

## Global Tourism Sees Upturn in Q3 but Recovery Remains Fragile

**Madrid, Spain, 29 November 2021** - After a weak first half of 2021, international tourism rebounded during the Northern Hemisphere summer season, boosting results for the third quarter of the year, especially in Europe.

According to the newest edition of the UNWTO World Tourism Barometer, **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. Europe recorded the best relative performance in the third quarter, with international arrivals 53% down on the same three-month period of 2019. In August and September arrivals were at -63% compared to 2019, the best monthly results since the start of the pandemic.

Between January and September 2021, **worldwide international tourist arrivals stood at -20% compared to 2020**, a clear improvement over the first six months of the year (-54%). In some sub regions – Southern and Mediterranean Europe, the Caribbean, North and Central America – arrivals actually rose above 2020 levels in the first nine months of 2021. Some islands in the Caribbean and South Asia, together with a few small destinations in Southern and Mediterranean Europe saw their best performance in Q3 2021 according to available data, with arrivals coming close to, or sometimes exceeding pre-pandemic levels.

UNWTO Secretary-General Zurab Pololikashvili said: "Data for the third quarter of 2021 is encouraging. However, arrivals are still 76% below pre-pandemic levels and results across the different global regions remain uneven." In light of the rising cases and the emergence of new variants, he added that "we cannot let our guard down and need to continue our efforts to ensure equal access to vaccinations, coordinate travel procedures, make use of digital vaccination certificates to facilitate mobility and continue to support the sector."

The uplift in demand was driven by increased traveler confidence amid rapid progress on vaccinations and the easing of entry restrictions in many destinations. In Europe, the **EU Digital Covid Certificate** has helped facilitate free movement within the European Union, releasing significant pent-up demand after many months of restricted travel. Arrivals in January-September 2021 were only 8% below the same period of 2020 yet still 69% below 2019. The **Americas** recorded the strongest inbound results in January-

September, with arrivals up 1% compared to 2020 but still 65% below 2019 levels. The Caribbean recorded the strongest results by subregion with arrivals up 55% compared to the same period in 2020, though still 38% below 2019.

### **Slow and uneven pace of recovery**

Despite the improvement seen in the third quarter of the year, the **pace of recovery remains slow and uneven** across world regions. This is due to varying degrees of mobility restrictions, vaccination rates and traveler confidence. While Europe (-53%) and the Americas (-60%) enjoyed a relative improvement during the third quarter of 2021, arrivals in Asia and the Pacific were down 95% compared to 2019 as many destinations remained closed to non-essential travel. Africa and the Middle East recorded 74% and 81% drops respectively in the third quarter compared to 2019. Among the larger destinations, Croatia (-19%), Mexico (-20%) and Turkey (-35%) posted the best results in July-September 2021, according to information currently available.

### **Gradual improvement in receipts and expenditure**

Data on international tourism receipts show a similar improvement in Q3 of 2021. Mexico recorded the same earnings as in 2019, while Turkey (-20%), France (-27%) and Germany (-37%) posted comparatively smaller declines from earlier in the year. In outbound travel, results were also moderately better, with France and Germany reporting -28% and -33% respectively in international tourism expenditure during the third quarter.

On the upside, tourism spending per trip has increased significantly due to large savings and pent-up demand, softening the blow to economies. International receipts rose from an average of US\$ 1,000 per arrival in 2019 to US\$ 1,300 in 2020 and could exceed US\$ 1,500 in 2021. However, higher spending is also the result of longer stays, rising transport and accommodation prices.

### **Looking ahead**

Despite recent improvements, uneven vaccination rates around the world and new Covid-19 strains could impact the already slow and fragile recovery. The economic strain caused by the pandemic could also weigh on travel demand, aggravated by the recent spike in oil prices and disruption of supply chains. 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.

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 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 largely on a coordinated response among countries in terms of travel restrictions, harmonized safety and hygiene protocols and effective communication to help restore consumer

confidence. This is particularly critical at a moment when cases are surging in some regions and new Covid-19 variants are emerging in different parts of the world.

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