

Agenda item 3(a)

**Current trends of international tourism**

CE/116/3(a)  
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**Executive summary**

According to the March 2022 issue of the [UNWTO World Tourism Barometer](#), international tourism continued its recovery in January this year, 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.

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 as destinations in both regions removed more restrictive travel measures.

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 7 April, 26 destinations had no COVID-19 related restrictions in place.

However, serious 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 and rising inflation, could disrupt an already slow and uneven recovery.

The conflict risks hampering the return of confidence in global travel. The US and the Asian source markets, the latter opening recently, which tend to be more risk-averse, could be particularly impacted, especially regarding travel to Europe. The early weeks of March show a slowdown in overall bookings and searches for travel and UNWTO will continue to monitor the impacts through its regular Assessment Reports.

UNWTO will continue to monitor the key indicators and insights on international tourism. Regular updates are available at [UNWTO Data Dashboards](#) and at [UNWTO Market Intelligence](#).

## DRAFT DECISION<sup>1</sup>

### **Current trends of international tourism** (document CE/116/3(a))

*The Executive Council,*

*Having examined* the report on current trends of international tourism,

1. *Welcomes* the report and updated information provided by the Secretary-General as well as the UNWTO monitoring reports and tools developed since the outbreak of COVID-19; and
2. *Requests* the Secretary-General to continue monitoring trends and recovery and to update the Members accordingly.

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<sup>1</sup>This is a draft decision. For the final decision adopted by the Council, please refer to the Decisions document issued at the end of the session.

## I. International tourism consolidates recovery trend

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1. According to the [March 2022 issue of the UNWTO World Tourism Barometer](#), international tourism continued its recovery in January this year, 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.
2. Despite the robust results, the pace of recovery was impacted by the Omicron variant and the re-introduction of travel restrictions across several destinations at the end of 2021. 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 whole year 2021 (as compared to 2019).
3. 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 international arrivals at -53% and -52%, respectively.
4. The Middle East (+89%) and Africa (+51%) grew slower in January 2022 over 2021, posting drops 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.
5. 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.
6. 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.
7. IATA's data shows that international RPKs rose 257% versus February 2021, improving from a 165% year-over-year increase in January 2022 versus the year-earlier period. All regions improved their performance compared to the prior month. February 2022 international RPKs were down 60% compared to the same month in 2019.
8. According to ForwardKeys data included in the [UNWTO Tourism Recovery Tracker](#), air bookings stood at -66% in March 2022, the best result since the start of the pandemic. The Middle East (-39%), Africa (-48%) and the Americas (-49%) showed the best performance in March 2022. Air bookings for Europe stood at -61% and Asia and the Pacific at -87%.

## II. Major risks weighing on the recovery of tourism

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9. 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 7 April,<sup>2</sup> 26 destinations had no COVID-19 related restrictions in place.
10. However, major downside risks threaten the recovery of tourism in 2022. The military offensive of the Russian Federation on Ukraine coupled with a challenging economic environment, including high energy prices and rising inflation, 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 recovery.
11. The conflict risks hampering the return of confidence in global travel. The US and the Asian source markets, the latter opening recently, which tend to be more risk-averse, could be particularly impacted, especially regarding travel to Europe. The early weeks of March show a slowdown in

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<sup>2</sup> UNWTO/IATA Easy Travel Dashboard - [www.unwto.org/unwto-iata-destination-tracker](http://www.unwto.org/unwto-iata-destination-tracker)

overall bookings and searches for travel and UNWTO will continue to monitor the impacts through its regular Assessment Reports<sup>3</sup>.

12. Both Russia and Ukraine represent a combined share of 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 and 1% of Europe's international tourism receipts.
13. 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%).
14. The military offensive is adding 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.
15. The 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, putting pressure on consumer purchasing power and savings as well as on operational costs for tourism businesses, many of which still struggling to recover from COVID-19.
16. 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<sup>4</sup>. Inflation, already high at the start of the year, could be at least a further 2.5 percentage points higher. The price shock, especially on food and energy, risks disrupting the production of goods and services worldwide and increasing poverty.
17. 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<sup>5</sup>.
18. 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.
19. UNWTO scenarios for international tourist arrivals published in January 2022 pointed to 30% to 78% growth in international tourist arrivals in 2022 over 2021, depending on various factors. This would take international tourism to be still 50% to 63% below pre-pandemic levels at the global level, with diverse recovery trends per region. Although these scenarios remain unchanged for now, they are subject to revision as health, geopolitical and economic factors evolve.
20. A verbal update on this agenda item will be provided at the 116th session of the Executive Council.

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<sup>3</sup> [https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2022-03/220325\\_impact\\_russia\\_ukraine.pdf?mEwk5ydtlmQa1W\\_IUwXee9pnXADOhpSa](https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2022-03/220325_impact_russia_ukraine.pdf?mEwk5ydtlmQa1W_IUwXee9pnXADOhpSa)

<sup>4</sup> [www.oecd.org/economic-outlook/](http://www.oecd.org/economic-outlook/)

<sup>5</sup> <https://unctad.org/news/ukraine-war-cuts-global-growth-prospects-1>