

International Tourism Back to 60% of Pre-Pandemic Levels in January-July 2022

Madrid, Spain, 26 September 2022 - *International tourism continued to show strong signs of recovery, with arrivals reaching 57% of pre-pandemic levels in the first seven months of 2022.*

According to the latest UNWTO World Tourism Barometer, international tourist arrivals almost tripled in January to July 2022 (+172%) compared to the same period of 2021. This means the sector recovered almost 60% of pre-pandemic levels. The steady recovery reflects strong pent-up demand for international travel as well as the easing or lifting of travel restrictions to date (86 countries had no COVID-19 related restrictions as of 19 September 2022).

UNWTO Secretary-General Zurab Pololikashvili said: "Tourism continues to recover steadily, yet several challenges remain, from geopolitical to economic. The sector is bringing back hope and opportunity for people everywhere. Now is also the time to rethink tourism, where it is going and how it impacts people and planet."

An estimated 474 million tourists travelled internationally over the period, compared to the 175 million in the same months of 2021. 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 of these arrivals, accounting for 65% of the total.

Europe and the Middle East Lead Recovery

Europe and the Middle East showed the fastest recovery in January-July 2022, with arrivals reaching 74% and 76% of 2019 levels respectively. Europe welcomed almost three times as many international arrivals as in the first seven months of 2021 (+190%), 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. Arrivals climbed to about 85% of 2019 levels in July. The lifting of travel restrictions in a large number of destinations also fuelled these results (44 countries in Europe had no COVID-19 related restrictions as of 19 September 2022).

The Middle East saw international arrivals grow almost four times year-on-year in January-July 2022 (+287%). 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, as some borders remained closed to non-essential travel.

Subregions and destinations

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 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%), Saint 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.

Tourism spending rises but challenges grow

The ongoing recovery can also be seen in outbound tourism spending from major source markets. Expenditure from France climbed to -12% in January-July 2022 compared to 2019 while spending from Germany rose to -14%. International tourism spending stood at -23% in Italy and -26% in the United States.

Robust performance was also recorded in international passenger air traffic, with a 234% increase in January-July 2022 (45% below 2019 levels) and a recovery of some 70% of pre-pandemic traffic levels in July, according to IATA.

Stronger-than-expected demand has also created important operational and workforce challenges in tourism companies and infrastructure, particularly airports. Additionally, the economic situation, exacerbated by the aggression of the Russian Federation against Ukraine, represents a major downside risk. 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, are major threats to the recovery of

international tourism through the remainder of 2022 and 2023. The potential slowdown can be seen in the latest UNWTO Confidence Index, which reflects a more cautious outlook, as well as in booking trends which are showing signs of slower growth.

Tourism Experts Cautiously Confident

On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period May-August 2022 with a score of 125, matching the bullish expectations expressed by the Panel in the May survey for the same 4-month period (124).

Prospects for the remainder of the year are cautiously optimistic. Although above-average performance is expected, tourism experts rated the period September-December 2022 with a score of 111, below the 125 score of the previous four months, showing a downgrade in confidence levels. Almost half of experts (47%) see positive prospects for the period September-December 2022, while 24% expect no particular change and 28% consider it could be worse. Experts also seem confident about 2023, as 65% see better tourism performance than in 2022.

The uncertain economic environment seems to have nonetheless reversed prospects for a return to pre-pandemic levels in the near term. 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%). According to experts, the economic environment continues to be the main factor weighing on the recovery of international tourism. Rising inflation and the spike in oil prices results in higher transport and accommodation costs, while putting consumer purchasing power and savings under pressure.

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