

# GLOBAL TOURISM RECOVERY IS ACCELERATING



According to the latest WTO World Tourism Barometer, global tourism has seen a 182% year-on-year increase in January-March 2022, with destinations around the world hosting around 117 million international arrivals, up from 41 million in the first quarter of 2021. Of the additional 76 million international arrivals for the first three months, around 47 million were recorded in March, showing that the recovery is gathering pace.

## Europe and the Americas Lead the Recovery

UNWTO (World Tourism Organization) data shows that in the first quarter of 2022, Europe welcomed nearly four times as many international arrivals (+280%) as in the first quarter of 2021, with results-driven by strong intra-regional demand.

### **In the Americas, arrivals more than doubled (+117%) during the same three months.**

However, arrivals in Europe and the Americas were still 43% and 46% below 2019 levels, respectively.

The Middle East (+132%) and Africa (+96%) also saw strong growth in Q1 2022 compared to 2021, but arrivals remained 59% and 61% below 2019 levels respectively.

Asia and the Pacific saw a 64% increase over 2021, but again, levels were 93% below 2019 figures, with several destinations remaining closed to non-core travel.

By sub-region, the Caribbean and Southern Mediterranean Europe continue to show the fastest recovery rates. In both cases, arrivals have returned to nearly 75% of 2019 levels, with some destinations reaching or exceeding the pre-pandemic levels.

## The Opening of Destinations

Although international tourism remains 61% below 2019 levels, the gradual recovery is expected to continue throughout 2022 as more destinations ease or lift travel restrictions and pent-up demand is released. As of June 2, 45 destinations (including 31 in Europe) had no Covid-19-related restrictions in place. In Asia, an increasing number of destinations have begun to ease travel restrictions.

Despite this positive outlook, a difficult economic environment coupled with the war in Ukraine poses a downside risk to the ongoing recovery in global tourism. However, the conflict appears to have had a limited direct impact on overall results so far, although it is disrupting travel to Eastern Europe.

Nevertheless, the conflict is having a major global economic impact, exacerbating already high oil prices and global inflation and disrupting international supply chains, resulting in increased transportation and accommodation costs for the tourism sector.

## Export Earnings Expected to Recover More Quickly

Total tourism export receipts (including passenger receipts) reached about US\$713 billion in 2021,

an increase of 4% in real terms over 2020, but still 61% below 2019 levels.

International tourism revenues reached \$602 billion, also 4% higher in real terms than in 2020. Europe and the Middle East performed best, with revenues reaching about 50% of pre-pandemic levels in both regions.

However, the amount spent per trip is increasing - from an average of USD 1,000 in 2019 to USD 1,400 in 2021.

### **Stronger Than Expected Recovery Ahead**

The latest UNWTO confidence index showed a marked increase. For the first time since the start of the pandemic, the index has returned to 2019 levels, reflecting the growing optimism of tourism experts around the world, building on strong pent-up demand, particularly intra-European travel and US travel to Europe.

According to the latest survey by the UNWTO expert group, an overwhelming majority of tourism professionals (83%) see a better outlook for 2022 compared to 2021, as long as the virus is contained and destinations continue to ease or lift travel restrictions. However, the ongoing closure of some major outbound markets, mainly in Asia and the Pacific, as well as uncertainty arising from the Russian-Ukrainian conflict, could delay the effective recovery of international tourism.

More experts (48%) now see a potential return of international arrivals to 2019 levels in 2023 (compared to 32% in the January survey), while the percentage indicating that this could happen in 2024 or later (44%) has decreased compared to the January survey (64%).

Meanwhile, at the end of April, international air capacity across the Americas, Africa, Europe, the North Atlantic and the Middle East was at or near 80% of pre-crisis levels, and demand is following suit.

### **UNWTO has revised its outlook for 2022 due to better-than-expected results in the first quarter of 2022, a significant increase in flight bookings and the outlook for the WTO confidence index.**

International tourist arrivals are now expected to reach 55% to 70% of 2019 levels in 2022, depending on several circumstances, including the speed at which destinations continue to lift travel restrictions, developments in the war in Ukraine, possible further outbreaks of coronavirus, and economic conditions including inflation and energy prices.

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