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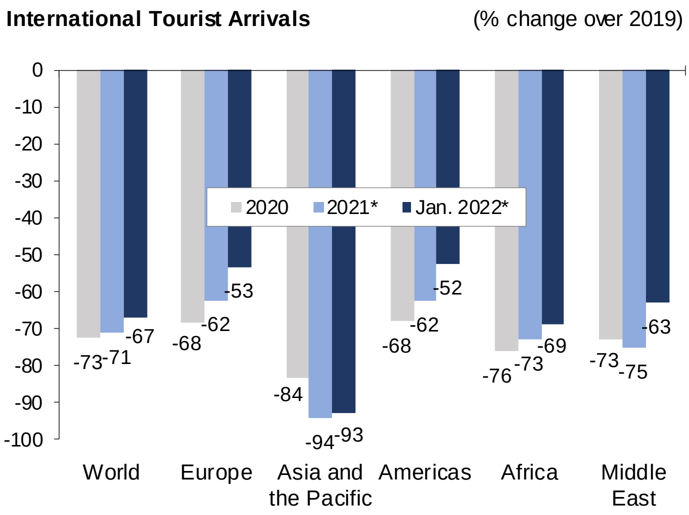
Tourism enjoys strong start in 2022 while facing new uncertainties

- International tourism continued its recovery in January 2022, with much better performance compared to the weak start of 2021.
- World arrivals more than doubled (+130%) compared to January 2021, an increase of 18 million. This is the same increase as in the whole of 2021 compared to 2020.
- Despite the robust results, the pace of recovery in January was impacted by the Omicron variant and the re-introduction of travel restrictions in several destinations. Arrivals were at -67% in January 2022 compared to 2019, after reaching -60% in Q4 2021.
- All world regions enjoyed a significant rebound in January 2022 compared to the low levels of January 2021. Europe (+199%) and the Americas (+97%) continued to post the strongest results, though international arrivals were still around half of pre-pandemic levels (-53% and -52% respectively).
- The Middle East (+89%) and Africa (+51%) also saw growth in January 2022 over 2021, but these regions saw a drop of 63% and 69% respectively compared to 2019. While Asia and the Pacific recorded a 44% year-on-year increase, several destinations remained closed to non-essential travel resulting in the largest decrease in international arrivals over 2019 (-93%).
- By subregions, the best results were recorded in Western Europe which saw four times more arrivals in January 2022 than in 2021, but 58% less than in 2019. Additionally, the Caribbean (-38%) and Southern and Mediterranean Europe (-41%) showed the fastest rates of recovery towards 2019 levels.
- After the unprecedented growth of 2022 and 2021, international tourism is expected to continue its gradual recovery in 2022. As of 24 March, 12 destinations had no COVID-19 related restrictions in place and an increasing number of destinations were easing or lifting travel restrictions, which is helping to unleash pent-up demand.
- However, high uncertainty derived from the military offensive of the Russian Federation on Ukraine coupled with a challenging economic environment and the travel restrictions still in place due to the ongoing pandemic, could affect overall confidence and disrupt the upward trend seen in tourism in 2021.



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-March 2022.

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

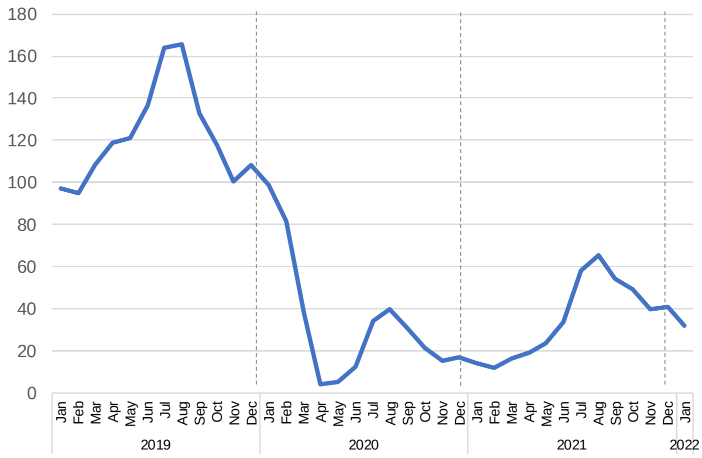
International tourism grew 130% in January 2022, but remained 67% below pre-pandemic levels

- International tourism continued its recovery in January 2022, with much better results than in early 2021.
- International tourist arrivals more than doubled (+130%) compared to January 2021, growing by 18 million. This increase in number of arrivals is the same as in the whole of 2021 over 2020.
- Despite the robust results, the pace of recovery was impacted by the Omicron variant and the re-introduction of travel restrictions across several destinations.
- International arrivals fell 67% below pre-pandemic levels in January 2022, after standing at -60% in the last quarter of 2021. This follows a massive 71% decline recorded in the entire year 2021.
- All world regions enjoyed a significant rebound in January 2022, though from low levels at the start of 2021. Europe and the Americas continued to post the strongest results. Europe (+199%) welcomed three times more international arrivals than in January 2021, while the Americas (+98%) doubled its arrivals. Compared to 2019, Europe and the Americas saw the smallest declines, with international arrivals at -53% and -52% respectively.
- The Middle East (+89%) and Africa (+51%) also saw growth in January 2022 over 2021, but these regions saw a drop of 63% and 69% respectively compared to 2019. Asia and the Pacific recorded a 44% year-on-year increase in January 2022 but recorded the largest decrease in international arrivals over 2019 (-93%), as several destinations remained closed to non-essential travel.
- Most world subregions saw their international arrivals grow by two to four times in January 2022 as compared to the same month in 2021. Western Europe (+300%) saw the best performance, with four times more arrivals than in January 2021, but 58% less than in 2019. The Caribbean (-38%) and Southern and Mediterranean Europe (-41%) showed the fastest recovery towards 2019 levels.
- Among destinations with available data, several islands in the Caribbean and Asia and the Pacific, together with some small destinations in Europe and Central America recorded the best results in January 2022 compared to 2019: Andorra (-3%), Albania (-7%), Dominican Republic (-11%), Serbia and Maldives (both -13%), Bulgaria and Curaçao (both -20%), El Salvador (-19%) and Seychelles (-27%). Bosnia and Herzegovina (+2%) exceeded pre-pandemic levels. Among larger destinations, Turkey and Mexico saw declines of 16% and 24% respectively. Most of these destinations were also among the best performers in 2021.

Major risks weighing on the recovery of tourism in the early months of 2022

- After the unprecedented drop in 2020 and 2021, international tourism is expected to continue its gradual recovery in 2022, as an increasing number of destinations ease or lift travel restrictions and pent-up demand is unleashed. As of 24 March, 12 destinations had no COVID-19 related restrictions in place.
- While international tourism bounces back, domestic tourism will continue to drive the recovery of the sector in an increasing number of destinations.
- However, major downside risks are threatening the ongoing recovery of tourism in 2022.
- The military offensive of the Russian Federation on Ukraine coupled with a challenging economic environment including high energy prices could disrupt the already slow and uneven pace of recovery. Travel restrictions still in place in many destinations due to the ongoing pandemic could also delay the recovery of international tourism.

International tourist arrivals by month, Jan 2019-Jan 2022 (millions)



Source: UNWTO (Data as of March 2022)

International Tourist Arrivals by (Sub)region

	(million) 2019	2020*	2021*	Share (%) 2021*	Change (%) 20/19	21/20*	21/19*	2022 Change (%)* over 2021 Jan.	over 2019 Jan.	2021 Change (%) over 2019 Q1	Q2	Q3	Q4	Nov.	Dec.
World	**1,468**	**403**	**421**	**100**	**-72.6**	**4.6**	**-71.3**	**129.7**	**-67.1**	**-85.9**	**-79.7**	**-61.6**	**-60.3**	**-60.5**	**-62.5**
Advanced economies[1]	*777*	*216*	*219*	*52.1*	*-72.1*	*1.3*	*-71.8*	*215.4*	*-66.2*	*-89.5*	*-83.5*	*-61.2*	*-57.1*	*-56.1*	*-62.0*
Emerging economies[1]	*691*	*186*	*202*	*47.9*	*-73.1*	*8.5*	*-70.8*	*83.0*	*-67.9*	*-82.6*	*-75.1*	*-62.1*	*-63.5*	*-64.6*	*-63.1*
By UNWTO regions:															
Europe	***746.9***	***237.3***	***281.3***	***66.8***	***-68.2***	***18.6***	***-62.3***	***199.3***	***-53.3***	***-84.5***	***-78.9***	***-49.8***	***-45.2***	***-44.7***	***-51.5***
Northern Europe	83.5	21.7	16.1	3.8	-74.0	-25.8	-80.7	183.8	-72.2	-91.0	-91.5	-78.9	-69.7	-66.8	-68.0
Western Europe	204.2	79.8	71.8	17.0	-60.9	-10.1	-64.9	293.5	-57.8	-88.3	-78.9	-51.4	-48.8	-47.0	-59.9
Central/Eastern Eur.	155.2	47.5	55.2	13.1	-69.4	16.2	-64.5	117.3	-55.1	-78.7	-75.7	-53.6	-53.3	-53.1	-55.9
Southern/Medit. Eur.	304.0	88.3	138.3	32.8	-70.9	56.6	-54.5	221.2	-40.5	-82.8	-77.1	-40.3	-30.5	-29.6	-34.0
- of which EU-27	540.3	179.7	203.5	48.3	-66.7	13.3	-62.3	243.3	-53.0	-86.7	-79.9	-49.4	-43.9	-42.4	-52.3
Asia and the Pacific	***360.1***	***59.3***	***20.9***	***5.0***	***-83.5***	***-64.7***	***-94.2***	***43.6***	***-93.0***	***-95.5***	***-94.5***	***-94.4***	***-91.9***	***-91.8***	***-90.5***
North-East Asia	170.3	20.3	11.3	2.7	-88.1	-44.1	-93.3	-17.0	-94.7	-94.7	-93.0	-92.9	-92.6	-92.4	-92.0
South-East Asia	138.6	25.4	3.2	0.8	-81.7	-87.5	-97.7	122.7	-96.1	-98.3	-98.1	-98.3	-96.2	-96.4	-94.9
Oceania	17.5	3.7	0.7	0.2	-79.0	-80.5	-95.9	305.2	-93.1	-98.6	-87.1	-94.2	-94.1	-95.7	-91.0
South Asia	33.7	10.0	5.7	1.4	-70.5	-42.9	-83.1	135.3	-72.5	-87.1	-90.7	-85.2	-71.6	-71.1	-67.1
Americas	***219.3***	***70.0***	***82.4***	***19.6***	***-68.1***	***17.7***	***-62.4***	***97.4***	***-52.5***	***-75.3***	***-59.4***	***-59.4***	***-46.2***	***-44.8***	***-41.2***
North America	146.6	46.7	57.0	13.5	-68.2	22.2	-61.1	81.4	-46.3	-72.0	-64.5	-62.4	-46.5	-44.0	-40.9
Caribbean	26.3	10.3	15.0	3.6	-61.0	45.8	-43.2	100.0	-38.5	-64.9	-23.1	-15.2	-14.0	-16.1	-13.2
Central America	10.9	3.1	4.9	1.2	-71.6	57.5	-55.3	177.1	-48.1	-76.7	-58.1	-48.3	-35.9	-39.5	-29.8
South America	35.4	9.9	5.5	1.3	-72.0	-44.6	-84.5	196.7	-77.8	-92.1	-66.7	-77.9	-70.1	-70.6	-65.6
Africa	***68.2***	***16.2***	***18.5***	***4.4***	***-76.2***	***13.9***	***-72.9***	***51.3***	***-68.9***	***-80.1***	***-76.0***	***-72.3***	***-64.0***	***-61.0***	***-66.7***
North Africa	25.6	5.5	6.1	1.5	-78.4	10.4	-76.1	-4.8	-79.7	-81.7	-79.0	-76.3	-68.9	-65.1	-70.9
Subsaharan Africa	42.6	10.7	12.3	2.9	-75.0	15.7	-71.0	75.7	-64.4	-79.4	-74.1	-68.9	-61.4	-59.1	-64.5
Middle East	***73.2***	***19.9***	***18.2***	***4.3***	***-72.8***	***-8.3***	***-75.1***	***89.3***	***-63.0***	***-82.3***	***-81.0***	***-73.9***	***-62.0***	***-60.7***	***-63.3***

Monthly/quarterly data series

Source: World Tourism Organization (UNWTO) (Data as collected by UNWTO, March 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.

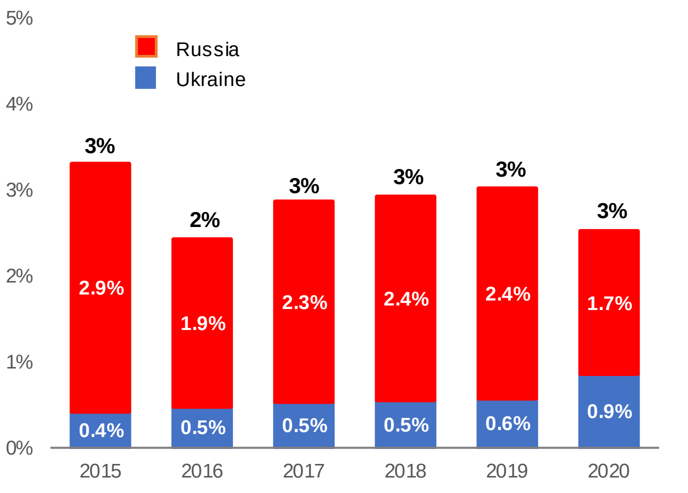
For regularly updated data, please check the *UNWTO Tourism Recovery Tracker:*

https://www.unwto.org/unwto-tourism-recovery-tracker

Russian military offensive on Ukraine: a risk to the ongoing recovery

- The military offensive of the Russian Federation on Ukraine is causing great human tragedy and suffering, impacting millions of livelihoods. The conflict also represents a major risk to the recovery of international tourism, which is still weak and uneven, though it is early to assess its full impact.
- The conflict risks hampering the return of confidence in global travel. The US and the Asian source markets, which have started to open up again but are more risk averse, could be particularly impacted, especially regarding travel to Europe.
- The shutdown of Ukrainian and Russian airspace, as well as the ban on Russian carriers by many European countries is affecting intra-European travel. According to Eurocontrol (as of 23 March), the re-routing around Ukraine is disrupting traffic flows across a wide area, with overflights of neighbouring Moldova stopped and overflights around the borders of Ukraine, Russia and Belarus also disrupted. It is also causing detours in long-haul flights between Europe and East Asia, which translates into longer flights and higher costs.
- Both Russia and Ukraine represent a combined 3% of global spending on international tourism in 2020, meaning at least US$ 14 billion in tourism receipts could be lost as a consequence of a prolonged conflict. As destinations these countries account for 4% of international arrivals in Europe but only 1% of Europe's international tourism receipts.

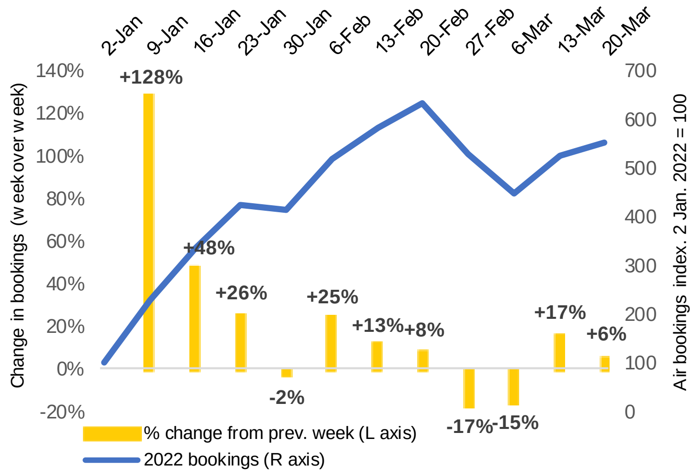
Russia and Ukraine's international tourism spending as a percentage of world total



Source: UNWTO (data as of March 2022)

- The importance of both markets is significant for neighbouring countries, but also for sun and sea destinations in Europe and beyond, including islands. The Russian market gained significant weight during the crisis in long haul destinations such as Maldives (up from 5% in 2019 to 17% in 2021), Seychelles (from 3% to 17%) or Sri Lanka (from 5% to 9%).
- Even though it is early to assess the full impact of the conflict, air travel searches and bookings across various channels show demand slowing down the week after the start of the invasion on 24 February 2022, but rebounding again in early March. It is yet to be seen if this reflects a reaction from consumers who are fearful of higher travel prices in the future, or whether demand is shifting towards destinations perceived to be safer or are closer to home.

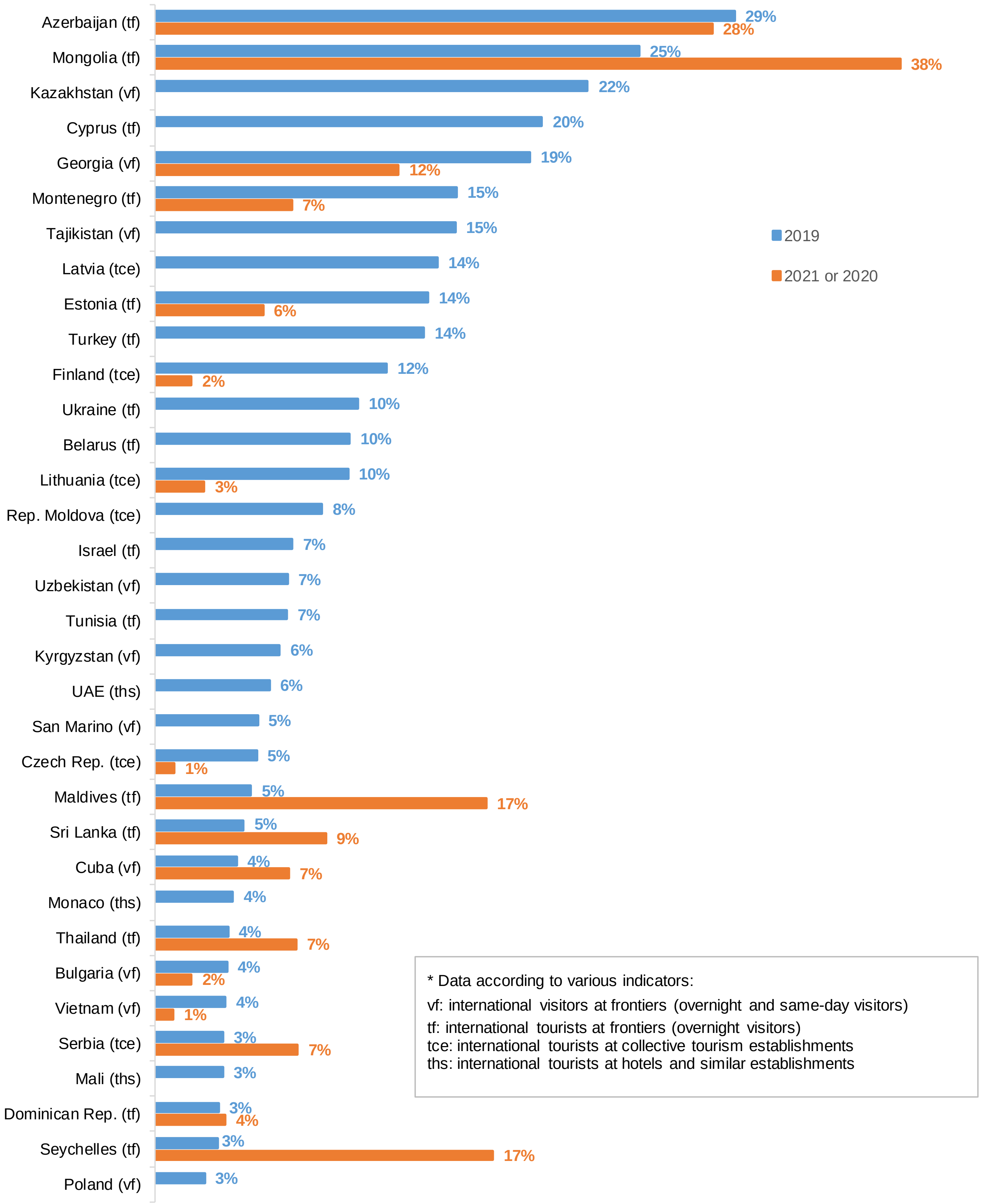
Air bookings from January to March 2022 for intra-European travel (index)*



Source: compiled by UNWTO from ForwardKeys data
* Bookings from week ending 2 Jan to 20 Mar 2022 and equivalent weeks of 2019.

- It is certain that the military offensive will add further pressure to already challenging economic conditions, undermining consumer confidence and raising investment uncertainty. Adverse economic factors which could affect travel demand include surging oil prices and overall inflation, as well as interest rate hikes and the continued disruption of supply chains. The conflict has caused higher prices in commodities like energy and food, as Russia and Ukraine are major commodity exporters.

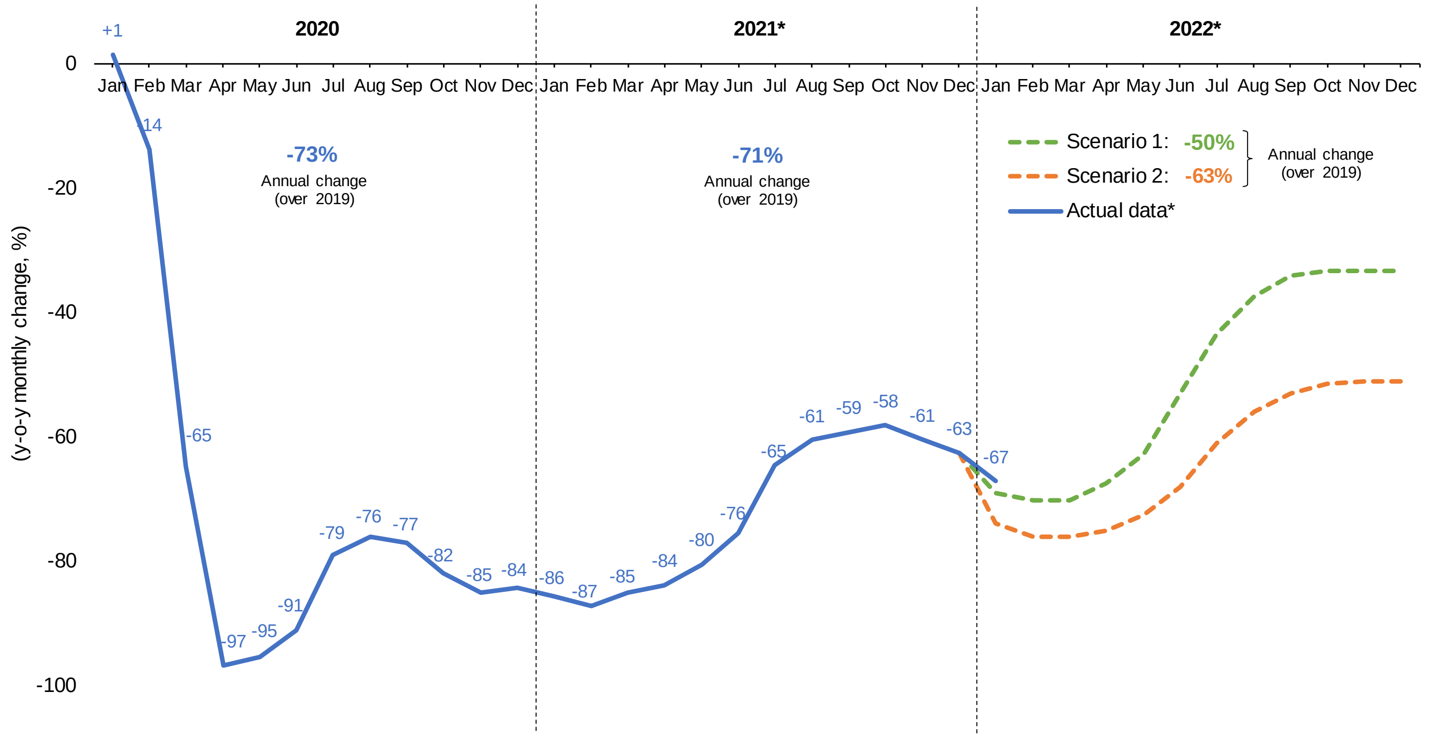
Destinations with highest share of Russian visitors (various indicators)*, 2019-2021 (Sorted by 2019) (% of total visitors)



Source: World Tourism Organization (UNWTO)

- The recent spike in oil prices (from lows of US$40 per barrel of Brent in 2020 to over US$100 in March 2022, the highest in 10 years), as well as rising inflation are making transport and accommodation more expensive and putting pressure on consumer purchasing power and savings.
- The conflict can also hinder economic growth. Amid the current uncertainty, the Organisation for Economic Co-operation and Development (OECD) estimates global growth could be more than 1 percentage point lower this year than was projected before the conflict. Inflation, already high at the start of the year, could be at least a further 2.5 percentage points higher. The price shock, especially on food and energy, risks disrupting the production of goods and services worldwide and increasing poverty.
- This forecast is in line with the analysis on the potential consequences of the conflict on global economic recovery and growth by the United Nations Conference on Trade and Development (UNCTAD), which has also downgraded its projection for world economic growth in 2022 from 3.6% to 2.6% and warned that developing countries will be most vulnerable to the slowdown.
- In order to curb surging inflation, the US Federal Reserve announced a 0.25% interest rate hike on 16 March 2022, the first increase from near zero rate since 2018, and projecting an increase to 1.9% by the end of the year. While tackling inflation, this will also make credit more expensive, affecting consumer and investment demand.
- UNWTO scenarios published in January 2022 pointed to 30% to 78% growth in international tourist arrivals in 2022 over 2021, depending on various factors. This would be 50% to 63% below pre-pandemic levels. Although these scenarios remain unchanged for now, they are subject to revision as health, policy, geopolitical and economic factors evolve.
- The impact of the conflict on short-term tourism trends is yet to be seen and will much depend on the length and extent of the conflict, which is hoped to be as limited as possible.
- The effective resumption of international travel will also continue to depend on ensuring vaccine equity and coordinating the response among countries in terms of travel restrictions, harmonized safety and hygiene protocols, and effective communication to help restore consumer confidence.

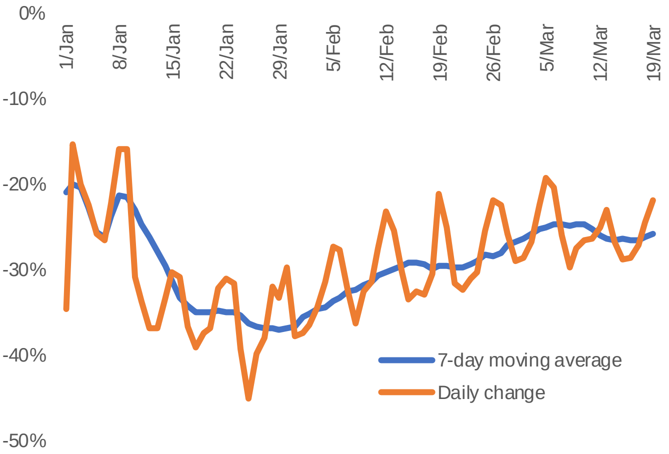
International tourist arrivals: 2020, 2021 and Scenarios for 2022 (y-o-y monthly change over 2019, %)



Source: UNWTO * Actual data for 2021 and 2022 is preliminary and based on estimates for destinations which have not yet reported results. (Data as of March 2022)

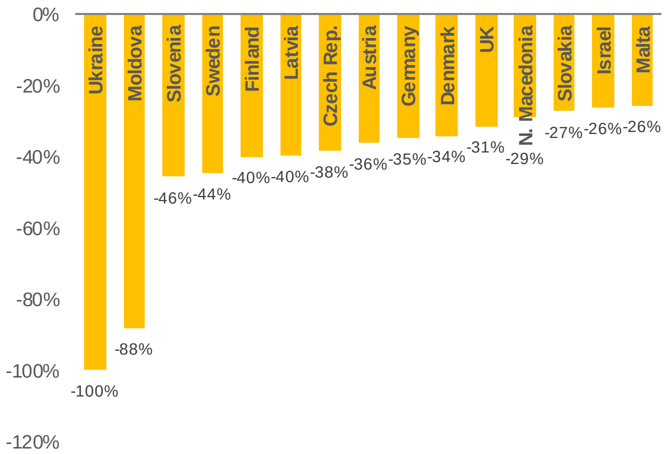
Note: The above scenarios are subject to revision.

Evolution of European flights (Eurocontrol Area):
Daily change and 7-day moving average, 2022 (% vs 2019)



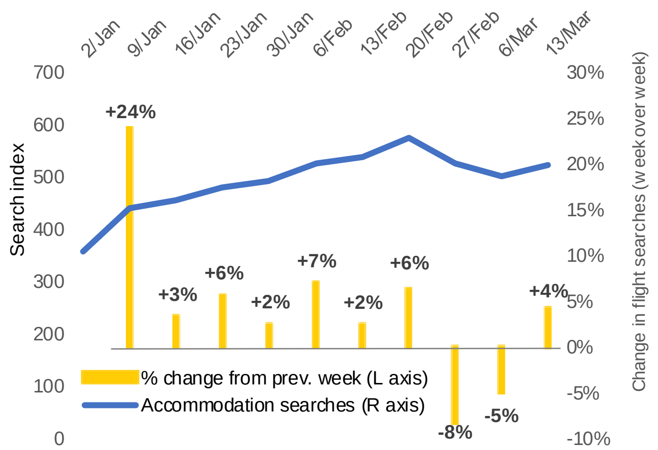
Source: compiled by UNWTO from Eurocontrol
(Based on 41 European countries covered by Eurocontrol)

European countries with largest decline in flights
from 24 February to 19 March 2022 (% change vs 2019)

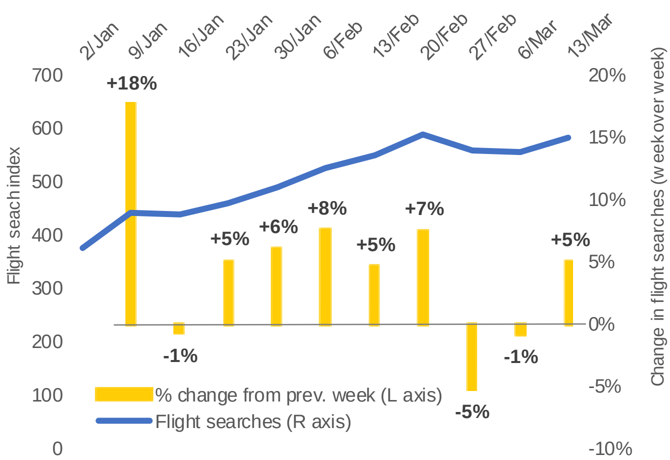


Source: compiled by UNWTO from Eurocontrol
(Based on 41 European countries covered by Eurocontrol)

Accommodation searches (international trips)
from January to March 2022 (index)*

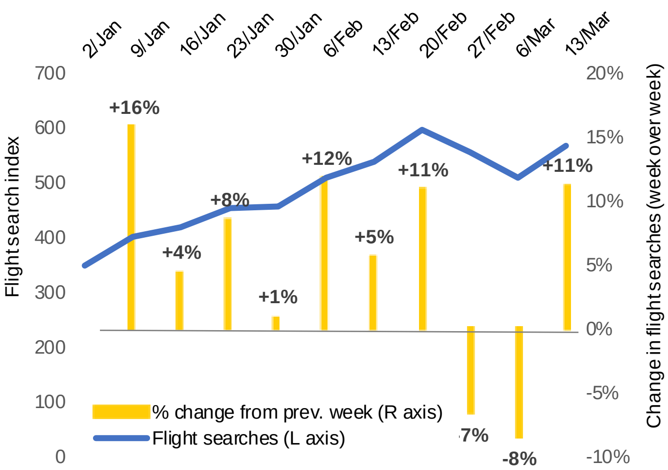


International flight searches, world
from January to March 2022 (index)*

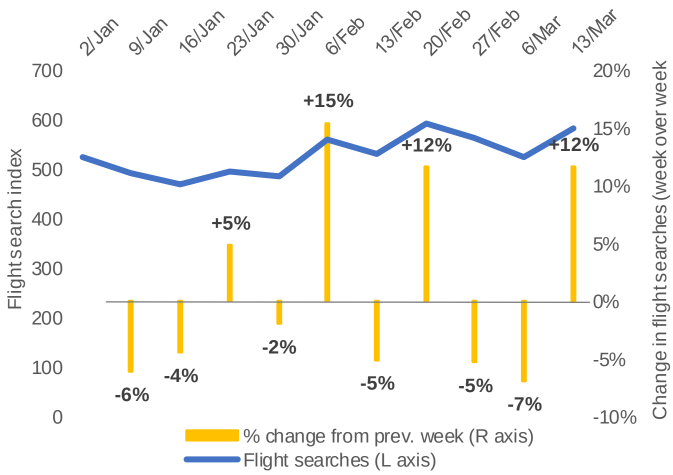


Source: compiled by UNWTO from Google data (https://destinationinsights.withgoogle.com)
* Global searches from week ending 2 January to 13 March 2022 and equivalent weeks of 2021.

Flight searches for travel from US to Italy
January to March 2022 (index)*



Flight searches for travel from US to France
January to March 2022 (index)*



Source: compiled by UNWTO from Google data (https://destinationinsights.withgoogle.com)
* Flight searches from week ending 2 January to 13 March 2022.

UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.

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Industry Indicators

Strong air travel recovery in January 2022, though impacted by Omicron

- According to **IATA**, global air travel increased by 82% (measured in revenue passenger kilometres or RPKs) in January 2022 compared to low traffic volumes recorded in January 2021. However, air travel was still half the levels recorded in pre-pandemic year 2019. Global air travel was disrupted by the Omicron variant at the start of 2022, but was significantly better than in the beginning of 2021.
- International passenger traffic showed strong growth in January 2022 (+166%), though slower compared to results in December 2021 (+182%), amid the impact of Omicron and related travel restrictions. Compared to 2019, international air traffic declined by 62% in January 2022. This result closely mirrors the drop recorded in international tourist arrivals (an estimated 67% in January 2022 versus 2019).
- At the regional level, Europe (+225% international RPKs) and Latin America (+157% RPKs) reported the fastest year-on-year growth rates in January, followed by North America (+149%), the Middle East (+145%) and Asia and the Pacific (+124%). International traffic in Africa increased 18%. Compared to January 2019, Latin America (-45%), Europe (-47%) and North America (-48%) showed the smallest declines in international RPKs, while the Middle East and Africa reported 56% and 62% decreases respectively. International RPKs in Asia and the Pacific were still 88% below 2019.
- Performance among key domestic markets was mixed. Japan (+107%) showed the fastest growth in domestic RPKs in January 2022 but remained 44% below pre-crisis levels. Growth in domestic RPKs slowed in the United States (+98%) and Brazil (+36%) during January compared to December, due to flight cancellations and staff shortages related to COVID-19 quarantines. Domestic RPKs in Brazil (-6%) and the United States (-18%) were close to pre-pandemic levels in January.
- In Australia, domestic RPKs increased 33% y-o-y in January 2022, but decreased 58% compared to 2019 levels. Domestic RPKs in Russia were up 24% y-o-y in January and 34% over 2019. In China (0%), domestic RPKs improved from the 34% decline in December, helped by higher demand ahead of the Chinese New Year, but were 38% below 2019. Domestic traffic in India (-18%) was hit by the Omicron outbreak in January 2022 and remained 49% below 2019 levels.
- IATA indicates that the pandemic situation has started to slowly improve after two years of severe disruptions. This brings a more optimistic outlook for air transport beyond Q1 but the impact of the conflict in Eastern Europe and rising inflationary pressures pose downside risks to a further recovery.
- IATA points out that the conflict could disrupt air travel in this area, and likely also beyond. The Ukraine market accounted for 3.3% of European passenger air traffic and 0.8% of global traffic in 2021. The Russian international market represented 5.7% of European traffic (excluding Russia's domestic market) and 1.3% of global traffic in 2021. Airspace closures have led to rerouting or cancellations of flights on some routes, mostly in the Europe-Asia but also in Asia-North America markets. In 2021, RPKs flown between Asia-North America and Asia-Europe accounted for 3.0%, and 4.5%, respectively, of global international RPKs. In addition to these disruptions, the sudden spike in fuel prices is putting pressure on airline costs.
- In terms of capacity, **ICAO** indicates that international capacity worldwide fell by 49% in January 2022 (compared to 2019), a much weaker result than the decline seen in the previous month (-38%), due to flight cancellations and the reimposition of travel bans amid the Omicron outbreak. Domestic air capacity decreased 17% in January 2022 over 2019.
- Data from **ForwardKeys** shows a 50% drop in international air bookings made between 1 January and 12 March 2022 (versus 2019) for any future travel. By departure region, Asia and the Pacific (-88%) suffered the biggest decline, followed by Africa and the Middle East (-46%) and Europe (-37%). Bookings from the Americas (-30%) were comparatively better. The Caribbean and Central America showed encouraging signs of recovery, according to air booking data from those subregions, with global bookings 25% and 21% below the same period in 2019 respectively. Strong bookings were recorded from the United States (-21%), particularly to Central America (+17%), Mexico (+14%) and Caribbean (-4%) destinations. South Asia also

showed strong performance among US travellers with bookings 7% up compared to 2019. The best performing destinations in South Asia were Maldives (+122%) and India (+10%). Bookings from Europe to the Caribbean were 3% above 2019 levels.

- According to **STR**, global hotel occupancy improved in February 2022 (51%) from weaker rates in January (43%). All world regions saw higher occupancy rates in February. The Middle East led the way with occupancy levels at 64%, while they reached 56% in the Americas, 48% in Africa, 47% in Europe and 46% in Asia and the Pacific. By subregions, the Caribbean (63%) continued to show the highest occupancy rates in February 2022, followed by Northern Europe (60%). (Data by region are based on STR statistical regions).

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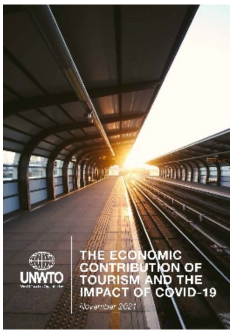
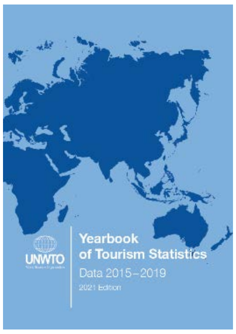
Publications

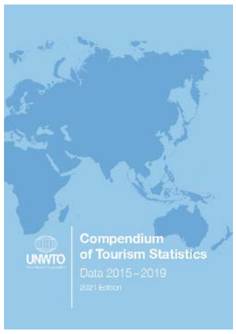
UNWTO World Tourism Barometer



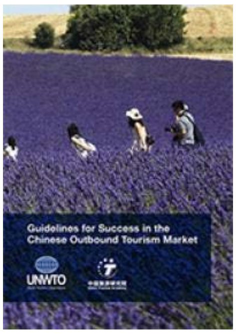
The economic Contribution of Tourism and the Impact of the COVID-19



Yearbook of Tourism Statistics (2015-2019)



Compendium of Tourism Statistics (2015-2019)



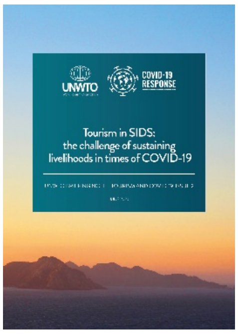
Guidelines for Success in the Chinese Outbound Tourism Market (2019)

Exploring Health Tourism (2018)

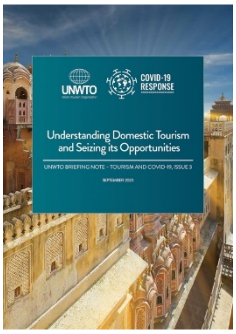
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)

European Union Tourism Trends (2018)

How are countries supporting tourism recovery? Tourism and Covid-19 (2020)



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

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