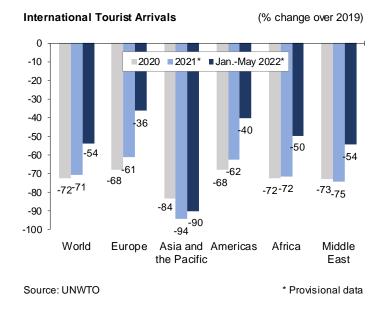


International tourism consolidates its strong recovery despite growing challenges

- 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 nonessential 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.





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.

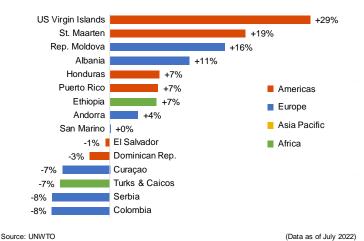
Europe and Americas continue to lead the recovery

- 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.

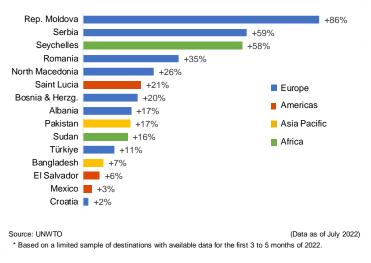
- The Middle East (+157%) and Africa (+156%) also saw robust growth in January-May 2022 over 2021, but remained 54% and 50% below 2019 levels respectively. Asia and the Pacific (+94%) saw arrivals almost double in January-May 2022, but stood at -90% compared to 2019, as some borders remained closed to 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-perfoming destinations in January-May 2022* International tourist arrivals (% change over 2019)



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

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



- 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

- tourism demand during the Northern Strong • 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-iatadestination-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 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.

						Monthly/quarterly data series													
				Share	Change (%) Change (%)*														
	(millio	n)		(%) 2021*				2022 over 2021 ²						2022 over 2019					
	2019	2020*	2021*		20/19 21/20*		21/19*	YTD	Jan.	Feb.	Mar.	Apr.	May	YTD	Jan.	Feb.	Mar.	Apr.	Мау
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
By UNWTO regions:																			
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	î	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	Î	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 used

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

UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.



Industry Indicators

International air travel continues to show strong growth in the first five months of 2022

- According to IATA, global air travel (measured in revenue passenger-kilometres or RPKs) increased 85% year-on-year in January-May 2022. The total air market accelerated its recovery in May (+83% y-o-y), driven by the performance of international air traffic, and reached 64% of pre-crisis levels in the same month.
- The rebound continued despite inflation, high jet fuel prices and the war in Ukraine. International bookings briefly exceeded domestic bookings in May, indicating a high willingness to travel.
- International passenger traffic showed strong growth in January-May 2022 (+276%) but remained 50% below 2019 levels. This result closely mirrors the data on international arrivals for the same period (-54%).
- Europe (+386% international RPKs) reported the fastest year-on-year growth in January-May 2022, with buoyant international traffic within Europe. Asia and the Pacific (+239%) recorded significant international growth, as the region gradually reopens. The Middle East (+239%), Latin America (+210%) and North America (+209%) also reported strong growth. Several routes connected to these regions outperformed pre-pandemic levels in May: Europe-Central America, Middle East-North America, and North America-Central America. International traffic in Africa increased 85%.
- Compared to January 2019, Latin America (-38%), Europe and North America (both -34%) showed the smallest declines in international RPKs, while Africa and the Middle East reported decreases of 48% and 37% respectively. International RPKs in Asia and the Pacific were still 82% below 2019.
- Domestic air traffic grew in all large markets reported by IATA. Japan (+72%), Brazil (+65%) the United States (+60%) showed the fastest y-o-y growth in domestic RPKs in the first five months of 2022. Australia (+35%) also saw robust growth. Compared to 2019, domestic RPKs in Brazil (-8%) and the United States (-8%) were close to pre-pandemic levels in January-May 2022.
- In India, domestic RPKs increased 46% y-o-y in January-May 2022 and reached 78% of 2019 levels.

In China, domestic RPKs grew 49% y-o-y, but traffic levels are still 57% below 2019 levels due to restrictive travel policies.

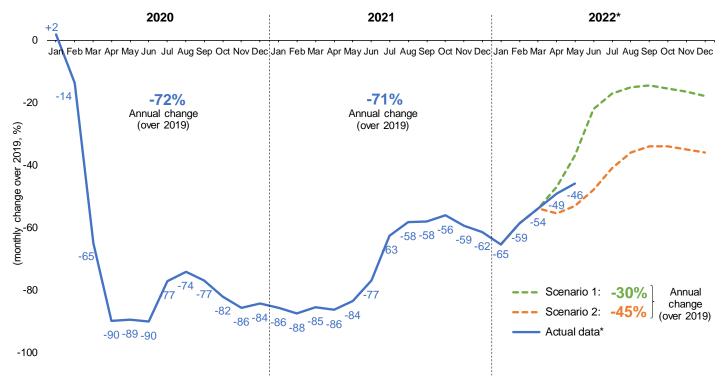
- In terms of capacity, international ASKs (available seat-kilometres) capacity worldwide increased 276% y-o-y in January-May 2022, but was still 43% below 2019 levels. Domestic air capacity grew 16% through May 2022 and recovered 82% of 2019 levels, according to IATA.
- According to STR, global hotel occupancy gradually improved throughout January-June 2022. Global occupancy rates reached 66% in June 2022, from 43% in January 2022. Europe, the Americas and Asia and the Pacific saw a continued increase in occupancy rates in the first half of 2022.
- Europe and the Americas led the way with occupancy levels in June at 75% and 69% respectively, close to the rates reached in June 2019 (79% and 71% respectively). Both Africa and the Middle East saw occupancy rates of 56% in June 2022. Asia and the Pacific also recorded rates of 56% in June, with a gradual recovery throughout H1 2022. By subregion, Northern Europe (79%) showed the highest occupancy rates in June 2022, while Western Europe and Southern Mediterranean Europe posted rates above 70%. (Data by region are based on STR statistical regions).

Forward-looking scenarios for 2022 by world region

- Our forward-looking scenarios published in the May 2022 issue of the World Tourism Barometer point to international arrivals reaching 55% to 70% of prepandemic levels in 2022 (-45% to -30% compared to 2019) depending on evolving circumstances, mostly changing travel restrictions, the evolution of the pandemic and mounting economic challenges. These include persistently high inflation, especially in energy prices, which translates into more expensive transport and accommodation services.
- Despite the currently strong pent-up demand, rising prices and weaker consumer confidence could dampen travel demand in the coming months. Major bottlenecks in air traffic and resulting flight delays and cancellations in some parts of the world could also impact international tourism numbers. The war in Ukraine might also disrupt international travel in parts of Eastern Europe.
- Scenarios by world region were prepared based on the latest tourism data and trends, as well as flight reservations for international travel through December 2022. These regional prospects show Europe and Americas recording the best tourism results in 2022, while Asia and the Pacific would lag behind due to more restrictive travel policies.

- International tourist arrivals in Europe could reach 65% to 80% of pre-pandemic levels in 2022 (-35% to -20% versus 2019) according to Scenario 1 and 2 respectively, depending on the extent of the impact from the factors mentioned above. In the Americas arrivals could climb to 63% to 76% of 2019 levels (-24% to -37% versus 2019) based on those two Scenarios.
- In Africa (-30% to -53% versus 2019) and the Middle East (-29% to -50%) arrivals could reach about 50% to 70% of pre-pandemic levels depending on the effect of the various adverse factors on travel. In Asia and the Pacific (-71% to -87%) arrivals would remain at roughly 30% of 2019 levels in the best-case scenario, due to stricter travel policies and restrictions related to the pandemic.

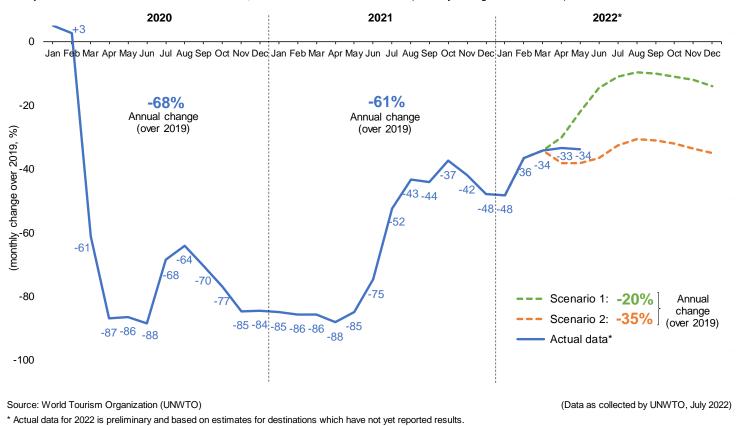
World: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)



Source: World Tourism Organization (UNWTO)

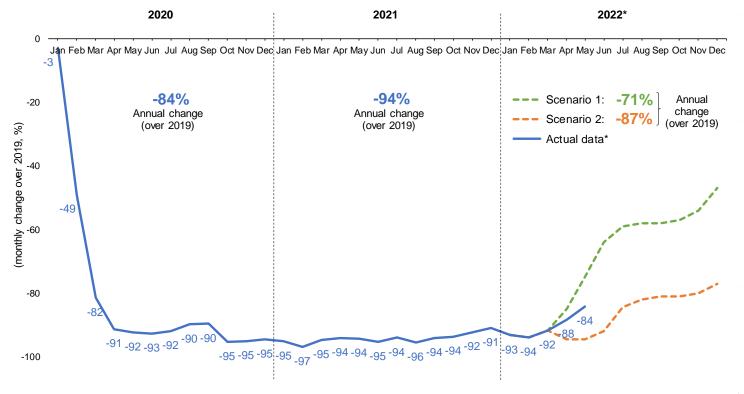
* Actual data for 2022 is preliminary and based on estimates for destinations which have not yet reported results.

(Data as collected by UNWTO, July 2022)



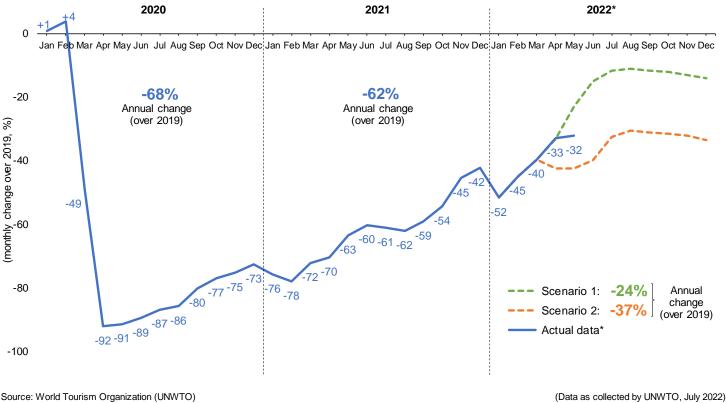
Europe: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)

Asia and the Pacific: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)



Source: World Tourism Organization (UNWTO)

* Actual data for 2022 is preliminary and based on estimates for destinations which have not yet reported results.

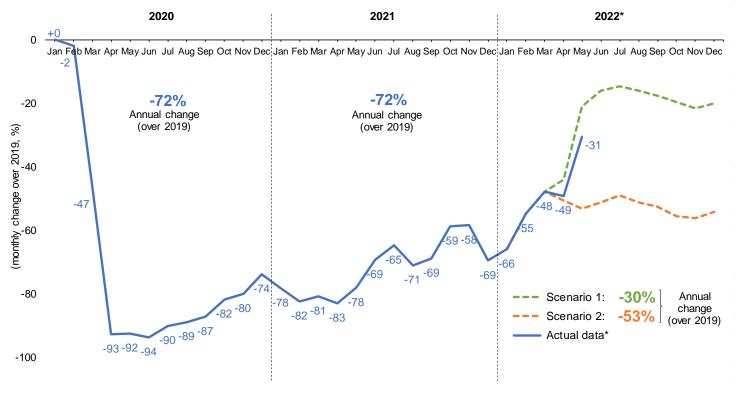


Americas: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)

Source: World Tourism Organization (UNWTO)

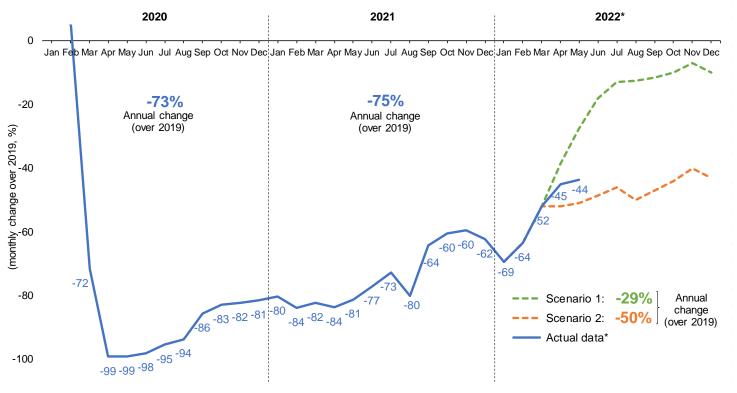
* Actual data for 2022 is preliminary and based on estimates for destinations which have not yet reported results.

Africa: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)



Source: World Tourism Organization (UNWTO)

* Actual data for 2022 is preliminary and based on estimates for destinations which have not yet reported results.



Middle East: International tourist arrivals in 2020, 2021 and Scenarios for 2022 (monthly change over 2019, %)

Source: World Tourism Organization (UNWTO)

* Actual data for 2022 is preliminary and based on estimates for destinations which have not yet reported results.

(Data as collected by UNWTO, July 2022)





Publications



UNWTO World Tourism Barometer



Guidelines for Success in the Chinese Outbound Tourism Market (2019)



The Economic Contribution of Tourism and the Impact of the COVID-19 (2021)



Exploring Health Tourism (2018)



Yearbook of Tourism Statistics (2015-2019)



The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



Compendium of Tourism Statistics (2015-2019)



European Union Tourism Trends (2018)



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Tourism in SIDS: the challenge of sustaining livelihoods in times of Covid-19 (2020)



Understanding domestic tourism and seizing its opportunities (2020)



UNWTO/GTERC Asia Tourism Trends, 2020 Edition