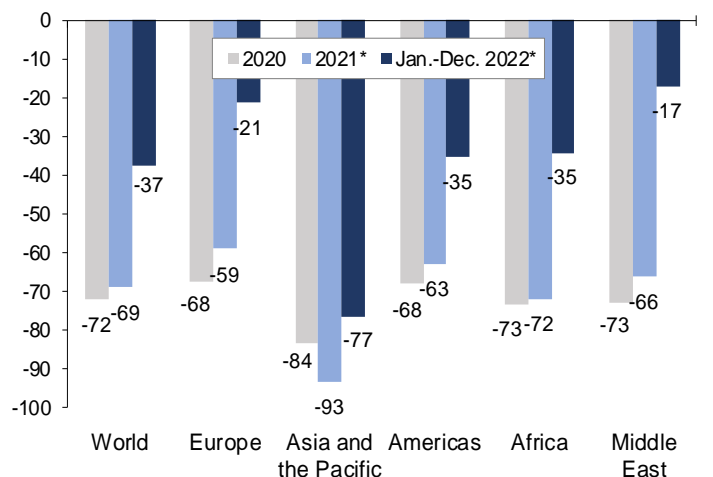




International tourism recovered 63% of pre-pandemic levels in 2022, with Europe and Middle East in the lead

- International tourism saw stronger than expected results in 2022, backed by large pent-up demand and the lifting or relaxation of travel restrictions in a large number of countries.
- Over 900 million tourists travelled internationally in 2022, double those in 2021 though still 37% fewer than in 2019.
- International tourism recovered 63% of pre-pandemic levels, in line with UNWTO's scenarios published in May 2022.
- Europe, the world's largest destination region, recorded 585 million arrivals in 2022 to reach nearly 80% of pre-pandemic levels (-21% over 2019). The Middle East enjoyed the strongest relative increase across regions in 2022 with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019).
- Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to stronger pandemic-related restrictions.
- By subregions, Western Europe (87%) and the Caribbean (84%) came closest to their pre-pandemic levels.
- The year 2022 saw a strong rebound in tourism spending, resulting in the recovery of pre-pandemic levels in income across many destinations.
- Looking ahead, international tourism is set to consolidate its recovery in 2023, backed by pent-up demand, particularly from Asia and the Pacific as destinations and markets open up.
- The UNWTO Panel of Experts survey indicates that 72% of respondents expect better performance in 2023. However, most experts (65%) also believe international tourism will not return to 2019 levels until 2024 or later.
- Based on UNWTO's scenarios for 2023, international tourist arrivals could reach 80% to 95% of pre-pandemic levels this year, with Europe and the Middle East expected to reach those levels. However, important risks remain ahead, especially economic and geopolitical.
- Tourists are expected to increasingly seek value for money and travel close to home in response to the challenging economic environment.

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, Director of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian and Javier Ruescas. Data was compiled from the [Tourism Market Intelligence Database](#) and the [Tourism Statistics Database](#) based on official country sources.

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-January 2022.

The next issue of the UNWTO World Tourism Barometer with more comprehensive results is scheduled to be published in March 2023.

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. This release is available in English, while the Statistical Annex is provided in English, French and Spanish.

Inbound tourism

International tourism grew 102% in 2022, but remained 37% below 2019

- International tourism saw stronger than expected results in 2022, backed by large pent-up demand and the easing of travel restrictions in a majority of countries (116 destinations had no COVID-19 travel restrictions in December 2022, according to the [UNWTO/IATA Destination Travel – Easy Travel](#)).
- International tourism recovered 63% of pre-pandemic levels, in line with UNWTO's scenarios published in May 2022.
- According to preliminary estimates, over 900 million tourists travelled internationally in 2022, twice as many as in 2021, though 37% fewer than in pre-pandemic year 2019.
- International arrivals saw a strong rebound through the northern hemisphere summer season, with the recovery showing a comparatively more moderate pace in the last few months of the year.
- Despite headwinds such as the emergence of Omicron at the beginning of the year, the start of the Russian offensive on Ukraine or a challenging economic environment, international tourism showed resilience, as reflected in the strong recovery in arrivals: from -59% versus 2019 levels in the first quarter of 2022 to -28% in the last quarter of 2022.
- Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to stronger travel restrictions. Asia and the Pacific, which accounted for 25% of the world's international tourists in 2019 represented only 9% in 2022.
- By subregions, Western Europe (87%) and the Caribbean (84%) came closest to their 2019 levels. Destinations reporting arrivals above pre-pandemic levels in the first ten to twelve months of 2022 include US Virgin Islands (+27%), Albania (+17%), Honduras (+17%), Sint Maarten (+15%), Andorra (+14%), Dominican Republic (+10%), El Salvador (+7%), Curaçao (+6%), Colombia (+5%) Ethiopia (+3%) and Liechtenstein (+2%).

Strong rebound in earnings across many destinations

Europe and the Middle East saw fastest recovery

- All regions enjoyed significant increases in 2022 compared to the previous year.
- Europe, the world's largest destination region, recorded 585 million arrivals in 2022 to reach nearly 80% of pre-pandemic levels (-21% over 2019), with a particularly strong summer season. This was supported by robust intra-regional demand and the implementation of coordinated travel measures. The region accounted for 64% of global arrivals in 2022.
- The Middle East enjoyed the strongest relative increase by region in 2022 with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019). The region welcomed large events such as Expo 2020 Dubai and the FIFA World Cup in Qatar, as well as a highly attended Hajj pilgrimage in Saudi Arabia.
- Notable increases in international tourism receipts were recorded across most destinations, in several cases higher than their growth in arrivals. This was supported by the increase in average spending per trip due to longer periods of stay, the willingness by travelers to spend more in their destination, and higher travel costs partly due to inflation.
- Several destinations reported tourism receipts above pre-pandemic levels in the first ten to twelve months of 2022, including Türkiye (+40%), Romania (+25%), Mexico (+13%), Portugal (+15%), Latvia (+14%), Pakistan, Morocco (both +6%) and France (+1%).
- The recovery can also be seen in outbound tourism, with strong international spending in the first ten to twelve months of 2022 from major source markets such as France (-4% over 2019), Germany (-8%), Italy (-10%) and the United States (-15%), compared to 2019. Emerging markets with robust growth in spending in 2022 include Qatar (+29%), India (+10% through June) and Saudi Arabia (+7% through September).

International tourism set to consolidate its recovery in 2023

- International tourism is expected to consolidate its recovery in 2023, backed by pent-up demand, particularly in Asia and the Pacific. Based on UNWTO's scenarios, international tourist arrivals could reach 80% to 95% of pre-pandemic numbers in 2023. Europe is expected to drive results in 2023, with arrivals reaching or exceeding pre-pandemic levels. There is still considerable room for recovery in some European destinations and subregions. The Middle East could also recover 2019 levels throughout 2023 after a strong rebound in 2022.
- The recent reopening of several Asian source markets and destinations will contribute to consolidate the recovery in 2023. The removal of COVID-19 related travel restrictions in China, the world's largest outbound market in 2019, is a significant and much welcomed step for the recovery of the tourism sector in Asia and the Pacific and worldwide.
- In the short term, the resumption of travel from China is likely to benefit Asian destinations in particular. However, the choice of destinations will be influenced by the availability and cost of air travel, visa regulations and COVID-19 related restrictions. By mid-January 2023 a total of 32 countries had imposed specific travel restrictions related to travel from China, mostly in Asia and Europe (see [UNWTO/IATA Destination Travel – Easy Travel](#)).
- At the same time, robust travel demand from the United States, backed by a strong US dollar, will continue to benefit destinations in the region and beyond. Europe, in particular, will benefit partly due to a weaker euro versus the US dollar.
- The improved performance of air traffic is expected to contribute to the ongoing recovery of international tourism in 2023. However, international seat capacity remained 37% below 2019 levels through September 2022 (IATA).
- Domestic tourism will continue to support the recovery of tourism overall, fueled by demand for destinations closer to home as tourists look for open-air activities, nature-based products and rural tourism.

Challenges ahead

- Economic, health and geopolitical headwinds could weigh on the sustained recovery of international tourism and confidence levels in 2023.
- According to the latest survey of the UNWTO Panel of Experts, the challenging economic environment including high inflation and interest rates, the spike in oil and food prices, as well as the fears of a global recession, are the main factors that could weigh on the recovery of tourism.
- Furthermore, continued uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions, health challenges related to COVID-19, as well as workforce shortages also represent downside risks.



International Tourist Arrivals by (Sub)region

											Monthly/quarterly data series							
	(million)				Share (%)	Change (%)				Change (%)*								
						vs. 2019				2022 versus 2021 ²				2022 versus 2019				
	2019	2020	2021*	2022*	2022*	20/19	21/20*	22/21*	21/19*	22/19*	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
World	1465	409	455	917	100	-72.1	11.2	101.6	-69.0	-37.4	190	226	68	62	-59.0	-39.4	-28.4	-28.2
Advanced economies ¹	778	222	244	516	56.2	-71.5	9.9	111.7	-68.7	-33.7	322	338	65	54	-57.8	-35.2	-24.9	-25.3
Emerging economies ¹	688	187	211	401	43.8	-72.8	12.7	90.0	-69.3	-41.6	119	137	73	71	-60.1	-44.7	-33.1	-31.3
<i>By UNWTO regions:</i>																		
Europe	744.5	241.9	304.7	584.9	63.8	-67.5	26.0	92.0	-59.1	-21.4	287	293	49	39	-41.3	-22.7	-15.2	-14.5
Northern Europe	83.7	23.3	21.0	68.7	7.5	-72.1	-9.8	226.5	-74.9	-18.0	682	848	170	83	-47.6	-16.9	-8.8	-15.0
Western Europe	205.1	83.5	87.7	178.1	19.4	-59.3	5.1	102.9	-57.2	-13.2	402	455	46	44	-40.2	-13.0	-3.7	-7.0
Central/Eastern Eur.	151.7	46.7	57.2	90.1	9.8	-69.2	22.4	57.6	-62.3	-40.6	139	126	23	37	-49.6	-44.4	-39.3	-31.2
Southern/Medit. Eur.	303.9	88.3	138.7	248.0	27.0	-70.9	57.0	78.8	-54.4	-18.4	275	245	43	28	-35.0	-21.0	-14.4	-10.7
- of which EU-27	539.8	185.1	225.9	435.3	47.5	-65.7	22.0	92.7	-58.2	-19.4	342	327	47	36	-41.1	-20.3	-13.3	-12.7
Asia and the Pacific	359.6	59.2	24.8	84.4	9.2	-83.5	-58.2	241.0	-93.1	-76.5	55	212	352	301	-91.2	-81.6	-71.6	-61.6
North-East Asia	170.3	20.3	11.2	17.7	1.9	-88.1	-44.8	58.5	-93.4	-89.6	-3	6	51	193	-94.1	-92.6	-89.7	-81.3
South-East Asia	138.0	25.5	2.9	34.9	3.8	-81.5	-88.5	↑	-97.9	-74.7	106	870	↑	↑	-96.4	-81.8	-66.8	-53.8
Oceania	17.5	3.6	0.8	6.2	0.7	-79.2	-79.1	719.6	-95.7	-64.4	586	344	↑	↑	-89.6	-66.8	-55.2	-46.1
South Asia	33.8	9.8	9.9	25.5	2.8	-71.1	1.4	158.3	-70.7	-24.4	97	393	269	64	-56.9	-20.8	-2.2	-10.3
Americas	219.3	69.8	81.4	142.4	15.5	-68.2	16.6	74.9	-62.9	-35.1	104	84	78	53	-51.6	-37.3	-32.5	-20.1
North America	146.6	46.5	57.0	92.1	10.0	-68.3	22.7	61.5	-61.1	-37.2	78	69	69	43	-50.1	-40.0	-36.7	-23.6
Caribbean	26.3	10.3	14.2	22.0	2.4	-60.8	37.6	55.1	-46.0	-16.3	132	55	39	32	-35.1	-17.3	-4.5	-2.6
Central America	10.9	3.1	4.7	8.6	0.9	-71.6	51.1	83.6	-57.1	-21.3	170	101	67	51	-38.6	-20.5	-17.3	-6.7
South America	35.4	9.9	5.5	19.6	2.1	-72.0	-44.9	258.1	-84.6	-44.7	241	453	316	159	-71.0	-46.7	-34.6	-21.9
Africa	68.8	18.4	19.4	45.0	4.9	-73.2	5.0	132.4	-71.9	-34.6	118	187	152	112	-58.2	-36.8	-24.3	-23.9
North Africa	25.6	5.6	6.6	19.1	2.1	-78.2	18.8	189.1	-74.2	-25.3	138	312	177	171	-59.6	-26.1	-14.2	-10.9
Subsaharan Africa	43.2	12.9	12.7	25.8	2.8	-70.2	-1.0	102.9	-70.5	-40.2	109	121	124	79	-57.4	-44.9	-34.9	-32.1
Middle East	73.0	19.8	24.7	60.3	6.6	-72.9	24.4	144.4	-66.2	-17.4	244	285	181	58	-34.3	-21.3	-11.7	-1.0
<i>Memorandum³</i>																		
ASEAN	138.5	25.4	2.9	34.9	3.8	-81.6	-88.5	1,095	-97.9	-74.8	106	872	↑	↑	-96.4	-81.8	-66.8	-53.8
G20	1,001	302	352	687	74.9	-69.8	16.5	95.0	-64.8	-31.4	208	245	57	51	-53.2	-33.0	-23.3	-23.6
GCC	47.7	13.5	18.3	44.1	4.8	-71.7	35.2	141.5	-61.7	-7.6	252	271	179	51	-23.8	-13.9	-3.0	11.3
LDCs	36.5	10.2	7.3	16.6	1.8	-72.1	-28.7	128.3	-80.1	-54.7	60	128	183	173	-76.8	-64.7	-52.0	-48.1
LLDCs	50.5	12.1	12.6	28.5	3.1	-76.1	4.3	126.2	-75.0	-43.5	103	160	192	136	-68.0	-49.6	-38.7	-36.0
SIDS	43.9	10.5	13.1	28.6	3.1	-76.0	24.8	117.3	-70.1	-35.0	210	162	110	74	-57.8	-38.0	-24.0	-16.8

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, January 2023)

* 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)³ 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 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>

Industry Indicators

International air travel continues recovery momentum in January-November 2022

Air passenger traffic

- According to **IATA**, international passenger traffic showed strong year-on-year growth in January-November 2022, with revenue passenger kilometres (RPKs) more than doubling (+164%). Major international routes continued to deliver strong results, tracking near pre-pandemic levels. International traffic recovered 61% of 2019 levels through November 2022, close to the result for international arrivals in the full-year 2022 (63%).
- Recovery in Asia and the Pacific (+375% international RPKs versus 2021) continued to accelerate thanks to the lifting of travel restrictions. Europe (+144%) show significant growth through November 2022, with buoyant international traffic within the region. The Middle East (+173%), North America (+141%), and Latin America (+134%) also reported strong growth. International traffic in Africa increased 86%.
- Compared to January-November 2019, North America (-22%), Europe (-25%), the Middle East and Latin America (both -28%) showed the smallest declines in international RPKs, while Africa reported decreases of 36%. International RPKs in Asia and the Pacific were still 70% below 2019.
- Most of the main domestic markets continued to achieve strong results. According to IATA, Australia (+114%), Japan (+84%), and India (+68%) saw robust growth in domestic RPKs in the first eleven months of 2022.
- Compared to 2019, domestic RPKs in Europe (-3%), North America (-6%), the Middle East (-10%), and specifically the United States (-6%) and Brazil (-5%) were close to pre-pandemic levels in January-November 2022. Latin America (0%) reached 2019 levels.
- In China, domestic RPKs decreased 54% in the first eleven months of 2022 though traffic was still 41% below 2019 levels.

Air capacity

- In terms of capacity, data from **IATA** shows that international capacity worldwide (measured in available seat-kilometres or ASKs) increased 90% y-o-y in January-November 2022, but was still 38% below 2019 levels. Europe (-21%) and Americas (-23%) saw the fastest recovery.
- Domestic air capacity grew 7% through November 2022 and recovered 84% of 2019 levels, according to IATA. Domestic air capacity exceeded pre-pandemic levels in Latin America (+2%) and the Middle East (+4%), while it came close in North America (-7%), Europe (-6%), Brazil (-1%) and the United States (-5%).

Accommodation

- According to **STR**, global occupancy rates reached 57% in December 2022, from 43% in January 2022. Global occupancy saw a gradual improvement throughout 2022, with peak rates above 65% in the June-October period.
- The Middle East (65%) saw the highest occupancy rates in December, followed by Europe (58%), Africa (56%), the Americas and Asia and the Pacific (both 54%). By subregion, South Asia (68%), South-East Asia, Northern Europe and the Caribbean (all 66%) showed the highest occupancy rates in December 2022 (data by region are based on STR statistical regions).

Outlook

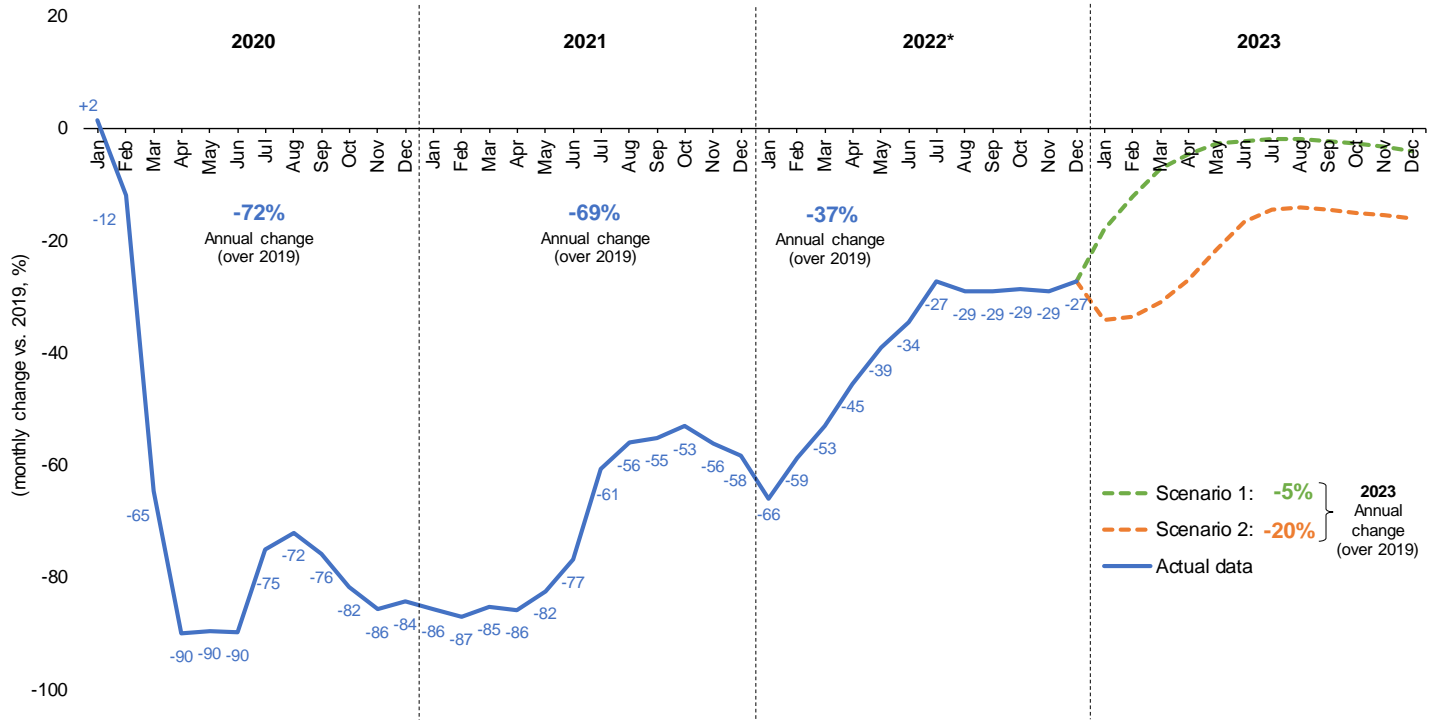
Pre-pandemic travel numbers in sight despite important risks in 2023

- After a strong rebound in 2022, international tourism could climb close to pre-pandemic levels in 2023 driven by strong pent-up demand and the reestablishment of travel flows in most parts of the world, including the re-opening of several destinations and source markets in Asia, particularly China.
- Some world regions could reach pre-pandemic levels in 2023, namely Europe and the Middle East, which recovered about 80% of their international visitors in 2022. The majority of UNWTO Panel Experts (65%) believe global arrivals will not return to pre-pandemic levels in 2024 or later, though 72% expect better tourism performance in 2023 than in 2022.
- The complete recovery remains subject to certain risks like a potential economic slowdown amid high inflation and rapid interest hikes, which have increased financial costs and debt levels. Global output could drop from 3.0% in 2022 to 1.9% in 2023 with many economies at risk of falling into recession, according to the World Economic Situation and Prospects 2023¹.
- Higher food and energy prices result in lower purchasing power and weaker consumer confidence, which could weigh on travel demand in 2023, specially in terms of spending. Travellers may increasingly seek value for money and take trips closer to home in response to the challenging economic environment. The Russian offensive in Ukraine and geopolitical tensions in North-East Asia could also disrupt the normalization of travel.
- Two forward-looking **scenarios** for international travel have been outlined by UNWTO for 2023 based on possible evolving circumstances and speeds of recovery (see graph in following page):
 - **Scenario 1** (baseline) assumes the almost complete normalization of international travel in 2023, including the opening of Asian destinations and source markets which remained closed in 2022. The recovery would be supported by strong traveller confidence and unleashed pent-up demand, with only limited impact from the economic slowdown and little or no worsening of geopolitical or health conditions, and no increase in travel restrictions. This scenario points to international arrivals worldwide climbing to 95% of 2019 numbers, meaning an almost complete recovery of pre-pandemic levels.
 - **Scenario 2** (downside) assumes a somewhat weaker recovery due to slower lifting of travel restrictions in Asia, including stricter conditions for travel from China in some destinations. This outlook also considers a larger impact from the global economic slowdown, with a sizeable drop in purchasing power due to persistent inflation and a decline in consumer confidence. According to this scenario, international arrivals would still remain 20% below 2019 levels in 2023.

The above scenarios are subject to revision in upcoming issues of the UNWTO World Tourism Barometer as economic, policy and geopolitical factors evolve.

¹ Global output at market exchange rates (not ppp weights). See World Economic Situation and Prospects (WESP) 2023 by the UN Department of Economic and Social Affairs (DESA) at: <https://desapublications.un.org/>

International tourist arrivals: 2020-2022 and Scenarios for 2023 (monthly change versus 2019, %)



Source: UNWTO

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

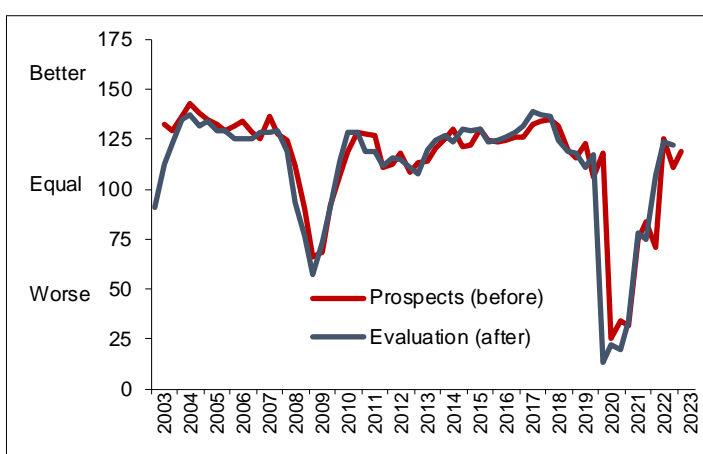
(Data as of January 2023)

UNWTO Confidence Index

Confidence levels slightly up, with expectations for China's reopening

- The survey conducted in January 2023 shows a slight uptick in the UNWTO Confidence Index for the period September-December 2022, reflecting improved confidence levels in the last months of the year. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period September-December 2022 with a score of 123, above the expectations expressed in the September survey ahead of that 4-month period (111).

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

- Despite economic and geopolitical headwinds, international tourism showed sustained recovery throughout 2022, though at a more moderate pace towards the end of year.
- Experts pointed out that no major shock which could alter the pace of recovery such as a potential recession took place. However, high inflation continued to affect travel costs and price-sensitive travel segments, according to experts.
- More than half of survey respondents evaluated September-December 2022 as better (46%) or much better (13%) than expected, while 18% did not see any change. Some 23% considered it worse or much worse.

Cautious optimism for January-April 2023

- Expectations for the period January-April 2023 indicate cautious optimism, with still large pent-up demand though in a context of uncertainty and

volatility. Some 38% of respondents expect better performance, while almost half see equal performance (26%) or worse (20%). 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.

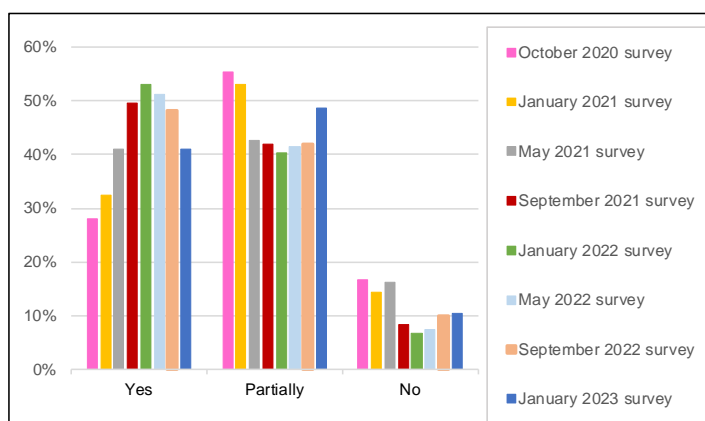
- The UNWTO Confidence Index shows a slight improvement (119) in January-April 2023 compared to prospects expressed for the previous period of September-December (111).
- The removal of COVID-19 related travel restrictions in China, the world's largest outbound market in 2019, is expected to underpin tourism recovery, particularly in Asia and the Pacific
- However, experts pointed out that the pace of resumption of the Chinese tourism market will also depend on the issuance of visas, the reestablishment of air connectivity and COVID-19 entry restrictions in the destinations.

Recovery to continue in 2023 amid challenges

- According to the latest survey, most tourism professionals (72%) see better or much better prospects for 2023 compared to 2022. Some 20% expect similar performance as in 2022, while only 8% consider 2023 will be worse or much worse than last year
- Bullish prospects are backed up by pent-up demand, in particular from the US, Europe and Middle East markets. The recent reopening of several Asian source markets and destinations, including Japan, the Republic of Korea and China, is expected to consolidate recovery.
- However, economic, geopolitical and health challenges remain. According to experts, the economic environment continues to be the main factor weighing on the recovery of international tourism. Global inflation and energy prices remain high, resulting in higher transport and accommodation costs.
- Economic factors are expected to influence how people travel in 2023, which could translate into a more cautious consumer attitude, with reduced spending, shorter trips and travel closer to home.

- Furthermore, continued uncertainty derived from the Russian aggression against Ukraine, health challenges related to COVID-19, as well as workforce shortages also represent downside risks.
- Domestic tourism will continue to drive the recovery in an important number of destinations, in particular in those with a large domestic market. However, 49% of experts consider that it is contributing to the recovery only partially (up from 42% in the September survey), which reflects the importance of international tourism in many destinations as well as the gradual recovery of international demand.

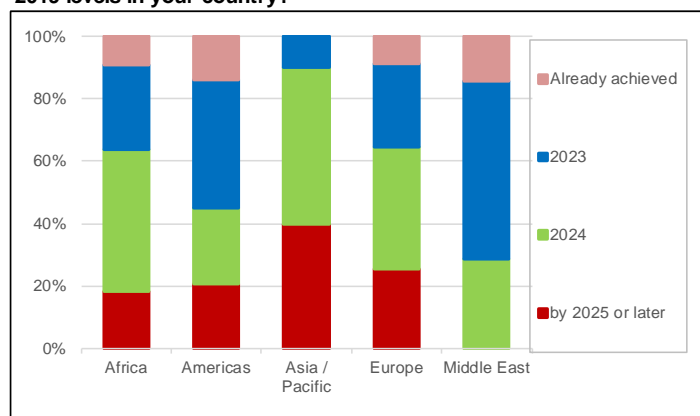
Is domestic tourism driving the recovery in your destination?



Source: January 2023 Survey of the UNWTO Panel of Tourism Experts

- While 40% of respondents indicated that their destination had already achieved (8%) or were still 0% to 20% below pre-pandemic levels in 2022 (32%), there is still room for recovery in many destinations, in particular in Asia and the Pacific and Africa.
- In fact, the largest share of experts pointing to a return to 2019 levels in 2024 or later are in Asia and the Pacific (90%), of which half pointed to 2024 and 40% to 2025 or later. Most experts in Africa (64%) indicated 2024 or later. Experts from the Middle East (57%) seem to be more confident about a full recovery in 2023.

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

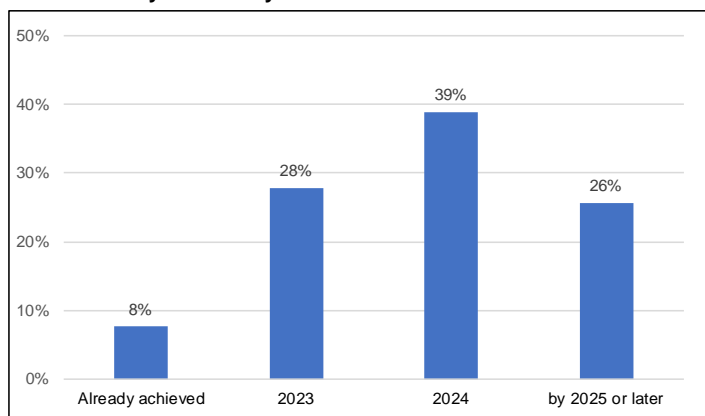


Source: January 2023 Survey of the UNWTO Panel of Tourism Experts

Return to pre-pandemic levels for global tourism not expected before 2024

- Around 65% of experts (up from 61% in September) believe international tourism will not return to 2019 levels before 2024, of which 26% in 2025 or later. Those indicating a return to pre-pandemic levels in 2023 has diminished significantly (27%) compared to the May survey (48%).

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

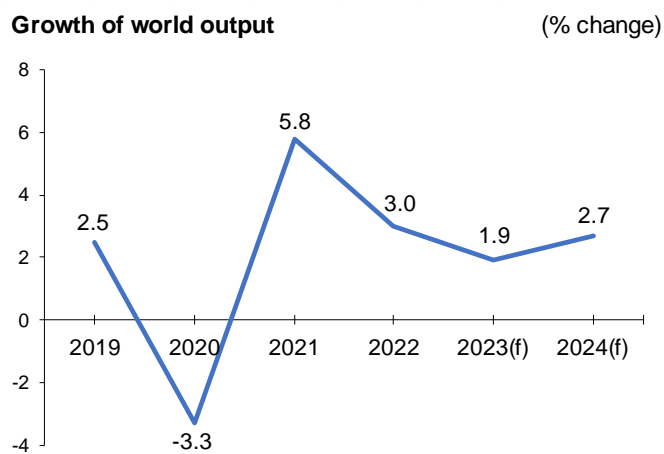


Source: January 2023 Survey of the UNWTO Panel of Tourism Experts

Economic Outlook

World economy foreseen to face major slowdown in 2023

- In its 2023 edition of the World Economic Situation and Prospects (WESP), the UN Department of Economic and Social Affairs (UN DESA) projects the world economy to grow 1.9% in 2023, down from 3.0% in 2022 following a series of shocks including high inflation, the war in Ukraine and the food and energy crisis. Global growth is forecast to moderately pick up to 2.7% in 2024, though this will depend on future monetary policy, the war in Ukraine, and possible supply-chain disruptions.



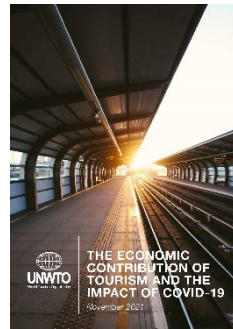
Source: UN DESA (WESP 2023)

(f) forecast

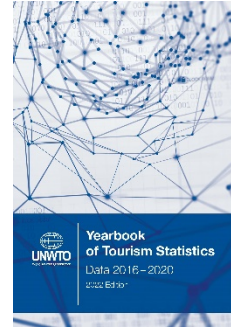
- Consumers in many countries are expected to cut back spending due to higher interest rates and lower real incomes resulting from surging inflation, which averaged 9% globally in 2022. The United Kingdom entered into recession in 2022 following a plunge in household spending, with GDP forecast to contract by 0.8% in 2023.
 - Growth in China is projected to improve to 4.8% in 2023, from 3.0% in 2022 with easing monetary and fiscal policies, and the interruption of the zero-COVID-19 policy in late 2022. Economic recovery in East Asia remains fragile, although average growth is stronger than in other regions.
 - Global inflationary pressures could gradually recede in 2023 as aggregate demand softens, which would allow central banks to slow the pace of monetary tightening. However, the short-term global outlook remains highly uncertain, as a series of economic, financial, geopolitical and environmental risks persist.
- See *World Economic Situation and Prospects (WESP) 2023* at: <https://desapublications.un.org/>
- Note: Economic growth rates in WESP are based on GDP at market exchange rates, not purchasing power parity (PPP) like in reports such as World Economic Outlook by the IMF. See global growth rates using PPP in the Memorandum section of Table I.1 of WESP (page 7).*
- The economic slowdown is affecting both developed and developing countries, with many facing risks of recession in 2023. The outlook has weakened for the United States, the European Union and other developed economies, negatively affecting the rest of the world economy. In the United States, gross domestic product (GDP) is forecast to grow only 0.4% in 2023 after 1.8% in 2022.
 - The European Union is projected to expand by 0.2% in 2023, down from 3.3% in 2022 when easing of COVID-19 restrictions and release of pent-up demand boosted economic activity, including international travel. Many countries in the region could face a mild recession in 2023. The EU remains vulnerable to disruptions in energy supply, despite its efforts to reduce dependence on fossil fuels from Russia.



UNWTO World Tourism Barometer



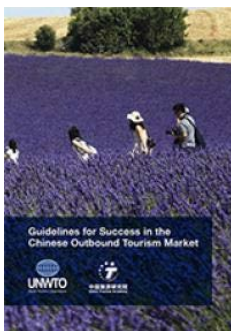
The Economic Contribution of Tourism and the Impact of COVID-19 (2021)



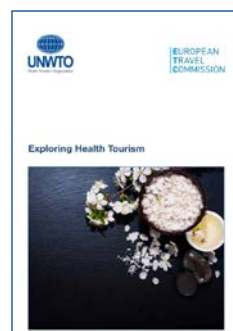
Yearbook of Tourism Statistics (2016-2020)



Compendium of Tourism Statistics (2016-2020)



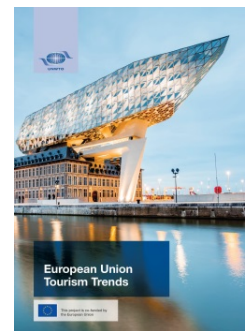
Guidelines for Success in the Chinese Outbound Tourism Market (2019)



Exploring Health Tourism (2018)



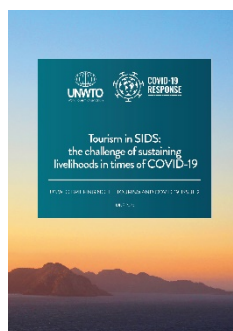
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



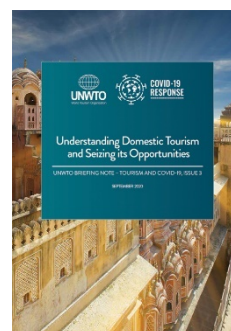
European Union Tourism Trends (2018)



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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