organization (WHO) to monitor the ongoing pandemic as well as emerging public health emergencies and their potential impact on travel.
- UNWTO's forward-looking scenarios published in May 2022 point to international arrivals reaching 55% to 70% of pre-pandemic levels in 2022 (-45% to -30% compared to 2019), with results depending on evolving circumstances.
- Scenarios by region show Europe (65% to 80% of 2019 levels) and Americas (63% to 76%) recording the best tourism results in 2022. In Africa and the Middle East arrivals could reach about 50% to 70% of pre-pandemic levels, while in Asia and the Pacific they would remain at 30% of 2019 levels in the best-case scenario, due to stricter policies and restrictions.

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series																		
	(million)			Share			Change (%)			Change (%)*					2022 over 2019				
				2021*			20/19 21/20*			2022 over 2021 ²					2022 over 2019				
	2019	2020*	2021*	2021*	20/19	21/20*	21/19*	YTD	Jan.	Feb.	Mar.	Apr.	May	YTD	Jan.	Feb.	Mar.	Apr.	May
World	1465	406	429	100	-72.3	5.8	-70.7	221	143	232	218	274	229	-53.9	-65.4	-58.7	-53.8	-49.0	-45.8
Advanced economies ¹	777	218	227	52.8	-71.9	4.0	-70.8	401	265	418	414	541	370	-49.9	-62.5	-52.8	-48.7	-45.3	-44.4
Emerging economies ¹	689	188	203	47.2	-72.8	8.0	-70.6	122	81	130	116	144	135	-58.1	-67.9	-64.1	-58.8	-53.1	-47.6
<i>By UNWTO regions:</i>																			
Europe	745.2	238.1	288.4	67.2	-68.0	21.1	-61.3	350	244	339	356	458	336	-36.4	-48.1	-36.4	-34.2	-33.3	-33.7
Northern Europe	83.7	23.3	22.4	5.2	-72.1	-4.1	-73.3	801	392	643	923	↑	847	-35.6	-65.1	-46.1	-32.7	-21.2	-23.1
Western Europe	204.2	79.8	72.4	16.9	-60.9	-9.3	-64.6	545	392	539	545	785	469	-32.1	-50.6	-39.8	-37.1	-21.2	-21.2
Central/Eastern Eur.	153.3	46.7	54.7	12.7	-69.5	17.2	-64.3	124	130	146	143	117	99	-51.3	-52.5	-47.0	-47.6	-53.1	-54.4
Southern/Medit. Eur.	304.0	88.3	138.9	32.4	-70.9	57.3	-54.3	366	242	362	347	523	362	-31.3	-36.1	-22.3	-24.8	-35.0	-34.4
- of which EU-27	540.5	181.4	209.5	48.8	-66.4	15.5	-61.2	430	289	427	458	611	384	-36.8	-47.2	-34.9	-33.2	-35.1	-36.1
Asia and the Pacific	359.6	59.2	20.6	4.8	-83.5	-65.1	-94.3	94	39	96	56	97	179	-90.4	-93.3	-93.9	-91.7	-88.3	-84.2
North-East Asia	170.3	20.3	11.3	2.6	-88.1	-44.1	-93.3	-9	-14	23	-33	-12	8	-94.4	-94.5	-96.6	-95.6	-93.5	-91.8
South-East Asia	138.0	25.5	2.9	0.7	-81.5	-88.8	-97.9	280	109	95	134	381	651	-93.5	-96.5	-97.2	-95.8	-91.9	-84.8
Oceania	17.5	3.6	0.7	0.2	-79.2	-80.2	-95.9	462	301	573	↑	538	296	-82.1	-92.4	-91.6	-83.0	-71.3	-67.6
South Asia	33.7	9.7	5.7	1.3	-71.1	-41.3	-83.1	215	119	143	171	215	677	-59.4	-74.3	-70.8	-59.3	-47.5	-35.4
Americas	219.3	69.8	82.4	19.2	-68.2	18.1	-62.4	112	99	150	117	126	86	-40.1	-51.6	-44.9	-39.6	-32.9	-32.1
North America	146.6	46.5	57.0	13.3	-68.3	22.8	-61.1	98	77	123	107	113	80	-39.2	-47.6	-44.8	-39.4	-33.4	-33.3
Caribbean	26.3	10.3	15.0	3.5	-60.8	44.9	-43.2	89	122	156	86	86	38	-18.4	-28.0	-15.6	-21.7	-11.9	-13.9
Central America	10.9	3.1	4.9	1.1	-71.6	58.1	-55.2	157	188	238	144	163	99	-27.4	-46.1	-30.7	-24.8	-17.4	-12.7
South America	35.4	9.9	5.5	1.3	-72.0	-44.5	-84.5	349	198	302	337	524	464	-63.8	-77.3	-69.4	-61.1	-54.2	-48.1
Africa	68.1	18.8	19.4	4.5	-72.5	3.3	-71.5	156	56	156	170	198	215	-49.9	-65.8	-54.7	-47.8	-49.1	-30.5
North Africa	25.6	5.6	7.0	1.6	-78.2	25.8	-72.6	238	-20	173	224	459	547	-48.2	-82.3	-55.8	-44.3	-49.9	-10.7
Subsaharan Africa	42.5	13.2	12.4	2.9	-69.0	-6.2	-70.9	127	88	149	147	135	125	-50.7	-59.0	-54.2	-49.6	-48.6	-40.8
Middle East	73.0	19.8	18.6	4.3	-72.9	-6.2	-74.5	157	55	126	172	236	200	-54.4	-69.4	-63.5	-51.9	-45.1	-43.5

Source: World Tourism Organization (UNWTO)

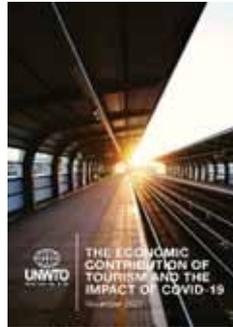
(Data as collected by UNWTO, July 2022)

* Provisional data

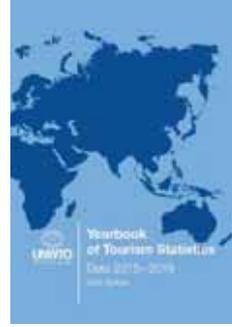
¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.² Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)
See box in page 'Annex-1' for explanation of abbreviations and symbols usedFor regularly updated data, please check the *UNWTO Tourism Recovery Tracker*: <https://www.unwto.org/unwto-tourism-recovery-tracker>



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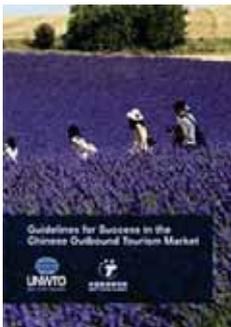
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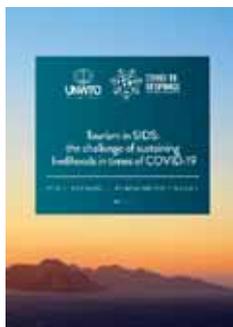
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