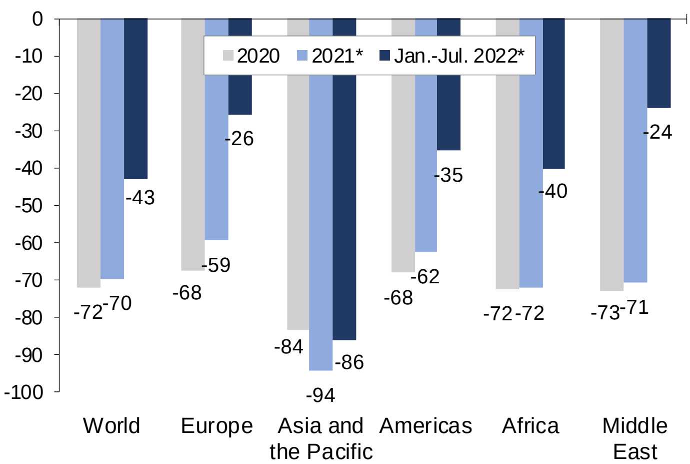
International tourism climbed to nearly 60% of pre-pandemic levels in January-July 2022

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

International Tourist Arrivals (% change over 2019)



Source: UNWTO * Provisional data

UNWTO
World Tourism Organization

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.

UNWTO World Tourism Barometer
ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2022 (version 24/09/22)

World Tourism Organization
C/ Poeta Joan Maragall 42, 28020 Madrid, Spain
Tel (34) 91 567 81 00 / Fax (34) 91 131 17 02
info@unwto.org - www.unwto.org

Follow us on:

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-September 2022.

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

Pages 1-6 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 arrivals almost tripled in January-July 2022, but remained 43% below 2019

- International tourism continued to show strong performance through July 2022, with arrivals reaching 57% of pre-pandemic levels in the first seven months of 2022.
- International tourist arrivals almost tripled (+172%) in January-July 2022 compared to the same period of 2021.
- Numbers climbed from -64% in January 2022 (versus 2019) to -28% in July, the strongest month since the start of the pandemic.
- Though international tourism was still 43% below 2019 levels in the first seven months of 2022, this also means it has recovered almost 60% of pre-pandemic levels.
- An estimated 474 million tourists travelled internationally during these seven months, compared to the 175 million in the same months of 2021.
- The steady recovery reflects strong pent-up demand for international travel, especially in the months of June and July which are part of the Northern Hemisphere summer season. The easing or lifting of travel restrictions in an increasing number of countries also contributed to boost results (86 countries had no COVID-19 related restrictions as of 19 September 2022, according to the UNWTO/IATA Destination Travel – Easy Travel).
- An estimated 207 million international arrivals were recorded in June and July 2022 combined, over twice the numbers seen in the same two months last year. These months represent 44% of the total arrivals recorded in the first seven months of 2022.
- Europe welcomed 309 million international arrivals in January-July 2022, accounting for 65% of the total 474 million recorded globally during that period.

Europe and the Middle East led the recovery through July 2022

- Most world regions enjoyed a significant rebound in the first seven months of 2022.
- Europe and the Middle East showed the fastest recovery in January-July 2022, with arrivals reaching 74% and 76% of 2019 levels, respectively. Arrivals in the Middle East surpassed pre-pandemic levels in the month of July (+3%), while in Europe they climbed to about 85% of 2019 levels.
- Europe (+190%) welcomed almost three times as many international arrivals as in the first seven months of 2021, with results boosted by strong intra-regional demand and travel from the United States. The region saw particularly robust performance in June (-21% over 2019) and July (-16%), reflecting a busy summer period. The strong dollar, which recently reached parity with the euro, has also favoured US travel to Europe, in particular during the summer months.
- Airports in the EU+ market (EU, EEA, Switzerland and UK) saw their passenger traffic nearly doubling at 94% in July compared to the same month last year (-15% over July 2019), according to the Airports Council International (ACI). The lifting of travel restrictions in a large number of destinations in Europe (44 as of 19 September 2022) also fuelled these results.
- The Middle East (+287%) saw international arrivals grow almost four times year-on-year in January-July 2022. Arrivals exceeded pre-pandemic levels in July (+3%), boosted by the extraordinary results posted by Saudi Arabia (+121%) following the Hajj pilgrimage.
- The Americas (+103%) and Africa (+171%) also recorded strong growth in January-July 2022 compared to 2021, reaching 65% and 60% of 2019 levels, respectively.
- Asia and the Pacific (+165%) saw arrivals more than double in the first seven months of 2022, though they remained 86% below 2019 levels. International tourism has slowly improved in the region further to some relaxation of restrictions in several destinations, particularly in South Asia but some borders remained closed to non-essential travel.

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

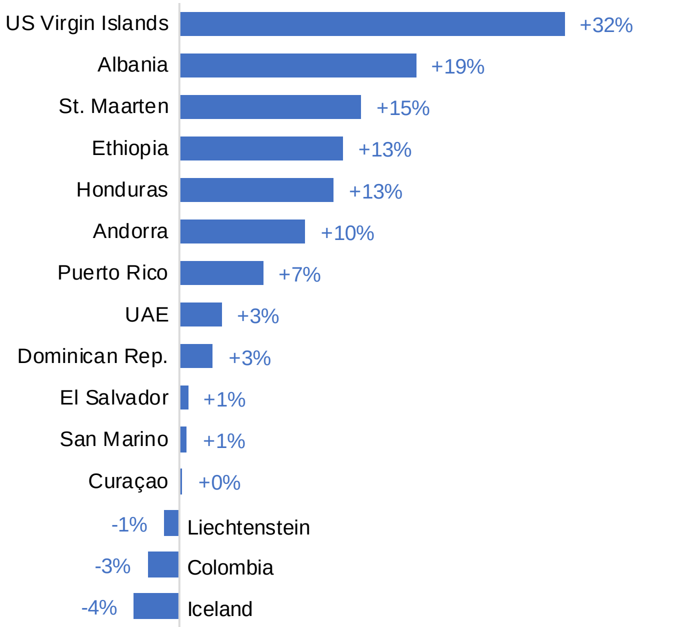
- Several subregions reached 70% to 85% of their pre-pandemic arrivals in January-July 2022. Southern Mediterranean Europe (-15% over 2019), the Caribbean (-18%) and Central America (-20%) showed the fastest recovery towards 2019 levels. Western Europe (-26%) and Northern Europe (27%) also posted strong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

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

- The robust recovery of tourism is reflected not only in the tourism data for many destinations across the globe but also in the various industry indicators such as air passenger traffic and hotel metrics.
- In fact, stronger-than-expected demand has also created important operational and workforce challenges in tourism companies and infrastructure, particularly airports, as the recovery was quicker than anticipated.
- Yet, looking ahead, the economic situation, exacerbated by the Russian offensive in Ukraine, represents a major downside risk to recovery.
- The combination of increasing interest rates in all major economies, rising energy and food prices and the growing prospects of a global recession as indicated by the World Bank (global growth would slump from 5.7% in 2021 to 2.9% in 2022), are major risks to the recovery of international tourism through the remainder of 2022 and 2023.
- High inflation has increased the cost of living around the world, reduced household budgets and put extra pressure on companies recovering from the crisis, particularly small and medium enterprises.
- The war in Ukraine and mounting geopolitical tensions in different parts of the world are also adding to the uncertainty.
- The potential slowdown can be seen in the latest UNWTO Confidence Index, which reflects a more cautious outlook, as well as on booking trends which are showing signs of slower growth.

Best-perfoming destinations in January-July 2022*

International tourist arrivals (% change over 2019)



Source: UNWTO (Data as of September 2022)

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

International Tourist Arrivals by (Sub)region

				Share	Change (%)			Monthly/quarterly data series Change (%)*													
	(million)			(%)				2022 over 2021²							2022 over 2019						
	2019	2020*	2021*	2021*	20/19	21/20*	21/19*	YTD	H1	Q1	Q2	May	Jun.	Jul.	YTD	H1	Q1	Q2	May	Jun.	Jul.
World	**1466**	**409**	**446**	**100**	**-72.1**	**9.0**	**-69.6**	**172**	**223**	**207**	**232**	**251**	**185**	**84**	**-42.9**	**-46.6**	**-57.1**	**-38.3**	**-37.8**	**-33.9**	**-27.8**
Advanced economies¹	*777*	*222*	*242*	*54.2*	*-71.5*	*9.0*	*-68.9*	*231*	*344*	*350*	*341*	*360*	*252*	*89*	*-38.5*	*-41.8*	*-53.6*	*-33.5*	*-33.4*	*-30.8*	*-26.0*
Emerging economies¹	*689*	*188*	*205*	*45.8*	*-72.7*	*8.9*	*-70.3*	*119*	*136*	*125*	*143*	*158*	*122*	*77*	*-48.1*	*-52.0*	*-60.6*	*-44.2*	*-43.5*	*-38.2*	*-30.2*
By UNWTO regions:																					
Europe	***746.0***	***241.9***	***303.1***	***67.9***	***-67.6***	***25.3***	***-59.4***	***190***	***300***	***309***	***295***	***342***	***207***	***65***	***-25.6***	***-28.4***	***-38.2***	***-22.5***	***-22.1***	***-20.6***	***-16.2***
Northern Europe	83.7	23.3	22.3	5.0	-72.1	-4.5	-73.4	480	709	634	747	868	573	246	-26.8	-32.2	-49.0	-20.7	-21.5	-17.0	-9.6
Western Europe	205.1	83.5	87.6	19.6	-59.3	4.9	-57.3	195	415	434	405	431	280	27	-26.1	-27.3	-36.5	-21.2	-19.1	-21.5	-21.8
Central/Eastern Eur.	153.3	46.7	54.5	12.2	-69.5	16.6	-64.5	104	137	142	133	148	110	39	-45.2	-46.7	-50.0	-44.4	-44.3	-42.5	-39.2
Southern/Medit. Eur.	303.9	88.3	138.7	31.1	-70.9	57.0	-54.4	189	286	314	275	345	174	76	-15.5	-18.8	-28.2	-14.1	-14.0	-12.3	-5.5
- of which EU-27	541.3	185.1	224.5	50.3	-65.8	21.3	-58.5	206	346	375	333	381	220	64	-23.0	-25.5	-36.1	-19.3	-19.0	-18.6	-14.9
Asia and the Pacific	***359.5***	***59.2***	***20.6***	***4.6***	***-83.5***	***-65.2***	***-94.3***	***165***	***134***	***55***	***206***	***197***	***348***	***329***	***-86.1***	***-88.0***	***-92.5***	***-83.3***	***-83.0***	***-79.0***	***-75.0***
North-East Asia	170.3	20.3	11.2	2.5	-88.1	-44.8	-93.4	2.5	2	-3	6	0	36	4	-93.1	-93.3	-94.1	-92.6	-92.4	-91.9	-92.1
South-East Asia	138.0	25.5	2.9	0.7	-81.5	-88.5	-97.9	741	543	120	973	897	↑	↑	-85.0	-88.5	-96.2	-80.1	-79.2	-71.9	-64.8
Oceania	17.4	3.6	0.8	0.2	-79.1	-79.3	-95.7	465	427	642	374	298	357	609	-74.9	-78.3	-89.0	-65.2	-65.8	-58.3	-55.0
South Asia	33.7	9.8	5.7	1.3	-71.1	-41.2	-83.0	245	222	119	374	575	610	362	-56.4	-59.8	-71.3	-44.7	-41.1	-39.1	-37.4
Americas	***219.3***	***69.8***	***82.3***	***18.4***	***-68.2***	***17.8***	***-62.5***	***103***	***105***	***117***	***97***	***89***	***80***	***95***	***-35.3***	***-37.6***	***-46.1***	***-29.4***	***-29.3***	***-28.3***	***-24.0***
North America	146.6	46.5	57.0	12.8	-68.3	22.7	-61.1	98	96	101	93	86	83	103	-35.0	-37.0	-43.7	-31.4	-31.3	-30.5	-26.1
Caribbean	26.3	10.3	15.0	3.4	-60.8	44.8	-43.2	50	60	97	37	31	12	14	-18.1	-20.2	-28.7	-10.6	-10.5	-11.6	-4.9
Central America	10.9	3.1	4.9	1.1	-71.6	59.3	-54.8	129	145	191	114	112	77	74	-19.8	-21.9	-32.1	-10.1	-6.7	-8.4	-7.6
South America	35.4	9.9	5.4	1.2	-72.0	-46.0	-84.9	371	375	287	470	473	394	356	-54.4	-58.0	-69.2	-42.5	-42.5	-37.6	-33.0
Africa	***68.1***	***18.8***	***18.9***	***4.2***	***-72.5***	***0.8***	***-72.2***	***171***	***181***	***134***	***223***	***294***	***169***	***146***	***-40.4***	***-45.4***	***-57.0***	***-34.2***	***-28.0***	***-27.3***	***-19.8***
North Africa	25.6	5.6	6.6	1.5	-78.2	18.8	-74.2	193	241	138	320	715	181	131	-33.2	-40.3	-59.6	-24.7	-7.9	-15.0	-12.9
Subsaharan Africa	42.5	13.2	12.3	2.8	-69.0	-6.9	-71.1	153	148	131	164	163	156	177	-45.8	-48.7	-55.6	-41.4	-40.5	-38.1	-29.0
Middle East	***73.0***	***19.8***	***21.4***	***4.8***	***-72.9***	***7.9***	***-70.7***	***287***	***289***	***257***	***319***	***317***	***293***	***278***	***-23.9***	***-28.2***	***-36.4***	***-19.9***	***-21.4***	***-10.0***	***3.2***
Memorandum³																					
ASEAN	*138.0*	*25.5*	*2.9*	*0.7*	*-81.5*	*-88.5*	*-97.9*	*742*	*545*	*120*	*975*	*899*	↑	↑	*-85.0*	*-89*	*-96*	*-80*	*-79*	*-72*	*-65*
G20	*1,003*	*302*	*347*	*77.8*	*-69.8*	*14.9*	*-65.4*	*177*	*245*	*234*	*252*	*277*	*189*	*74*	*-36.2*	*-40*	*-50*	*-32*	*-32*	*-29*	*-23*
GCC	*47.7*	*13.5*	*15.3*	*3.4*	*-71.7*	*13.5*	*-67.9*	*316*	*306*	*280*	*332*	*346*	*314*	*378*	*-11.9*	*-17*	*-25*	*-9*	*-14*	*2*	*31*
LDCs	*36.4*	*10.5*	*6.8*	*1.5*	*-71.1*	*-35.3*	*-81.3*	*141*	*119*	*59*	*199*	*213*	*224*	*260*	*-67.7*	*-71*	*-77*	*-64*	*-64*	*-58*	*-49*
LLDCs	*50.5*	*12.2*	*11.8*	*2.7*	*-75.9*	*-2.5*	*-76.5*	*174*	*158*	*115*	*191*	*208*	*189*	*246*	*-57.9*	*-61*	*-71*	*-53*	*-49*	*-50*	*-40*
SIDS	*43.3*	*10.6*	*12.5*	*2.8*	*-75.5*	*17.9*	*-71.1*	*164*	*180*	*198*	*168*	*166*	*145*	*114*	*-44.7*	*-48*	*-57*	*-37*	*-34*	*-32*	*-27*

Source: World Tourism Organization (UNWTO) (Data as collected by UNWTO, September 2022)

* Provisional data

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

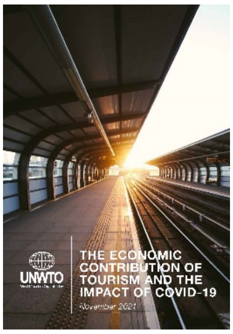
See box in page 'Annex-1' for explanation of abbreviations and symbols used

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

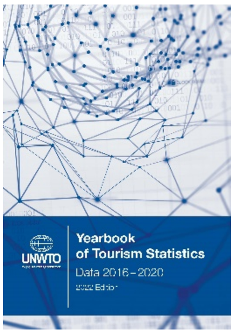
UNWTO World Tourism Organization

Publications

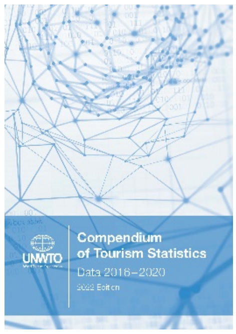
UNWTO World Tourism Barometer



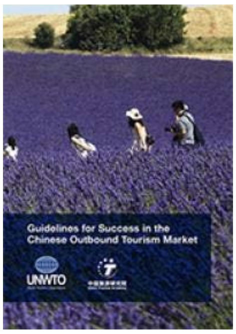
The Economic Contribution of Tourism and the Impact of the COVID-19 (2021)



Yearbook of Tourism Statistics (2016-2020)



Compendium of Tourism Statistics (2016-2020)



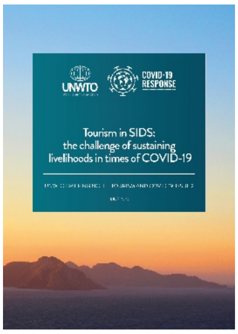
Guidelines for Success in the Chinese Outbound Tourism Market (2019)

Exploring Health Tourism (2018)

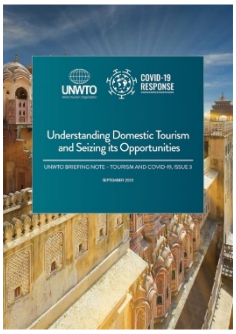
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)

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

www.unwto.org/publications