

Agenda item 3(a)

Current trends of international tourism

CE/118/3(a)
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Executive summary

According to the [January 2023 issue of the UNWTO World Tourism Barometer](#), international tourism reached 63% of pre-pandemic levels in 2022 driven by strong pent-up demand and the lifting of travel restrictions in a majority of countries around the world.

Over 900 million tourists travelled internationally last year, double those in 2021 though still 37% fewer than in 2019.

Europe saw 585 million arrivals in 2022, almost 80% of pre-pandemic levels (-21% over 2019). The Middle East enjoyed the strongest relative increase 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.

International arrivals could reach 80% to 95% of pre-pandemic levels in 2023 according to UNWTO's scenarios, with Europe and the Middle East expected to attain 2019 levels.

The reopening of several Asian source markets and destinations will contribute to consolidate the recovery in 2023. In particular, the removal of COVID-19 restrictions in China, the world's largest outbound market in 2019, is a significant step towards the recovery in Asia and worldwide.

However, economic, health and geopolitical headwinds could weigh on the sustained recovery of international tourism and confidence levels in 2023. The challenging economic environment, including high inflation and interest rates, the spike in oil and food prices, as well as fears of a global recession could weigh on the recovery of tourism. The uncertainty derived from the Russian aggression against Ukraine is also an important downside risk.

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

DRAFT DECISION¹

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(document CE/118/3(a))

The Executive Council,

1. *Welcomes* the report and updated information provided by the Secretary-General as well as UNWTO's continuous monitoring tools; and
2. *Requests* the Secretary-General to continue monitoring trends and the recovery of international tourism and to update the Members accordingly.

¹This 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. Strong recovery of international tourism in 2022

1. According to the [January 2023 issue of the UNWTO World Tourism Barometer](#), international tourism saw stronger than expected results in 2022, backed by large pent-up demand and the lifting or easing of travel restrictions in a large number of destinations around the world.
2. International tourism recovered 63% of pre-pandemic levels in 2022, in line with UNWTO's scenarios published in May 2022. Over 900 million tourists travelled internationally, double those in 2021 though still 37% fewer than in 2019.
3. Despite headwinds including a challenging economic environment, international tourist numbers improved from -59% (versus 2019) in the first quarter of 2022 to -28% in the fourth quarter.
4. The easing of restrictions contributed decisively to this recovery. By March 2023 a total of 124 destinations had lifted all COVID-19 travel restrictions compared to only 31 the year before according to the [UNWTO/IATA Destination Travel – Easy Travel](#).
5. All regions enjoyed significant growth in 2022 compared to the previous year. Europe, the world's largest destination region, recorded 585 million arrivals in 2022, reaching almost 80% of pre-pandemic levels (-21% over 2019). The Middle East enjoyed the strongest relative increase with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019).
6. Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to ongoing pandemic-related restrictions.
7. By subregions, Western Europe and the Caribbean came the closest to their pre-pandemic levels in 2022, reaching 87% and 84% of their international arrivals respectively.
8. Most destinations enjoyed notable increases in international tourism receipts, in some cases higher than their growth in arrivals. This was supported by higher average spending per trip due to longer periods of stay, the willingness by travellers to spend more in their destination, and higher travel costs partly due to inflation.
9. The recovery can also be seen in outbound tourism, with strong international tourism spending in the first ten to twelve months of 2022 from major source markets such as France (-4% over 2019), Germany (-8%), Italy (-10%) and the United States (-15%). Some emerging markets recovered pre-pandemic expenditure levels in 2022, including Qatar (+29%), India (+10% through June) and Saudi Arabia (+7% through September).
10. Industry indicators confirm these trends. IATA's data shows an increase of 152% in international passenger air traffic (RPKs) in 2022 as compared to 2021 (still 38% below 2019 levels) while according to STR, global hotel occupancy gradually improved throughout 2022 ending the year at the global level at 56% as compared to 43% in January 2022. Further improvements are confirmed in the first months of 2023, with global occupancy rates reaching 54% in January and 63% in February.

II. International tourism set consolidate its recovery in 2023

11. International tourism is expected to consolidate its recovery in 2023, backed by strong pent-up demand, particularly in Asia and the Pacific.
12. International arrivals could reach 80% to 95% of pre-pandemic numbers in 2023 according to UNWTO's scenarios. Europe is expected to drive results in 2023, with arrivals reaching or exceeding pre-pandemic levels. There is still considerable room for recovery in some European destinations and subregions. The Middle East could also recover 2019 levels throughout 2023 after a strong rebound in 2022.
13. According to the latest survey of the UNWTO Panel of Tourism Experts, most tourism professionals (72%) see better or much better prospects for 2023 compared to 2022. Some 20% expect similar performance as in 2022, while only 8% consider 2023 will be worse or much worse than last year.

14. 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 for the recovery of the tourism sector in Asia and the Pacific and worldwide.
15. The resumption of travel from China is likely to benefit mostly Asian destinations in the short term. However, the choice of destinations will be influenced by the availability and cost of air travel, visa regulations and COVID-19 related restrictions. By mid-January 2023 a total of 32 countries had imposed specific travel restrictions related to travel from and through China but this number has come significantly down to 13 by the end of March 2023 ([see UNWTO/IATA Destination Travel – Easy Travel](#)).
16. 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 from a weaker euro versus the US dollar.
17. The improved availability of air capacity is expected to contribute to the ongoing recovery of international tourism in 2023. International seat capacity remained 25% below 2019 levels in January 2023 (IATA) while demand data for January 2023 confirms the positive trend with a recovery of 77% of pre-pandemic levels in that month and a growth of 104% over January 2022.
18. Expectations for the period January-April 2023 indicate cautious optimism, with the UNWTO Confidence Index showing a slight improvement (119) in January-April 2023 compared to prospects expressed for the previous period of September-December (111).
19. However, 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 UNWTO Panel of Experts held in January, the challenging economic environment including high inflation and interest rates, are the main factors that could weigh on the recovery of tourism. Furthermore, the continued Russian aggression against Ukraine and other geopolitical tensions, as well as workforce challenges also represent downside risks for the sector going into 2023.

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