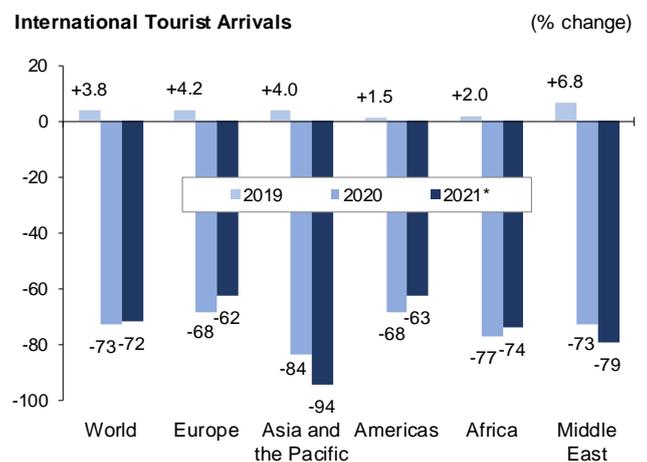




International tourism up 4% in 2021 but still 72% below pre-pandemic levels

- Global tourism experienced a mild 4% upturn in 2021, with 15 million more international tourist arrivals (overnight visitors) than in 2020 but remained 72% below the levels of pre-pandemic year 2019 according to preliminary estimates.
- This follows a 73% plunge in international travel in 2020, the worst year on record for tourism due to the COVID-19 pandemic.
- International tourism rebounded moderately in the second half of 2021, with international arrivals down 62% in both the third and fourth quarters, compared to the same periods in 2019.
- Rising vaccination rates combined with softer travel restrictions due to increased cross-border coordination and protocols, have all helped release pent up demand in 2021.
- Europe and the Americas recorded the strongest results by region relative to 2020 with arrivals up 19% and 17% respectively, though they remained 62% and 63% below 2019 levels.
- Africa saw a 12% increase in 2021 compared to 2020, though remained 74% below 2019 levels. In the Middle East arrivals declined 24% compared to 2020 and 79% over 2019. In Asia and the Pacific, arrivals dropped 65% from 2020 levels and 94% when compared to pre-pandemic values.
- By subregion, the Caribbean saw the best performance in 2021, with international arrivals up 63% over 2020, though 37% below 2019, with some destinations coming close to, or exceeding pre-pandemic levels.
- The economic contribution of tourism (tourism direct gross domestic product) is estimated at US\$1.9 trillion in 2021, above the US\$1.6 trillion in 2020, but still well below the pre-pandemic value of US\$ 3.5 trillion.
- The latest UNWTO Panel of Experts survey indicates that 61% of tourism professionals expect better performance in 2022 than in 2021. However, most experts (64%) also believe international tourism will not return to 2019 levels until 2024 or later.
- The recent surge in COVID-19 cases and the emergence of the Omicron variant could disrupt the recovery of tourism in early 2022.
- UNWTO scenarios point to 30% to 78% growth in international tourist arrivals in 2022 depending on various factors. This would be 50% to 63% below pre-pandemic levels.
- While international tourism bounces back, domestic tourism will continue to drive the recovery of the sector in an increasing number of destinations. Domestic travel is fueled by demand for destinations which are closer to home and have low population density, as tourists look for open-air activities, nature-based products and rural tourism.



Source: UNWTO

* Provisional data (% change over 2019)



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 159 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 in mid-January 2022.

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

Pages 1-4 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

2021 saw a mild 4% increase or 15 million more international arrivals than in 2020

- According to preliminary estimates, international tourism experienced a mild 4% upturn in 2021, with 15 million more international tourist arrivals (overnight visitors) than in 2020. However, arrivals remained 72% below the levels of pre-pandemic year 2019.
- This follows a 73% plunge in international travel in 2020, the worst year on record for tourism due to the unprecedented impact from the COVID-19 pandemic.
- An estimated 415 million international arrivals were recorded globally in 2021 versus 400 million in 2020.
- After a weak first half of 2021, international tourism rebounded moderately in the second half of the year. Indeed, the first half of 2021 saw 117 million international arrivals (28% of the 2021 total), while the second half saw 298 million (72%).
- International arrivals declined 62% during both the third and fourth quarters of 2021, compared to 2019. October (-59%) and November (-63%) saw relatively better performance following the upturn experienced during the Northern Hemisphere summer months. These results compare favorably with October and November 2020, when arrivals declined by more than 80%, due to the re-introduction of travel restrictions in many countries amid the resurgence of the virus.
- The uplift in demand in 2021 was driven by increased traveler confidence amid rapid progress on vaccinations and the easing of entry restrictions in many destinations.
- As countries again relaxed their restrictions for the 2021 Northern Hemisphere summer season, the destinations with complete border closure dropped to 63 in June and 46 in November 2021, the lowest since the start of the pandemic (see the UNWTO Sustainable Development of Tourism Department's eleventh report on COVID-19 travel restrictions)
- International tourism is estimated to have dropped 66% in December 2021, amid the rise of the new Omicron variant and a surge in COVID-19 cases.
- Africa saw a 12% increase in 2021 compared to 2020, though remained 74% below 2019 levels. In the Middle East arrivals declined 24% compared to 2020 and 79% over 2019.
- In Asia and the Pacific arrivals were 94% below 2019 levels in 2021, as many destinations remained closed to non-essential travel.
- By subregion, the Caribbean saw the strongest performance in 2021, with international arrivals up 63% over 2020, though 37% below 2019. According to available data, some islands in the Caribbean came close to, or exceeded pre-pandemic levels.
- Southern Mediterranean Europe (+57%) and Central America (+54%) also enjoyed a significant rebound over 2020, but remained 54% and 56% below 2019 levels respectively. North America (+17%) and Central Eastern Europe (+18%) climbed above 2020 levels as well.
- Among the destinations with available data for January-November 2021, several islands in the Caribbean and Asia and the Pacific, together with some small European destinations recorded the best results compared to 2019: US Virgin Islands (+29%), Puerto Rico (+4%), Albania (-11%), San Marino (-19%), Maldives (-24%), Saint Maarten (-26%), Dominican Republic (-27%), Liechtenstein (-29%) and Aruba (-30%). Major destination Mexico saw a decline of 30% through November 2021.
- Despite the overall improvement, the pace of recovery remains slow and uneven across world regions due to varying degrees of mobility restrictions, vaccination rates and traveler confidence.
- While international tourism gradually recovers, domestic travel continues to contribute to the recovery of the overall tourism sector, especially in several destinations with large domestic markets.

Europe and the Americas recorded the strongest results in 2021

- Europe and the Americas recorded the strongest results by region relative to 2020 with arrivals up 19% and 17% respectively, though they remained 62% and 63% below 2019 levels.

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series															
	(million)			Share (%)	Change (%)			Change (%)*								
								2021 over 2020 ²				2021 over 2019				
	2019	2020*	2021*	2021*	20/19	21/20*	21/19*	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
World	1,464	400	415	100	-72.7	3.8	-71.7	-80.7	244.9	67.5	132.6	-86.0	-80.1	-62.0	-62.3	
Advanced economies ¹	777	215	218	52.5	-72.3	1.2	-72.0	-85.0	167.4	43.7	200.6	-89.5	-83.6	-61.5	-58.9	
Emerging economies ¹	687	185	197	47.5	-73.1	6.8	-71.3	-76.9	355.0	116.6	82.8	-82.6	-75.8	-62.7	-65.7	
<i>By UNWTO regions:</i>																
Europe	746.1	235.7	279.8	67.4	-68.4	18.7	-62.5	-80.3	186.5	54.4	182.2	-84.5	-78.9	-50.0	-45.9	
Northern Europe	83.5	21.7	15.1	3.6	-74.0	-30.3	-81.9	-89.0	72.0	0.7	82.9	-91.0	-91.5	-78.9	-75.4	
Western Europe	205.4	79.8	71.7	17.3	-61.1	-10.2	-65.1	-85.1	100.8	13.6	231.2	-88.4	-79.1	-52.1	-48.4	
Central/Eastern Eur.	153.2	46.0	54.5	13.1	-70.0	18.4	-64.4	-73.8	272.5	69.1	133.3	-78.7	-75.8	-54.2	-52.9	
Southern/Medit. Eur.	304.0	88.2	138.5	33.4	-71.0	57.1	-54.4	-77.2	259.6	92.0	200.9	-82.6	-77.0	-40.1	-30.9	
- of which EU-27	540.5	178.4	203.9	49.1	-67.0	14.3	-62.3	-82.7	133.2	41.4	222.0	-86.7	-79.9	-49.6	-43.4	
Asia and the Pacific	360.4	59.4	20.9	5.0	-83.5	-64.8	-94.2	-91.8	301.3	76.2	55.8	-95.5	-94.4	-94.2	-92.2	
North-East Asia	170.3	20.3	11.3	2.7	-88.1	-44.3	-93.4	-84.8	538.1	64.2	-1.1	-94.7	-93.0	-92.9	-92.8	
South-East Asia	138.6	25.4	3.3	0.8	-81.7	-87.0	-97.6	-97.2	13.9	0.5	87.2	-98.2	-98.0	-98.0	-96.3	
Oceania	17.5	3.7	0.7	0.2	-79.0	-81.4	-96.1	-98.2	935.5	184.1	95.5	-98.6	-86.4	-94.1	-96.2	
South Asia	34.0	10.0	5.6	1.4	-70.5	-43.8	-83.4	-86.7	426.0	263.5	236.1	-87.1	-90.7	-85.2	-72.6	
Americas	219.3	69.9	81.9	19.7	-68.1	17.2	-62.7	-70.5	417.0	183.1	93.4	-75.2	-61.2	-59.8	-52.1	
North America	146.6	46.7	54.8	13.2	-68.2	17.3	-62.7	-67.1	263.8	138.2	73.7	-72.0	-64.5	-62.4	-53.0	
Caribbean	26.3	10.3	16.7	4.0	-61.0	62.8	-36.5	-57.2	↑	250.3	116.5	-64.4	-22.9	-15.0	-23.0	
Central America	10.9	3.1	4.8	1.1	-71.6	53.7	-56.4	-71.7	↑	↑	218.3	-76.7	-58.1	-48.3	-40.1	
South America	35.4	9.8	5.7	1.4	-72.2	-42.4	-84.0	-90.5	↑	530.5	182.6	-92.2	-79.9	-81.0	-72.0	
Africa	68.6	15.9	17.9	4.3	-76.8	12.4	-73.9	-78.9	144.5	96.5	55.0	-81.6	-76.7	-73.5	-66.2	
North Africa	25.6	5.5	6.1	1.5	-78.4	10.4	-76.1	-77.1	↑	188.0	91.6	-81.7	-79.0	-76.3	-68.9	
Subsaharan Africa	42.9	10.4	11.8	2.8	-75.9	13.5	-72.6	-79.6	66.1	61.4	42.6	-81.6	-75.3	-71.1	-64.8	
Middle East	69.9	19.0	14.5	3.5	-72.8	-23.7	-79.3	-77.5	↑	130.1	64.5	-82.2	-82.9	-81.3	-70.6	

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, January 2022)

* Provisional data

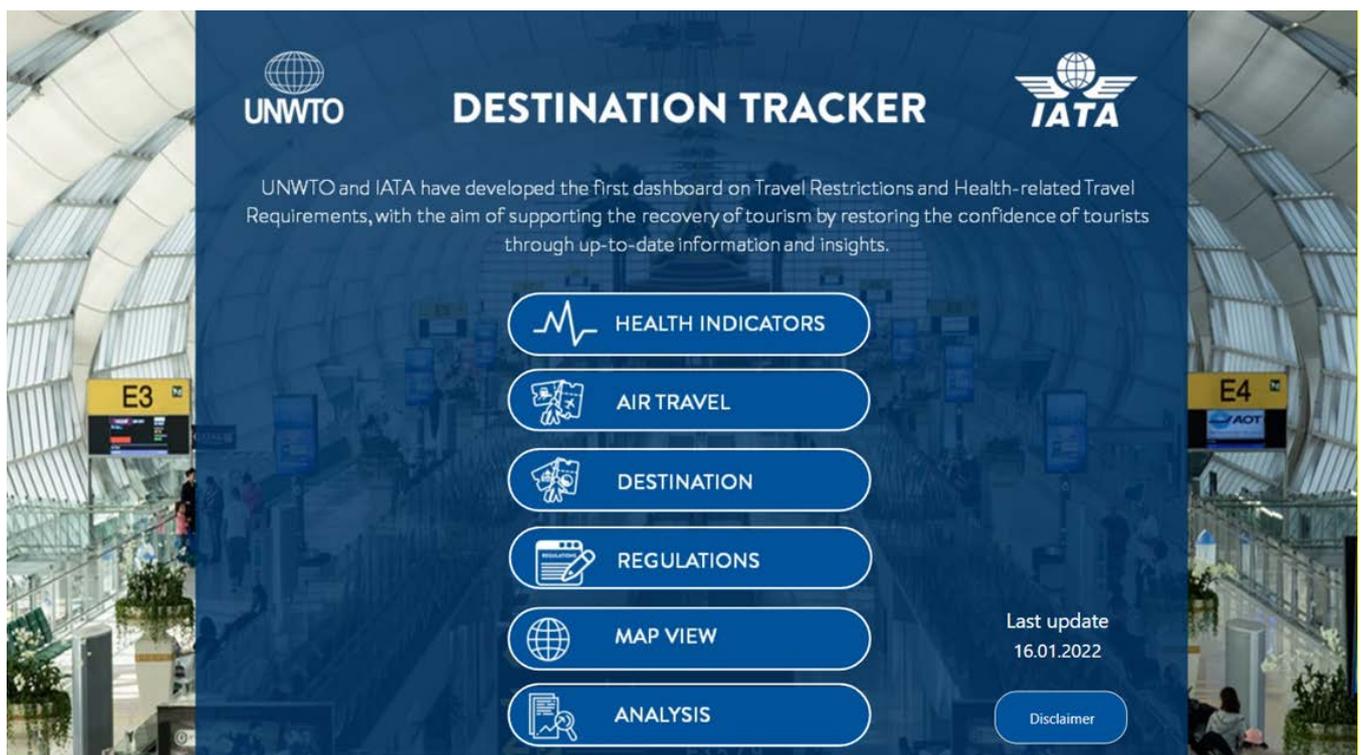
¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.² Arrows (↑) indicate percentage change above 1000. (See Methodological Notes).

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>

A challenging start of 2022

- The new Omicron variant which hampered tourism at the start of the year as some countries reintroduced travel bans and restrictions for certain markets, shows the volatility of the health situation and consequent impact of travel restrictions. Yet, Omicron may prove to have a limited impact as cases recede, which surely will contribute to restore consumer confidence, ease restrictions and release pent-up demand towards the Easter holiday period.
- Economic factors could also weigh on travel demand in 2022, particularly the recent spike in oil prices (from lows of US\$40 in 2020 to over US\$90 in early 2022 per barrel of Brent), as well as rising inflation, the potential rise in interest rates and disruption in supply chains. This could translate into even higher transport and accommodation prices, supply shortages, and put consumer purchasing power and savings under pressure.
- The challenging economic environment is reflected in the latest projection made by the International Monetary Fund, pointing to more moderate global growth this year: from 5.9% in 2021 to 4.4% in 2022, according to the January 2022 Update of the World Economic Outlook (WEO). Aside from economic disruptions, recent geopolitical tensions in Eastern Europe have added to growing uncertainty.
- Despite the clear improvement in international travel in 2021, uneven vaccination rates around the world and the possibility of new COVID-19 variants continue to put the recovery at risk. As of 31 January 2022, some 58% of the world's population had been vaccinated against COVID-19, but marked differences exist between world regions. While the share of vaccinated people in Europe and Asia reached 65%, this was still 14% in Africa (data from "Our World in Data" contained in the [UNWTO/IATA Destination Tracker](#)).
- On the upside, the recovery experienced in many destinations and markets is expected to continue, as the latest UNWTO scenarios for 2022 and prospects by the Panel of Experts show. An increasing number of destinations are opening up to international travel and easing restrictions to vaccinated travellers. Recent reopening announcements made by several Asian destinations are encouraging, as the region has remained the most restrictive one with regard to non-essential travel. The experience gained from developments 2020 and 2021 should also provide opportunities to strengthen the recovery and unleash large pent-up demand.
- The safe resumption of international travel will continue to depend on ensuring vaccine equity and coordinating the response among countries in terms of travel restrictions, as well as harmonized safety and hygiene protocols and effective communication to help restore consumer confidence.



Industry Indicators

International air travel shows improvement in 2021, but still far from pre-pandemic levels

- According to **IATA**, global passenger air traffic fell by 59% (measured in revenue passenger kilometres or RPKs) in the year 2021 compared to pre-crisis year 2019. After a sluggish first half of 2021, demand for air travel started to recover in mid-2021 as more markets reopened with vaccination progress. International passenger traffic declined by 76% in 2021 compared to 2019.
- This result closely mirrors the drop recorded in international tourist arrivals (an estimated -72% in 2021 versus 2019). Among world regions, Asia and the Pacific (-93%) recorded the largest decrease in international RPKs in 2021, due to high travel restrictions. The Middle East, Europe, Latin America, North America and Africa recorded declines in the range of 72%-65%.
- Despite the Omicron outbreak, international air traffic continued to recover in December 2021 (-58% over same month of 2019), thanks to VFR travel (visit friends and relatives) which has proven more resilient. However, IATA points out that results would have been stronger in the absence of the Omicron variant. Latin America (-40% international RPKs), Europe and North America (both -42% RPKs) performed the best in December, while Africa (-62% RPKs) was the only region to see weaker results due to travel bans from southern Africa to limit the spread of the variant.
- Domestic air traffic continued to lead the way in 2021, with a decline of 26% over 2019 compared with a drop of 76% in international routes. The United States recorded a 24% decrease in 2021, impacted by the Delta variant in late summer and lately Omicron, which caused staff shortage by the end of the year. China exceeded pre-crisis levels in the months of April and May, but small outbreaks leading to restrictions pushed domestic RPKs in 2021 to levels 24% below 2019. Domestic RPKs in Brazil (-27% in 2021) recovered with the support of robust progress in vaccination and reached 96% of 2019 levels in December. India saw a 42% RPK decline, while domestic traffic in Australia (-62%) and Japan (-58%) suffered from on and off strict travel rules.
- According to **ICAO**, the number of air passengers worldwide in 2021 reached 2.3 billion or 49% below pre-pandemic (2019) levels, an improvement from the 60% drop seen in 2020. Global seat capacity offered by airlines improved by 20% during 2021, exceeding the growth in passenger demand. Mirroring the data by IATA, ICAO shows that domestic seat capacity (-19%) recovered much faster than international capacity (-65%). The overall passenger load factor in 2021 stood at 68%, compared to 82% in 2019.
- Data from **ForwardKeys** indicates a 69% drop in international air bookings made between 1 January and 31 December 2021 (versus 2019) for any future international travel. By departure region, Asia and the Pacific (-95%) suffered the largest drop, followed by Africa and the Middle East (-63%) and Europe (-62%). Bookings from the Americas (-52%) were comparatively better. The Caribbean and Central America showed encouraging signs of recovery, according to air booking data from those subregions, with global bookings 39% and 38% below the same period in 2019 respectively.
- Stronger outbound air reservations were recorded from the United States (-42%), particularly to Mexico (+7%) and Caribbean destinations (-6%). Caribbean islands also benefited from European travel flows, with countries such as Germany (-39%), UK (-36%) and France (-17%) recording close to pre-pandemic booking levels by the end of the year, following the acceleration of international travel before the surge of Omicron.
- According to **STR**, global hotel occupancy continued to improve in 2021. The Middle East led the way globally in terms of recovery, with occupancy levels at 62%, while they reached 53% in both Asia and the Pacific and the Americas, 46% in Africa and 43% in Europe. By subregions, the Caribbean (61%) and South Asia (60%) saw the highest occupancy rates in 2021. (Data by region are based on STR statistical regions).

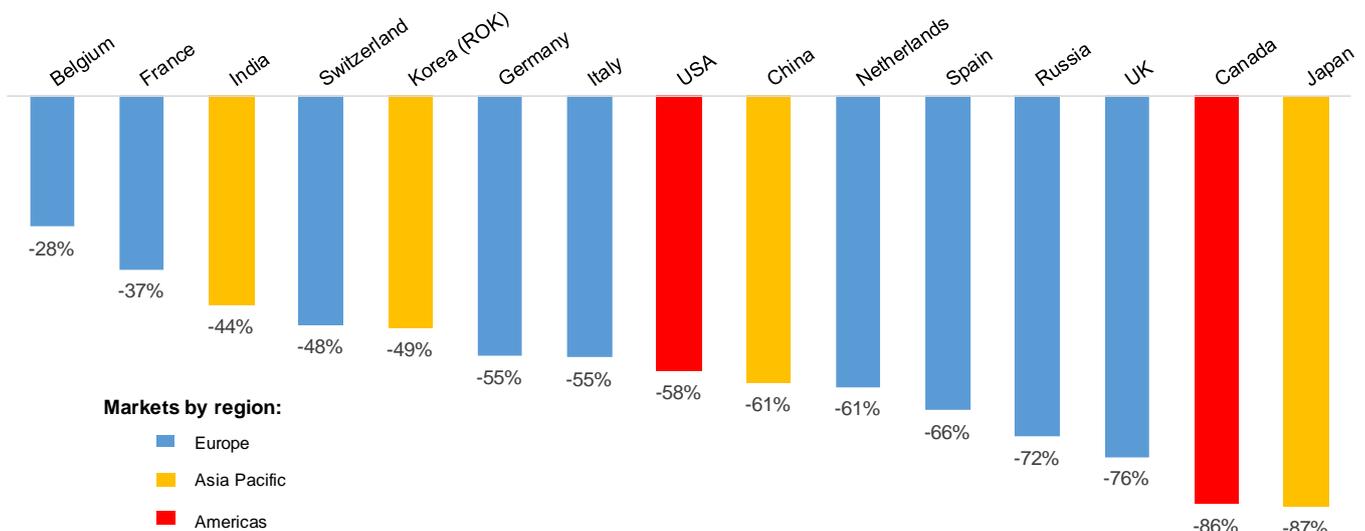
International tourism receipts and expenditure continue to recover slowly

- Following a 64% slump in international tourism receipts in 2020, world destinations recorded a modest improvement in the first nine to eleven months of 2021, especially in Europe, though earnings remained well below the levels of pre-pandemic year 2019.
- International tourism receipts could reach US\$ 700 to 800 billion in 2021 according to preliminary estimates, up from US\$ 536 billion in 2020. (Updated estimates will be published in the May 2022 issue of the UNWTO World Tourism Barometer).
- Among the larger destinations, Mexico and Turkey saw comparatively better results in January-November 2021, as receipts grew by 77% and 103% respectively versus the same period of 2020 (local currencies). However, this was 22% and 32% below the same months of 2019 respectively. France reported an 18% increase over 2020, though a 40% decline over 2019.
- European destinations such as Croatia (-12%), Belgium (-30%), Poland (-37%) and Greece (-42%) also recorded relatively smaller declines in earnings over 2019.
- According to available data at the time of publication, Mexico was the only major destination to see receipts climb above pre-pandemic levels in one or more months of 2021, namely in June, July and September-November
- Among the smaller destinations, North Macedonia, Romania, Serbia, Pakistan, Saint Lucia, and Antigua & Barbuda also recorded higher tourism receipts in specific months, compared to 2019.
- The small improvement in international receipts together with a major rebound in domestic tourism has pushed tourism direct gross domestic product (TDGDP) to an estimated US\$1.9 trillion in 2021, up from US\$1.6 trillion in 2020, but still well below the pre-pandemic value of US\$ 3.5 trillion.

Modest improvement in international tourism expenditure

- Expenditure on outbound travel also improved in some markets in the period January-November 2021. Among the top world source markets, France spent 18% more through November 2021 than in the same period of 2020, but still 35% less than in 2019.
- Belgium (-28% in January-September 2021), India (-44% through June) and the Republic of Korea (-49% through November) also saw relatively better results, though spending remained below 2019 levels. Other markets reporting comparatively smaller declines in expenditure were Qatar (-2%), Saudi Arabia (-27%) and Austria (-39%), all in January-September 2021 over the same period of 2019.

World's Top 15 source markets: international tourism expenditure in 2021 (% change in YTD period)*



Source: UNWTO

(Data as of January 2022)

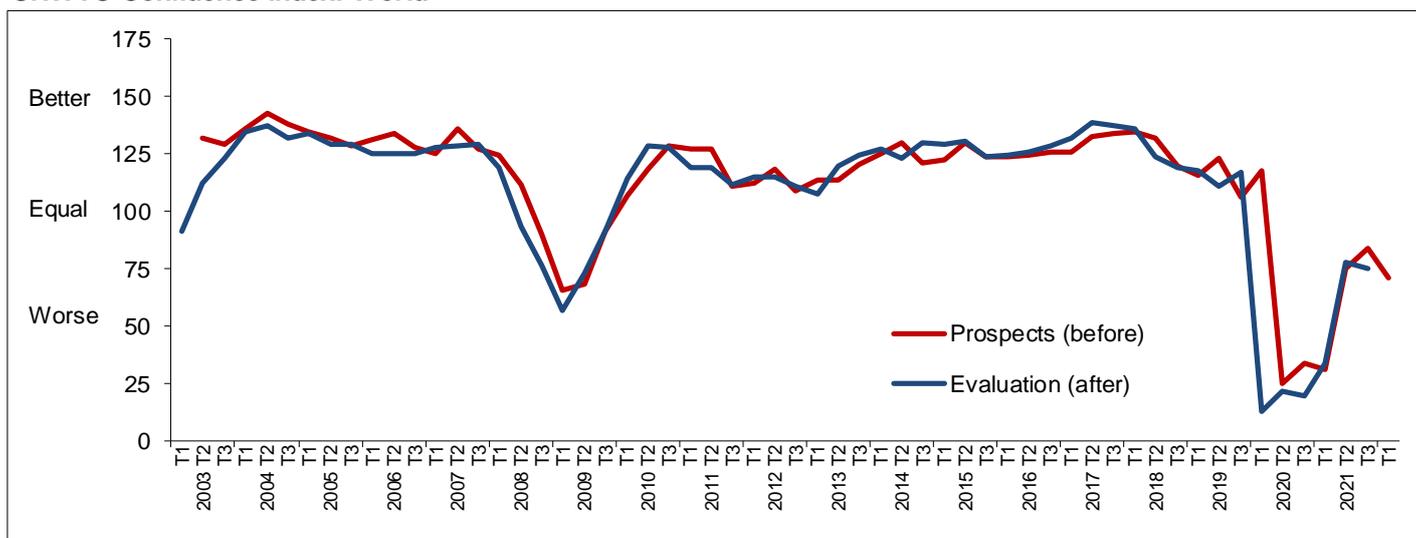
* Highest change in year-to-date period (first nine to eleven months) of 2021 over 2019, based on available data to date.

UNWTO Confidence Index

Confidence weakens slightly amid Omicron and other new risks

- According to the survey conducted in January 2022, the **UNWTO Confidence Index** showed a slight decline in the period September-December 2021, following a small uptick in May-August. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period September-December 2021 with a score of 75, below the expectations expressed by the Panel in the September survey for that 4-month period (84).
- Despite the easing of restrictions and the pent-up demand for travel during the Northern Hemisphere summer season, fears amid the surge of the Omicron variant in late November weighed on confidence levels towards the end of 2021.
- Experts pointed out that the Delta variant and in particular the rapid spread of Omicron, continued to pose a serious risk and led to the re-introduction of travel bans in many countries. The multiplicity and volatility of entry requirements, as well as the uneven pace of vaccination around the world, weighed on the overall results.
- In addition, experts mentioned that while leisure travel is leading the way to recovery in many destinations, the business segment is still largely affected. Large global events such as COP26 in Glasgow or the start of Expo 2020 Dubai took place, but the industry continued to suffer the cancellation or postponement of many events and meetings. Staff and skill shortages are also becoming a major challenge as tourism restarts.
- More than half of survey respondents evaluated September-December 2021 as worse (31%) or much worse (25%) than expected, while 17% did not see any change. Only 27% considered it better.

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

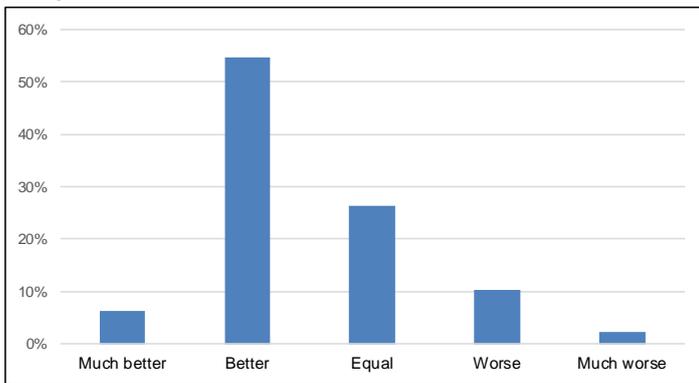
Mixed outlook for January-April 2022

- Expectations for the period January-April 2022 are **mixed** due to the rapid spread of the Omicron variant in early 2022, with 53% of respondents rating the period as worse or much worse than expected. The first four months of the year cover most of the Northern Hemisphere winter season and the Southern Hemisphere summer season, as well as major travel periods such as the Chinese New Year and Easter.
- The UNWTO Confidence Index shows a slight decline in January-April 2022 with prospects for this four-month period producing a score of 71, below the score of 84 for September-December 2021.
- Despite a challenging start of the year, the holding of large events such as the Spanish tourism fair FITUR or sports competitions like the Australian Open and the Beijing 2022 Winter Olympics in the months of January and February (though the latter was closed to the general public) shows positive signs.

2022: Better prospects amid persisting uncertainty

- According to the latest UNWTO Panel of Experts survey, most tourism professionals (61%) see **better** or much better prospects for 2022 compared to 2021. Some 26% are rather uncertain about a trend reversal while 12% still consider 2022 prospects worse compared to 2021.

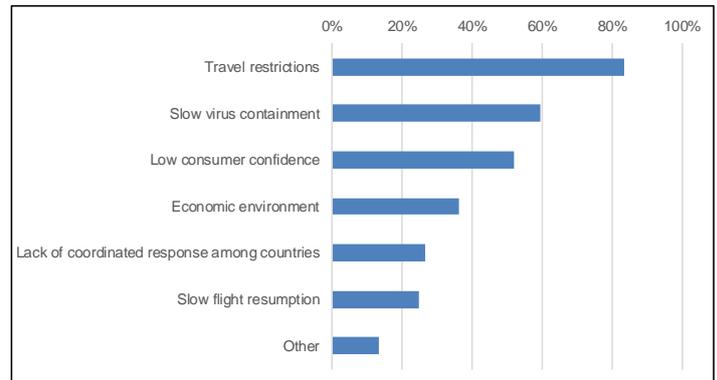
Prospects for 2022



- Slightly more than half of experts considered that no noticeable change in trend occurred in 2021 with regard to inbound tourism in their destination, while the remaining half indicated that international travel experienced an upturn. Tourism performance was comparatively better in 2021 than in 2020, which was reflected in the moderate rebound in many destinations, but overall results were still far from pre-pandemic levels.
- Experts continue to expect a **rebound** which could unleash pent-up demand for international travel in 2022, around the second quarter and mostly during the third quarter. By 2022, a larger share of the world population is expected to be vaccinated and more destinations open again, which would strengthen the modest recovery witnessed in 2021. However, an increasing number of experts (42% vs 33% in the September 2021 survey) expect a potential rebound only in 2023. This could reflect a temporary delay in the ongoing recovery of international tourism, with a challenging start of 2022 amid the Omicron variant.
- According to experts, travel restrictions continue to be the main barrier to the recovery of international tourism, along with slow virus containment. The surge in COVID-19 cases and a challenging economic environment are weighing on consumer confidence. Despite initiatives implemented to facilitate safe travel such as the EU Digital COVID Certificate, the lack of coordinated response among countries to ensure harmonized protocols and

coordinated restrictions remains an important obstacle to fully restore confidence and effectively resume international travel.

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



- On the upside, most experts (51%) believe that the current vaccination roll-out is contributing to the effective resumption of international tourism, though 43% consider that it is contributing only partially. Despite progress made, the **vaccination** roll-out remains uneven. A greater impact will depend on the speed, geographic scope and efficacy of vaccination. According to experts, the vaccine should be accompanied by a coordinated response among countries on travel restrictions, standardized health and safety protocols including testing and vaccination certificates, wider recognition of different vaccines, use of digital tools, reliable data and clear and evidence-based communication. Experts indicate that the continuation of vaccination including the booster dose in both source markets and destinations will be key to gradually lift travel restrictions, increase traveller confidence and resume travel demand.
- An increasing number of destinations are opening up their borders to vaccinated travelers as shown by the reopening announcement made by several destinations including Morocco, Australia, the Philippines, Thailand and New Zealand. Other destinations have recently announced the entry to vaccinated travellers without testing, which would facilitate travel and reduce travel expenses.

Domestic tourism continues to support recovery

- Domestic tourism continues to drive the recovery in an increasing number of destinations, in particular in those with a sheer domestic market. An increasing number of experts (53%, up from 32% in the May survey) underlined the contribution of domestic

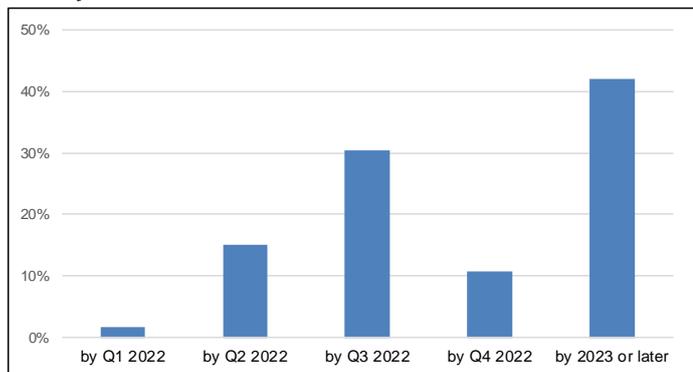
tourism to support the recovery in times of pandemic, where different sorts of restrictions to international travel are still in place. However, domestic tourism is still not compensating for the drop in international tourism in many countries that are largely dependent on international demand. Furthermore, the pandemic continued to severely disrupt domestic travel in some countries, due to local lockdowns, curfews or states of emergency.

- According to experts, **domestic tourism and travel close to home**, are among the major travel trends identified in 2022. Domestic travel has triggered a rising demand for open-air activities, nature-based products and rural tourism linked to a more sustainable, authentic and responsible experience.
- Due to the uncertain and volatile situation caused by the pandemic and related travel restrictions, the predominance of **last-minute bookings** is expected to remain in 2022.
- Other trends identified by experts were visiting friends and relatives as purpose for travel, a growing trend towards more free independent travel (FIT) and a rising interest in wellness tourism.

Travel restrictions continue to be the main barrier to the recovery

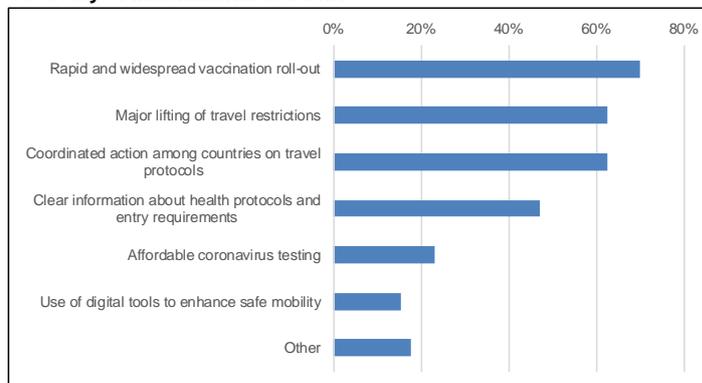
- Travel restrictions continue to be the main barrier to the recovery of international tourism, along with slow virus containment. Despite initiatives implemented to facilitate safe travel such as the EU Digital COVID Certificate, the lack of coordinated response among countries to ensure harmonized protocols and coordinated restrictions remains an important obstacle to fully restore confidence and effectively resume international travel.

When do you expect a rebound in international tourism in your country?



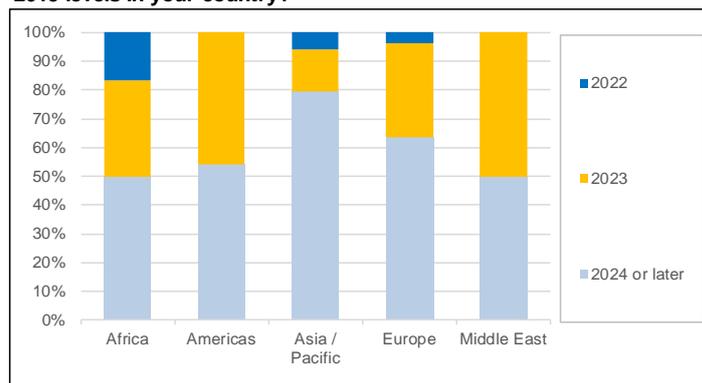
- In this regard, a rapid and more widespread vaccination roll-out, followed by a major lifting of travel restrictions, and more coordination and clearer information on travel protocols, are the main factors identified by experts for the effective recovery of international tourism.

What are the main factors which could contribute to an effective recovery of international tourism?



- Looking ahead, most experts (64%) now expect a return of international arrivals to 2019 levels in 2024 or later, up from 45% in the September survey. The percentage indicating a return to pre-pandemic levels in 2023 (32%) has diminished when compared to the September survey (43%). By regions, the largest share of experts pointing to a return to 2019 levels in 2024 or later are in Asia and the Pacific (80%), followed by Europe (60%) (For more survey graphs please see the Statistical Annex).

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

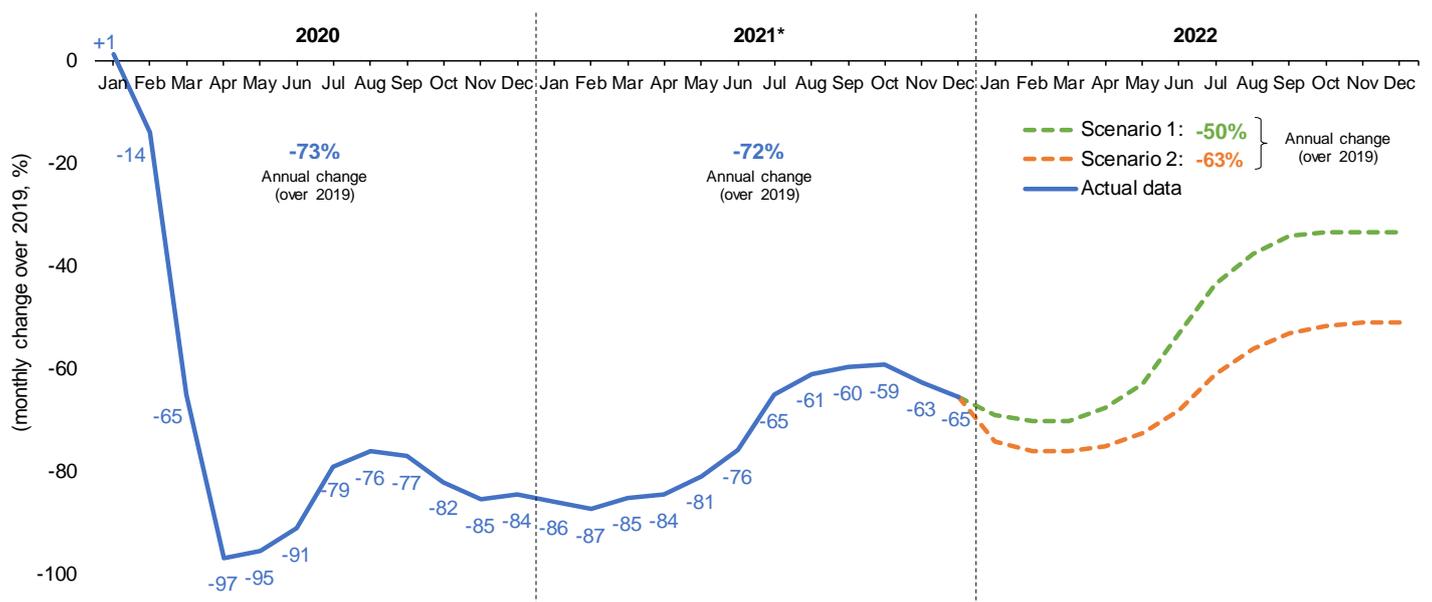


Outlook

Moderately bright outlook for 2022 despite major challenges

- After the unprecedented plunge of international travel in 2020 and 2021, the outlook for 2022 looks moderately bright. The global vaccination effort and new medical treatments for coronavirus have helped reduce fatality rates and slowly restore traveler confidence, while strong policy support and softer restrictions to travel are contributing to unleash pent-up demand. A major rebound in international tourism could take place during the Northern Hemisphere summer season if progress remains on track.
- However, the recovery remains subject to important challenges and uncertainties such as the risk of new virus strains like Omicron, uneven vaccination rates around the world, and ongoing mobility restrictions, particularly in Asia and the Pacific. Geopolitical tensions in Eastern Europe could continue to disrupt travel in the region and elsewhere.
- An economic downturn could weigh on travel demand if rising inflation persists and supply shortages continue. The recent spike in oil prices has pushed accommodation and transport prices higher in many destinations. Tighter monetary policy including interest rate hikes and a reduction in asset purchases by central banks could help stabilize prices but could also dampen consumer demand.
- Two forward-looking scenarios have been outlined for 2022 based on possible evolving circumstances and alternative speeds of recovery:
 - **Scenario 1** (baseline) assumes a progressive improvement in both traveler sentiment and health conditions in 2022 with no major reversals, but a small impact from deteriorating economic conditions, mostly high inflation. The scenario shows international arrivals in 2022 climbing to 50% of 2019 levels, a 78% increase from 2021. After a weak start of the year, travel demand would gain momentum in the second quarter and accelerate in the third, as COVID-19 cases continue to drop, and confidence gradually rise.
 - **Scenario 2** (downside) points to a somewhat weaker recovery due to a slower reduction in coronavirus cases and prolonged travel restrictions in some parts of the world. It also assumes a slightly larger impact from economic factors, including persistently high energy prices and tighter monetary conditions. Under this scenario, international arrivals would grow 30% compared to 2021, but would remain 63% below 2019 levels.
- The above scenarios are subject to revision in upcoming issues of the UNWTO World Tourism Barometer as health, policy and economic factors evolve.

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



Source: UNWTO * Actual data for 2021 is preliminary and based on estimates for destinations which have not yet reported results.

Note: The above scenarios are subject to revision.

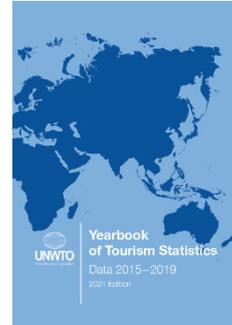
(Data as of January 2022)



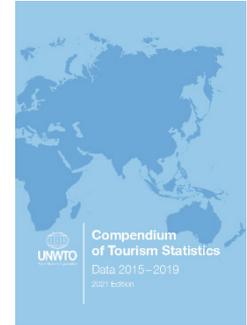
UNWTO World Tourism Barometer



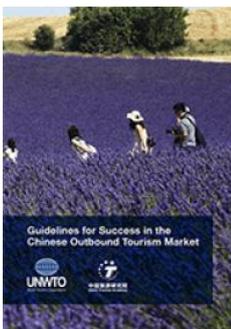
International Tourism Highlights, 2020 Edition



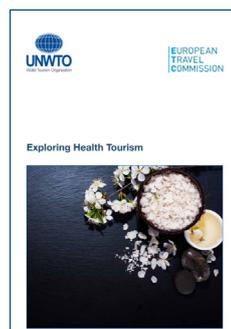
Yearbook of Tourism Statistics (2015-2019)



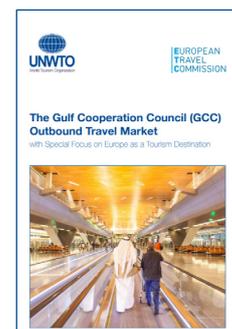
Compendium of Tourism Statistics (2015-2019)



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



Exploring Health Tourism (2018)



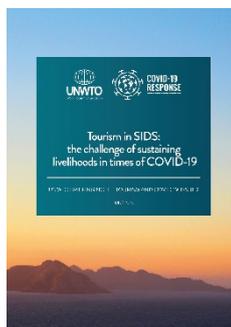
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



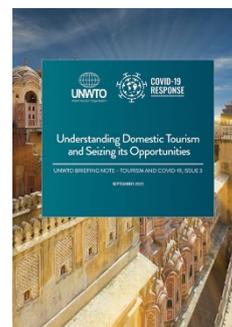
European Union Tourism Trends (2018)



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



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UNWTO/GTERC Asia Tourism Trends, 2020 Edition

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