



Tourist numbers down 83% in Q1 2021 but confidence slowly rising

- International tourist arrivals (overnight visitors) dropped by 83% in the period January-March 2021 compared to 2020, as travel restrictions remained high and consumer confidence low due to the coronavirus pandemic. This follows an unprecedented drop of 73% in 2020, the worst year on record for international tourism.
- By regions, Asia and the Pacific continued to suffer the largest declines with a 94% drop in international arrivals in the first quarter of 2021, compared to 2020. Europe recorded the second largest decline with -83%, followed by Africa (-81%), the Middle East (-78%) and the Americas (-71%).
- International tourism receipts plunged by US\$ 930 billion in 2020, an estimated 64% drop in real terms (local currencies, constant prices) due to the slump in global travel. International visitors spent about US\$ 536 billion in destinations last year, about one third of the amount spent in 2019 (US\$ 1,466 billion).
- Industry confidence is slowly rising for the period May-August 2021 according to the latest survey of the UNWTO Panel of Experts. The pace of the vaccination rollout in some key source markets as well as policies to restart tourism safely, most notably the EU Digital Green Certificate, have boosted hopes for a rebound in some markets.
- However, uncertainty remains high due to the ongoing pandemic and surge of new variants, the travel restrictions still in place and the uneven rollout of vaccines.
- 60% of experts now point to a rebound in 2022, up from 50% in January 2021. The remaining 40% still see a potential rebound in 2021, mostly during the second half of the year, though fewer than in the January survey (50%).
- Nearly half of all experts see a return to 2019 levels in 2024 or later, while the percentage indicating a return to pre-pandemic levels in 2023 has somewhat decreased (37%) when compared to the January survey (43%).
- Due to weaker-than-expected results in the first quarter of 2021, our scenarios for 2021 were revised downward. The first scenario points to a rebound in July and would result in a 40% increase in international arrivals in 2021 compared to 2020, though still 63% below the pre-pandemic levels of 2019. The second scenario considers a rebound in the month of September and a 10% increase in arrivals compared to 2020, though a 75% decrease compared to 2019.
- Along with the continuation of the vaccination rollout, the safe and responsible restart of tourism will depend on a coordinated response among countries regarding travel restrictions, standardized safety protocols and effective communication.



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.

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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 May 2021.

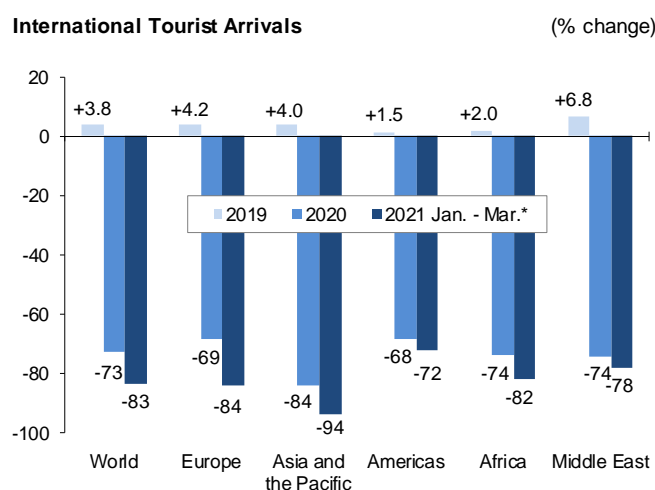
The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published in July 2021.

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

Tourist numbers down 83% in Q1 2021 but confidence slowly rising

- International tourist arrivals (overnight visitors) dropped by 83% in the period January-March 2021 compared to the previous year, as travel restrictions remained high and consumer confidence low. These results follow an unprecedented drop of 73% in international arrivals in 2020, the worst year on record for international tourism.
- This sharp decline represents a loss of some 180 million international arrivals compared to the same period of 2020, or 265 million compared to pre-pandemic year 2019. International travel volumes are still 88% below the first quarter of pre-pandemic year 2019.
- Although data for March shows a comparatively smaller decline of 65%, this is compared to March 2020 when arrivals had fallen significantly below 2019 levels. Arrivals in March 2021 were in fact 88% below the same month of 2019.
- Many countries reintroduced stricter travel restrictions since the end of 2020 due to the worsening of the pandemic with a surge in cases and the emergence of new variants, all weighing on the resumption of international travel. These restrictions include mandatory testing, quarantines, curfews, local lockdowns and, in some cases, a complete closure of borders. In early February 2021, still 32% of destinations worldwide remained completely closed to international tourism and another 34% had partial closures. In addition, the vaccination rollout has been slower than expected and quite uneven across countries and regions.
- Against this backdrop, all world regions saw large declines in international arrivals in the first quarter of the year.
- By regions, Asia and the Pacific continued to show the highest impact with a 94% drop in international arrivals in the first quarter of 2021 as compared to 2020. Europe recorded a decline of 84%, followed by Africa (-82%), the Middle East (-78%) and the Americas (-72%).
- Several world subregions continued to see drops of 90% to nearly 100% in arrivals in Q1 2021, mostly in Asia and the Pacific. Central and Eastern Europe, Southern and Mediterranean Europe, Central America, North Africa and Sub-Saharan Africa recorded decreases below 80%. The Caribbean (-61%) saw the lowest decline among subregions in the first quarter, as several island destinations saw better performance in March.
- Only a small number of destinations saw decreases below 50% in January-March 2021, among which Mexico, the Dominican Republic, Puerto Rico, Macao (China), Maldives, Albania and Bulgaria.
- While demand for international tourism dropped sharply and still remains subdued, domestic tourism continued to grow in several large markets such as China and the Russian Federation, where domestic air travel has returned to pre-COVID levels. Chinese travellers made 256 million domestic tourist trips during China's week-long Spring Festival holiday ending on 17 February, a 75% increase over the same period in 2019, according to the Ministry of Culture and Tourism of China.



Source: World Tourism Organization (UNWTO) © * Provisional data

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series																
	(million)			Share		Change		Percentage change*									
				2020*		19/18		20*/19		2021 over 2020					2021 over 2019		
	2018	2019	2020*	2020*	19/18	20*/19	YTD	Q1	Jan.	Feb.	Mar.	YTD	Q1	Jan.	Feb.	Mar.	
World	1,413	1,466	398	100	3.8	-72.8	-82.7	-82.7	-86.5	-86.4	-65.0	-87.5	-87.5	-86.5	-88.4	-87.7	
Advanced economies ¹	761	777	212	53.3	2.1	-72.7	-86.8	-86.8	-88.9	-90.1	-73.3	-90.8	-90.8	-88.9	-91.4	-91.8	
Emerging economies ¹	651	689	186	46.7	5.7	-73.0	-79.0	-79.0	-84.4	-82.9	-58.5	-84.4	-84.4	-84.2	-85.6	-83.4	
<i>By UNWTO regions:</i>																	
Europe	716.0	746.3	235.1	59.0	4.2	-68.5	-83.4	-83.4	-85.2	-87.3	-71.0	-87.0	-87.0	-84.6	-87.0	-88.8	
Northern Europe	81.0	83.7	20.7	5.2	3.3	-75.3	-91.7	-91.7	-92.0	-92.5	-89.7	-93.2	-93.2	-91.5	-92.1	-95.5	
Western Europe	200.2	205.4	79.1	19.8	2.6	-61.5	-89.9	-89.9	-87.4	-94.0	-84.9	-92.2	-92.2	-86.8	-93.7	-95.1	
Central/Eastern Eur.	146.2	153.3	47.7	12.0	4.8	-68.9	-77.8	-77.8	-82.1	-79.8	-68.0	-81.6	-81.6	-82.6	-80.8	-81.3	
Southern/Medit. Eur.	288.6	303.9	87.7	22.0	5.3	-71.2	-78.4	-78.4	-82.8	-83.7	-53.6	-83.7	-83.7	-81.5	-83.2	-85.7	
- of which EU-27	523.8	540.7	177.9	44.7	3.2	-67.1	-85.6	-85.6	-86.4	-89.0	-75.6	-88.9	-88.9	-85.9	-88.7	-91.6	
Asia and the Pacific	346.5	360.4	57.1	14.3	4.0	-84.1	-93.6	-93.6	-95.8	-93.9	-81.8	-96.6	-96.6	-96.0	-97.1	-96.8	
North-East Asia	169.2	170.3	20.2	5.1	0.7	-88.1	-89.3	-89.3	-94.0	-86.2	-35.2	-96.2	-96.2	-95.1	-97.3	-96.4	
South-East Asia	128.6	138.6	25.5	6.4	7.8	-81.6	-96.6	-96.6	-98.0	-96.8	-91.1	-97.8	-97.8	-97.9	-97.9	-97.6	
Oceania	17.0	17.5	3.6	0.9	2.4	-79.4	-98.0	-98.0	-98.3	-98.3	-96.4	-98.5	-98.5	-98.2	-98.7	-98.6	
South Asia	31.7	34.0	7.8	2.0	7.5	-77.0	-90.9	-90.9	-92.4	-91.8	-82.4	-92.9	-92.9	-91.9	-92.2	-94.7	
Americas	216.0	219.3	69.7	17.5	1.5	-68.2	-71.2	-71.2	-76.4	-79.3	-46.8	-75.8	-75.8	-76.2	-78.5	-73.1	
North America	142.2	146.6	46.7	11.7	3.1	-68.1	-67.1	-67.1	-71.3	-76.1	-46.5	-72.0	-72.0	-70.4	-75.3	-70.7	
Caribbean	25.8	26.3	10.3	2.6	2.0	-60.7	-59.5	-59.5	-71.5	-71.5	-12.2	-66.3	-66.3	-70.7	-69.5	-59.7	
Central America	10.8	10.9	2.9	0.7	0.8	-73.1	-76.3	-76.3	-82.3	-84.6	-45.0	-80.5	-80.5	-82.8	-83.5	-75.2	
South America	37.2	35.4	9.7	2.4	-4.7	-72.6	-90.9	-90.9	-92.1	-92.4	-83.2	-92.5	-92.5	-92.5	-92.1	-93.1	
Africa	68.7	70.1	18.2	4.6	2.0	-74.0	-80.7	-80.7	-83.4	-85.2	-69.4	-83.2	-83.2	-83.3	-85.1	-81.3	
North Africa	24.1	25.6	5.5	1.4	6.4	-78.4	-76.8	-76.8	-79.7	-82.4	-54.6	-81.6	-81.6	-79.3	-80.7	-84.2	
Subsaharan Africa	44.6	44.5	12.7	3.2	-0.3	-71.4	-82.2	-82.2	-84.9	-86.7	-72.9	-83.9	-83.9	-84.9	-87.2	-79.9	
Middle East	65.5	70.0	18.2	4.6	6.8	-74.0	-78.0	-78.0	-83.6	-83.6	-43.0	-82.4	-82.4	-82.2	-83.1	-82.0	

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, May 2021)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.

See box in page 'Annex-1' for explanation of abbreviations and symbols used.

International air traffic remains subdued while domestic recovers

- According to **IATA**, passenger traffic overall (measured in revenue passenger-kilometres) improved in March 2021 but remained significantly below pre-COVID levels. The small recovery was driven by the rebound in domestic travel (-32% RPKs compared to March 2019), particularly in China. International travel in March declined by 89% RPKs versus March 2019 and remained subdued during Q1 2021 due to strict travel restrictions.
- All international markets remained weak in March 2021, similar to the performance seen in the previous months of January and February. Asia and the Pacific (-95% RPKs) continued to post the largest decline, followed by Europe (-88%). International RPKs in Latin America and the Middle East decreased by 82%, while North America plunged by 81% in March. Africa (-74% RPKs) was the best performing region for the sixth consecutive month, partly thanks to softer restrictions and more a stabilization in the number of COVID cases.
- The recovery in the domestic traffic in March 2021 (up from -51% in February) was reliant on the pace of vaccination and the strictness of travel restrictions in some markets. China (-3% RPKs compared to March 2019) was the key contributor to the rebound in domestic traffic following the relaxation of travel restrictions implemented in February. Among key domestic markets, Russia (+9% RPKs) remained well above pre-crisis levels while domestic traffic was up in the United States (-44% RPKs) in the face of rapid vaccination rollout. Domestic RPKs also showed steeped recovery in March in both Australia (-46% RPKs) and Japan (-58%), while India (-32%) and Brazil (-54%) saw declines amid rising COVID-19 cases.
- Data from **ForwardKeys** indicates a 90% drop in international air bookings made between 1 January and 28 May 2021 (compared to the same period in 2019) for any future travel. By departure region, Asia and the Pacific (-99%) suffered the biggest drop, followed by Europe (-90%). Bookings from the Americas (-79%), as well as Africa and the Middle East (-84%) recorded comparatively smaller decreases. The Caribbean and Central America showed encouraging signs of recovery, according to air booking data, with global bookings for any future arrivals 55% and 60% below the same period in

2019 respectively. A strong booking activity from the United States has been recorded, particularly to Caribbean destinations, some of which are close to pre-pandemic levels when it comes to US visitors.

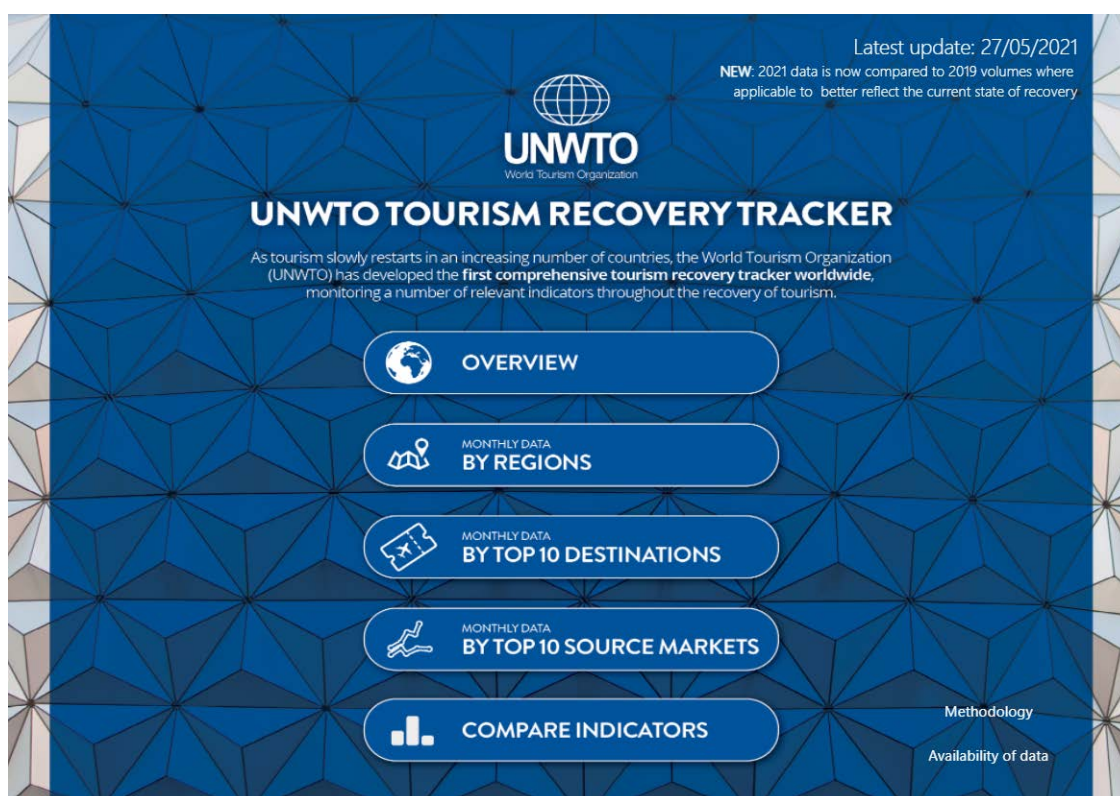
- According to **ICAO**, air capacity continued to recovery slowly, with a decrease of 56% in March 2021, seven percentage points up from February. Domestic air capacity (-21%) continued to perform better than international capacity (-77%) in March 2021 compared to pre-crisis levels. Domestic capacity grew above 2019 levels in China (+9%) and Russia (+1%).
- Data from **STR** on the accommodation industry indicates mixed performance among regions. Occupancy data for April 2021 shows that Asia and the Pacific (57%) and the Americas (53%) recorded rates above 50%, while occupancy was up in the Middle East (45%). Occupancy reached 33% in Africa and remained at lows in Europe (26%) (data by region are based on STR statistical regions).

Slight improvement in prospects for the restart of tourism

- The rollout of COVID-19 vaccines is expected to help restore consumer confidence, contribute to ease travel restrictions and gradually normalize travel in 2021, particularly as the pace of vaccinations advances in main tourism source markets and destinations.
- Industry confidence is slowly recovering for the first time since the pandemic started as shown in the latest survey of the UNWTO Panel of Experts. The pace of the vaccination rollout in some key source markets, the relaxation of entry restrictions undertaken by several European destinations to allow entry of vaccinated travellers, the resumption of an increasing number of international air routes, or travel bubbles such as New Zealand-Australia, are recent developments towards the restart of international travel.
- In addition, the EU Digital Green Certificate has boosted hopes for the resumption of safe travelling in the European Union during the summer season. The EU certificate will be a proof that a person has been vaccinated against COVID-19, tested negative, or recovered from an infection. The certificate's regulation will enter into application on 1 July. Meanwhile, as of 1 June, seven EU Member

States –Bulgaria, Czechia, Denmark, Germany, Greece, Croatia and Poland– started issuing the first EU certificates, while certain countries have decided to launch the EU Digital COVID Certificate only when all functions are deployed nationwide (https://ec.europa.eu/commission/presscorner/detail/en/ip_21_2721)

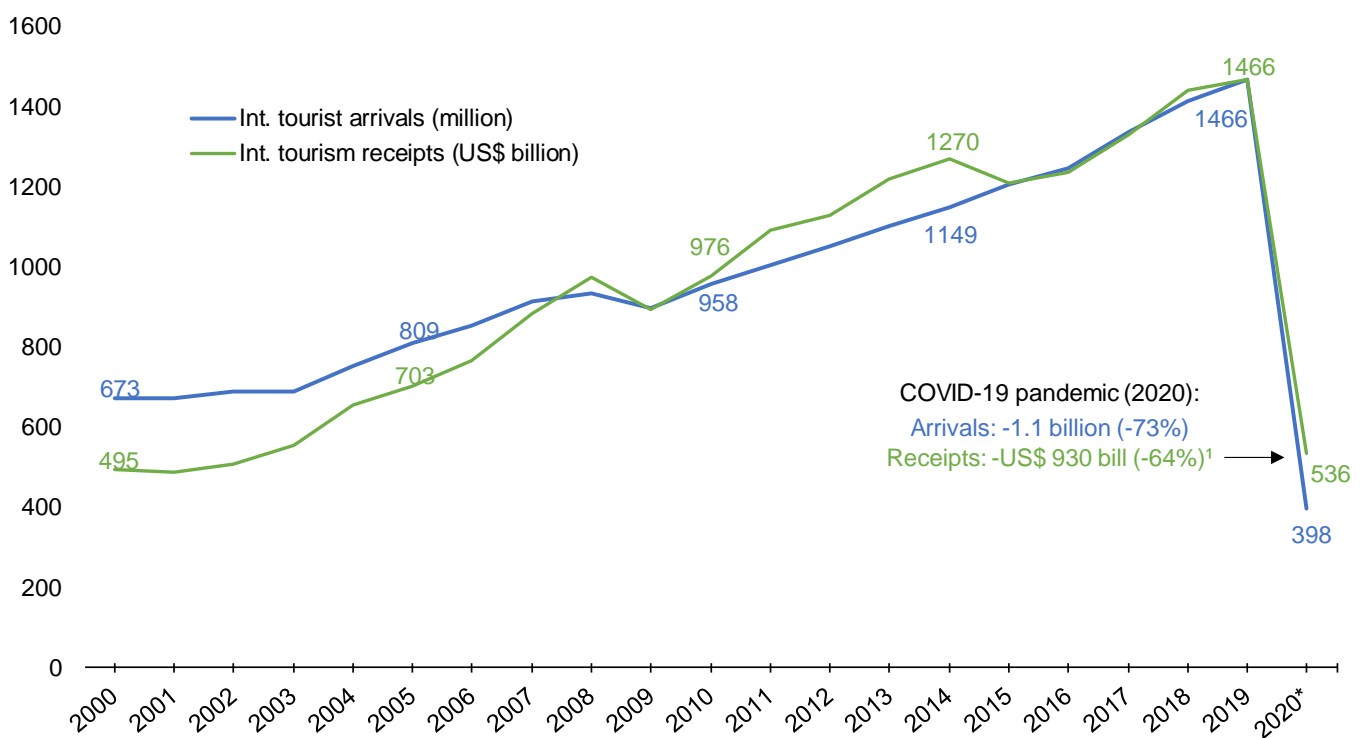
- However, uncertainty remains high due to the ongoing pandemic and the surge of new variants, the travel restrictions and advisories still in place, as well as the uneven vaccination rollout.
- New cases of COVID-19 continue to be reported worldwide, with some 170 million confirmed cases as of 31 May 2021, according to the World Health Organization.
- According to information from “Our World in Data” contained in the UNWTO/IATA Destination Tracker (<https://www.unwto.org/unwto-iata-destination-tracker>), cumulative vaccinations worldwide have risen from 3.3 doses per 100 people in February to 24.9 doses per 100 people in May, though the pace of vaccination remains uneven among world regions. The share of the total world population which has received at least one vaccine dose has only reached 11%, as of 31st May 2021. The progress made in vaccination has been faster in North America (37%), Europe (32%) and South America (19%), while the pace has been much slower in Asia (6%) and Africa (2%).
- In order to contain the spread of the virus, many countries still remain with borders completely closed to international travel, among which major source markets such as China. The Canada-United States border continues to be closed to non-essential travel, while travel restrictions in Canada could start to be lifted after 75% of the population has received at least one dose of vaccine and 20% has been fully vaccinated.
- While an increasing number of destinations are opening up to international tourism, multiple forms of entry requirements can be found among countries, including proof of vaccination, negative PCR or rapid test, quarantine, colour-coded travel system or digital registration form. In view of this, the lack of coordinated restrictions, harmonized safety protocols and clear communication on travel requirements could continue to weigh on the rapid resumption of international travel.
- Along with the continuation of the vaccination rollout, the safe and responsible restart of tourism will rely on a coordinated response among countries on travel restrictions, standardized safety protocols and effective communication.



International tourism receipts down 64% in 2020

- International tourism receipts plunged by US\$ 930 billion in 2020, an estimated 64% in real terms (local currencies, constant prices) due to the coronavirus pandemic and slump in global travel. International visitors spent about US\$ 536 billion in destinations last year, down from US\$ 1,466 billion in 2019.
- Total export revenues from tourism, including passenger transport receipts, dropped by nearly US\$ 1.1 trillion in 2020, a 63% decrease from 2019, cutting the value of total worldwide exports by over 4% (in US dollar terms). Consequently, the share of international tourism in global exports of goods and services sank to 3% in 2020, from 7% in 2019.
- The loss in tourism revenues (US\$ 1.1 trillion) represents 42% of the total decline in global exports in 2020 (US\$ 2.6 trillion). It also accounts for practically the entire drop in services exports (93%).
- By regions, Asia and the Pacific and the Middle East suffered the largest drops in tourism receipts in 2020, with declines of 70% and 69% respectively in real terms, followed by Africa (-64%), Europe and the Americas (both -60%).
- This is by far the largest decrease in tourism revenues in recorded history, impacting millions of jobs, small businesses and livelihoods all over world, particularly in emerging economy destinations such as Small Island Developing States (SIDS) where tourism is more labour intensive and a major part of the balance of payments.

International tourist arrivals and tourism receipts, 2000-2020

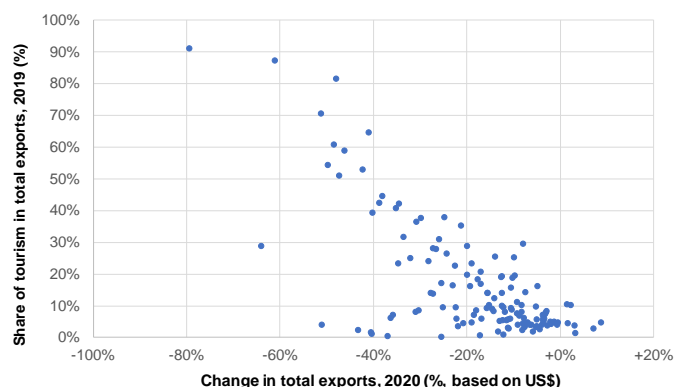


Source: UNWTO * Provisional data. ¹ Real percentage change (local currencies, constant prices) (Data as of May 2021)

Major impact on tourism-dependent destinations

- This crisis has naturally impacted more severely economies which are most dependent on tourism for export revenues, such as SIDS and countries with large tourism sectors. Available data shows there is a relationship between declines in overall export revenues in 2020 and dependence on tourism (measured as a percentage of total exports). In destinations with higher shares of tourism, total exports dropped to a larger extent in 2020.
- In the analysis below, destinations were divided into four clusters based on their reliance on tourism for export revenues. Cluster 1 consists of destinations where tourism accounts for 50% or higher shares of total exports, cluster 2 includes those with shares of 30% to 49%, cluster 3 those with 20% to 29% reliance, and cluster 4 (not shown in graph) those with 19% or lower dependence on tourism.
- Cluster 1 destinations Macao (China), Bahamas and Aruba have the highest shares of tourism revenues relative to total exports (over 80%), and their exports dropped by 50% to 80% in 2020 (change in US dollars). In Cabo Verde, Jamaica and São Tomé and Príncipe, tourism represents some 60% to 70% of revenues and exports declined by 40% to 50%.

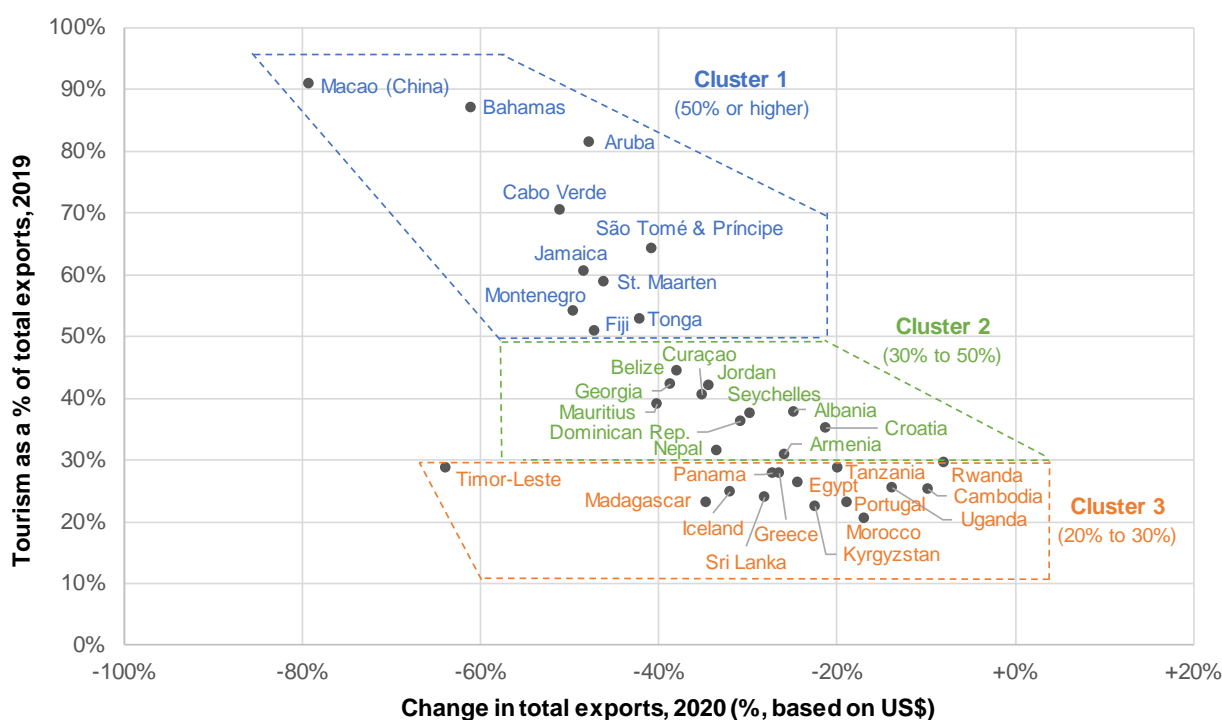
Decline in total exports and dependence on tourism for revenues (all destinations)



Source: World Tourism Organization (UNWTO) and World Trade Organization (WTO) (Data as of May 2021)

- In Cluster 2 destinations Belize, Georgia and Jordan, tourism represents about 40% of export revenues and overall exports fell by 30% to 40% in 2020. Correspondingly, cluster 3 destinations have comparatively lower shares and recorded somewhat smaller declines in total exports.

Decline in total exports in most tourism-dependent countries and territories, 2020



Source: World Tourism Organization (UNWTO) and World Trade Organization (WTO)

(Data as of May 2021)

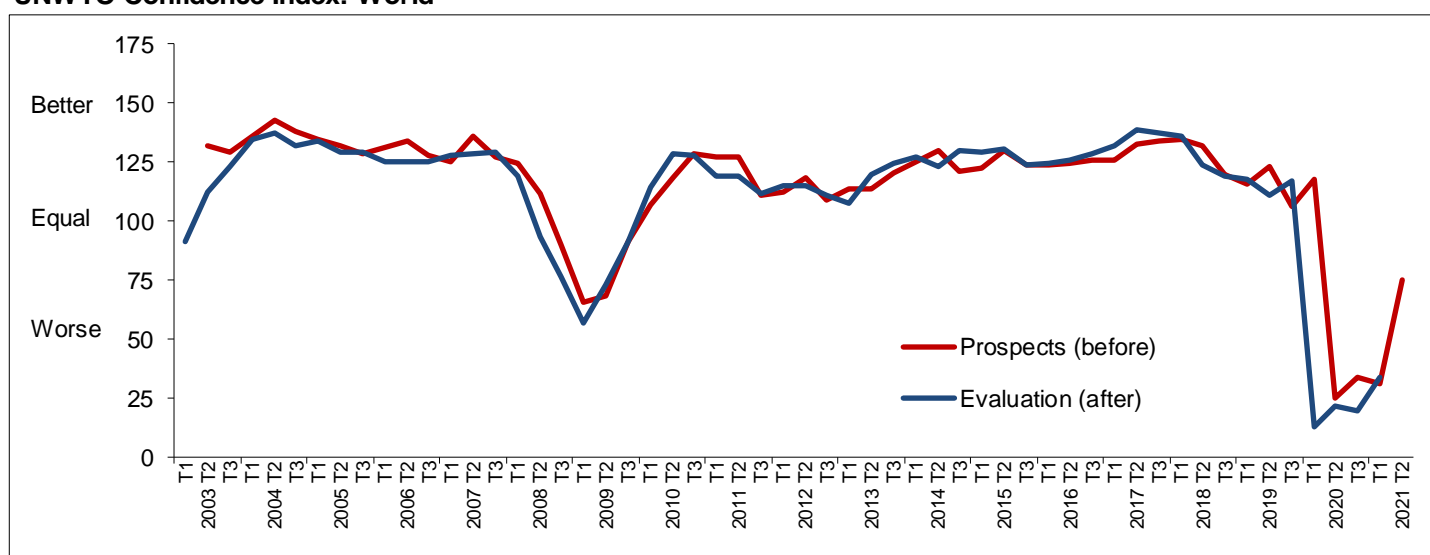
Note: Destinations are divided into clusters based on the share of international tourism in total export revenues.

UNWTO Confidence Index

Small uptick in confidence levels amid persisting uncertainty

- The UNWTO Confidence Index continued at record lows in the period January-April 2021, according to the latest survey conducted in May 2021. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the first four months of 2021 with a score of 34, in line with the expectations (32) expressed by the Panel in January for the 4-month period. A vast majority (85%) of respondents evaluated the period January-April 2021 as much worse (58%) or worse (27%) than expected.
- This reflects continued weak demand for international travel at the beginning of 2021, as countries tightened travel restrictions in response to the spike in COVID-19 cases and the spread of new variants. Mandatory testing, quarantines, and in some cases the complete closure of borders, have all weighed on the resumption of international travel at the beginning of the year. In addition, the speed and distribution of the vaccination rollout have been slower than expected and quite uneven across countries and regions.

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

Confidence slightly up for May-August 2021 but still at weak levels

- Expectations remain weak for the period May-August 2021, with 62% of respondents rating the period as worse (46%) or much worse (16%). Only 25% of experts expect better results. The period May-August covers the Northern Hemisphere summer season.
- However, UNWTO experts rated prospects for May-August with a score of 75 well above the score of 32 recorded in January-April. This reflects a small improvement in confidence levels for the first time since the pandemic started, though still below the average score of 100.
- While uncertainty remains high due to the ongoing pandemic, the travel restrictions still in place, the slower-than-expected vaccination rollout and the closure of some major source markets such as China with borders completely closed, experts mentioned that the continuation of the vaccination process could favour the gradual lifting of travel restrictions, the return of confidence in travellers and the release of pent-up demand.
- Experts from Europe mentioned that recent measures implemented by some Mediterranean destinations to facilitate the entry to vaccinated travellers as well as the resumption of travel from top outbound markets the United Kingdom and later on

the United States, could help the gradual restart of international travel towards the summer season in Europe. In addition, the EU Digital COVID certificate, which regulation will enter into force on 1st of July, will facilitate the safe free movement of citizens within the EU during the COVID-19 pandemic.

- On the downside, experts mentioned the lack of harmonized safety protocols among countries and the multiplicity of requirements, which could hinder travel. According to experts, the vaccine should be accompanied by a coordinated response among

countries on travel restrictions, standardized health and safety protocols including testing and vaccination certificates, reliable data and a clear and evidence-based communication.

- Experts from Africa are the most pessimistic about May-August 2021, with 73% expecting worse or much worse results, followed by experts from the Middle East (67%), the Americas and Africa (both 63%). Experts from Europe are the least pessimistic of all world regions, with 59% expecting a worsening of results in May-August 2021.

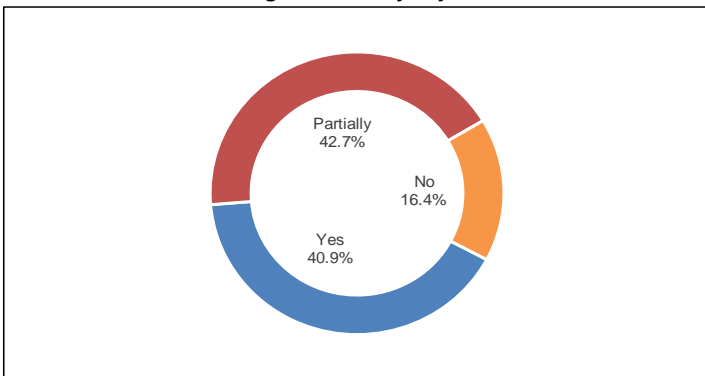
2021: improved prospects in a context of high uncertainty

- Responses from experts show slightly better prospects for 2021. More than half of respondents (56%) expressed better prospects for this year, slightly up from the January survey (45%). Still, 18% do not expect any change and 26% consider 2021 prospects worse as compared to 2020.
- According to experts, the vaccine and a faster virus containment will positively contribute to a safe and effective restart of tourism, though challenges remain regarding the high number of COVID-19 cases still seen in several countries around the world, as well as the emergence of new virus outbreaks and variants. On the other hand, the deteriorating economic environment reflected in job losses, business failures and cutbacks on tourism supply are weighing on the recovery. Air capacity cuts and safety protocol costs related to the pandemic will represent a challenge as well.

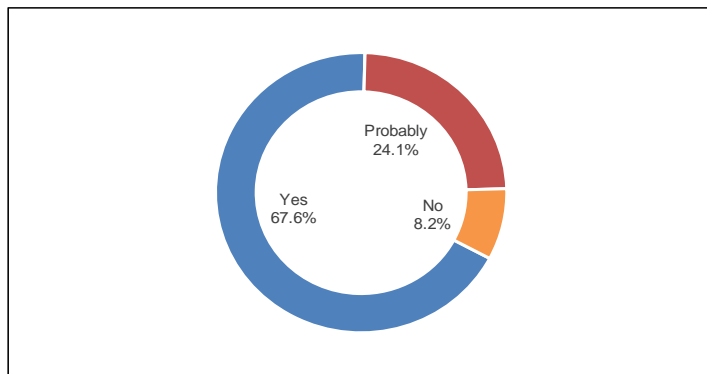
of travel fairs such as FITUR and Arabian Travel Market are also positive signs for the sector.

- Respondents point out that short-haul travel, close to neighbouring countries and within the same region, would resume faster, while the recovery of long-haul travel could take longer. On segments, some experts also expect leisure and high-end travel to resume sooner while the recovery of the highly impacted MICE and business travel is yet to be seen.

Is domestic tourism driving the recovery in your destination?



Do you expect the vaccination rollout will contribute to the resumption of international tourism in 2021?



- The celebration of the Tokyo 2020 Olympics and the Expo 2020 Dubai scheduled for 2021 could mark the revival of travel to major global events. The holding

- Domestic tourism continues to drive the recovery of several destinations but in many cases only partially, as it is not compensating for the drop in international demand. The resumption of domestic tourism is helping the recovery of destinations with a sheer domestic size, though domestic tourism is not strong enough to drive the recovery in destinations heavily relying on inbound tourism. Furthermore, the pandemic continued to severely disrupted domestic travel in some countries, due to local lockdowns. Two thirds of the respondents (68%) expect the

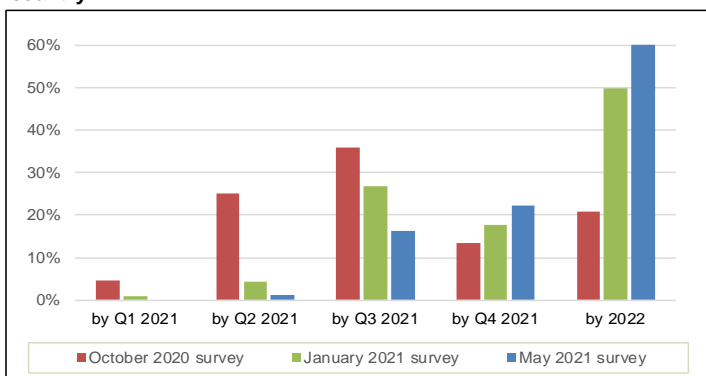
vaccine to contribute to the resumption of international tourism in 2021, while 24% consider it only probable. However, this will depend on the speed, scope and efficacy of the vaccination rollout.

Experts indicate that vaccination in both source markets and destinations will be key to gradually lift travel restrictions, boost traveller confidence and resume travel demand.

More than half of respondents see a rebound in international tourism in 2022

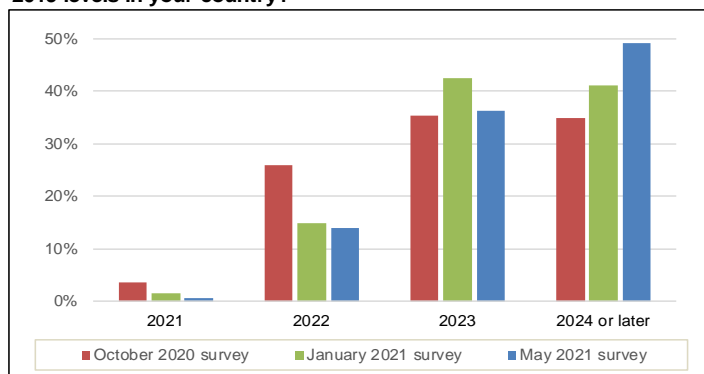
- 60% of respondents now expect a rebound in 2022, up from 50% in January 2021. The remaining 40% of respondents still see a potential rebound in 2021, mostly during the second half of the year, though below the expectations shown in the January 2020 survey (50% expected recovery in 2021).

When do you expect a rebound in international tourism in your country?



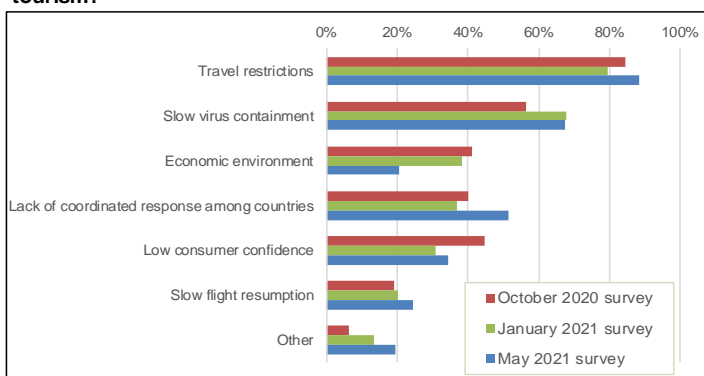
- This suggests that the worsening of the pandemic and strict travel restrictions, which have already affected international tourism during almost the first half of 2021, could be delaying the potential rebound and that the vaccination pace would help to determine whether the change in trend could start by the second half of 2021 or in 2022.
- Looking ahead, nearly half of the experts do not to see a return to pre-pandemic 2019 levels happening before 2024. Prospects for recovery in 2024 or later are stronger compared to what experts expressed in January (41%). The share of respondents who point to a return to pre-pandemic levels in 2023 has somewhat decreased (37%), when compared to the January survey. By regions, the largest share of experts pointing to a return to 2019 levels in 2024 or later are in the Americas and Asia and the Pacific (both 56%), as well as in Europe (46%) (For region graphs please see the Statistical Annex).

When do you expect international tourism to return to pre-pandemic 2019 levels in your country?



- According to experts, travel restrictions continue to be the main barrier weighing on the recovery of international tourism, along with slow virus containment. Nonetheless, the lack of coordinated response among countries to ensure harmonized protocols and coordinated restrictions have become more critical, as an increasing number of experts (53% in May 2021 vs 37% in January) has identified this factor as an important obstacle to restore confidence and resume international travel.

What are the main factors weighing on the recovery of international tourism?



UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.



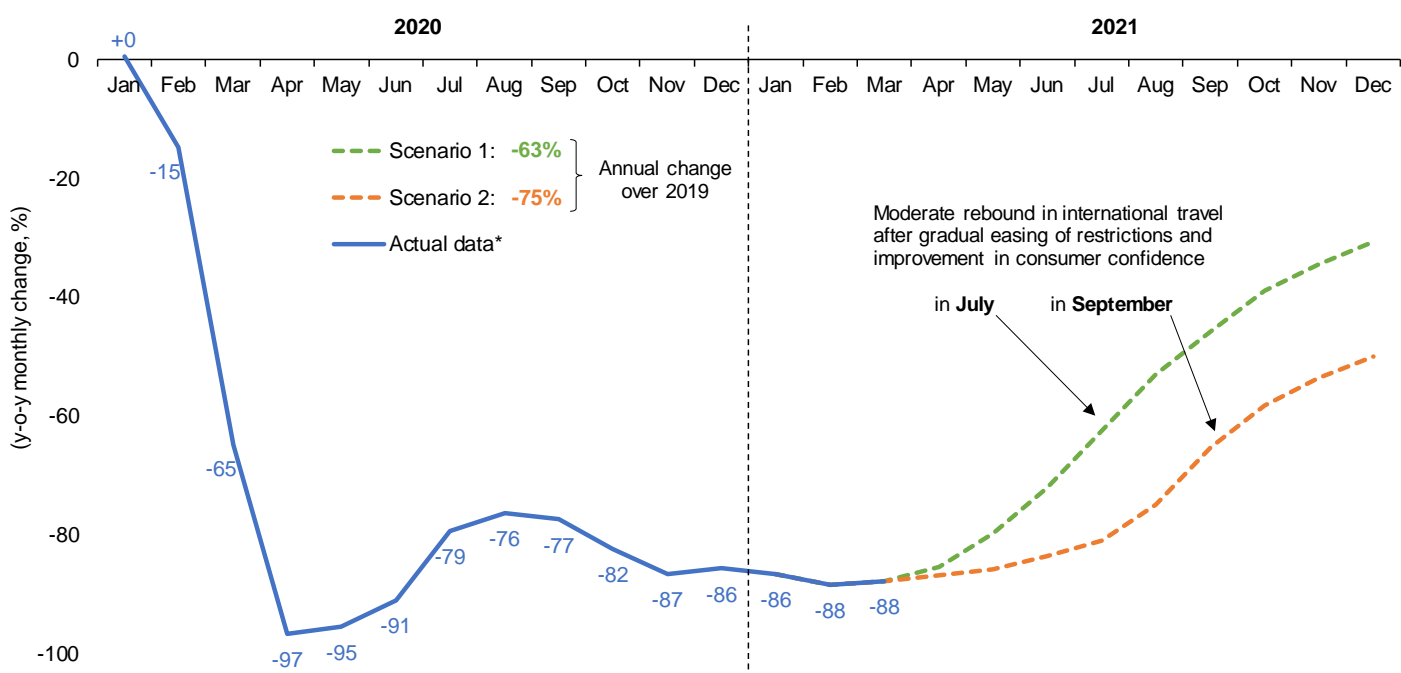
Consult the tourism dashboard at: www.unwto.org/unwto-tourism-dashboard



Revised Outlook for 2021

- Prospects for international tourism in 2021 remain highly uncertain after international arrivals dropped 83% year-on-year in the first quarter of 2021, or 88% compared to 2019 levels.
- Large pent-up demand could fuel a rebound in travel in the second half of 2021 if travel restrictions are eased and traveler confidence continues to improve. But the rebound continues to depend very much on the containment of the pandemic, the efficient coordination of health and safety travel protocols among countries and the continued rollout of vaccines. Slower distribution and shortage of vaccines, mainly in some emerging and developing economies, risks delaying the recovery significantly.
- The two forward-looking scenarios outlined in the March issue of the World Tourism Barometer for 2021 have been revised owing to the weaker-than-expected results in the first quarter, as well as delayed lifting of travel restrictions, weak coordination and policy volatility in terms of entry requirements.
- The scenarios still assume a gradual re-opening of borders and improvement in traveler confidence in the months of July and September 2021 respectively, in line with the increase in vaccination and expected improvement in coordination of travel requirements, though projected results are somewhat lower. They also assume that no significant setbacks occur after the initial rebound, either regarding the evolution of the pandemic or the consequent restrictions to international travel.
- **Scenario 1** points to a rebound in July and would result in a 40% increase in international arrivals in 2021 compared to 2020, though still a **63%** decline versus the pre-pandemic levels of 2019.
- **Scenario 2** considers a rebound in the month of September and a 10% increase in arrivals compared to 2020, though a **75%** decrease compared to 2019.
- It is important to note that these scenarios are based on the premise that health conditions and traveler confidence do not deteriorate significantly after travel restrictions are lifted in the months of July or September.
- Similar scenarios were outlined for 2020 about a year ago, and although arrivals followed closely one of the expected trend lines until August, the rise in infections and ensuing increase in travel restrictions, including the closure of borders in many destinations led to a reversal in results from September onwards.

International tourist arrivals in 2020 and Scenarios for 2021 (y-o-y monthly change over 2019, %)



Source: UNWTO * Actual data is preliminary and based on estimates for destinations which have not yet reported monthly results.

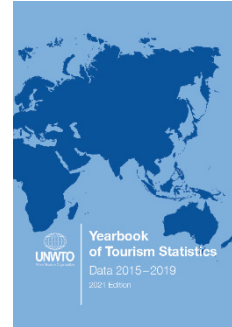
(Data as of May 2021)



UNWTO World Tourism Barometer



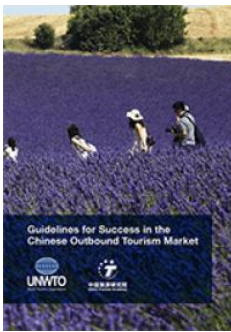
International Tourism Highlights, 2020 Edition



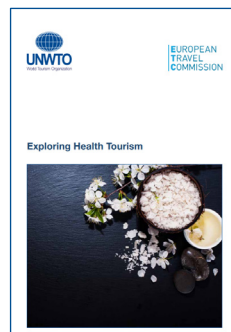
Yearbook of Tourism Statistics (2015-2019)



Compendium of Tourism Statistics (2015-2019)



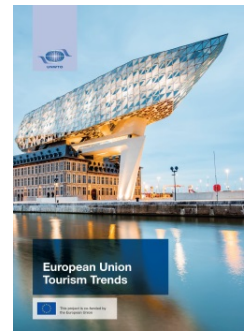
Guidelines for Success in the Chinese Outbound Tourism Market (2019)



Exploring Health Tourism (2018)



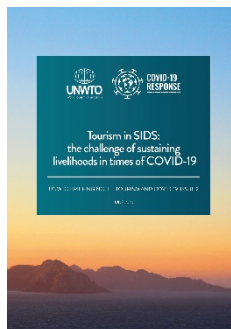
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



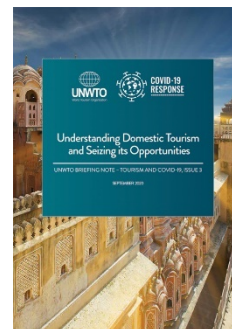
European Union Tourism Trends (2018)



How are countries supporting tourism recovery? Tourism and Covid-19 (2020)



Tourism in SIDS: the challenge of sustaining livelihoods in times of Covid-19 (2020)



Understanding domestic tourism and seizing its opportunities (2020)



UNWTO/GTERC Asia Tourism Trends, 2020 Edition

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