



UNWTO
World Tourism Organization

UNWTO WORLD TOURISM BAROMETER

JANUARY 2022



2020: WORST YEAR ON RECORD FOR TOURISM

International tourist arrivals:

-73%
-1.1 billion

Export revenues from international tourism:

-63% (real terms)
-US\$ 1.1 trillion

Tourism Direct GDP:

-US\$ 2.0 trillion

Decline to levels of early

1990s



2021*: ANOTHER CHALLENGING YEAR

International tourist arrivals

-72% vs 2019
-1 billion

+4% vs 2020
+15 million

Export revenues from international tourism:

-US\$ 0.9 to -US\$ 1.0 trillion

Direct Tourism GDP:

-US\$ 1.6 trillion

SOURCE: UNWTO

*PROVISIONAL DATA. CHANGE OVER 2019 UNLESS OTHERWISE INDICATED. (DATA AS OF JANUARY 2022)



UNPRECEDENTED IMPACT FROM COVID-19

2019
pre-pandemic year

2020

2021*

International tourist arrivals
(overnight visitors)

1.5
billion

400
million

415
million

Export revenues from
international tourism
(international tourism receipts
+ passenger transport)

US\$ 1.7
trillion

US\$ 638
billion

US\$ 700-800
billion

Tourism Direct Gross
Domestic Product (TDGDP)

US\$ 3.5
trillion

US\$ 1.6
trillion

US\$ 1.9
trillion

2021* INTERNATIONAL TOURIST ARRIVALS

AMERICAS
+ 17% (VS 2020)
- 63% (VS 2019)

AFRICA
+ 12% (VS 2020)
- 74% (VS 2019)

WORLD
+ 4% (VS 2020)
- 72% (VS 2019)

EUROPE
+ 19% (VS 2020)
- 63% (VS 2019)

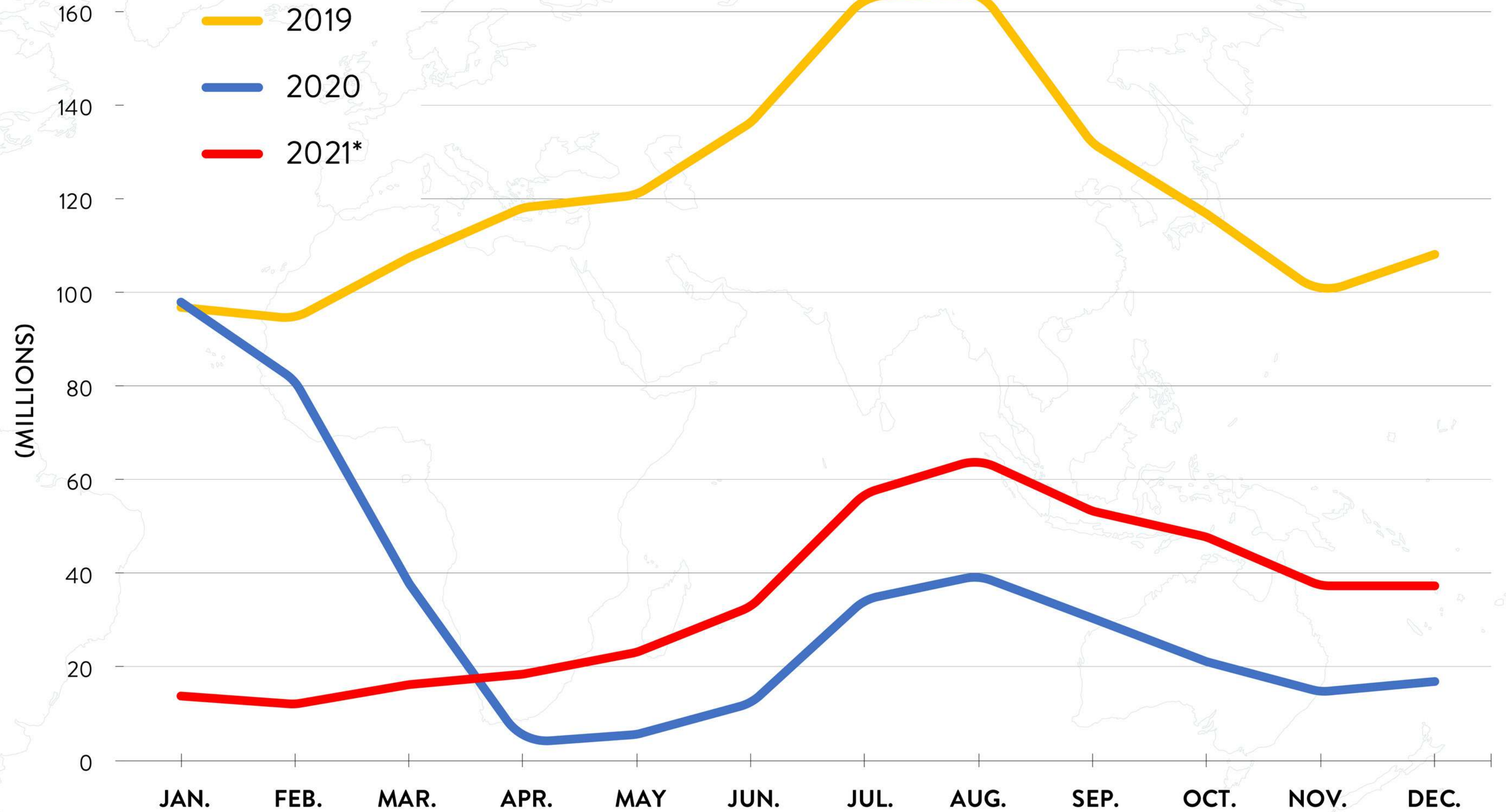
ASIA & THE PACIFIC
- 65% (VS 2020)
- 94% (VS 2019)

MIDDLE EAST
- 24% (VS 2020)
- 79% (VS 2019)



SOURCE: UNWTO
* PROVISIONAL DATA (DATA AS OF JANUARY 2022)

INTERNATIONAL TOURIST ARRIVALS BY MONTH (MILLIONS) 2019-2021



* Provisional data



SOURCE: UNWTO
(DATA AS OF JANUARY 2022)



2021 HIGHLIGHTS

- International tourist arrivals increased by 4% in 2021 compared to 2020, however they remained 72% below 2019 levels.
- 2021 saw 15 million more international tourist arrivals compared to 2020.
- After a weak first half of 2021, international tourism rebounded moderately during the Northern Hemisphere summer season, boosting results for the third quarter. The positive momentum continued into the fourth quarter.
- The Americas together with Europe saw the best results in 2021. The Caribbean recorded the best performance by subregion.
- The recent improvement was driven by increased traveler confidence amid rapid progress on vaccinations and the easing of travel restrictions in many destinations.
- Average receipts per arrival exceeded US\$ 1,500 in 2021, due to large pent-up savings and longer periods of stay, but also higher transport and accommodation prices.
- The number of closed destinations dropped to the lowest level in November 2021. Asia and the Pacific remains the region with the largest share of closed destinations.
- The recovery remains fragile and uneven amid the emergence of the new Omicron variant and surging infections in some parts of the world.

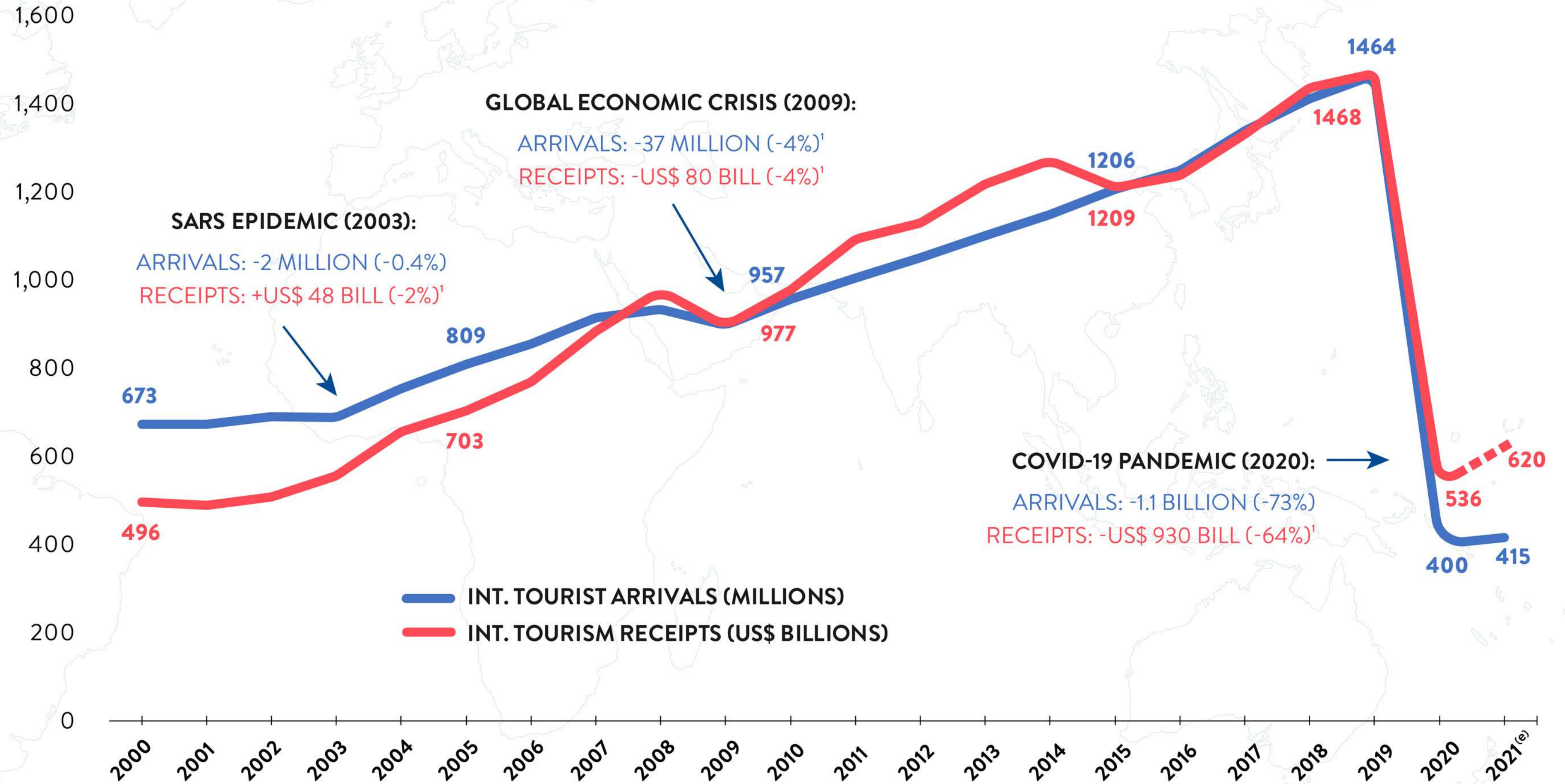
INTERNATIONAL TOURIST ARRIVALS AND TOURISM RECEIPTS 2000–2021

(e) Figures for 2021 are preliminary estimates

¹ Real percentage change (local currencies, constant prices)



SOURCE: UNWTO
(DATA AS OF JANUARY 2022)





2022 OUTLOOK

- **Challenges**

- Recent rise in infections and the new Omicron variant could again disrupt the recovery and confidence through early 2022 as some countries reintroduce travel bans and restrictions for certain markets.
- Asia and the Pacific is still the region with the largest share of closed destinations.
- The vaccination roll-out remains uneven.
- Economic environment: oil price hike, rise in inflation and potential increase in interest rates, as well as high debt levels and continued disruption in international supply chains.

- **Opportunities**

- Ongoing recovery in many countries and markets, mostly in Europe and the Americas.
- Still large pent-up demand.
- Ongoing vaccination roll-out.
- Experience gained from years 2020 and 2021.
- Use of digital tools to facilitate travel such as the EU Digital COVID Certificate.

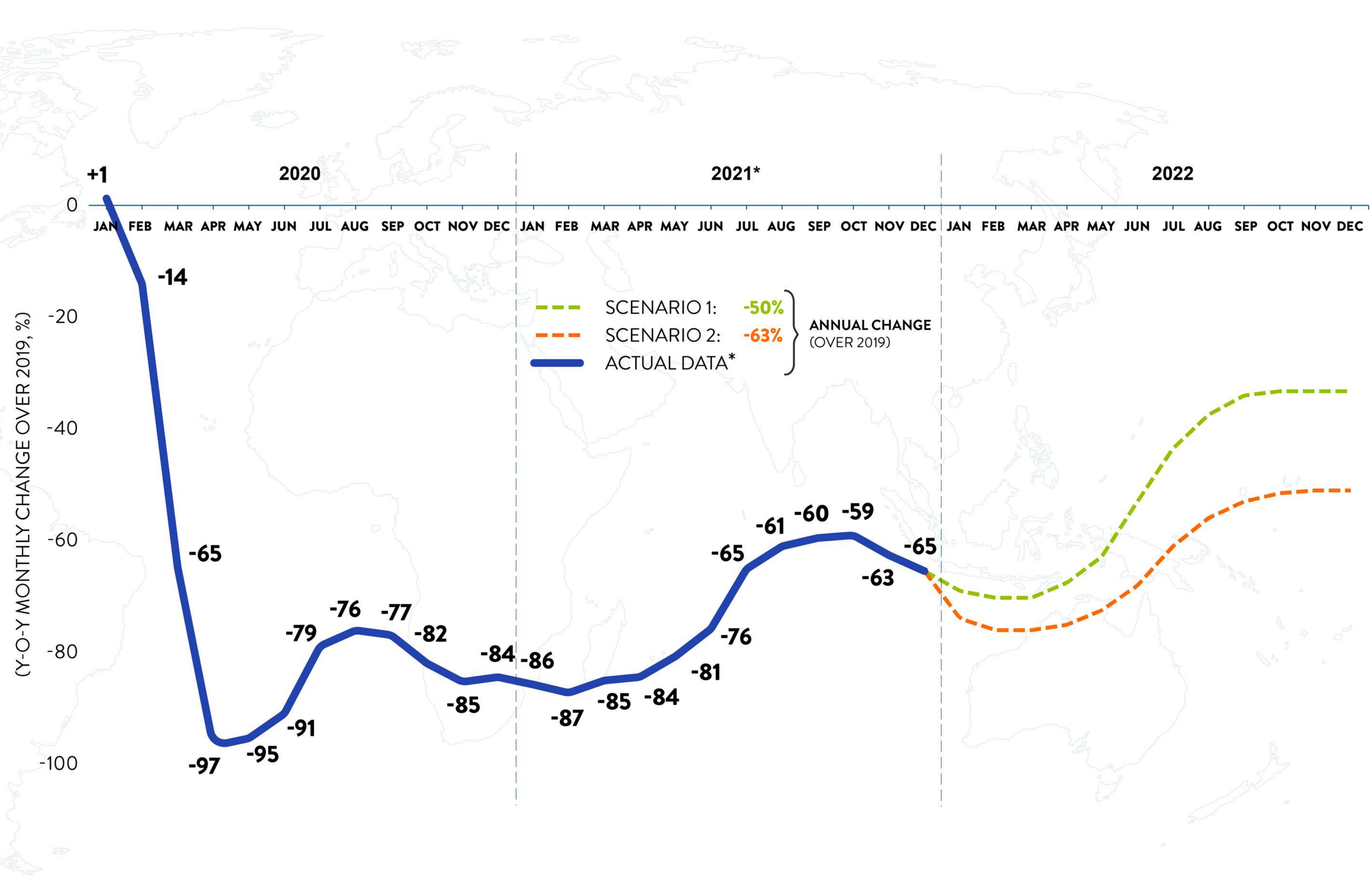
INTERNATIONAL TOURIST ARRIVALS: SCENARIOS FOR 2022

(Y-O-Y MONTHLY CHANGE
OVER 2019, %)

* Actual data for 2021 is preliminary
and based on estimates for
destinations which have not yet
reported results.



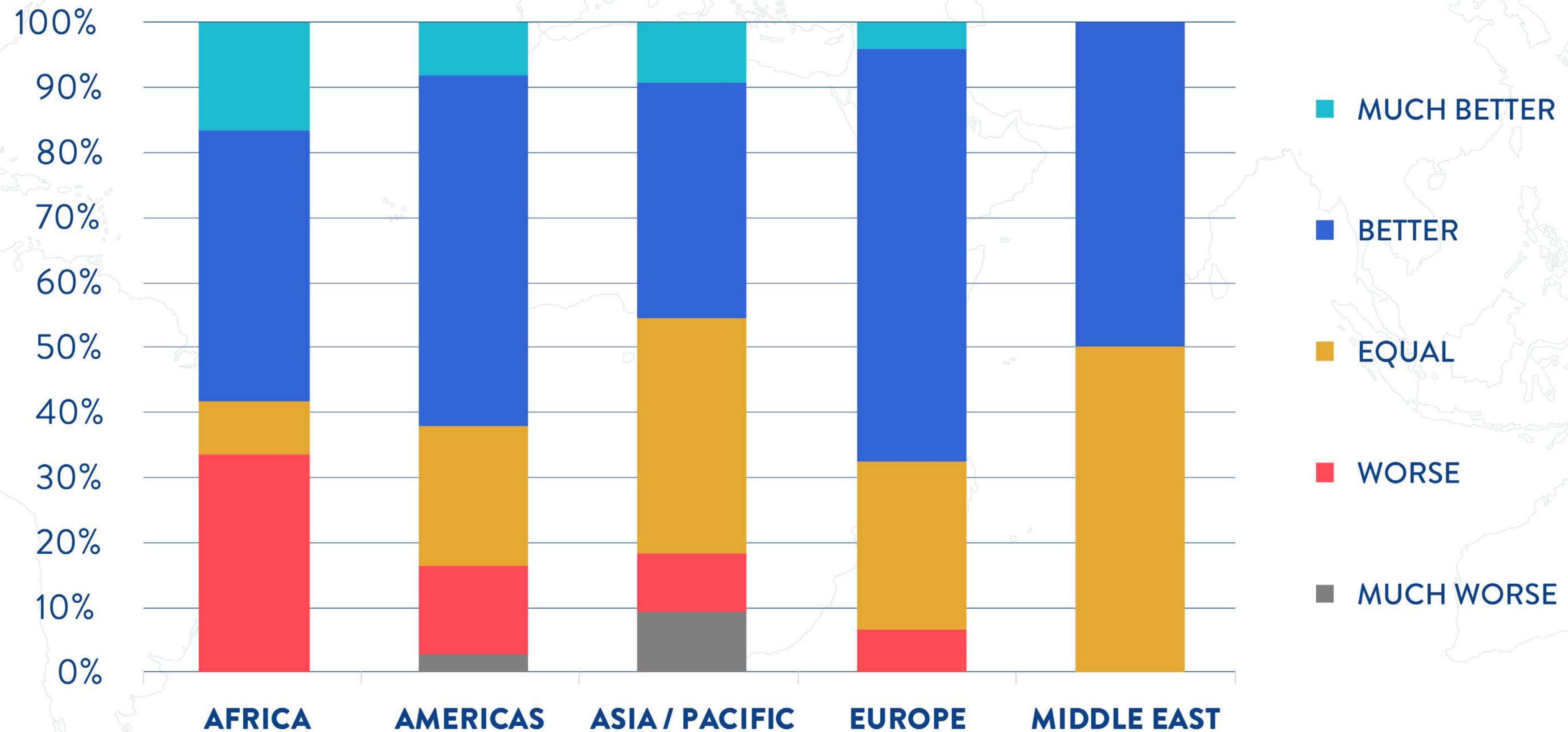
SOURCE: UNWTO
(DATA AS OF JANUARY 2022)





EXPERTS FROM MOST WORLD REGIONS INDICATE BETTER PROSPECTS FOR 2022

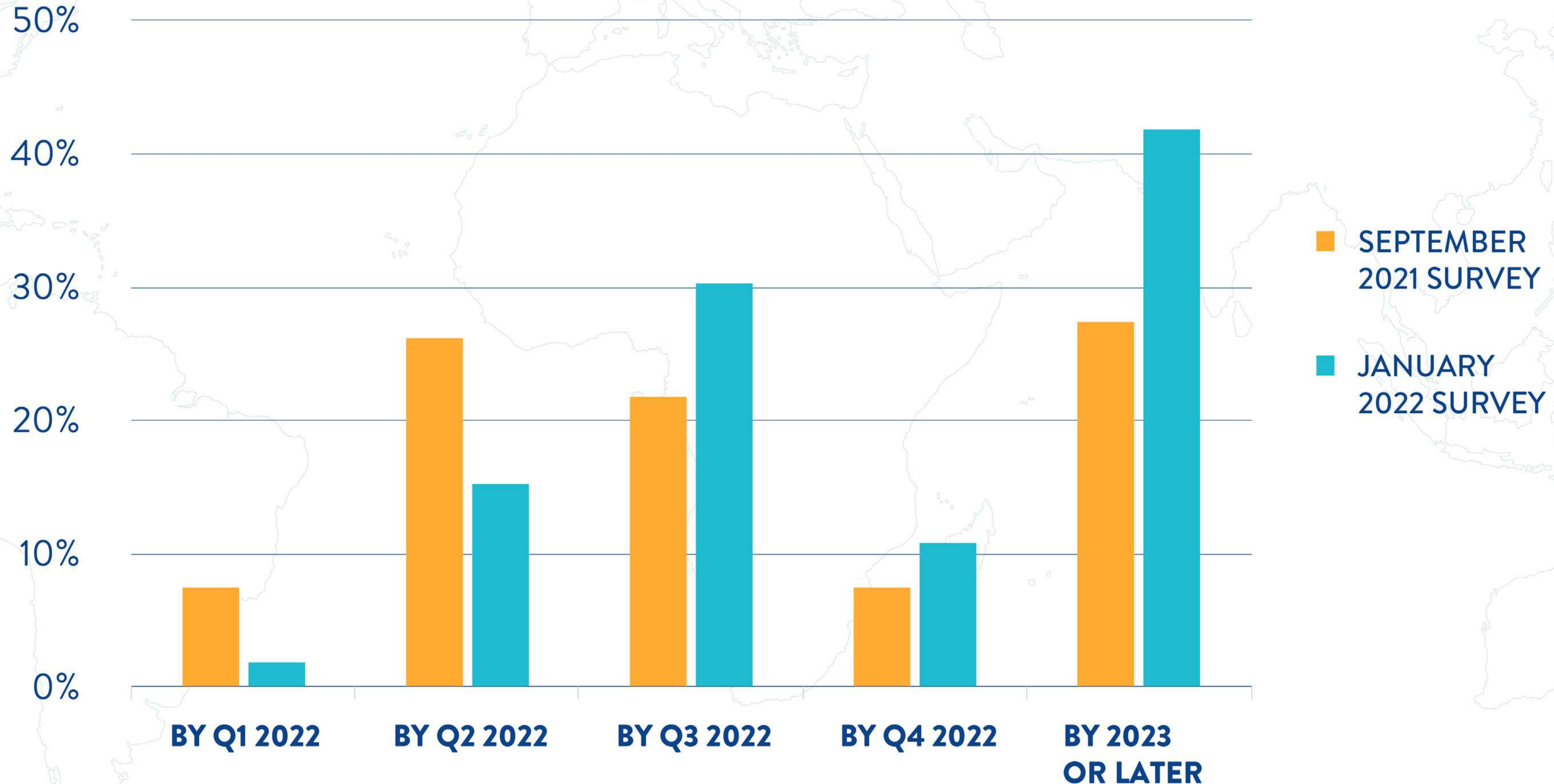
WHAT ARE YOUR PROSPECTS FOR TOURISM PERFORMANCE IN
YOUR DESTINATION OR BUSINESS IN 2022 AS COMPARED TO 2021?



SOURCE: WORLD TOURISM ORGANIZATION (UNWTO)
UNWTO PANEL OF EXPERTS, JANUARY 2022 SURVEY

EXPERTS STILL SEE A POTENTIAL REBOUND IN 2022, THOUGH **EXPECTATIONS FOR 2023** GAIN MOMENTUM

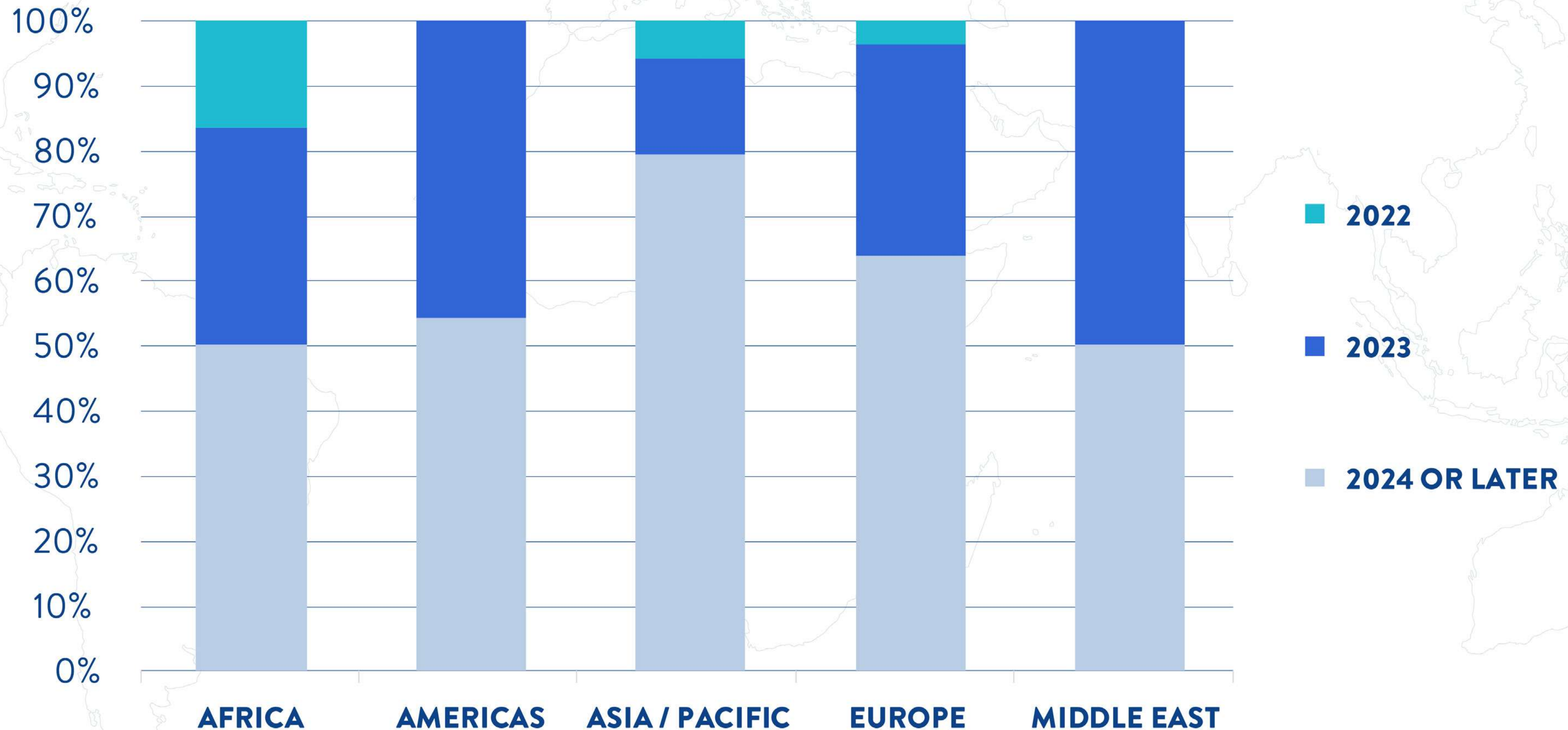
WHEN DO YOU EXPECT A REBOUND IN INTERNATIONAL TOURISM IN YOUR COUNTRY?





MOST EXPERTS NOW SEE **A RETURN OF INTERNATIONAL ARRIVALS TO 2019 LEVELS ONLY IN 2024 OR LATER**

WHEN DO YOU EXPECT INTERNATIONAL TOURISM TO RETURN TO PRE-PANDEMIC 2019 LEVELS IN YOUR COUNTRY?

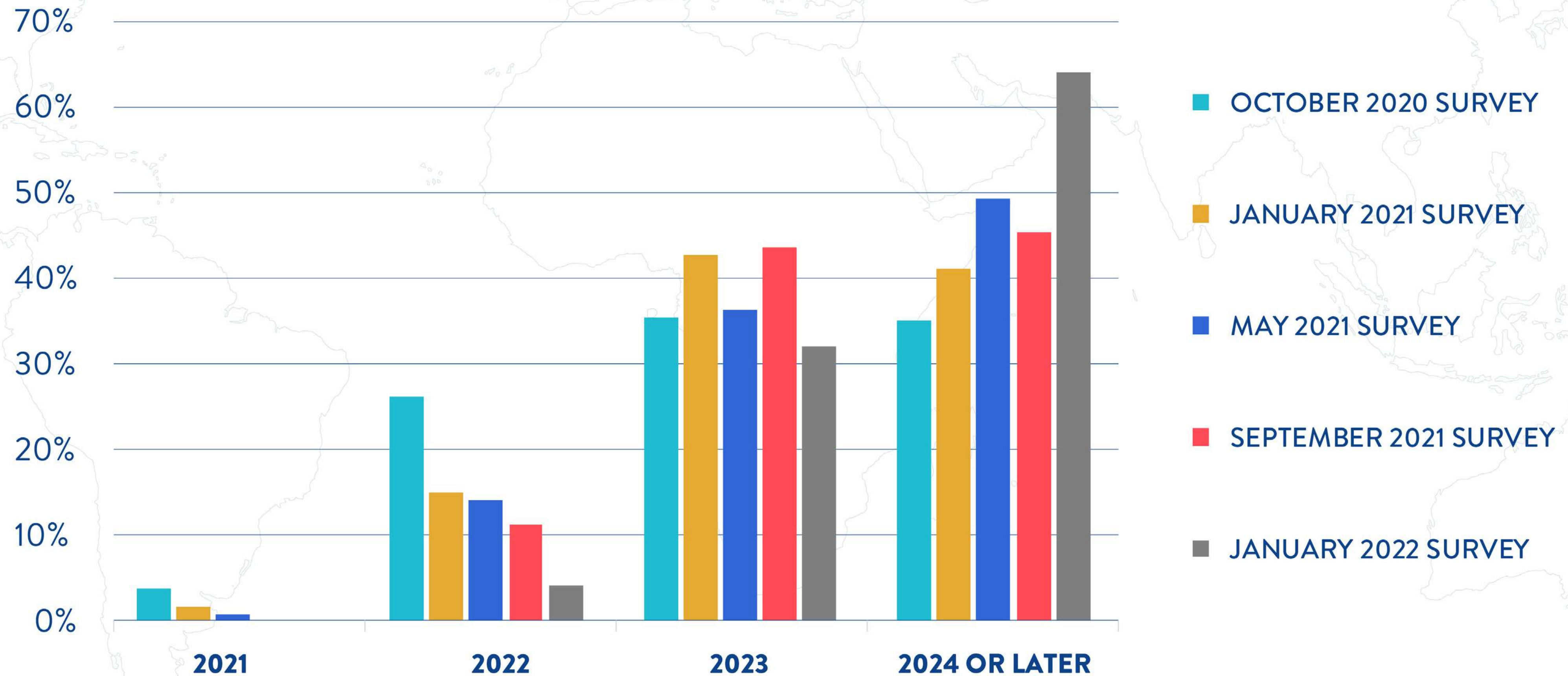


SOURCE: WORLD TOURISM ORGANIZATION (UNWTO)
UNWTO PANEL OF EXPERTS, JANUARY 2022 SURVEY.



LATEST PANEL SURVEY SHOWS DELAY IN EXPECTED RECOVERY TO PRE-PANDEMIC LEVELS

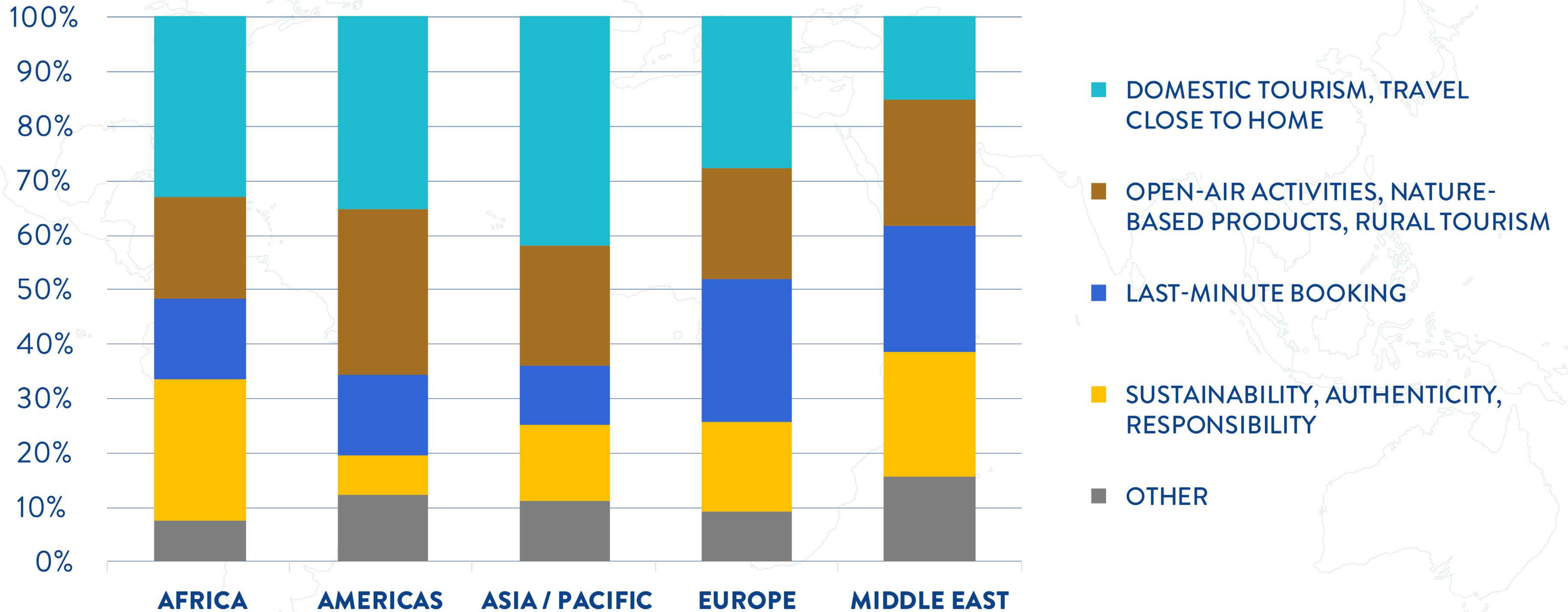
WHEN DO YOU EXPECT INTERNATIONAL TOURISM TO RETURN TO PRE-PANDEMIC 2019 LEVELS IN YOUR COUNTRY?



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DOMESTIC TOURISM, TRAVEL CLOSE TO HOME, OPEN-AIR ACTIVITIES, NATURE-BASED PRODUCTS AND RURAL TOURISM IDENTIFIED AS MAJOR TRAVEL TRENDS IN 2022



SOURCE: WORLD TOURISM ORGANIZATION (UNWTO)
UNWTO PANEL OF EXPERTS, JANUARY 2022 SURVEY.



CHANGES IN CONSUMER TRENDS

SHORT-LIVED TRENDS OR HERE TO STAY?

Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travelers go for 'staycations' or vacations close to home.

More responsible

Sustainability, authenticity and localhood: travelers believe in the importance of creating a positive impact on local communities, increasingly searching for authenticity.

Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.

Longer stays & higher spending

2021 has seen a significant increase in spending per trip and longer stays



**COVID-19
RESPONSE**
