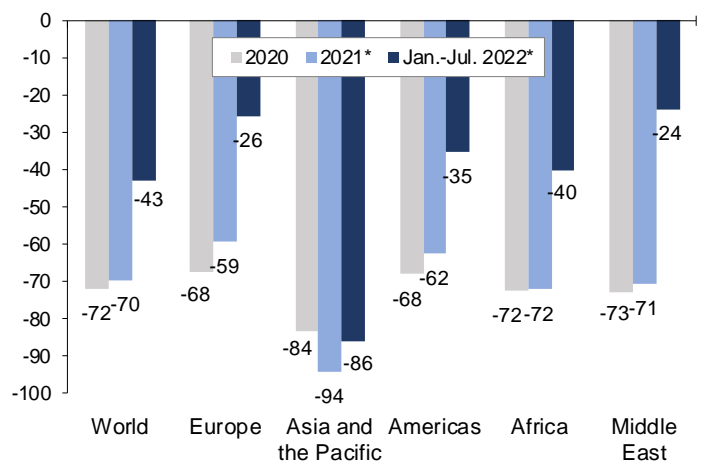




## International tourism climbed to nearly 60% of pre-pandemic levels in January-July 2022

- International tourism continued to show strong performance through July 2022, with arrivals reaching 57% of pre-pandemic levels in the first seven months of 2022.
- International tourist arrivals almost tripled (+172%) in January-July 2022 compared to the same period of 2021.
- The steady recovery reflects strong pent-up demand for international travel, especially in the months of June and July which are part of the Northern Hemisphere summer season. The easing or lifting of travel restrictions in an increasing number of countries also contributed to boost results.
- An estimated 207 million international arrivals were recorded in June and July 2022 combined, over twice the numbers seen in the same two months last year. These months represent 44% of the total arrivals recorded in the first seven months of 2022.
- Europe and the Middle East showed the fastest recovery in January-July 2022, with arrivals reaching 74% and 76% of 2019 levels, respectively.
- Europe (+190%) welcomed almost three times as many international arrivals as in the first seven months of 2021, while the Middle East (+287%) saw arrivals grow almost four times year-on-year in January-July 2022.
- The Americas (+103%) and Africa (+171%) also recorded strong growth in January-July 2022 compared to 2021, reaching 65% and 60% of 2019 levels respectively. Asia and the Pacific (+165%) saw arrivals more than double in the first seven months of 2022, though they remained 86% below 2019 levels.
- According to the September 2022 survey, the UNWTO Panel of Tourism Experts rated the period May-August 2022 with a score of 125 (on a scale of 0 to 200). Prospects for the remainder of the year are cautiously optimistic, with a score of 111, showing a downgrade in confidence levels.
- The challenging economic environment including high inflation and the spike in oil prices, aggravated by the war in Ukraine, continues to be the main factor weighing on the recovery of tourism, according to experts.
- Some 61% of experts now see a potential return of international arrivals to 2019 levels in 2024 or later while those indicating a return to pre-pandemic levels in 2023 has diminished (27%) compared to the May survey (48%).

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](http://www.e-unwto.org/loi/wtobarometereng).

**We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org).**

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

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

Pages 1-5 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](http://www.e-unwto.org). This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

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## Inbound tourism

### *International arrivals almost tripled in January-July 2022, but remained 43% below 2019*

- International tourism continued to show strong performance through July 2022, with arrivals reaching 57% of pre-pandemic levels in the first seven months of 2022.
  - International tourist arrivals almost tripled (+172%) in January-July 2022 compared to the same period of 2021.
  - Numbers climbed from -64% in January 2022 (versus 2019) to -28% in July, the strongest month since the start of the pandemic.
  - Though international tourism was still 43% below 2019 levels in the first seven months of 2022, this also means it has recovered almost 60% of pre-pandemic levels.
  - An estimated 474 million tourists travelled internationally during these seven months, compared to the 175 million in the same months of 2021.
  - The steady recovery reflects strong pent-up demand for international travel, especially in the months of June and July which are part of the Northern Hemisphere summer season. The easing or lifting of travel restrictions in an increasing number of countries also contributed to boost results (86 countries had no COVID-19 related restrictions as of 19 September 2022, according to the [UNWTO/IATA Destination Travel – Easy Travel](#)).
  - An estimated 207 million international arrivals were recorded in June and July 2022 combined, over twice the numbers seen in the same two months last year. These months represent 44% of the total arrivals recorded in the first seven months of 2022.
  - Europe welcomed 309 million international arrivals in January-July 2022, accounting for 65% of the total 474 million recorded globally during that period.
- in the Middle East surpassed pre-pandemic levels in the month of July (+3%), while in Europe they climbed to about 85% of 2019 levels.
- Europe (+190%) welcomed almost three times as many international arrivals as in the first seven months of 2021, with results boosted by strong intra-regional demand and travel from the United States. The region saw particularly robust performance in June (-21% over 2019) and July (-16%), reflecting a busy summer period. The strong dollar, which recently reached parity with the euro, has also favoured US travel to Europe, in particular during the summer months.
  - Airports in the EU+ market (EU, EEA, Switzerland and UK) saw their passenger traffic nearly doubling at 94% in July compared to the same month last year (-15% over July 2019), according to the Airports Council International (ACI). The lifting of travel restrictions in a large number of destinations in Europe (44 as of 19 September 2022) also fuelled these results.
  - The Middle East (+287%) saw international arrivals grow almost four times year-on-year in January-July 2022. Arrivals exceeded pre-pandemic levels in July (+3%), boosted by the extraordinary results posted by Saudi Arabia (+121%) following the Hajj pilgrimage.
  - The Americas (+103%) and Africa (+171%) also recorded strong growth in January-July 2022 compared to 2021, reaching 65% and 60% of 2019 levels, respectively.
  - Asia and the Pacific (+165%) saw arrivals more than double in the first seven months of 2022, though they remained 86% below 2019 levels. International tourism has slowly improved in the region further to some relaxation of restrictions in several destinations, particularly in South Asia but some borders remained closed to non-essential travel.

### *Europe and the Middle East led the recovery through July 2022*

- Most world regions enjoyed a significant rebound in the first seven months of 2022.
- Europe and the Middle East showed the fastest recovery in January-July 2022, with arrivals reaching 74% and 76% of 2019 levels, respectively. Arrivals

### The Caribbean, Southern and Mediterranean Europe and Central America close to pre-pandemic levels

- Several subregions reached 70% to 85% of their pre-pandemic arrivals in January-July 2022. Southern Mediterranean Europe (-15% over 2019), the Caribbean (-18%) and Central America (-20%) showed the fastest recovery towards 2019 levels. Western Europe (-26%) and Northern Europe (27%) also posted strong results.
- In the month of July arrivals came close to pre-pandemic levels in the Caribbean (-5%), Southern and Mediterranean Europe (-6%) and Central America (-8%).
- Among destinations reporting data on international arrivals in the first five to seven months of 2022, those exceeding pre-pandemic levels were: the US Virgin Islands (+32% over 2019), Albania (+19%), Sint Maarten (+15%), Ethiopia and Honduras (both +13%), Andorra (+10%), Puerto Rico (+7%), United Arab Emirates and Dominican Republic (both +3%), San Marino and El Salvador (both +1%), and Curaçao (0%).
- Among destinations reporting data on international tourism receipts in the first five to seven months of 2022, Serbia (+73%), Sudan (+64%), Romania (+43%), Albania (+32%), North Macedonia (+24%), Pakistan (+18%), Türkiye, Bangladesh and Latvia (all +12%), Mexico and Portugal (both +8%), Kenya (+5%) and Colombia (+2%) all exceeded pre-pandemic levels in January-July 2022.
- The ongoing recovery can also be seen in outbound tourism spending from major source markets. Expenditure from France was at -12% in January-July 2022 compared to 2019 while spending from Germany stood at -14%. International tourism spending remained at -10% in Belgium, -23% in Italy and -26% in the United States.

### The economic environment - a major downside risk to the ongoing recovery

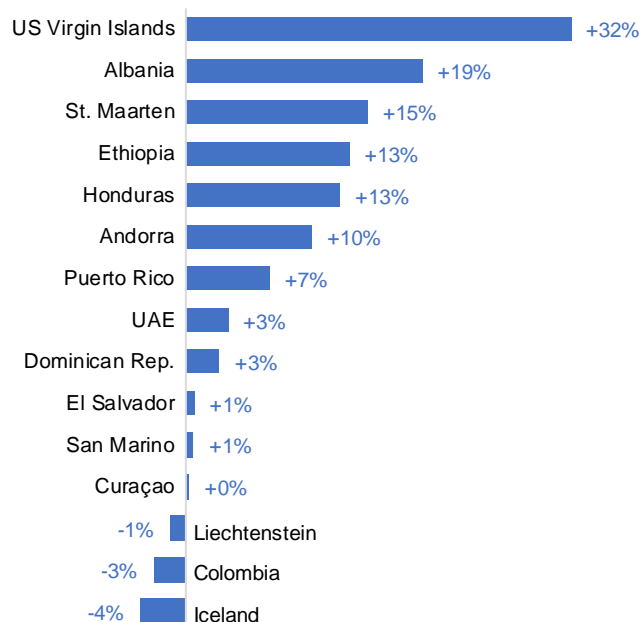
- The robust recovery of tourism is reflected not only in the tourism data for many destinations across the globe but also in the various industry indicators such as air passenger traffic and hotel metrics.
- In fact, stronger-than-expected demand has also created important operational and workforce challenges in tourism companies and infrastructure,

particularly airports, as the recovery was quicker than anticipated.

- Yet, looking ahead, the economic situation, exacerbated by the Russian offensive in Ukraine, represents a major downside risk to recovery.
- The combination of increasing interest rates in all major economies, rising energy and food prices and the growing prospects of a global recession as indicated by the World Bank (global growth would slump from 5.7% in 2021 to 2.9% in 2022), are major risks to the recovery of international tourism through the remainder of 2022 and 2023.
- High inflation has increased the cost of living around the world, reduced household budgets and put extra pressure on companies recovering from the crisis, particularly small and medium enterprises.
- The war in Ukraine and mounting geopolitical tensions in different parts of the world are also adding to the uncertainty.
- The potential slowdown can be seen in the latest UNWTO Confidence Index, which reflects a more cautious outlook, as well as on booking trends which are showing signs of slower growth.

#### Best-performing destinations in January-July 2022\*

International tourist arrivals (% change over 2019)



Source: UNWTO

(Data as of September 2022)

\* Based on destinations with available data for the first 5 to 7 months of 2022.

## International Tourist Arrivals by (Sub)region

## Monthly/quarterly data series

	(million)		Share		Change (%)		Change (%)*														
			%				2022 over 2021 <sup>2</sup>						2022 over 2019								
	2019	2020*	2021*	2021*	20/19	21/20*	21/19*	YTD	H1	Q1	Q2	May	Jun.	Jul.	YTD	H1	Q1	Q2	May	Jun.	Jul.
<b>World</b>	<b>1466</b>	<b>409</b>	<b>446</b>	<b>100</b>	<b>-72.1</b>	<b>9.0</b>	<b>-69.6</b>	<b>172</b>	<b>223</b>	<b>207</b>	<b>232</b>	<b>251</b>	<b>185</b>	<b>84</b>	<b>-42.9</b>	<b>-46.6</b>	<b>-57.1</b>	<b>-38.3</b>	<b>-37.8</b>	<b>-33.9</b>	<b>-27.8</b>
Advanced economies <sup>1</sup>	777	222	242	54.2	-71.5	9.0	-68.9	231	344	350	341	360	252	89	-38.5	-41.8	-53.6	-33.5	-33.4	-30.8	-26.0
Emerging economies <sup>1</sup>	689	188	205	45.8	-72.7	8.9	-70.3	119	136	125	143	158	122	77	-48.1	-52.0	-60.6	-44.2	-43.5	-38.2	-30.2
<i>By UNWTO regions:</i>																					
<b>Europe</b>	<b>746.0</b>	<b>241.9</b>	<b>303.1</b>	<b>67.9</b>	<b>-67.6</b>	<b>25.3</b>	<b>-59.4</b>	<b>190</b>	<b>300</b>	<b>309</b>	<b>295</b>	<b>342</b>	<b>207</b>	<b>65</b>	<b>-25.6</b>	<b>-28.4</b>	<b>-38.2</b>	<b>-22.5</b>	<b>-22.1</b>	<b>-20.6</b>	<b>-16.2</b>
Northern Europe	83.7	23.3	22.3	5.0	-72.1	-4.5	-73.4	480	709	634	747	868	573	246	-26.8	-32.2	-49.0	-20.7	-21.5	-17.0	-9.6
Western Europe	205.1	83.5	87.6	19.6	-59.3	4.9	-57.3	195	415	434	405	431	280	27	-26.1	-27.3	-36.5	-21.2	-19.1	-21.5	-21.8
Central/Eastern Eur.	153.3	46.7	54.5	12.2	-69.5	16.6	-64.5	104	137	142	133	148	110	39	-45.2	-46.7	-50.0	-44.4	-44.3	-42.5	-39.2
Southern/Medit. Eur.	303.9	88.3	138.7	31.1	-70.9	57.0	-54.4	189	286	314	275	345	174	76	-15.5	-18.8	-28.2	-14.1	-14.0	-12.3	-5.5
- of which EU-27	541.3	185.1	224.5	50.3	-65.8	21.3	-58.5	206	346	375	333	381	220	64	-23.0	-25.5	-36.1	-19.3	-19.0	-18.6	-14.9
<b>Asia and the Pacific</b>	<b>359.5</b>	<b>59.2</b>	<b>20.6</b>	<b>4.6</b>	<b>-83.5</b>	<b>-65.2</b>	<b>-94.3</b>	<b>165</b>	<b>134</b>	<b>55</b>	<b>206</b>	<b>197</b>	<b>348</b>	<b>329</b>	<b>-86.1</b>	<b>-88.0</b>	<b>-92.5</b>	<b>-83.3</b>	<b>-83.0</b>	<b>-79.0</b>	<b>-75.0</b>
North-East Asia	170.3	20.3	11.2	2.5	-88.1	-44.8	-93.4	2.5	2	-3	6	0	36	4	-93.1	-93.3	-94.1	-92.6	-92.4	-91.9	-92.1
South-East Asia	138.0	25.5	2.9	0.7	-81.5	-88.5	-97.9	741	543	120	973	897	↑	↑	-85.0	-88.5	-96.2	-80.1	-79.2	-71.9	-64.8
Oceania	17.4	3.6	0.8	0.2	-79.1	-79.3	-95.7	465	427	642	374	298	357	609	-74.9	-78.3	-89.0	-65.2	-65.8	-58.3	-55.0
South Asia	33.7	9.8	5.7	1.3	-71.1	-41.2	-83.0	245	222	119	374	575	610	362	-56.4	-59.8	-71.3	-44.7	-41.1	-39.1	-37.4
<b>Americas</b>	<b>219.3</b>	<b>69.8</b>	<b>82.3</b>	<b>18.4</b>	<b>-68.2</b>	<b>17.8</b>	<b>-62.5</b>	<b>103</b>	<b>105</b>	<b>117</b>	<b>97</b>	<b>89</b>	<b>80</b>	<b>95</b>	<b>-35.3</b>	<b>-37.6</b>	<b>-46.1</b>	<b>-29.4</b>	<b>-29.3</b>	<b>-28.3</b>	<b>-24.0</b>
North America	146.6	46.5	57.0	12.8	-68.3	22.7	-61.1	98	96	101	93	86	83	103	-35.0	-37.0	-43.7	-31.4	-31.3	-30.5	-26.1
Caribbean	26.3	10.3	15.0	3.4	-60.8	44.8	-43.2	50	60	97	37	31	12	14	-18.1	-20.2	-28.7	-10.6	-10.5	-11.6	-4.9
Central America	10.9	3.1	4.9	1.1	-71.6	59.3	-54.8	129	145	191	114	112	77	74	-19.8	-21.9	-32.1	-10.1	-6.7	-8.4	-7.6
South America	35.4	9.9	5.4	1.2	-72.0	-46.0	-84.9	371	375	287	470	473	394	356	-54.4	-58.0	-69.2	-42.5	-42.5	-37.6	-33.0
<b>Africa</b>	<b>68.1</b>	<b>18.8</b>	<b>18.9</b>	<b>4.2</b>	<b>-72.5</b>	<b>0.8</b>	<b>-72.2</b>	<b>171</b>	<b>181</b>	<b>134</b>	<b>223</b>	<b>294</b>	<b>169</b>	<b>146</b>	<b>-40.4</b>	<b>-45.4</b>	<b>-57.0</b>	<b>-34.2</b>	<b>-28.0</b>	<b>-27.3</b>	<b>-19.8</b>
North Africa	25.6	5.6	6.6	1.5	-78.2	18.8	-74.2	193	241	138	320	715	181	131	-33.2	-40.3	-59.6	-24.7	-7.9	-15.0	-12.9
Subsaharan Africa	42.5	13.2	12.3	2.8	-69.0	-6.9	-71.1	153	148	131	164	163	156	177	-45.8	-48.7	-55.6	-41.4	-40.5	-38.1	-29.0
<b>Middle East</b>	<b>73.0</b>	<b>19.8</b>	<b>21.4</b>	<b>4.8</b>	<b>-72.9</b>	<b>7.9</b>	<b>-70.7</b>	<b>287</b>	<b>289</b>	<b>257</b>	<b>319</b>	<b>317</b>	<b>293</b>	<b>278</b>	<b>-23.9</b>	<b>-28.2</b>	<b>-36.4</b>	<b>-19.9</b>	<b>-21.4</b>	<b>-10.0</b>	<b>3.2</b>
<i>Memorandum<sup>3</sup></i>																					
ASEAN	138.0	25.5	2.9	0.7	-81.5	-88.5	-97.9	742	545	120	975	899	↑	↑	-85.0	-89	-96	-80	-79	-72	-65
G20	1,003	302	347	77.8	-69.8	14.9	-65.4	177	245	234	252	277	189	74	-36.2	-40	-50	-32	-32	-29	-23
GCC	47.7	13.5	15.3	3.4	-71.7	13.5	-67.9	316	306	280	332	346	314	378	-11.9	-17	-25	-9	-14	2	31
LDCs	36.4	10.5	6.8	1.5	-71.1	-35.3	-81.3	141	119	59	199	213	224	260	-67.7	-71	-77	-64	-64	-58	-49
LLDCs	50.5	12.2	11.8	2.7	-75.9	-2.5	-76.5	174	158	115	191	208	189	246	-57.9	-61	-71	-53	-49	-50	-40
SIDS	43.3	10.6	12.5	2.8	-75.5	17.9	-71.1	164	180	198	168	166	145	114	-44.7	-48	-57	-37	-34	-32	-27

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, September 2022)

\* Provisional data

<sup>1</sup> 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](http://www.imf.org/external/ns/cs.aspx?id=29).<sup>2</sup> Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)<sup>3</sup> ASEAN: Association of Southeast Asian Nations, G20: Group of Twenty, GCC: Gulf Cooperation Council, LDCs: Least Developed Countries LLDCs: Landlocked Developing Countries SIDS: Small Island Developing States  
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>



The UNWTO Tourism Data Dashboard – provides statistics and insights on key indicators for inbound and outbound tourism at the global, regional and national levels. Data covers tourist arrivals, tourism receipts, tourism share of exports and contribution to GDP, source markets, seasonality and accommodation data.

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- UNWTO/IATA Easy Travel
- COVID-19: Measures to Support Travel and Tourism

25/09/2022

Latest update

Methodological Notes



EASY TRAVEL

UNWTO and IATA have developed the first dashboard on Travel Restrictions and Health-related Travel Requirements, with the aim of supporting the recovery of tourism by restoring the confidence of tourists through up-to-date information and insights.

Last update  
28. sep. 2022

HEALTH INDICATORS

RESTRICTIONS

RESTRICTION-FREE COUNTRIES

MAP VIEW

ANALYSIS

Disclaimer

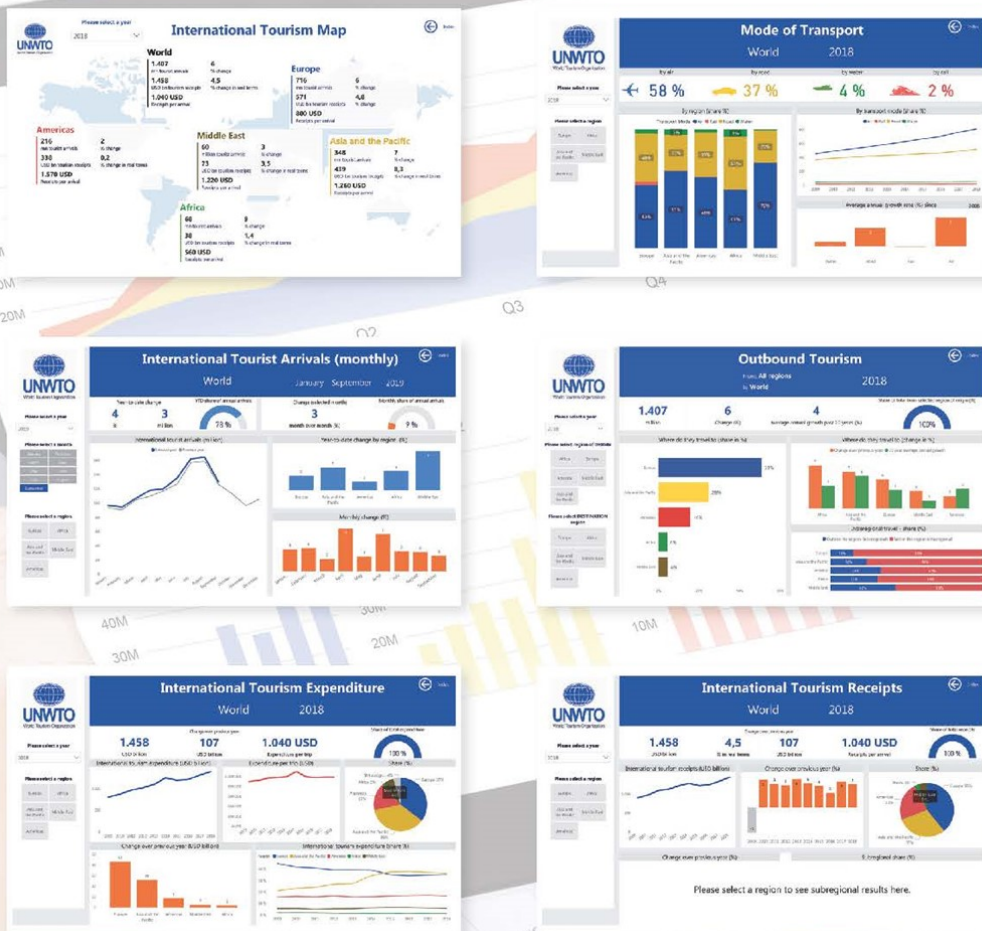
## Industry Indicators

### *International air travel continues to show robust recovery in the first seven months of 2022*

- According to **IATA**, global air travel (measured in revenue passenger-kilometres or RPKs) increased 78% year-on-year in January-July 2022. The total air market continued to increase in July (+59% y-o-y), and reached 75% of pre-crisis levels in the same month. Both international (+151% y-o-y) and domestic traffic (+240%) recorded robust results in July.
- International passenger traffic showed strong year-on-year growth in January-July 2022 (+234%) but remained 45% below 2019 levels. This result closely mirrors the data on international arrivals for the same period (-43%).
- Europe (+264% international RPKs) reported the fastest year-on-year growth in January-July 2022, with buoyant international traffic within Europe which exceeded 2109 levels in May and June. Asia and the Pacific (+323%) recorded significant international growth, as the region gradually eases restrictions. The Middle East (+230%), Latin America (+176%) and North America (+181%) also reported strong growth. International traffic in Africa increased 85%.
- Compared to January-July 2019, North America (-28%), Europe (-29%), Middle East (-33%) and Latin America (-34%) showed the smallest declines in international RPKs, while Africa reported decreases of 43%. International RPKs in Asia and the Pacific were still 78% below 2019.
- Domestic air traffic grew in all large markets reported by IATA. Japan (+87%), Australia (+60%), the United States (+37%), and Brazil (+53%) saw robust growth in domestic RPKs in the first seven months of 2022. Compared to 2019, domestic RPKs in Brazil (-6%) and the United States (-8%) were close to pre-pandemic levels in January-July 2022.
- In India, domestic RPKs increased 70% y-o-y in January-July 2022 and reached 82% of 2019 levels. In China, domestic RPKs decreased 45% in the first seven months of 2022 and traffic levels are still 52% below 2019 levels.
- In terms of capacity, international capacity worldwide (measured in available seat-kilometres or ASKs) increased 118% y-o-y in January-July 2022, but was still 40% below 2019 levels. Domestic air capacity grew 7% through July 2022 and recovered 84% of 2019 levels, according to IATA. Domestic air capacity was close or exceeded pre-pandemic levels through July 2022 in Latin America (+1%), the Middle East (-2%), North America (-6%) and Europe (-10%), as well as in Brazil (-1%), the United States (-6%) and India (-9%).
- Data from **ForwardKeys** shows a 43% drop in international air bookings made between 1 January and 31 July 2022 (versus 2019) for any future travel. By departure region, Asia and the Pacific (-80%) suffered the biggest decline, followed by Africa and the Middle East (-36%). Bookings from Europe (-29%) and the Americas (-21%) were comparatively better. North America, The Caribbean and Central America showed encouraging signs of recovery, according to air booking data from those subregions, with global bookings 19%, 22% and 22% below the same period in 2019 respectively. Strong bookings were recorded from the United States (-14%), particularly to Central America (+11%), Mexico (+18%) and Caribbean (+1%) destinations.
- South Asia and Southern Europe also showed strong performance among US travellers with bookings 7% and 3% up compared to 2019. The best performing destinations in South Asia were Maldives (+98%) and India (+10%). In Southern Europe, Albania (+66%), Turkey (+60%) and Portugal (+46%) were destinations benefitting the most from US travellers. Bookings from Europe to the Caribbean were 1% above 2019 levels.
- According to **STR**, global hotel occupancy gradually improved throughout January-July 2022. Global occupancy rates reached 67% in August 2022, from 43% in January 2022.
- Europe led the way with occupancy levels at 74% in both July and August 2022. The Americas (66%), the Middle East (63%), Asia and the Pacific (62%) and Africa (61%) all saw occupancy rates higher than 60% in August 2022. These improved rates were reflected across most subregions, with Northern Europe (79%), and Southern Mediterranean Europe (76%) showing the highest occupancy rates in August 2022 (Data by region are based on STR statistical regions).

# UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.



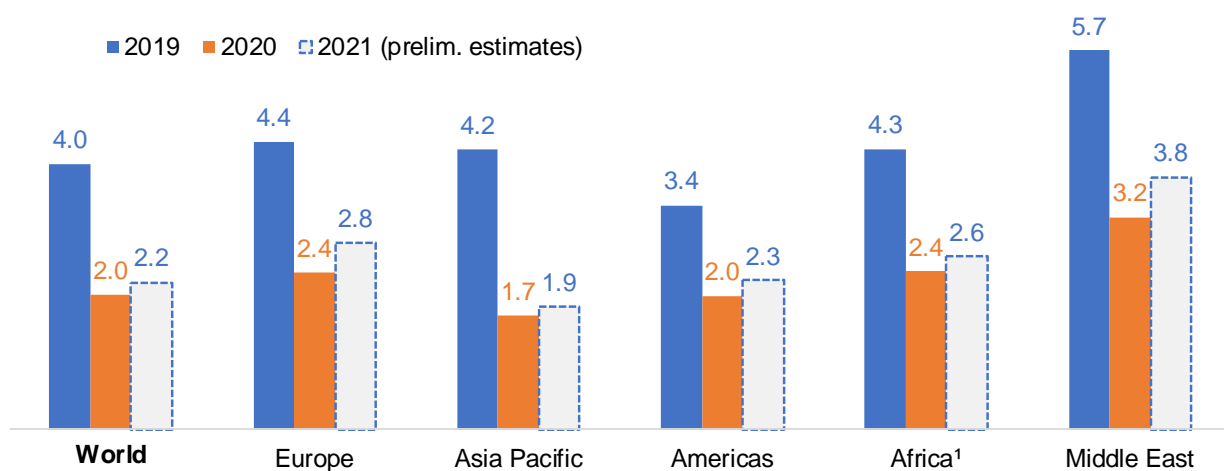
Consult the tourism dashboard at: [www.unwto.org/unwto-tourism-dashboard](http://www.unwto.org/unwto-tourism-dashboard)



## The Economic Contribution of Tourism (update)

- Tourism represents a major source of export revenues for many countries and an important part of their economies. The sector supports millions of direct and indirect jobs all over the world, particularly for women and young people.
- In 2020-21, the Covid-19 pandemic caused an unprecedented disruption to tourism, resulting in a massive drop in international arrivals and tourism revenues following a global lockdown and widespread travel restrictions to contain the coronavirus. International arrivals plunged from 1.5 billion in 2019 to 0.4 billion in 2020, a 72% decline. In 2021 they remained 70% below pre-pandemic levels.
- Export revenues from tourism (consisting of international tourism receipts and passenger transport fares) fell from USD 1.8 trillion in 2019 to USD 0.7 trillion in 2020, a 63% drop in real terms. In 2021 they were still 60% below 2019 levels.
- Building on the modelling work of [“The Economic Contribution of Tourism and the Impact of Covid-19” \(November 2021\)](#), our updated estimates show the contribution of tourism declining from **4.0%** of global GDP in 2019, to **2.0%** in 2020 and then rebounding slightly to **2.2%** in 2021, measured in tourism direct gross domestic product (TDGDP) and based on the framework of Tourism Satellite Accounts (TSA)<sup>1</sup>.
- In value terms, TDGDP fell from USD 3.5 trillion in 2019, to USD 1.7 trillion in 2020 and recovered to about 2.2 trillion in 2021 following a moderate increase in travel, particularly domestic tourism. Overall, the pandemic caused an economic loss of some USD 3.2 trillion in TDGDP, of which USD 1.8 trillion in 2020 and USD 1.4 trillion in 2021.
- By regions, Asia and the Pacific boasted the largest tourism economy before the pandemic, with a TDGDP of USD 1.3 trillion in 2019, followed by Europe and the Americas with about USD 1.0 trillion each. In the Middle East it reached about USD 135 billion, and in Africa about USD 90 billion.
- The pandemic caused Asia and the Pacific's TDGDP to drop from 4.2% of GDP in 2019 to 1.7% in 2020, before timidly bouncing back to 1.9% in 2021. In Europe, it fell from 4.4% to 2.4%, then climbed to 2.8%. In the Americas it moved from 3.4% of GDP in 2019 to 2.0% in 2020 and 2.3% in 2021.
- The largest percentage point (pp) loss in 2020 and 2021 combined was also recorded in Asia and the Pacific with -4.9 pp in TDGDP, followed by the Middle East with -4.4 pp. Europe and Africa both saw a decline of 3.5 pp due to the pandemic and the Americas 2.5 pp. In 2021, the Middle East had the highest relative TDGDP, with tourism directly accounting for 3.8% of the region's economy.

Tourism direct gross domestic product (TDGDP), % of GDP



Source: UNWTO

<sup>1</sup> Estimates for Africa should be interpreted with caution due to limited official data.

(Data as of Sept. 2022)

<sup>1</sup> For more information on TDGDP, see methodological section of “The Economic Contribution of Tourism and the Impact of Covid-19” (November 2021) at: [www.e-unwto.org/doi/10.18111/9789284423200](http://www.e-unwto.org/doi/10.18111/9789284423200)

## UNWTO Confidence Index

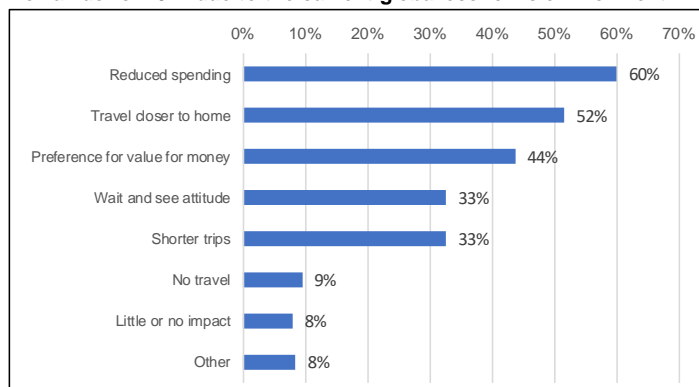
### Confidence Index confirms strong demand in May-August 2022, but downgrades sentiment for the remainder of the year

- Based on the survey conducted in September 2022, the UNWTO Confidence Index confirms the strong travel demand seen in the period May-August 2022, reflecting a busy Northern Hemisphere summer season. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period May-August 2022 with a score of 125, matching the bullish expectations expressed by the Panel in the May survey for that 4-month period (124).
- Some two-thirds of survey respondents evaluated May-August 2022 as better (38%) or much better (21%) than expected, while 17% did not see any change. Only a quarter of experts considered performance worse or much worse than expected.
- Experts indicated that despite headwinds, travel was robust as pent-up demand was unleashed and more destinations gradually eased or lifted restrictions. However, congestion in several major airports and workforce shortages caused some operation and travel disruptions during the summer season.

#### Cautious expectations for Sept.-Dec. 2022

- Although prospects for the remainder of the year remain cautiously optimistic, the Index shows a downgrade compared to the previous period. Tourism experts rated the period September-December 2022 with a score of 111, below the 125 score of the previous four months, but still indicating above-average performance. Almost half of experts (47%) see better prospects for the period September-December 2022 (down from 59% in May-August), while 24% see no particular change and 28% consider it could be worse.
- According to experts, the economic environment continues to be the main factor weighing on the recovery of international tourism. Rising inflation and the spike in energy prices have resulted in higher transport and accommodation costs, while putting consumer purchasing power and disposable income under pressure.
- This could translate into a more cautious consumer attitude, with reduced spending and travelling closer to home, making shorter trips or looking for value for money.

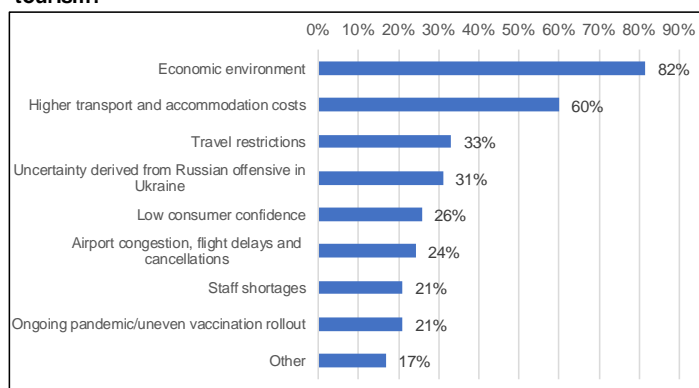
#### What could be the potential impact in consumer behaviour in the remainder of 2022 due to the current global economic environment?



Source: September 2022 Survey of the UNWTO Panel of Tourism Experts

- Some experts pointed out that the potential impact of an economic slowdown on travel would depend on how long and how deep the downturn is.
- Travel restrictions and the spread of the coronavirus, which have been the main obstacles to the effective recovery of international tourism since the pandemic began, have gradually diminished. This is reflected in the increasing number of destinations lifting COVID-19 related restrictions and the rapid advancement in vaccinations around the world. However, some major outbound markets mostly in Asia and the Pacific continue to be affected by restrictions related to the coronavirus.

#### What are the main factors weighing on the recovery of international tourism?



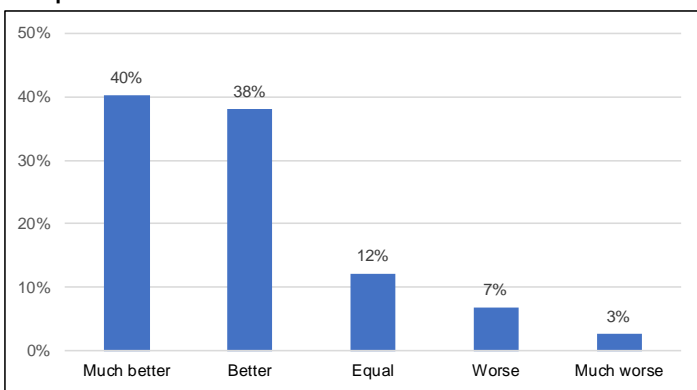
Source: September 2022 Survey of the UNWTO Panel of Tourism Experts

- Domestic tourism continues to drive the recovery in several destinations, in particular in those with a large domestic market. However, domestic tourism is still not compensating for the drop in international tourism in many countries that are largely dependent on international demand.

**Tourism to continue to consolidate results in 2023**

- According to the latest UNWTO Panel of Experts survey, a majority of tourism professionals (78%) from across all world regions continue to positively evaluate 2022 and expect better performance compared to 2021.

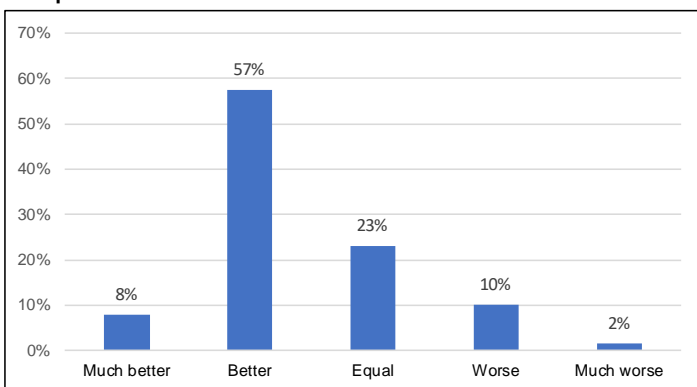
**Prospects for 2022**



Source: September 2022 Survey of the UNWTO Panel of Tourism Experts

- Experts are also confident about 2023, with 65% foreseeing better tourism performance than in 2022.

**Prospects for 2023**

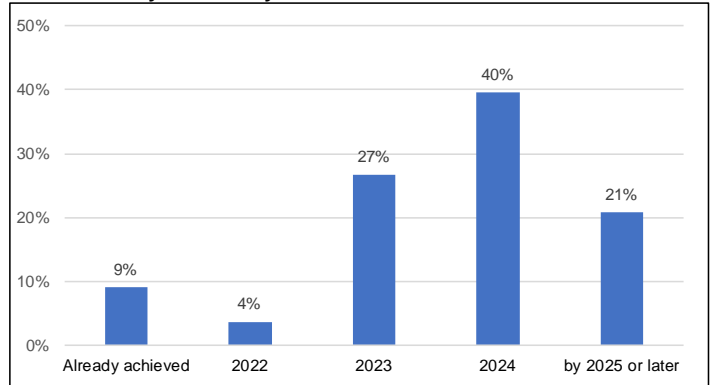


Source: September 2022 Survey of the UNWTO Panel of Tourism Experts

- Yet, the uncertain economic environment seems to have reversed prospects for a return to pre-pandemic levels in the near term. Some 61% of experts now see a potential return of international arrivals to 2019 levels in 2024 or later while those

indicating a return to pre-pandemic levels in 2023 has diminished (27%) compared to the May survey (48%). Only 5% of respondents indicated that their destinations had already returned to 2019 levels.

**When do you expect international tourism to return to pre-pandemic 2019 levels in your country?**



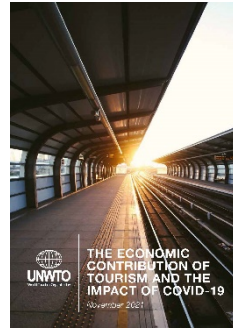
Source: September 2022 Survey of the UNWTO Panel of Tourism Experts

- In this regard, 39% of experts estimate that international tourism in their destination could reach 80% to 100% of 2019 levels in 2022, while 23% point to 60% to 80% of 2019 levels. Some 13% think that by the end of 2022, international tourism could reach or exceed pre-pandemic levels in their destination. Only 5% of respondents see international arrivals remaining 60% to 80% below 2019 levels in 2022, which corresponds to the levels of 2021 (-71%).
- By regions, the largest share of experts pointing to a return to 2019 levels in 2024 or later are in Asia and the Pacific (81%), of which 42% pointed to 2024 and 39% to 2025 or later. Experts from the Americas (62%) seem to be more confident about a full recovery in 2023.

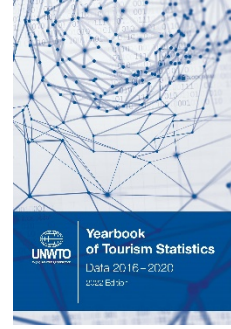
*(For more survey graphs please see the Statistical Annex).*



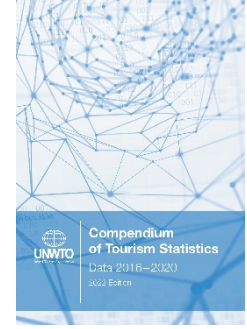
**UNWTO World Tourism Barometer**



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



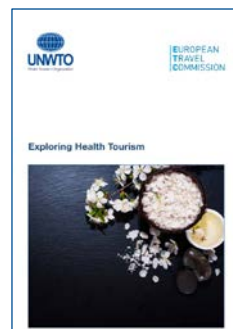
**Yearbook of Tourism Statistics (2016-2020)**



**Compendium of Tourism Statistics (2016-2020)**



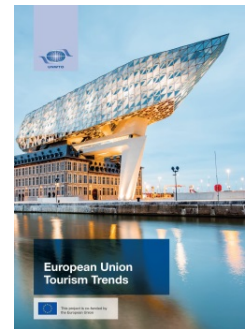
**Guidelines for Success in the Chinese Outbound Tourism Market (2019)**



**Exploring Health Tourism (2018)**



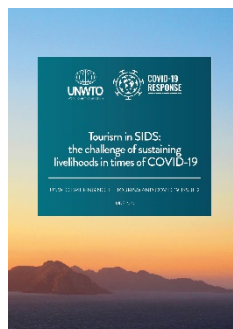
**The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)**



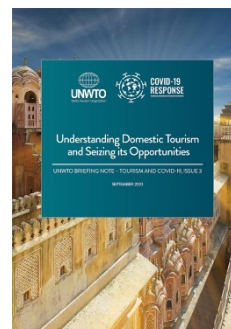
**European Union Tourism Trends (2018)**



**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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