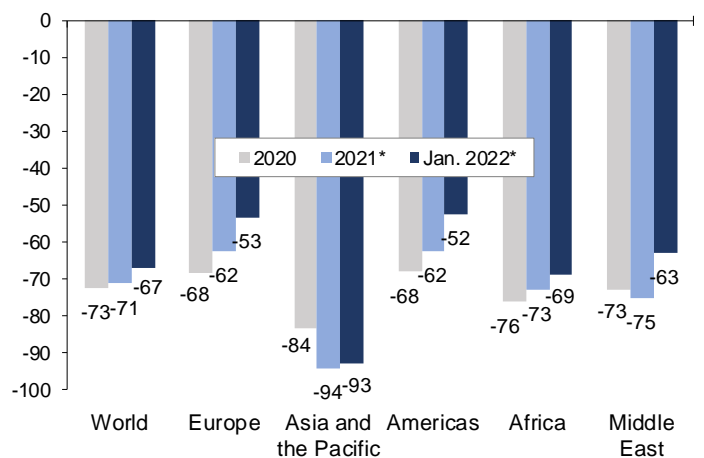




Tourism enjoys strong start in 2022 while facing new uncertainties

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

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.

We welcome your comments and suggestions at barom@unwto.org.

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

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

Pages 1-7 of this document constitute the Excerpt of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

Inbound tourism

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

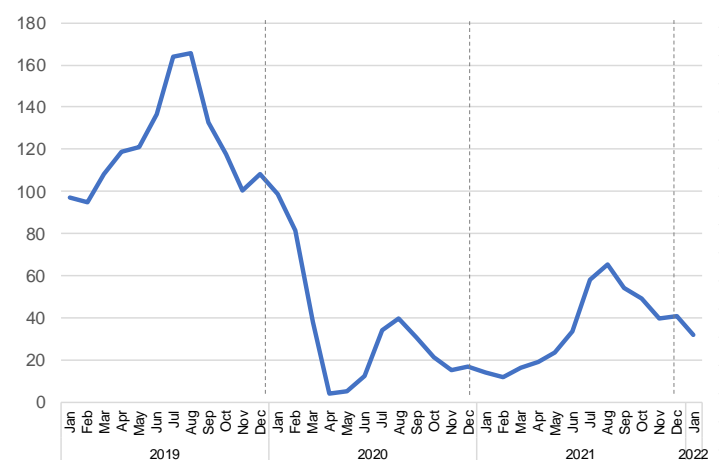
- International tourism continued its recovery in January 2022, with much better results than in early 2021.
- International tourist arrivals more than doubled (+130%) compared to January 2021, growing by 18 million. This increase in number of arrivals is the same as in the whole of 2021 over 2020.
-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

(both -13%), Bulgaria and Curaçao (both -20%), El Salvador (-19%) and Seychelles (-27%). Bosnia and Herzegovina (+2%) exceeded pre-pandemic levels. Among larger destinations, Turkey and Mexico saw declines of 16% and 24% respectively. Most of these destinations were also among the best performers in 2021.

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

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

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



Source: UNWTO

(Data as of March 2022)

International Tourist Arrivals by (Sub)region

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

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, March 2022)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.

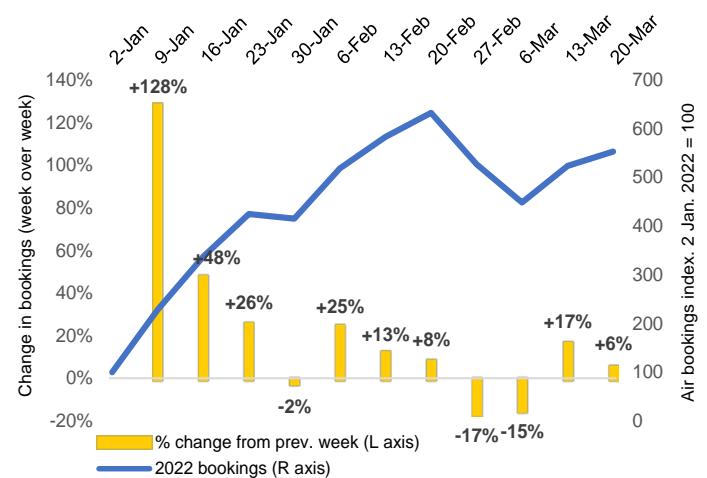
See box in page 'Annex-1' for explanation of abbreviations and symbols used.

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

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

- The military offensive of the Russian Federation on Ukraine is causing great human tragedy and suffering, impacting millions of livelihoods. The conflict also represents a major risk to the recovery of international tourism, which is still weak and uneven, though it is early to assess its full impact.
- The conflict risks hampering the return of confidence in global travel. The US and the Asian source markets, which have started to open up again but are more risk averse, could be particularly impacted, especially regarding travel to Europe.
- The shutdown of Ukrainian and Russian airspace, as well as the ban on Russian carriers by many European countries is affecting intra-European travel. According to Eurocontrol (as of 23 March), the re-routing around Ukraine is disrupting traffic flows across a wide area, with overflights of neighbouring Moldova stopped and overflights around the borders of Ukraine, Russia and Belarus also disrupted. It is also causing detours in long-haul flights between Europe and East Asia, which translates into longer flights and higher costs.
- Both Russia and Ukraine represent a combined 3% of global spending on international tourism in 2020, meaning at least US\$ 14 billion in tourism receipts could be lost as a consequence of a prolonged conflict. As destinations these countries account for 4% of international arrivals in Europe but only 1% of Europe's international tourism receipts.
- The importance of both markets is significant for neighbouring countries, but also for sun and sea destinations in Europe and beyond, including islands. The Russian market gained significant weight during the crisis in long haul destinations such as Maldives (up from 5% in 2019 to 17% in 2021), Seychelles (from 3% to 17%) or Sri Lanka (from 5% to 9%).
- Even though it is early to assess the full impact of the conflict, air travel searches and bookings across various channels show demand slowing down the week after the start of the invasion on 24 February 2022, but rebounding again in early March. It is yet to be seen if this reflects a reaction from consumers who are fearful of higher travel prices in the future, or whether demand is shifting towards destinations perceived to be safer or are closer to home.

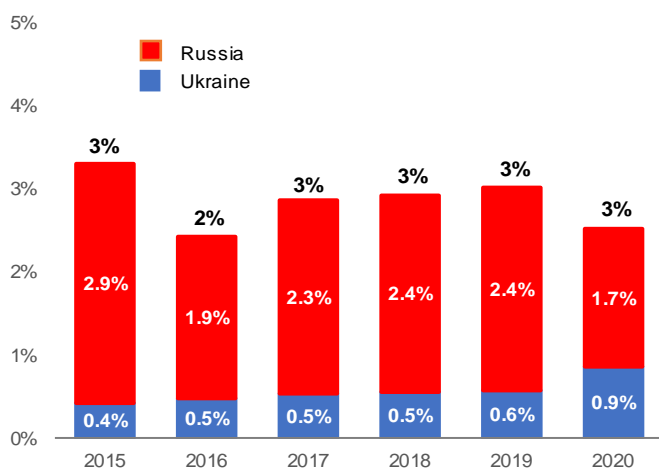
Air bookings from January to March 2022 for intra-European travel (index)*



Source: compiled by UNWTO from ForwardKeys data

* Bookings from week ending 2 Jan to 20 Mar 2022 and equivalent weeks of 2019.

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

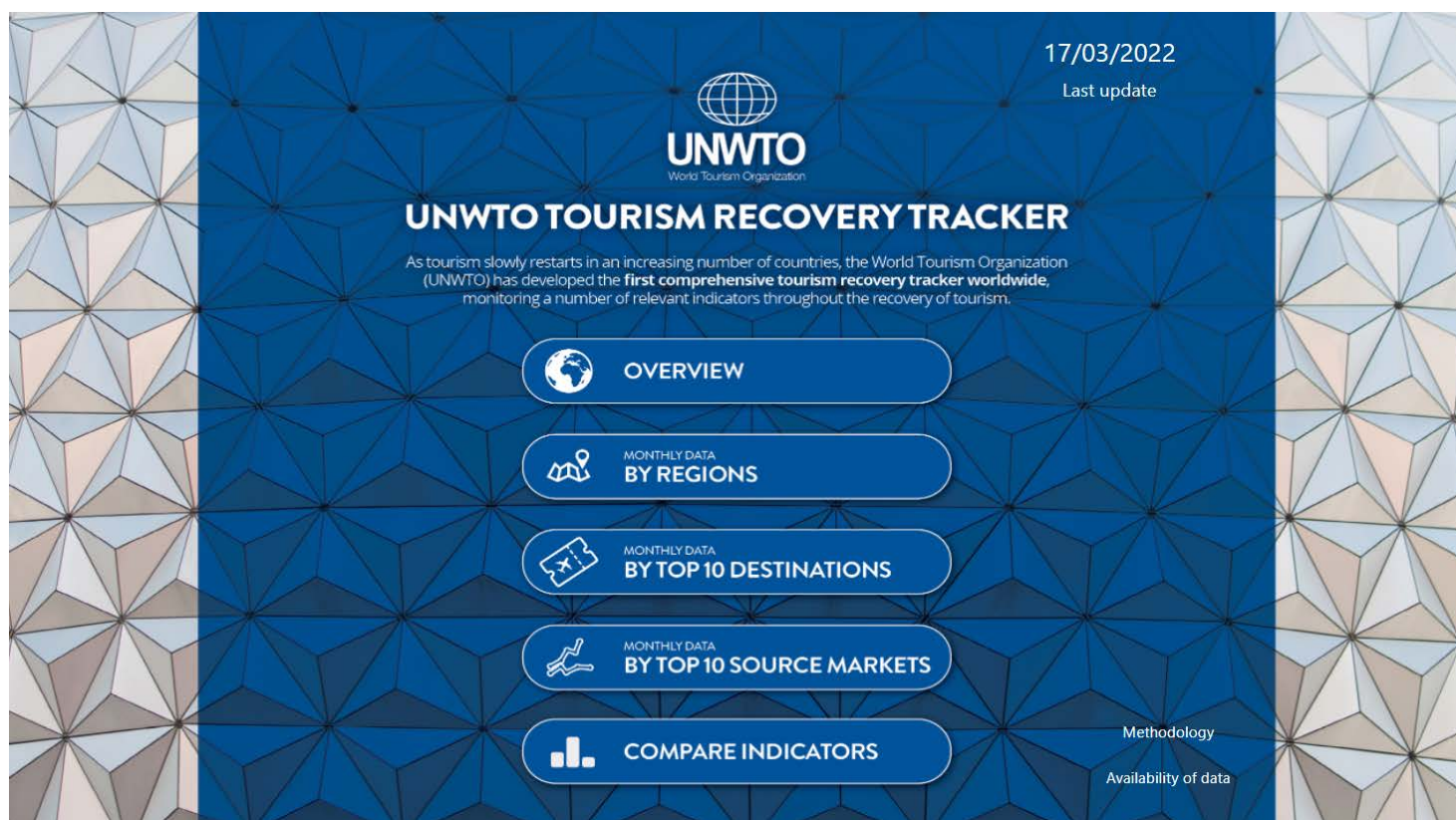


Source: UNWTO

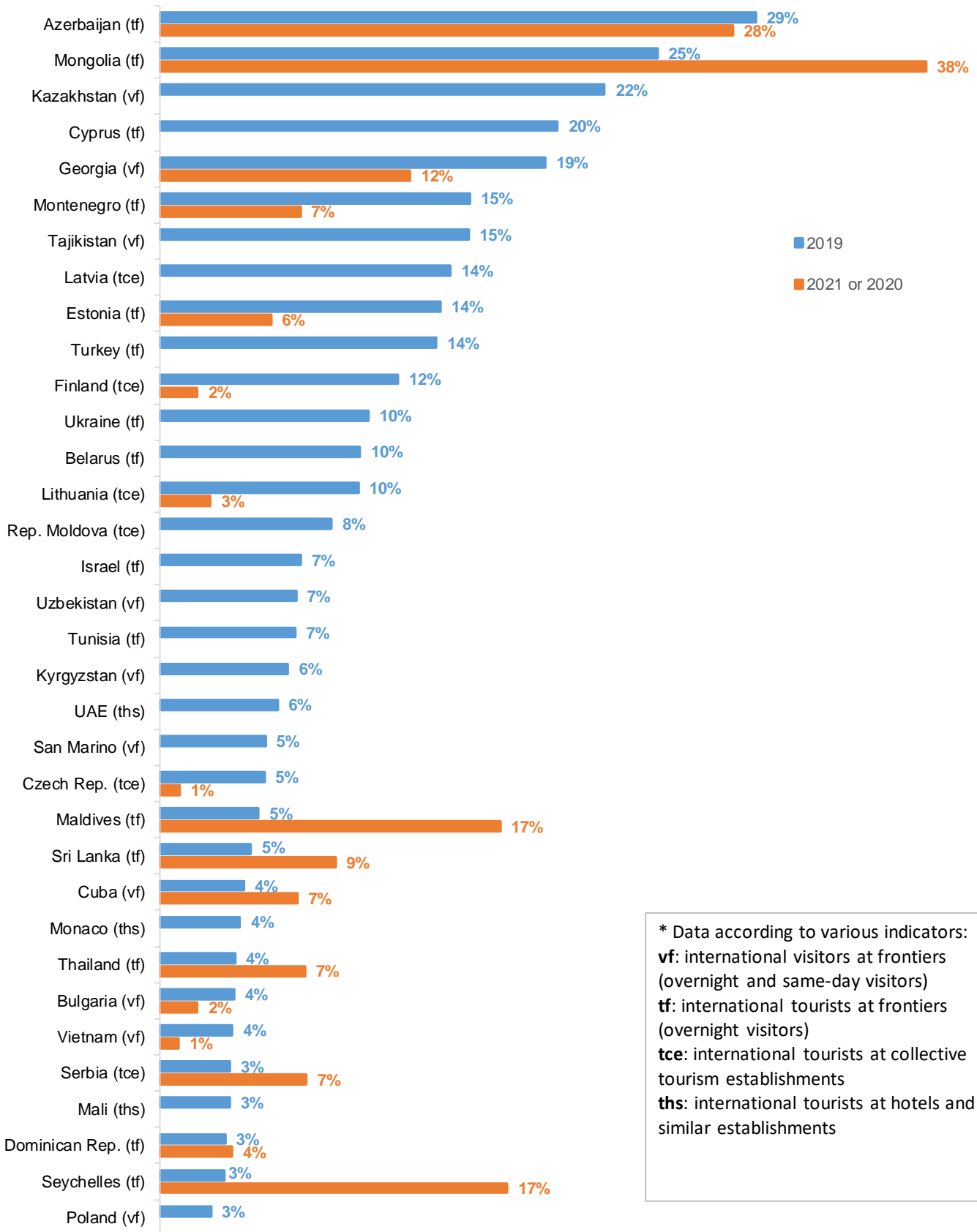
(data as of March 2022)

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

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



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

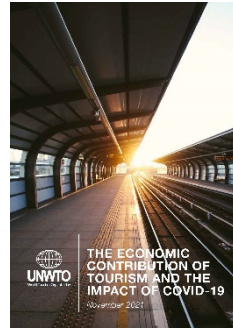


* Data according to various indicators:
vf: international visitors at frontiers (overnight and same-day visitors)
tf: international tourists at frontiers (overnight visitors)
tce: international tourists at collective tourism establishments
ths: international tourists at hotels and similar establishments

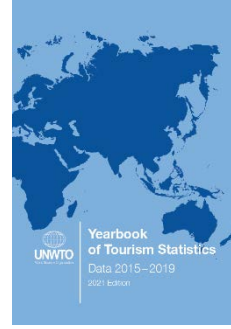
Source: World Tourism Organization (UNWTO)



UNWTO World Tourism Barometer



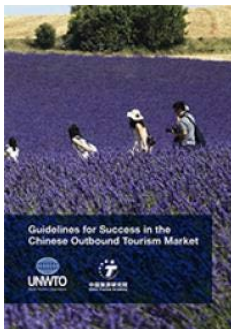
The economic Contribution of Tourism and the Impact of the COVID-19



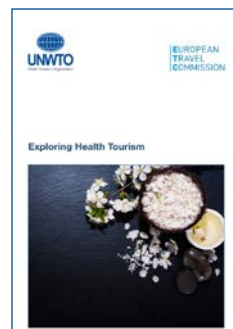
Yearbook of Tourism Statistics (2015-2019)



Compendium of Tourism Statistics (2015-2019)



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



Exploring Health Tourism (2018)



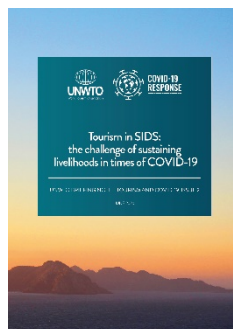
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



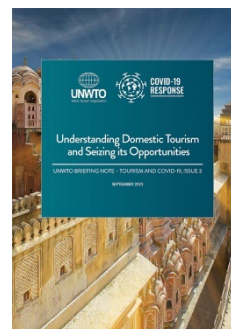
European Union Tourism Trends (2018)



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



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



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