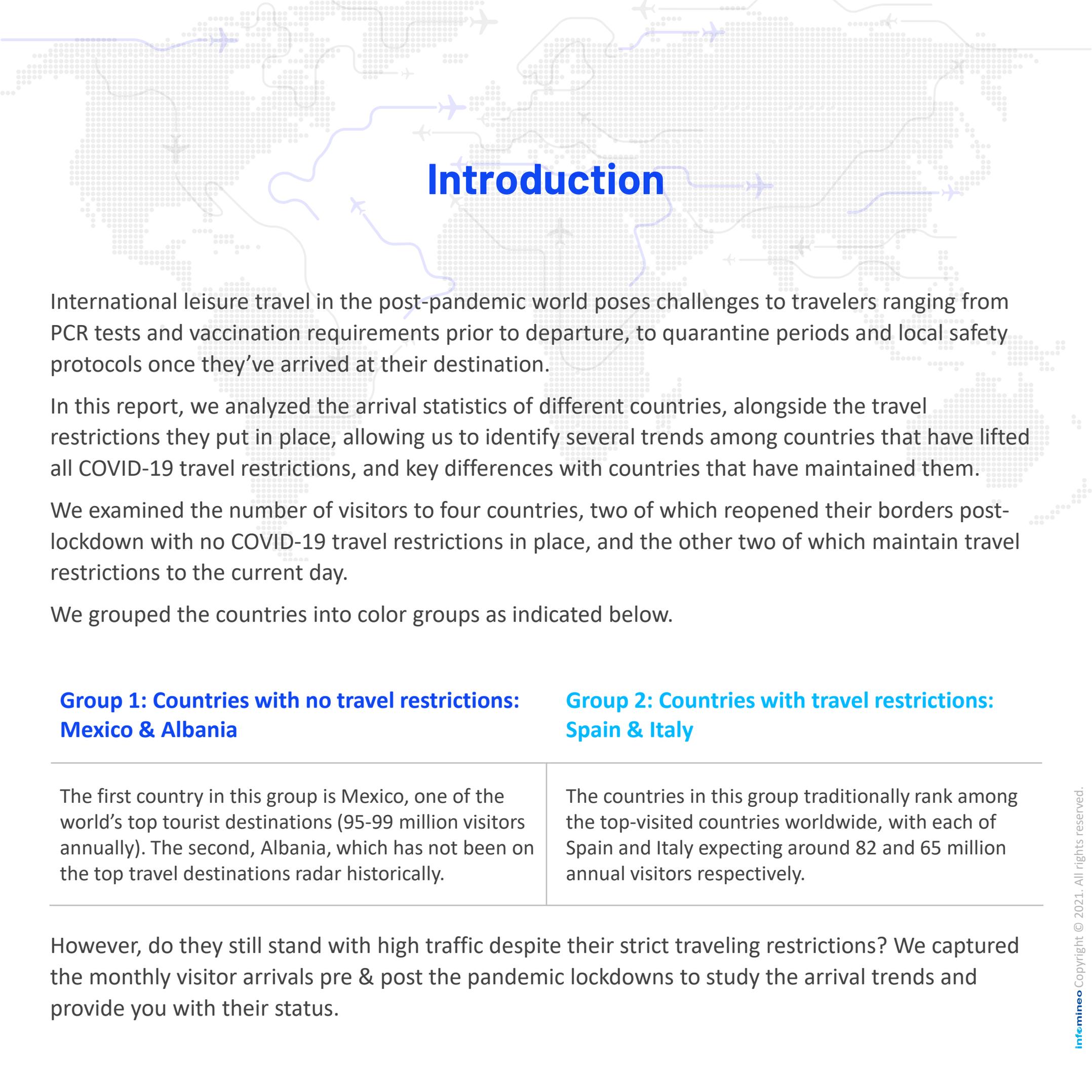


infomineo
VALUE ADDED BUSINESS SERVICES

**TRAVEL &
TOURISM**



A world map with a dotted grid background. Overlaid on the map are several blue and grey lines representing flight paths, with small airplane icons at various points along these paths. The word "Introduction" is centered in a bold blue font.

Introduction

International leisure travel in the post-pandemic world poses challenges to travelers ranging from PCR tests and vaccination requirements prior to departure, to quarantine periods and local safety protocols once they've arrived at their destination.

In this report, we analyzed the arrival statistics of different countries, alongside the travel restrictions they put in place, allowing us to identify several trends among countries that have lifted all COVID-19 travel restrictions, and key differences with countries that have maintained them.

We examined the number of visitors to four countries, two of which reopened their borders post-lockdown with no COVID-19 travel restrictions in place, and the other two of which maintain travel restrictions to the current day.

We grouped the countries into color groups as indicated below.

Group 1: Countries with no travel restrictions: Mexico & Albania

The first country in this group is Mexico, one of the world's top tourist destinations (95-99 million visitors annually). The second, Albania, which has not been on the top travel destinations radar historically.

Group 2: Countries with travel restrictions: Spain & Italy

The countries in this group traditionally rank among the top-visited countries worldwide, with each of Spain and Italy expecting around 82 and 65 million annual visitors respectively.

However, do they still stand with high traffic despite their strict traveling restrictions? We captured the monthly visitor arrivals pre & post the pandemic lockdowns to study the arrival trends and provide you with their status.

Challenges of International Tourism Travel Post Covid

Country lockdowns



Countries, such as Morocco, still do not allow local citizens to travel abroad unless a mandatory purpose has been justified



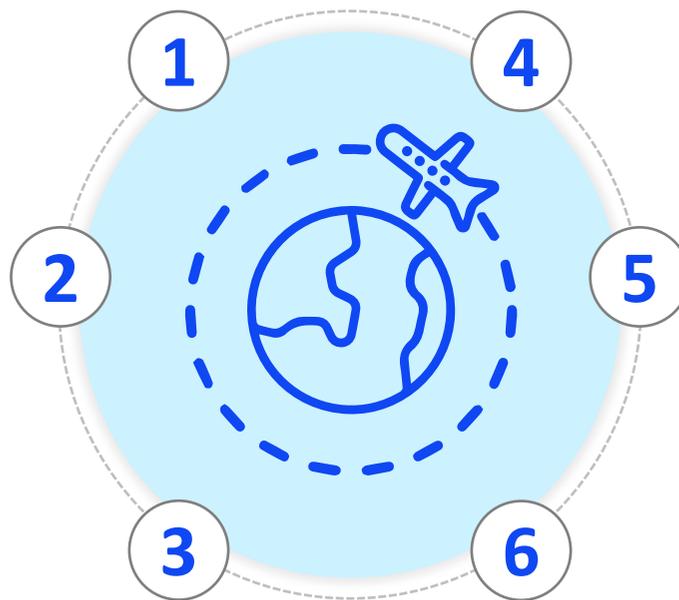
Quarantine Periods

Several countries still oblige citizens to quarantine once entering the borders

Country Safe Zone Lists



Countries, such as UK, have created a list safe zone and red zone countries in which citizens from red zone countries are not permitted to enter UK



Vaccine Certificates

Several countries, such as all EU countries, require a vaccine in order to enter the territory

PCR & Covid Tests



Most of the countries globally require a negative PCR or Antigen test before departure



Local Safety Protocols

A lot of countries still have safety protocols such as curfews, limited restaurant capacity, museums & cinemas shut, etc.

What are countries doing to re-activate tourism?

01

Visa incentives

Albania allowed visitors from 8 destinations in Asia & Middle east to enter without visa in 2021

04

Ending Quarantine

Countries, such as UAE, lifted mandatory quarantine for visitors



02

No Covid restrictions

Mexico is open for tourism without the need of presenting a PCR test

03

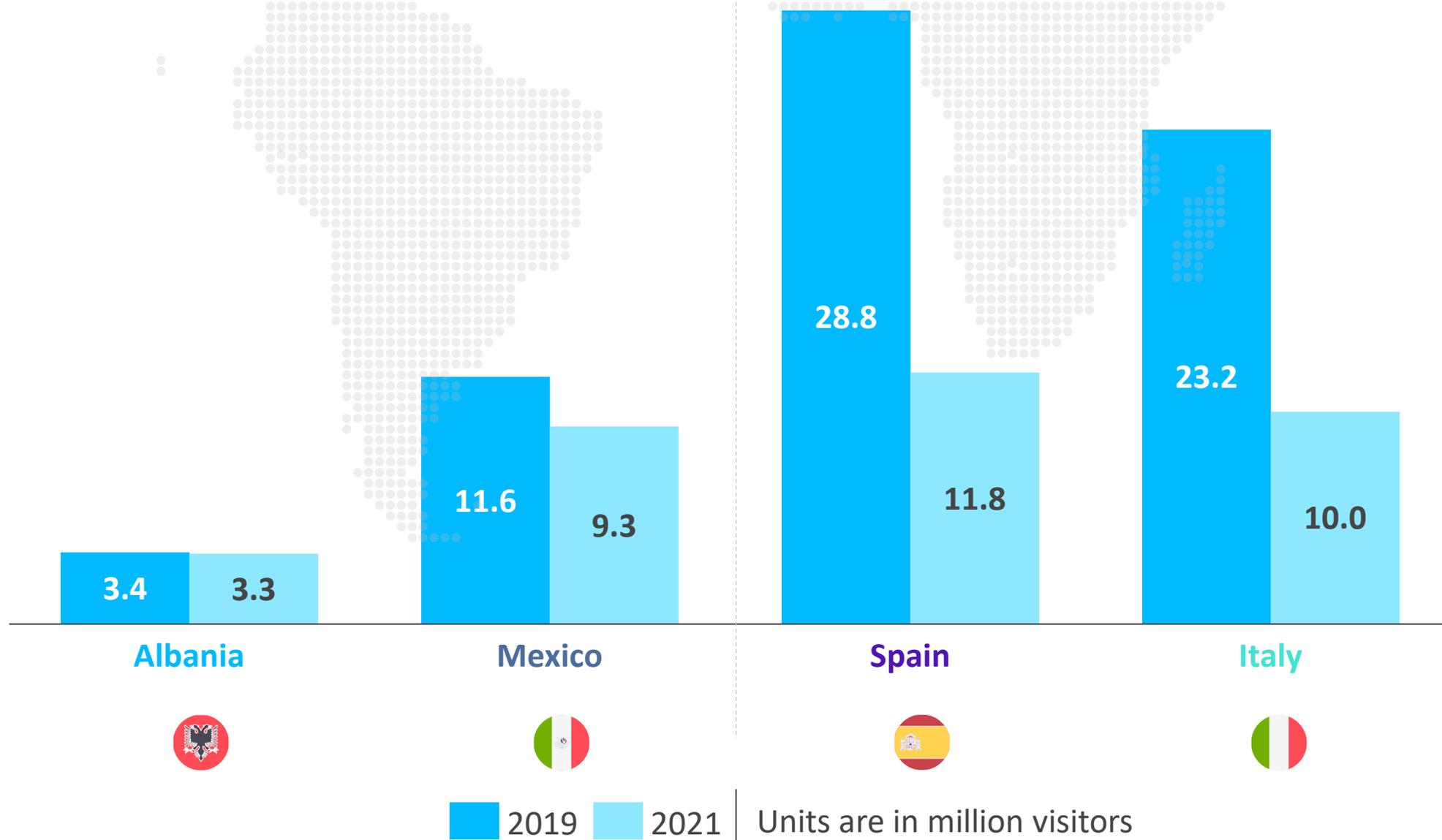
Reducing 2020-Implemented Protocols

Egypt opened for tourism in full capacity, curfews ended, and all hospitality services are back to business after the pause in 2020

Monthly Tourist arrivals pre and post Covid in the high-season

Countries that fully opened for tourism without travel restrictions

countries that impose strict travel requirements for inbound tourists



Note: The figures above express the sum of the number of tourist arrivals in June, July & August in 2021 vs 2019
Sources: Albania Instat, INEGI Mexico, Authority of Statistics Spain, Bank D'Italia, Press Search, Infomineo Analysis

Tourist arrival recovery rates in 2021 comparison to pre-covid times

Countries that fully opened for tourism without travel restrictions

countries that impose strict travel requirements for inbound tourists

Mexico

Albania

Spain

Italy

80.7%

97.7%

40.3%

32.3%

Travel & Tourism Recovery Timeline



Mexico

MAR
20

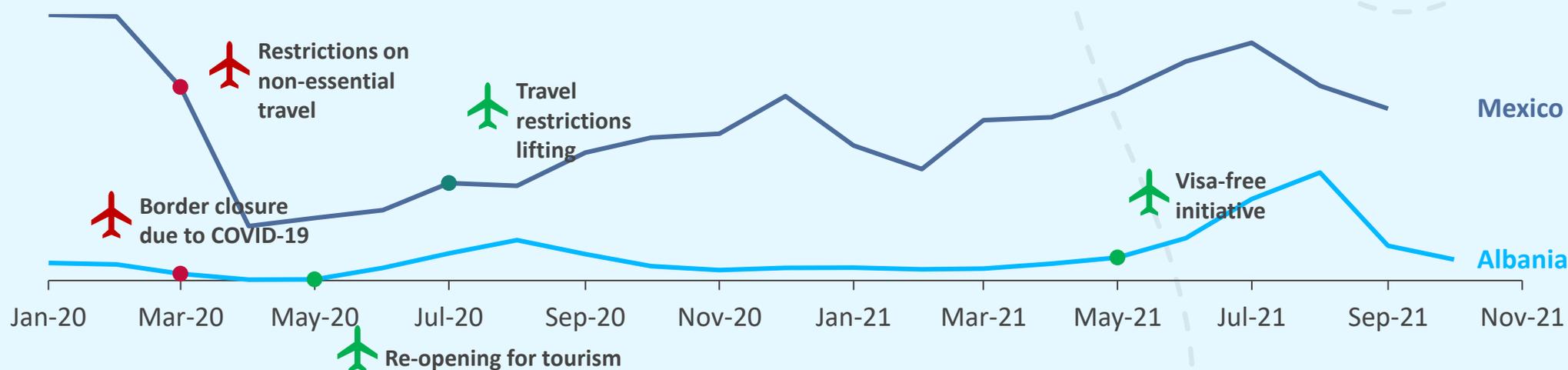


Non-essential travel from/to Mexico was restricted

JUL
20



Mexico lifted tourism travel restrictions. After opening in July 2020, the number of visitors started increasing gradually until reaching 80% recovery in the high season



Albania

MAR
20



Albania Closed due to COVID-19. Arrivals decreased from **228k** in Feb to **12k** in Apr

MAY
20



Albania Opened for Tourism, Hence, the increase from **16k** to **180k**

MAY
21

Albania's New Initiative (Visa-Free) for 8 countries. After Albania re-opened without any restrictions, the recovery rate averaged **48%** in 2020, compared to 2019. In May 2021, Albania Implemented free-visa travel to 8 countries, which resulted in arrivals almost reaching pre-covid rates (**98.5%** in July 2021)

Travel & Tourism Recovery Timeline

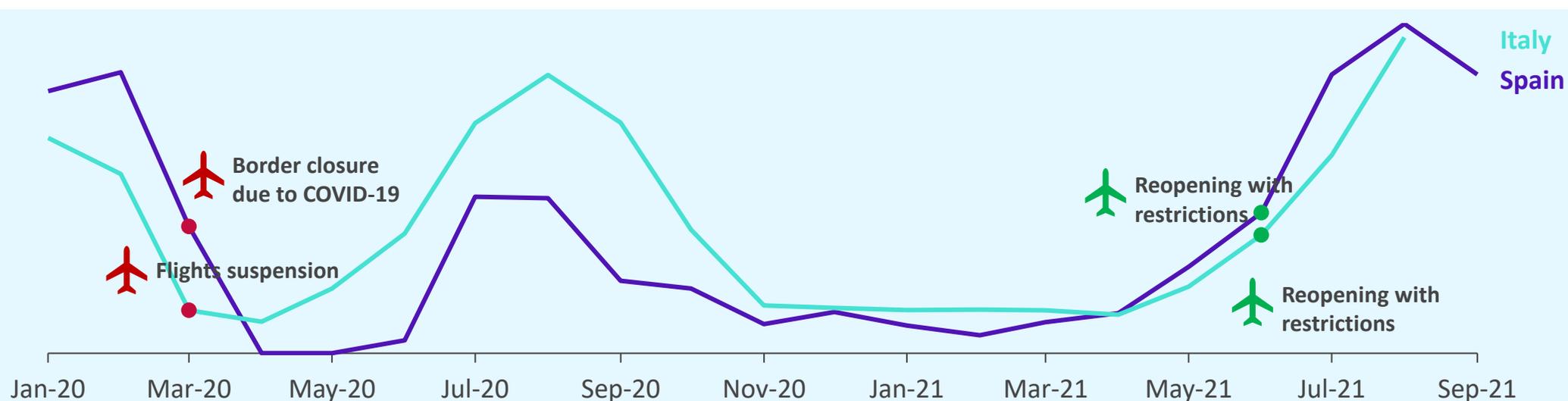


Spain

- MAR 20**

 Spain closes its borders to contain spread of Covid-19, suspending all travel visas for foreign countries
- Jun 21**

 Spain reopens to global tourists, provided they provide proof of vaccination. Despite being open for tourism, arrivals have not yet recovered, at 25%-51% of the 2019 figures. As with Italy, traffic is still lower than the usual due to travel restrictions (vaccine requirements and allowing visitors only from a list of “safe” countries)



Italy

- MAR 20**

 Italy suspended all flights
- June 21**

 Italy re-opened for vaccinated travelers
- Sept 21**
 Italy removed quarantine requirements for vaccinated travelers. Although Italy opened for tourism, the tourist arrivals have only recovered 28%-37%, compared to 2019. Traffic is still lower than the usual due to travel restrictions (vaccine requirements and allowing visitors only from a list of “safe” countries)

Sources: Albania Instat, INEGI Mexico, Authority of Statistics Spain, Bank D'Italia, Press Search, Infomineo Analysis