

# International Tourism And Recreation Development Trends In 2022: New Tourism Trends

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DOI: 10.47750/pnr.2022.13.S09.425

## Abstract

The article considers the revival of international tourism and recreation in 2022 and compares it with the pre-Covid 2019. The main trends in 2022 were also identified, and the threats that the conflict between Russia and Ukraine entailed for the further development of the tourism sector of the world and the European region were clarified. The advantages of investing in the tourism industry are presented, and recommendations are proposed for effectively solving problems in the field of tourist destination marketing.

**Keywords** — Tourism, forecast, trend, coronavirus pandemic, conflict

## I. INTRODUCTION

In today's globalized world, the tourism industry occupies a decisive place in the system of international economic relations and takes the position of a significant factor in economic growth, which contributes to increasing a country's competitiveness on the world stage and solving a number of economic and social issues.

Tourism entered the 21<sup>st</sup> century as a sector of the economy, which was characterized by stable development and turned into one of the most profitable and dynamic sectors of the global economy. The tourism industry accounted for about 10% of world GDP, 6% of world exports, about 30% of world trade in services, 7% of total world investment, 11% of world consumer spending, with every 10<sup>th</sup> job associated with this sector [1].

Alongside domestic factors (demand processes, market segmentation, coordination of business, advertising, employees, seasonality, etc.), the development of tourism is influenced by external factors (geopolitical, economic, socio-demographic, as well as scientific and technological), among which it is worth paying attention to geopolitical factors (political upheavals, terrorist attacks, and military conflicts), which affect the dynamics and distribution of tourist flows.

The crisis of the coronavirus pandemic has marked significant changes for everyone, and above all for tourism, which is one of the sectors most affected by the virus. 2020 was the year when international tourism came to an almost complete halt, leaving domestic and local tourism as the only alternative.

The spread of the coronavirus has provoked and exacerbated many threats:

- 1) Threats to health and life. A large number of complications and deaths have escalated due to the coronavirus.
- 2) Economic threats. The pandemic affected small entrepreneurs who were forced to close due to the lockdown, large enterprises lost orders, and entire economic regions suffered losses due to the cessation or restriction of labour migration. Together, economic threats have led to an aggravation of social conflicts.
- 3) Social and legal threats. In the sphere of law, the coronavirus provoked an aggravation of the dilemma between legal regulation and the freedom of citizens. At the same time, it is obvious that the loss of human potential and interpersonal connections, as well as fear that has spread in society can only be stopped by confident, purposeful, and coordinated actions of governments and states.
- 4) Political and ideological threats. Unfortunately, although the coronavirus is a common enemy, it (except some cases) did not give impetus to unite peoples. In some countries, the issues of the pandemic, lockdown, and vaccination have been taken to the political plane and used for political struggle. Politically motivated government decisions to counter COVID-19 have allowed Covid-dissident and anti-vaccine movements to flourish.

The COVID-19 pandemic has provoked a deep crisis in the tourism industry, which has required tour operators, travel agents, airlines, hotels, cruise companies, restaurants, and other businesses involved in tourism to adapt accordingly and follow the latest trends in the tourism market. The tourism industry found itself in uncertain working conditions, which led to significant changes in the functioning of the subjects of tourism business [2].

There have been some improvements in 2021, but only to a very small extent, as restrictions were still in place, and many countries kept their borders completely or partially closed. In 2022, tourism and recreation continued to recover at a much faster pace.

## II. MATERIALS AND METHODS

UNWTO international statistics and information from specialized business publications were the materials used for this study. Scientific methods used in the study include data collection and processing, systematic analysis, and comparison. To summarize the results, a comprehensive analysis of the trends in the development of tourism and recreation in the world was carried out in order to determine the main trends for 2022 and develop recommendations for effectively solving problems in the field of tourist destination marketing.

## III. RESULTS AND DISCUSSION

A number of authors tend to believe that the pandemic will forever change the global tourism market, even if its consequences are finally overcome [3, 4, 5, 6]. At the same time, scientific research should respond in a timely manner to the needs of the tourism industry in order to determine appropriate development strategies [7].

Global tourism has shown steady growth over the past decades. However, the COVID-19 pandemic has triggered an international crisis that has radically transformed the entire industry all over the world. Tourism business has suffered the most due to travel restrictions. The coronavirus has shocked the global travel industry, leading to political uncertainty, an economic downturn in major markets, and a decline in international business tourism.

In general, the number of international arrivals was almost three times higher in January-July 2022 than for the same period in 2021, with the Middle East leading in this indicator.

According to the UNWTO World Tourism Barometer, international tourism grew by 172% in January-July 2022 year-on-year, with tourism regions worldwide receiving around 207 million international arrivals in June-July 2022, which is twice as much compared to the same months of 2021 [8]. This indicates that the recovery of tourism is gaining momentum. High travel demand during the summer season accounted for almost half (44% of the 7-month total) of arrivals in June and July 2022. The easing or lifting of restrictions on travel between countries is very conducive to the recovery of international tourism.

UNWTO data show that the Middle East received almost four times more international arrivals (+287%) during the 7 months of 2022 than in the same months of 2021. Europe ranked second and received almost three times as many international tourists (+190%), driven by strong intra-regional demand and travels from the United States. Africa (+171%) also saw significant growth in January-July 2022 compared to 2021. Asia-Pacific recorded growth by +165% over 7 months of 2022 compared to 2021. Arrivals more than doubled (+103%) in the US over the same 7 months (Fig. 1, drawn by the author based on [8]).



Fig. 1 Growth of international tourist arrivals by region for 7 months of 2022 compared to the same period of 2021, %

Despite significant achievements in the development of international tourism, it has not yet been possible to achieve pre-pandemic values in the industry. The number of arrivals in Europe and the Middle East reached 74% and 76% of the 2019 level,

respectively. Arrivals to the Americas and Africa were still 65% and 60% below 2019 levels, respectively. Arrivals to the Asia-Pacific region remained 86% below 2019 levels as several destinations remained closed to travel (Fig. 2, drawn by the author based on [8]).

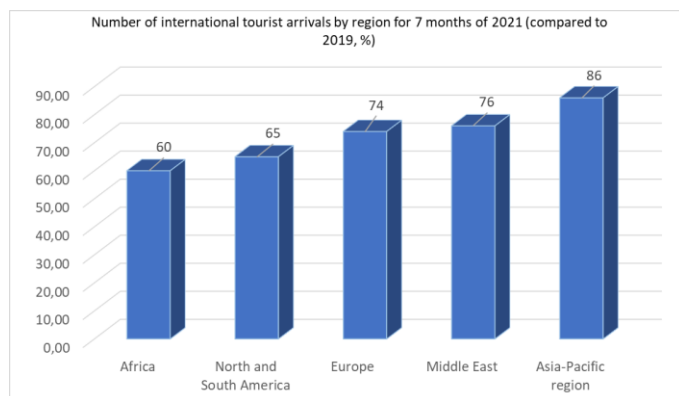


Fig. 2 Number of international tourist arrivals by region for 7 months of 2021 (compared to 2019, %)

Although international tourism remains 43% below 2019 levels, a gradual recovery is expected to continue through the end of 2022 as more destinations ease or lift travel restrictions and pent-up demand is released. For example, Spain became the last European country to lift anti-COVID restrictions starting October 21, 2022. A growing number of destinations in Asia have begun easing these restrictions.

Data analysis showed that \$1 trillion (USD) was lost in international tourism export earnings in 2021, adding to the \$1 trillion lost in the first year of the pandemic. Total export income from tourism (including revenue from passenger traffic) reached approximately \$713 billion in 2021, up 4% from 2020 but is still 61% below 2019 levels. International tourism receipts reached \$602 billion, which is also 4% more in real terms than in 2020. Europe and the Middle East showed the best results, with revenues in both regions rising to around 50% from pre-pandemic levels. However, the amount spent per trip is on the rise, from an average of \$1,000 in 2019 to \$1,400 in 2021.

Despite a rise in the UNWTO Confidence Index in May 2022 and optimism associated at that time with high pent-up demand, in particular for intra-European travels and travels from US to Europe, the outlook for the rest of 2022 is cautiously optimistic among travel experts around the world, and shows lowering of the level of confidence.

According to a UNWTO expert panel survey, the vast majority of tourism professionals (83%) see a better outlook for 2022 compared to 2021 if the virus is finally contained and destinations continue to ease or lift travel restrictions. However, the current closure of some of the main outbound tourism markets, mainly in Asia and the Pacific, as well as the uncertainty caused by the Russian-Ukrainian conflict, may delay the effective recovery of international tourism.

Previously, more experts (48%) saw a potential return of international arrivals to 2019 levels in 2023 (compared to 32% in the January survey), while the percentage of those who indicated that this could happen in 2024 or later (44%) decreased compared to the January survey (64%). Meanwhile, by the end of April 2022, the capacity of international aircraft in America, Africa, Europe, the North Atlantic, and the Middle East reached or approached 80% of the pre-crisis level.

The difficult economic environment, caused by high inflation, a leap in oil prices, the conflict between Russia and Ukraine, and geopolitical tensions in the world, worsened experts' forecasts. Currently, about 61% of experts see the recovery of tourism and the return of international tourist arrivals to the level of 2019 only in 2024 or even later. The percentage of those who indicated that this could happen in 2023 (27%) has decreased compared to the May survey (48%).

Despite the aggravating circumstances, a significant increase in flight bookings and the prospects based on the UNWTO Confidence Index in the first half of 2022 give hope for better results in the tourism industry in 2022.

Positive forecasts indicate that international tourist arrivals will reach 70% of 2019 levels by the end of 2022, depending on several factors, notably the speed at which international destinations continue to lift travel restrictions, possible new coronavirus outbreaks, and global economic conditions, in particular, inflation and energy prices [9].

We can talk about new travel trends that appeared in 2022:

- 1) Restricted international travel (restrictions by both destinations and airlines) to ensure 100% safety for the traveller.
- 2) Stricter testing for COVID-19. Testing for COVID-19 was still in effect as a preventive measure two years after the pandemic.
- 3) Conscious travel. People travelled to more distant destinations but with longer stays as consumers sought to get as much enjoyment as possible in every place they visited.

- 4) Green travel. Climate change is a problem that exists and is growing. Consumers have become much more responsible and are aware of the reality in which they live every day.
- 5) A combination of education and recreation for the youngest members of the family (“ed-ventures”) [10]. While adults may have needed to work remotely or attend meetings, their children have been able to participate in workshops and learn through play.
- 6) The use of virtual tours and virtual reality technology in tourism. More than 2,000 world museums and archives from around the world have already moved to the Internet through virtual reality in collaboration with the Google Cultural Institute. The use of digital technology in tourism allows potential customers to feel present in the room of any hotel, airport, or train station, in a restaurant, a local amusement ride, or even at a certain tourist event without being physically present and, respectively, without health risks.
- 7) Paying more attention to consumers in the domestic market or in neighbouring countries. Travel restrictions and the general reluctance or fear of a large proportion of tourists to travel outside their country have made them a safer and more desirable target group for travel companies. The experience of developed countries shows that citizens always have a desire to eventually leave their own city/metropolis [7].
- 8) Focusing on leisure issues and development of rural green tourism. The organization of visits to natural attractions, rural tourism, and individually planned family trips by car over short distances have become in demand. The advantage of rural green tourism is that it can satisfy the client’s desire for a short-term vacation.
- 9) Changes in the demographic structure of consumers of tourism services. A decrease in the number of travellers was observed among older people, and to a slightly lesser extent among middle-aged people. As more young people are now returning to active tourism and travel, it makes sense for travel companies to develop products specifically for the young.

Despite the above positive prospects, the difficult economic situation, combined with the military conflict between Russia and Ukraine, creates risks for the current recovery of international tourism. The Russian-Ukrainian conflict seems to so far have had a limited direct impact on the overall results, although it has hindered travel in Eastern Europe. However, this conflict has significant economic consequences around the world. European tourism seems to still remain resilient to economic, pandemic, and geopolitical upheavals. But the ongoing Russian-Ukrainian conflict has aggravated the oil and gas crisis. Soaring energy and commodity prices fuelled inflation, have increased business costs, disrupted supply chains, and negatively impacted consumer spending throughout much of 2022. The extent to which the oil price shock will affect travel through the energy dependency sector remains uncertain. If the conflict continues, its impact could lead to increased travel costs, while vacationers are more likely to explore places closer to home and cut travel costs.

But no matter how pessimistic the situation with the tourism industry looks today, it should be remembered that there are many examples in the world when countries recovered after large-scale conflicts and received tourists again. Croatia is often recalled in this context, which managed to become a very popular location after the hostilities.

Other countries have also gone through the path of tourism recovery. Cyprus has become one of the most popular destinations for tourists after the ethnic conflict between the Greek and Turkish communities. We know the example of Israel, which maintains its tourist status during the constant war with Palestine. Israel’s tourism industry seems to have fully adapted to the constant military conflict.

The experience of Georgia is revealing. In fact, the main conclusion of the Department of Tourism and Resorts of Georgia based on the results of the military conflict with Russia in 2008 is that Georgia has become much more famous among foreign tourists because of the armed conflict. Only 2-3% of the world’s population had heard of Georgia before the conflict. After the conflict, Georgia felt a big surge in tourism and recognition in the world.

The importance of investing in the development of tourism is growing due to the urgent need to restore international tourism. Tourism clusters can be one of the priority areas for the investment development of the tourism industry, since such associations have an organizational structure. Cluster companies have competitive advantages that are achieved through specialization, which, in turn, increases labour productivity and reduces the cost of products and services. Clusters are formed within resort and recreation areas, which gives investors confidence that the invested capital will remain capital.

The benefits of investing in the tourism industry for each country/region include:

- 1) Increase in cash flow to the region, including the inflow of foreign currency.
- 2) Gross national product growth.
- 3) Creation of new jobs.
- 4) Reforming the structure of recreation, which can be used by both tourists and local residents.
- 5) Attracting capital, including foreign capital.
- 6) Increase in tax revenues.

The task of attracting investments is to use the competitive advantages of the regions and develop the components that create these advantages, which, in turn, will help improve the investment climate.

Therefore, the tourism industry should develop based on the following perspectives:

- 1) Become a branch of the economy that attracts foreign exchange reserves to the country.
- 2) Contribute to the formation of the revenue part of the country's budget.
- 3) Create new jobs in the country.
- 4) Effectively participate in structural changes in the economic complex of the country in favour of services.
- 5) Develop social ethnographic tourism with the involvement of the native, cultural, and spiritual heritage of one's own country.

Each state must realize the need to create a favourable climate for the development of the hospitality industry, which now faces the task of not only surviving, but also meeting the requirements of the 21<sup>st</sup> century.

Of course, the pandemic has hit the tourism business hard. At the same time, the industry is presented with a unique opportunity to review and restructure, so that its potential begins to increase more and more for the benefit of the planet and its inhabitants. The unique tourism potential can not only provide jobs, but also promote equality and social inclusion, as tourism is one of the fastest growing sectors in the world, and plays an important role in restoring social and economic stability.

Governments around the world are taking a number of measures to ensure the sustainable functioning of the tourism sector and adapt to the new tough and limited economic development conditions. One of the most common policy options to reduce the negative impact of the pandemic on governments is to defer tax and debt obligations and provide businesses with affordable loans.

Any crisis inevitably leads to the emergence of new opportunities. We can say that COVID-19 has become a catalyst for the tourism industry to innovate and integrate new technology. Areas for the introduction of technological innovations in the field of tourism ("future technology") include:

- 1) Non -contact options for verifying identity.
- 2) Virtual medical examinations.
- 3) Disinfecting robots with ultraviolet radiation.
- 4) Porter robots.
- 5) Devices that allow reducing the client's physical contact during travel.

To effectively solve problems in the field of tourist destination marketing, the following recommendations are proposed for practical implementation by specialized government agencies and tourism companies that specialize in serving tourists in tourist destinations:

- 1) Planning marketing strategies for tourist destinations should take into account the possibility of addressing the issues of epidemiological safety and hygiene for tourists who choose these tourist destinations.
- 2) To increase the number of air travel to pre-pandemic levels, travel companies must expand their activities by attracting more tourists in the domestic market and in the markets of the near abroad.
- 3) Providing services to individual tourists and their families in the field of leisure activities at destinations should become one of the ways to preserve and develop the tourism business.
- 4) Travel companies – through marketing communication channels, primarily through social media and online services – should actively encourage young people to visit tourist destinations as a target group that is actively returning to pre-crisis patterns of consumption of tourism services.
- 5) Active use of state-of-the-art digital technology (such as virtual tours) in the field of tourist destination marketing should become one of the most promising areas for preserving and ensuring the development of the tourism business.

#### IV. CONCLUSION

Today, the tourism industry occupies a decisive place in the system of international economic relations and is one of the most significant sectors of the global economy. The tourism business is moving forward; therefore, the development of industries that coexist with or depend on the tourism business depend on the way this industry develops today (along with the economic growth of tourist sites and tourist regions).

The development trends of the tourism industry have been transformed in the face of constant global and regional changes. European tourism has been seriously affected by the Russian-Ukrainian conflict. COVID-19 also made adjustments to the complex process of international tourism development, since no one could foresee the scale of the damage and the spread of this virus, and therefore build a strategy to respond to such an unexpected challenge in a timely manner – neither at the level of states, nor at the level of individual sectors of the economy or companies. Closed borders, suspended flights, limited movement of the population even within countries, and – in some countries – long-term lockdowns with restrictions on the movement of citizens from their

place of work to their place of residence (with no more than two stops by ground transport), have become today a sign of the time of the COVID-19 pandemic. The traditional way of arranging people's lives with understandable vacation periods and freedom of movement has changed dramatically, and there is now a need for new approaches to the formation of supply in the tourism market. The well-established expression "tourism is paused" has appeared – after all, no one can still definitely predict whether the tourism industry will recover in full and whether it will be exactly the same as it was before.

The COVID-19 pandemic has caused radical changes in the global tourism market, with currently unpredictable consequences on its further development. The pandemic has caused an unprecedented drop in the performance of the tourism market in most countries worldwide. In response to these challenges, travel companies have been forced to significantly revise their marketing plans and programmes. Changes affected all areas of the tourism business to a greater or lesser extent.

Although the COVID-19 pandemic significantly affected the state and further development of the tourism industry in early 2020, any crisis not only leads to negative consequences, but also brings new opportunities and prospects – for the tourism market among others. These opportunities include the active introduction of modern technology, the implementation of personalized approaches for customers, the expansion of the geography of travel routes, etc. In addition, the importance of such factors as travel safety is growing. Tourists prefer individual tours or small-group tours at domestic resorts. Of course, the tourism industry will very soon enter a new stage of competition, which will lead to a new situation in the resource planning of the market.

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