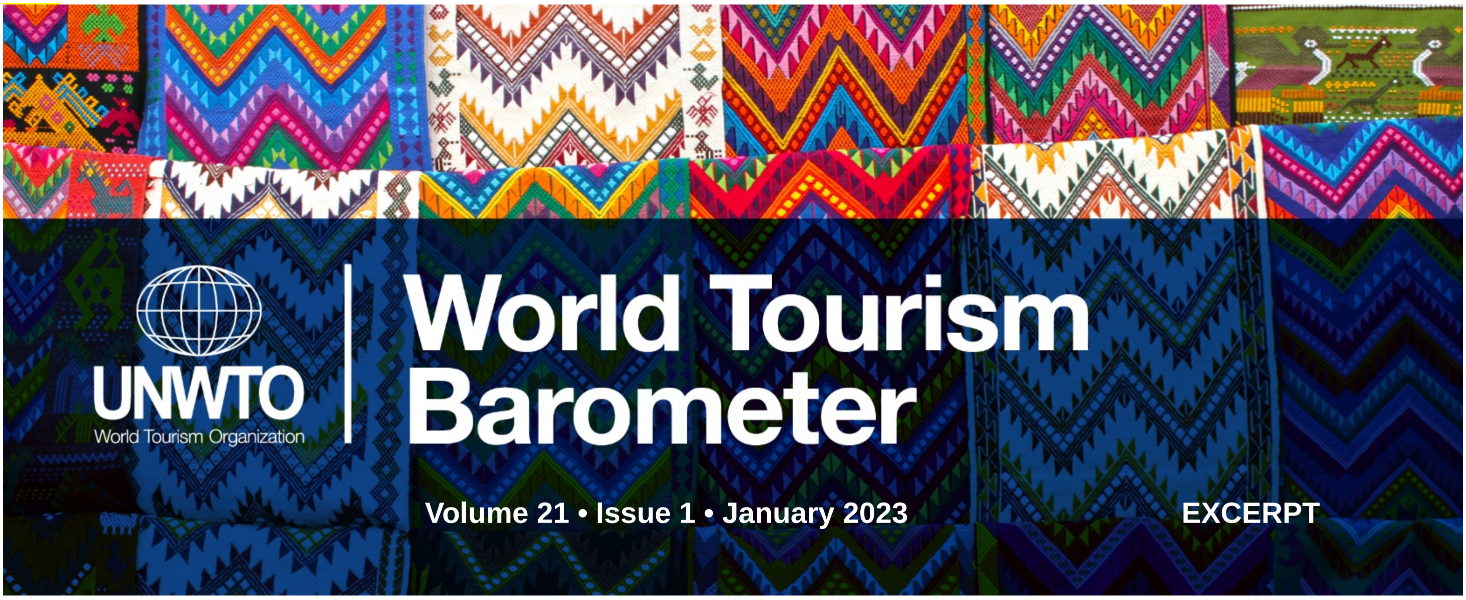

World Tourism Barometer

UNWTO World Tourism Organization

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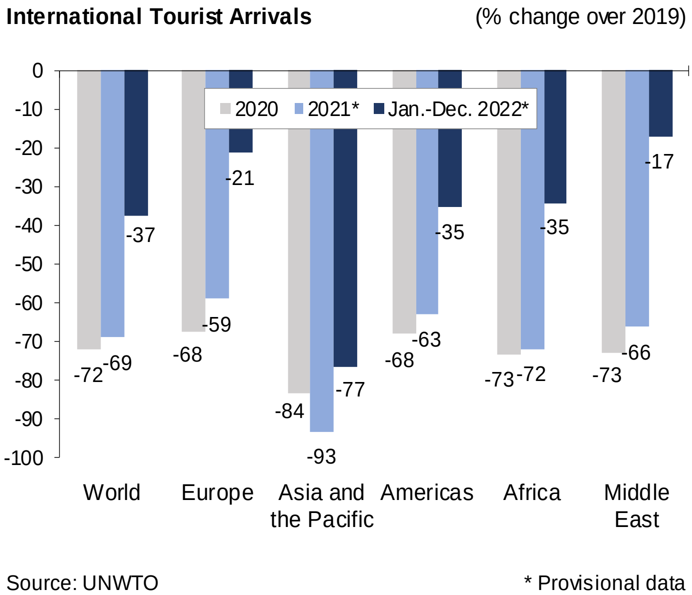
International tourism recovered 63% of pre-pandemic levels in 2022, with Europe and Middle East in the lead

- 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.



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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 large number 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 its strong recovery in arrivals: from -59% versus 2019 levels in the first quarter of 2022 to -28% in the last quarter.

Europe and the Middle East saw fastest recovery

- All regions enjoyed significant increases in 2022 over 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 across regions 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.
- 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. Asia, 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 include US Virgin Islands (+27%), Albania (+17%), Honduras (+17%), Sint Maarten (+15%), Andorra (+14%), Dominican Republic (+10%), El Salvador (+7%), Curacao (+6%), Colombia (+5%) Ethiopia (+3%) and Liechtenstein (+2%).

Strong rebound in earnings across many destinations

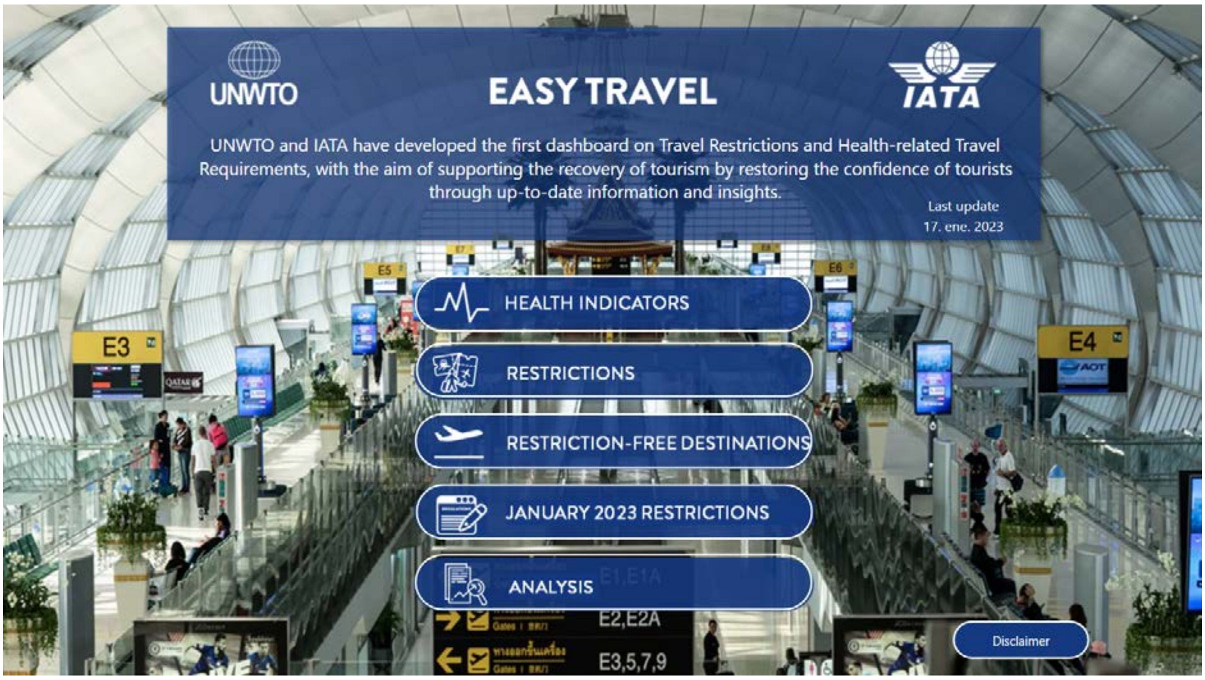
- Notable increases in international tourism receipts have been recorded across most destinations, in several cases higher than their growth in arrivals. This has been supported by the increase in average spending per trip due to longer periods of stay, the willingness by travelers to spend more in their 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 from major source markets such as France (-4% over 2019), Germany (-8%), Italy (-10% through October 2022) and the United States (-15% through November), compared to 2019. Emerging markets with robust rebound 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 2023Europe is expected to drive results in 2023, with arrivals reaching or exceeding pre-pandemic levels and still considerable room for recovery in some 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 to 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 shaped by the availability and cost of air travel, visa regulations and processes, as well as COVID-19 related restrictions. By mid-January 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 tourism recovery, 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 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, continues to be the main factor weighing 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

	(million)				Share (%)	Change (%)			vs. 2019		Monthly/quarterly data series Change (%)* 2022 versus 2021[2]					2022 versus 2019				
	2019	2020	2021*	2022*	2022*	20/19	21/20*	22/21*	21/19*	22/19*	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4
World	**1466**	**409**	**455**	**917**	**100**	**-72.1**	**11.2**	**101.6**	**-69.0**	**-37.4**	**102**	**190**	**226**	**68**	**62**	**-37.4**	**-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*	*111*	*322*	*338*	*65*	*54*	*-33.9*	*-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*	*91*	*119*	*137*	*73*	*71*	*-41.6*	*-60.1*	*-44.7*	*-33.1*	*-31.3*
By UNWTO regions:																				
Europe	***744.5***	***241.9***	***304.7***	***584.9***	***63.8***	***-67.5***	***26.0***	***92.0***	***-59.1***	***-21.4***	***92***	***287***	***293***	***49***	***39***	***-21.3***	***-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	222	682	848	170	83	-19.2	-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	103	402	455	46	44	-13.3	-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	56	139	126	23	37	-40.8	-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	79	275	245	43	28	-18.4	-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	92	342	327	47	36	-19.5	-41.1	-20.3	-13.3	-12.7
Asia and the Pacific	***360.1***	***59.1***	***24.8***	***84.4***	***9.2***	***-83.6***	***-58.1***	***241.0***	***-93.1***	***-76.6***	***241***	***55***	***212***	***352***	***301***	***-76.6***	***-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	58.4	-3	6	51	193	-89.6	-94.1	-92.6	-89.7	-81.3
South-East Asia	138.6	25.5	2.9	34.9	3.8	-81.6	-88.5	↑	-97.9	-74.8	↑	106	870	↑	↑	-74.6	-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	763	586	344	↑	↑	-64.2	-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	152	97	393	269	64	-23.7	-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***	***75***	***104***	***84***	***78***	***53***	***-35.2***	***-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	62	78	69	69	43	-37.2	-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	55	132	55	39	32	-16.4	-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	84	170	101	67	51	-21.3	-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	248	241	453	316	159	-45.0	-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***	***140***	***118***	***187***	***152***	***112***	***-34.6***	***-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	192	138	312	177	171	-24.7	-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	105	109	121	124	79	-42.1	-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***	***149***	***244***	***285***	***181***	***58***	***-17.0***	***-34.3***	***-21.3***	***-11.7***	***-1.0***
Memorandum[3]																				
ASEAN	*138.5*	*25.4*	*2.9*	*34.9*	*3.8*	*-81.6*	*-88.5*	*1,095*	*-97.9*	*-74.8*	↑	*106*	*872*	↑	↑	*-74.6*	*-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*	*95*	*208*	*245*	*57*	*51*	*-31.5*	*-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*	*141*	*252*	*271*	*179*	*51*	*-7.6*	*-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*	*141*	*60*	*128*	*183*	*173*	*-60.1*	*-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*	*152*	*103*	*160*	*192*	*136*	*-47.0*	*-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*	*119*	*210*	*162*	*110*	*74*	*-35.0*	*-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

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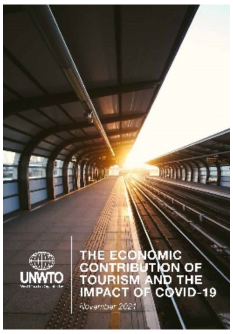

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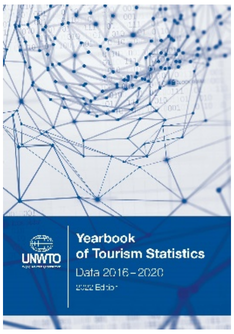

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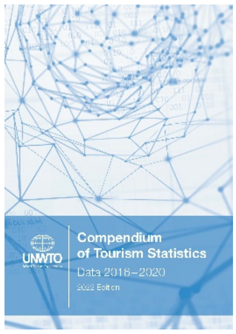

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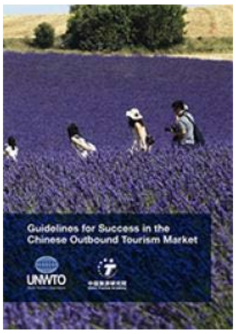

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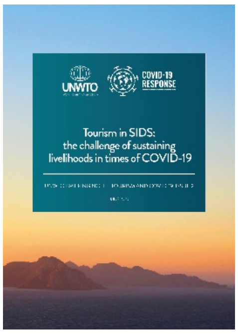

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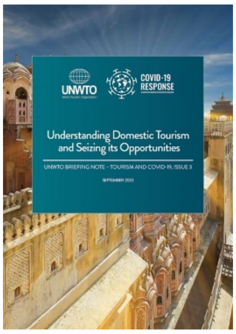

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