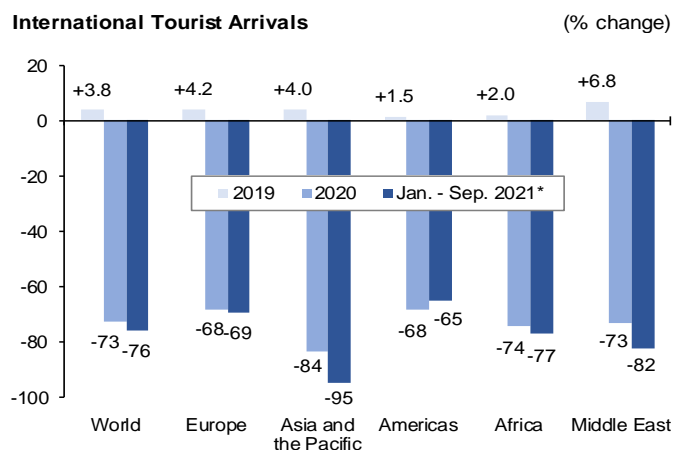


Global Tourism Sees Upturn in Q3 2021 but Recovery Remains Fragile

- After a weak first half of 2021, international tourism rebounded moderately during the Northern Hemisphere summer season, boosting results for the third quarter of the year, especially in Europe.
- International tourist arrivals (overnight visitors) increased by 58% in July-September 2021 compared to the same period of 2020. However, they remained 64% below 2019 levels.
- In both August and September 2021 arrivals were at -63% compared to 2019, the best monthly results since the start of the pandemic.
- Data on international tourism receipts and spending show a similar improvement in Q3 2021.
- The uplift in demand during the third quarter of 2021 was driven by increased traveler confidence amid rapid progress on vaccinations and the easing of entry restrictions in many destinations.
- In January-September 2021, international tourist arrivals worldwide were 20% lower than the same period in 2020, but still 76% below 2019 levels.
- The Americas recorded the strongest results in the first nine months of 2021, with arrivals up 1% compared to 2020 but still 65% below 2019 levels. Europe saw an 8% decline compared to 2020, which is 69% below 2019. In Asia and the Pacific arrivals were 95% below 2019 levels as many destinations remained closed to non-essential travel. Africa and the Middle East recorded 77% and 82% drops respectively compared to 2019.
- Despite the improvement in the third quarter of the year, the pace of recovery remains slow and uneven across world regions due to varying degrees

of mobility restrictions, vaccination rates and traveler confidence.

- According to the latest UNWTO data, international tourist arrivals are expected to remain 70% to 75% below 2019 levels in 2021, a similar decline as in 2020.
- Export revenues from international tourism could reach US\$ 700-800 billion in 2021, a small improvement from 2020 but less than half the US\$ 1.7 trillion recorded in 2019.
- The direct economic contribution of tourism is estimated at US\$ 1.9 trillion in 2021 (measured in tourism direct gross domestic product) well below the pre-pandemic value of US\$ 3.5 trillion.
- The safe resumption of international tourism will continue to depend on a coordinated response among countries on travel restrictions, harmonized health and hygiene protocols and effective communication.



Source: UNWTO

* Provisional data (% change over 2019)



The World Tourism Organization (UNWTO) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

UNWTO's membership includes 159 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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About the *UNWTO World Tourism Barometer*

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this *UNWTO World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

This report was prepared by the **UNWTO Tourism Market Intelligence and Competitiveness Department**, under the supervision of Sandra Carvão, Chief of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian, and Javier Ruescas.

For more information including copies of previous issues, please visit: www.e-unwto.org/loi/wtobarometereng.

We welcome your comments and suggestions at barom@unwto.org.

Data collection for this issue was closed at the end of November 2021.

The next issue of the *UNWTO World Tourism Barometer* is scheduled to be published in January 2022.

Pages 1-4 of this document constitute the Excerpt of the *UNWTO World Tourism Barometer*. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

Inbound tourism

International tourism down 76% in January-September 2021

- International tourism rebounded moderately during the Northern Hemisphere summer season, lifting results for the third quarter and overall first nine months of 2021.
- In January-September 2021, international tourist arrivals (overnight visitors) were 20% below the same period in 2020 and 76% below 2019 levels.
- The Americas recorded the strongest inbound results, with arrivals up 1% compared to the same nine months of 2020, but still 65% below 2019 levels. Europe saw an 8% decline compared to 2020, which is 69% below 2019.
- By subregion, the Caribbean saw the best results with a 55% increase over the same period in 2020, though 38% below 2019. In Southern and Mediterranean Europe (+31%) and North America (+3%) arrivals also climbed above 2020 levels in January-September 2021.
- Higher demand during the summer season in the Northern Hemisphere led to a 58% increase in arrivals worldwide during the third quarter of 2021 compared to 2020. However, arrivals remained 64% below 2019 levels.
- August and September saw the best monthly results since the start of the pandemic, with international arrivals at -63% in both months, compared to 2019.
- Europe recorded the best performance by region in Q3 2021 with arrivals at -53% compared to the same period of 2019.
- Some islands in the Caribbean and South Asia, together with a few countries in Southern and Mediterranean Europe enjoyed the best results in the third quarter according to available data, with arrivals coming close to, or sometimes exceeding pre-pandemic levels.
- Among the larger destinations, Croatia (-19%), Mexico (-20%), Austria (-23%) and Turkey (-35%) posted some of the best inbound results in Q3 2021.
- The recent improvement was driven by increased traveler confidence amid rapid progress on vaccination and the easing of entry restrictions in many destinations, as well as large pent-up demand.
- However, the pace of recovery remains slow and uneven due to different degrees of mobility restrictions, vaccination rates and traveler confidence.
- In Asia and the Pacific arrivals were down 95% in the third quarter of 2021 compared to 2019 as many destinations remained closed to non-essential travel. In Africa and the Middle East, they were 74% and 81% below 2019 levels respectively.
- Among the larger destinations with available data, Greece (+89%) and Turkey (+88%) recorded the largest increase in international arrivals in January-September 2021 compared to the same period of 2020. In addition, Macao (China) (+43%), Bulgaria (+42%), Sweden (+30%), Mexico (+28%), Spain (+17%) and Ukraine (+14%) all saw double-digit growth over 2020.
- Domestic travel is contributing to the recovery of the overall tourism sector, especially in several destinations with large domestic markets. The surge in domestic tourism during the Northern Hemisphere summer season partly compensated for the drop in inbound travel in some markets.

Modest improvement in international tourism receipts and expenditure

- The latest data on international tourism receipts show a similar improvement as in arrivals. Among countries reporting data for the third quarter of 2021, Mexico recorded the same tourism earnings as in 2019, while Turkey (-20% compared to 2019), France (-27%) and Germany (-37%) posted comparatively smaller declines from earlier in the year.
- Outbound data also shows a small uplift in demand, with France and Germany reporting -28% and -33% respectively in international tourism expenditure compared to 2019. Among smaller markets, Romania (-7%), Portugal (-17%) and Ukraine (-21%) also posted somewhat better results in Q3 2021.

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series																		
	(million)		Share (%)	Change		Percentage change (%)*													
				(%)		2021 over 2020 ²								2021 over 2019					
	2019	2020*	2020*	19/18	20/19	YTD	Q1	Q2	Q3	Jul.	Aug.	Sep.	YTD	Q1	Q2	Q3	Jul.	Aug.	Sep.
World	1,466	401	100	3.8	-72.6	-19.8	-81.8	227.3	58.0	58.5	54.3	62.4	-75.7	-86.8	-81.1	-64.1	-66.6	-62.9	-62.6
Advanced economies ¹	777	214	53.3	2.1	-72.5	-16.4	-85.5	177.5	49.0	33.8	45.5	73.2	-74.8	-89.9	-83.0	-60.1	-65.9	-57.6	-55.8
Emerging economies ¹	689	188	46.9	5.7	-72.7	-23.7	-78.5	297.8	76.7	115.6	73.8	44.2	-76.7	-83.9	-78.8	-69.5	-67.5	-69.9	-71.4
By UNWTO regions:																			
Europe	746.1	235.1	58.6	4.2	-68.5	-7.9	-82.9	161.8	44.1	36.7	42.5	55.3	-69.2	-86.5	-80.7	-53.3	-58.3	-50.3	-50.8
Northern Europe	83.5	21.5	5.4	3.4	-74.2	-52.0	-89.0	72.0	0.2	-4.6	-1.3	11.0	-85.9	-91.0	-91.5	-79.0	-81.0	-77.7	-77.8
Western Europe	205.4	79.3	19.8	2.6	-61.4	-25.7	-88.0	84.0	10.4	-3.4	11.2	28.1	-70.5	-90.7	-80.8	-53.4	-59.3	-51.1	-48.8
Central/Eastern Eur.	153.2	46.1	11.5	4.8	-69.9	-31.7	-81.1	166.3	13.7	4.3	13.3	25.6	-77.3	-84.5	-82.6	-69.1	-71.4	-68.4	-67.4
Southern/Medit. Eur.	304.0	88.2	22.0	5.3	-71.0	31.2	-77.2	259.6	89.8	97.9	82.3	92.0	-60.1	-82.6	-77.0	-40.7	-46.3	-36.2	-39.8
- of which EU-27	540.5	178.6	44.5	3.2	-67.0	-7.1	-84.3	123.3	40.8	24.1	39.9	64.6	-67.7	-87.9	-80.8	-49.8	-56.7	-46.2	-45.5
Asia and the Pacific	360.4	59.4	14.8	4.0	-83.5	-74.7	-91.8	303.9	62.3	151.3	30.0	30.7	-94.9	-95.5	-94.3	-94.7	-93.8	-95.8	-94.5
North-East Asia	170.3	20.3	5.0	0.7	-88.1	-51.6	-84.8	538.1	64.2	188.4	22.9	26.5	-93.5	-94.7	-93.0	-92.9	-91.7	-94.6	-92.5
South-East Asia	138.6	25.4	6.3	7.8	-81.7	-91.7	-97.2	19.7	4.9	19.3	-10.8	7.4	-98.0	-98.2	-97.9	-97.9	-97.7	-98.2	-97.8
Oceania	17.5	3.7	0.9	2.4	-79.0	-76.9	-98.2	935.5	193.2	511.4	72.8	50.5	-93.4	-98.6	-86.5	-93.9	-89.2	-96.3	-96.5
South Asia	34.0	10.0	2.5	7.5	-70.5	-71.8	-86.7	426.0	135.0	212.6	150.1	81.6	-89.3	-87.1	-90.7	-90.4	-91.0	-90.7	-89.5
Americas	219.3	69.9	17.4	1.5	-68.1	1.5	-70.5	413.9	181.9	230.8	196.3	126.4	-65.3	-75.2	-61.4	-60.0	-60.0	-61.2	-58.5
North America	146.6	46.7	11.6	3.1	-68.2	2.7	-67.1	263.8	140.0	179.3	151.7	98.7	-65.7	-72.0	-64.5	-62.1	-63.6	-63.7	-58.3
Caribbean	26.3	10.3	2.6	2.0	-61.0	54.8	-57.2	↑	236.5	265.3	271.3	155.6	-38.0	-64.4	-24.8	-18.4	-13.3	-19.9	-24.9
Central America	10.9	3.1	0.8	0.8	-71.6	19.9	-71.7	↑	↑	↑	↑	↑	-62.1	-76.7	-58.1	-48.8	-47.4	-52.0	-46.6
South America	35.4	9.8	2.5	-4.7	-72.2	-56.3	-90.3	↑	527.7	694.5	472.6	446.6	-85.2	-92.1	-79.9	-81.4	-81.6	-81.7	-80.8
Africa	70.1	18.0	4.5	2.0	-74.3	-33.8	-78.9	140.7	90.2	125.2	68.1	75.6	-77.2	-81.7	-76.7	-74.1	-71.0	-77.5	-73.7
North Africa	25.6	5.5	1.4	6.4	-78.4	-8.0	-77.1	↑	188.0	258.9	156.5	118.5	-78.4	-81.7	-79.0	-76.3	-70.7	-80.8	-79.1
Subsaharan Africa	44.5	12.5	3.1	-0.3	-71.9	-43.1	-79.6	63.5	53.2	62.1	37.9	61.7	-76.4	-81.6	-75.3	-72.3	-71.3	-74.8	-70.3
Middle East	70.0	18.9	4.7	6.8	-73.0	-39.2	-77.5	↑	127.8	339.2	114.6	73.0	-82.2	-82.3	-83.0	-81.4	-81.6	-86.3	-73.5

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, November 2021)

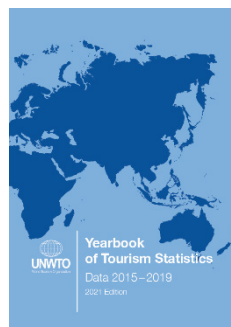
For regularly updated data, please check the *UNWTO Tourism Recovery Tracker* at:<https://www.unwto.org/unwto-tourism-recovery-tracker>



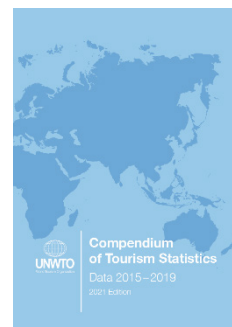
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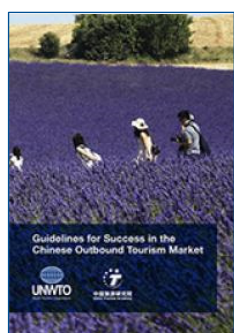
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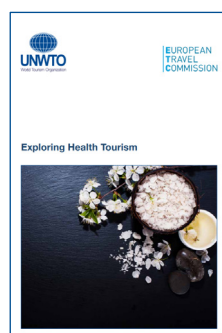
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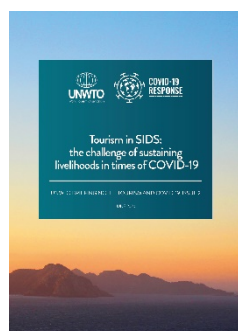
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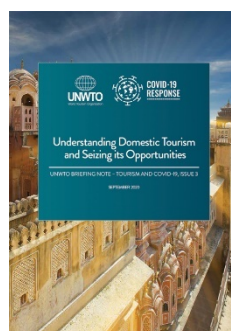
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