Executive summary

According to the May 2023 issue of the UNWTO World Tourism Barometer, international tourism reached 80% of pre-pandemic levels in the first quarter of 2023 (20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall.

International tourism grew 86% in Q1 2023 compared to the same period last year, showing continued strength. An estimated 235 million tourists travelled internationally in the first three months of 2023, more than double those in the same period of 2022. The Middle East saw the strongest performance (+15%) and was the first world region to recover pre-pandemic numbers in a full quarter. Europe reached 90% of pre-pandemic levels, supported by robust intra-regional demand. Africa and the Americas reached about 85% of 2019 levels, while arrivals in Asia and the Pacific climbed to 54% of pre-pandemic levels.

International arrivals could reach 80% to 95% of pre-pandemic levels in the fully year of 2023 according to UNWTO’s scenarios. The reopening of several Asian source markets and destinations end of 2022 and early 2023 is to contribute to consolidate the recovery. 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, the challenging economic environment, including high inflation and interest rates, the spike in oil and food prices exacerbated by the ongoing Russian aggression against Ukraine are important downside risks. In response to the challenging economic environment, tourists are expected to increasingly seek value for money and travel closer to home this year.

International tourism has showed a remarkable recovery in view of the impact the pandemic had on the sector:

- A loss of 2.6 billion international arrivals in 2020-2022 combined, almost twice the arrivals recorded in 2019
- A total loss in export revenues from tourism amounting to USD 2.6 trillion for the 2020-2022 period, representing one and a half times the revenues earned in 2019

Updated information will be presented verbally to the General Assembly. Regular updates are also available at UNWTO Tourism Data Dashboards and at UNWTO Market Intelligence.
DRAFT RESOLUTION¹

The General Assembly,

1. Welcomes the report presented by the Secretary-General as well as UNWTO’s continuous monitoring of international tourism trends; and

2. Requests the Secretary-General to continue monitoring trends and update Members accordingly.

¹ This is a draft resolution. For the final resolution adopted by the Assembly, please refer to the Resolutions document issued at the end of the session.
I. International arrivals recovered 80% of pre-pandemic levels in the first quarter of 2023

1. According to the May 2023 issue of the UNWTO World Tourism Barometer, international arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall.

2. International tourism grew 86% in Q1 2023 compared to the same period last year, reflecting continued strength at the start of the year with an estimated 235 million tourists travelling internationally in the first three months, more than double those in the same period of 2022.

3. The Middle East saw the strongest performance, with arrivals exceeding by 15% the number recorded in the first quarter of 2019. As a result, the Middle East is the first world region to recover pre-pandemic numbers in a full quarter.

4. Europe, the world’s largest destination region, reached 90% of pre-pandemic levels in Q1 2023, supported by robust intra-regional demand. Travel from the United States also contributed to results. Africa recovered 88% of its pre-pandemic arrivals in the first three months of 2023 and the Americas about 85%.

5. International tourism experienced a rapid recovery in Asia and the Pacific where arrivals climbed to 54% of pre-pandemic levels in Q1 2023 after the opening up of several destinations and source markets at the end of 2022 and earlier this year.

6. By subregions, North Africa (+4%) and Southern Mediterranean Europe (+1%) were the only subregions to recover pre-pandemic levels in Q1. Central America (98%), the Caribbean (94%), Western Europe (92%) and Northern Europe (91%) came very close to their Q1 2019 levels.

7. Industry indicators confirm these trends. As per IATA’s data, total air traffic in June 2023 (measured in revenue passenger kilometres or RPKs) rose 31% compared to June 2022. Globally, air travel demand reached 90% of pre-COVID levels in the first half of 2023 with international demand at 84%.

8. According to STR, global hotel occupancy gradually improved throughout 2023 reaching 70% in June 2023 as compared to 58% in June 2022. Europe saw the highest occupancy rate at 76% in June 2023.

2023: International tourist arrivals to recover 80% to 95% of pre-pandemic levels

9. UNWTO’s scenarios for 2023 project international arrivals to recover 80% to 95% of pre-pandemic levels by the end of the year, backed by strong pent-up demand, particularly in Asia and the Pacific.

10. According to the UNWTO Panel of Experts, the challenging economic environment continues to be the main factor weighing on the full recovery of international tourism in 2023. Against this backdrop, tourists are expected to increasingly seek value for money and travel closer to home in response to elevated prices and the overall economic challenges.

11. The International Monetary Fund’s latest Updated World Economic Outlook (July 2023) indicates that global growth could fall from 3.5% in 2022 to 3.0% in 2023, amid rising interest rates to fight inflation.

12. Uncertainty derived from the Russian aggression against Ukraine and other mounting geopolitical tensions also continue to represent downside risks. While the sector should remain vigilant to risks associated with health, the World Health Organization declared on 5 May 2023 that COVID-19 is now an established and ongoing health issue which no longer constitutes a public health emergency of international concern.
II. Looking back at the worst years for international tourism

13. Tourism suffered its deepest crisis in recorded history during the COVID-19 pandemic. International tourist arrivals (overnight visitors) plunged from 1.5 billion in 2019 to 407 million in 2020, a 72% drop in just one year, impacted by global lockdowns, widespread travel restrictions and the slump in visitor demand.

14. In 2021 arrivals remained 69% below 2019 levels as the world continued to fight the pandemic and most restrictions continued in place, though domestic tourism rebounded moderately in many markets. The year 2022 saw a partial recovery in international travel fuelled by strong pent-up demand and the easing of restrictions, with arrivals more than doubling compared to 2021 but remaining 34% below 2019 levels.

15. Overall, the pandemic generated a loss of 2.6 billion international arrivals in 2020-2022 combined, almost twice the arrivals recorded in 2019.

16. Export revenues from international tourism dropped 62% in 2020 and 59% in 2021, versus 2019 (real terms) and then rebounded in 2022 yet remaining 34% below pre-pandemic levels.

17. The total loss in export revenues from tourism amounts to USD 2.6 trillion for the 2020-2022 period, one and a half times the revenues earned in 2019.

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