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.

UNWTO
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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 May 2021.

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

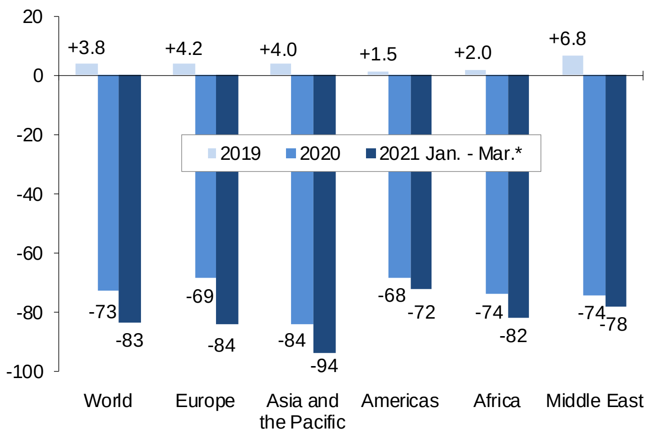
Pages 1-4 of this document constitute the Excerpt of the UNWTO World Tourism Barometer. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English,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

International Tourist Arrivals (% change)



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

International Tourist Arrivals by (Sub)region

	International Tourist Arrivals (million)			Share (%)	Change (%)		Monthly/quarterly data series Percentage change* 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	-83.3	-83.3	-86.7	-86.7	-67.4	-88.0	-88.0	-86.6	-88.7	-88.5
Advanced economies[1]	761	777	212	53.3	2.1	-72.7	-87.3	-87.3	-88.9	-90.1	-76.3	-91.1	-91.1	-89.0	-91.5	-92.7
Emerging economies[1]	651	689	186	46.7	5.7	-73.0	-79.7	-79.7	-84.7	-83.4	-60.4	-84.9	-84.9	-84.6	-86.0	-84.2
By UNWTO regions:																
Europe	716.0	746.3	235.1	59.0	4.2	-68.5	-84.1	-84.1	-85.6	-87.8	-72.7	-87.5	-87.5	-85.0	-87.6	-89.5
Northern Europe	81.0	83.7	20.7	5.2	3.3	-75.3	-91.9	-91.9	-92.2	-92.8	-89.7	-93.4	-93.4	-91.8	-92.4	-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	-80.4	-80.4	-83.7	-81.9	-73.1	-83.9	-83.9	-84.2	-83.0	-84.5
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	-93.8	-93.8	-95.9	-94.1	-82.3	-96.7	-96.7	-96.1	-97.2	-96.9
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	-96.9	-96.9	-98.1	-97.0	-91.9	-98.0	-98.0	-98.0	-98.1	-97.8
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	-72.2	-72.2	-76.4	-79.3	-51.3	-76.6	-76.6	-76.2	-78.5	-75.3
North America	142.2	146.6	46.7	11.7	3.1	-68.1	-68.7	-68.7	-71.3	-76.1	-53.1	-73.3	-73.3	-70.4	-75.3	-74.3
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	-81.9	-81.9	-83.4	-85.2	-74.5	-84.2	-84.2	-83.3	-85.1	-84.4
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	-83.9	-83.9	-84.9	-86.7	-79.2	-85.5	-85.5	-84.9	-87.2	-84.5
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.