

# COVID-19 AND TOURISM

2020: A year in review

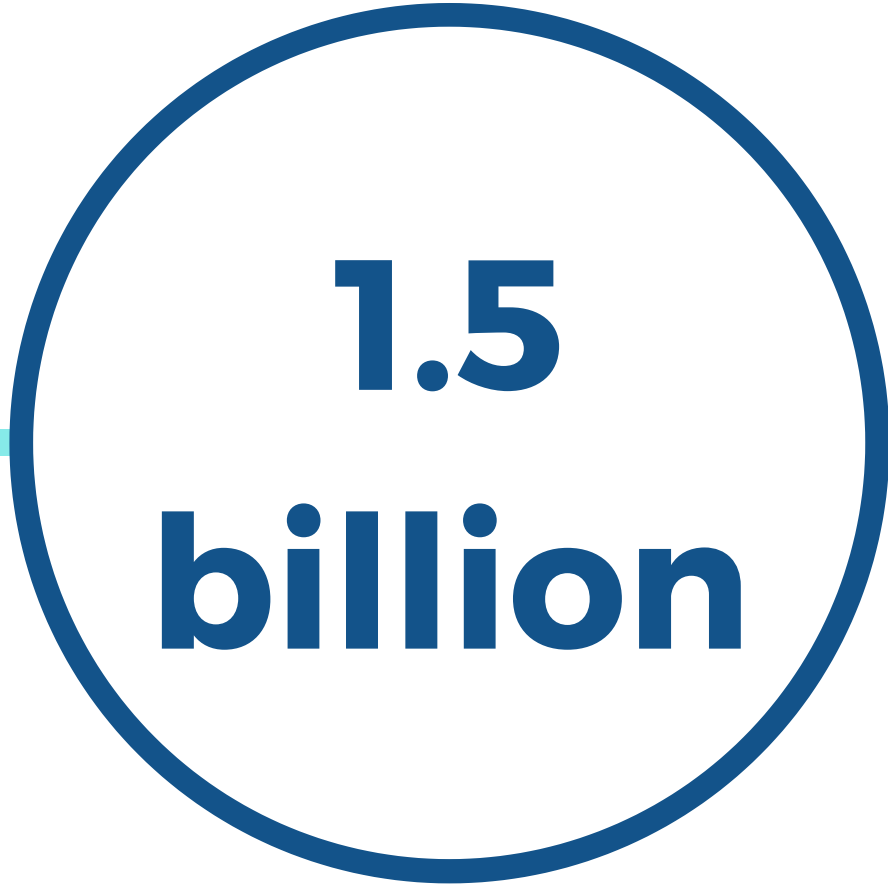
January 2021



**UNWTO**  
World Tourism Organization



# TOURISM IN PRE-PANDEMIC TIMES



**1.5  
billion**

## INTERNATIONAL TOURISTS

International tourist  
arrivals in 2019  
(10th consecutive year  
of sustained growth)



## MILLIONS OF JOBS

With a high share of  
women  
(54% of the workforce)  
and youth



**US\$ 1.7  
trillion**

## EXPORT REVENUES

- **3rd largest** export category
- **50%** of total exports for many small developing countries



## GROWING FASTER THAN THE WORLD ECONOMY

Tourism is a key sector  
in many advanced and  
emerging economies

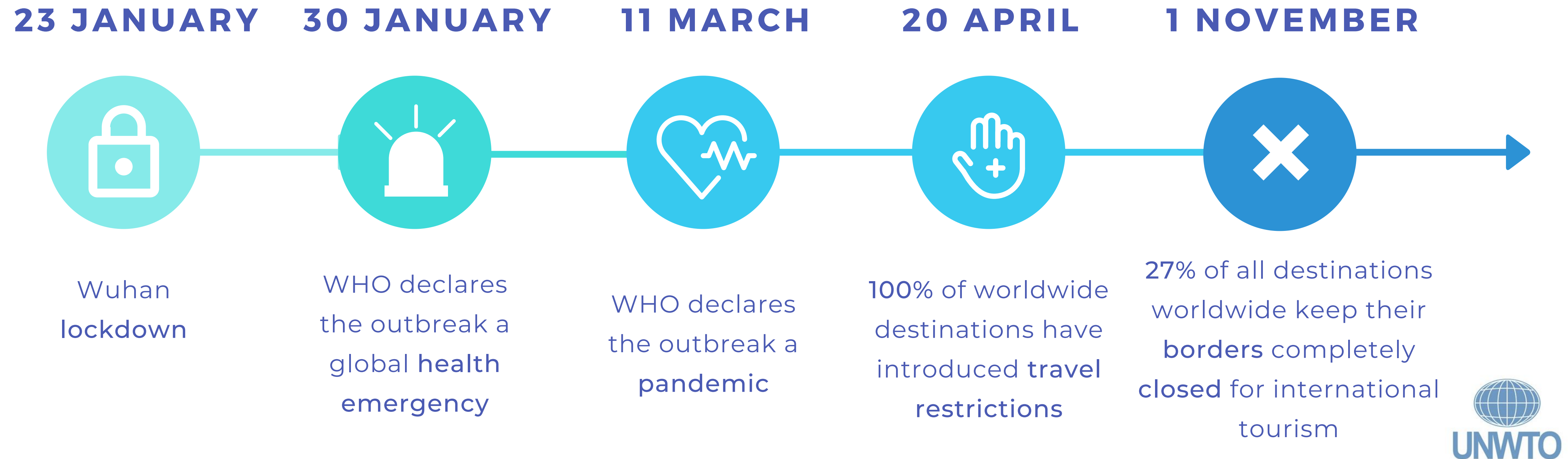


# THE IMPACT OF COVID-19 ON INTERNATIONAL TOURISM



# 2020

## a timeline marked by closures



# 2020 INTERNATIONAL TOURIST ARRIVALS

JANUARY-DECEMBER

## WORLD

2019: 1.5 BILLION (+4%)  
2020: 381 MILLION (-74%)

## AMERICAS

2019  
219 MN (+1%)  
  
2020:  
69 MN (-69%)

## EUROPE

2019  
746 MN (+4%)  
  
2020:  
221 MN (-70%)

## AFRICA

2019  
70 MN (+2%)  
  
2020:  
18 MN (-75%)

## MIDDLE EAST

2019  
65 MN (+8%)  
  
2020:  
16 MN (-75%)

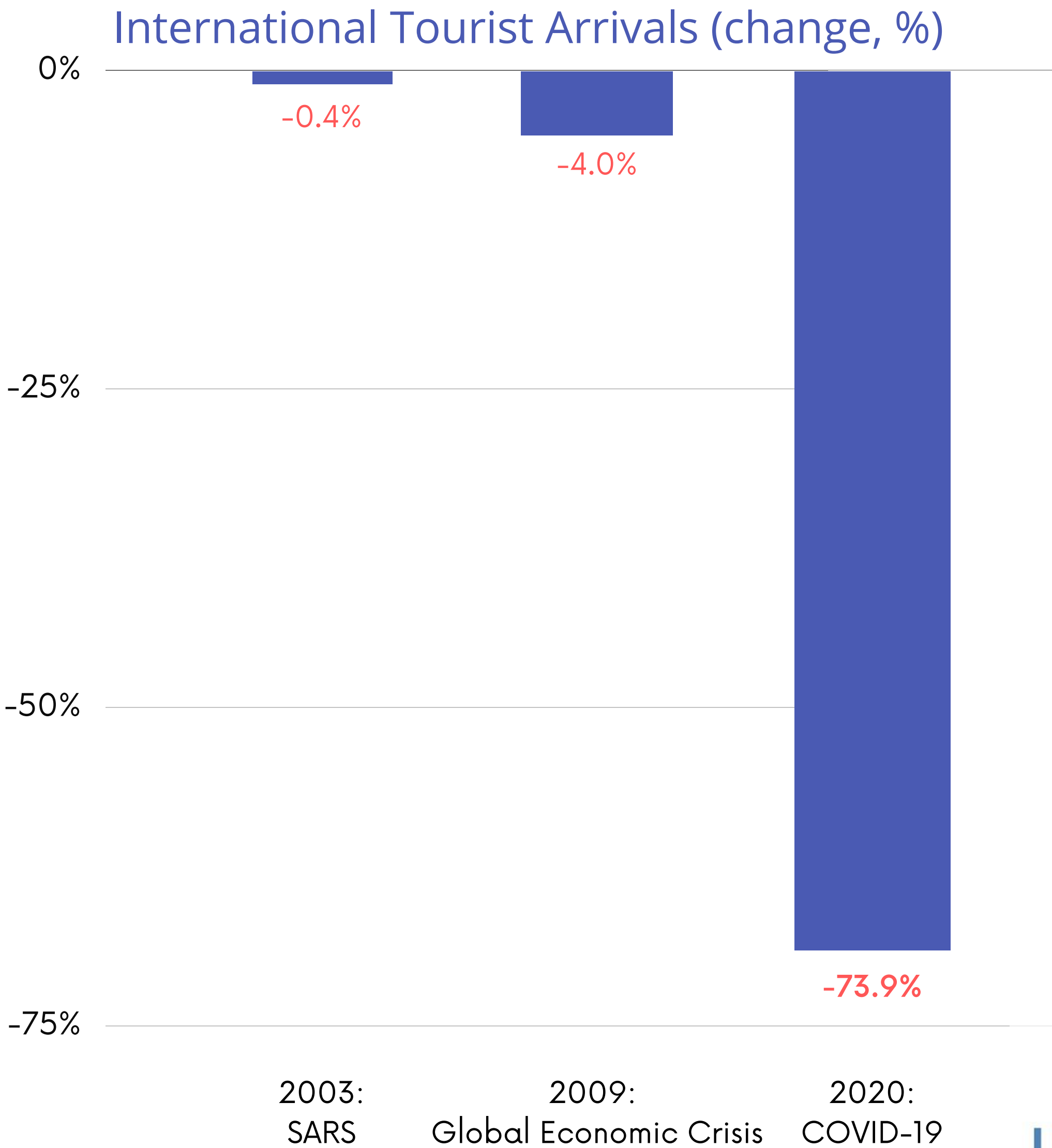
## ASIA & THE PACIFIC

2019  
360 MN (+4%)  
  
2020:  
57 MN (-84%)



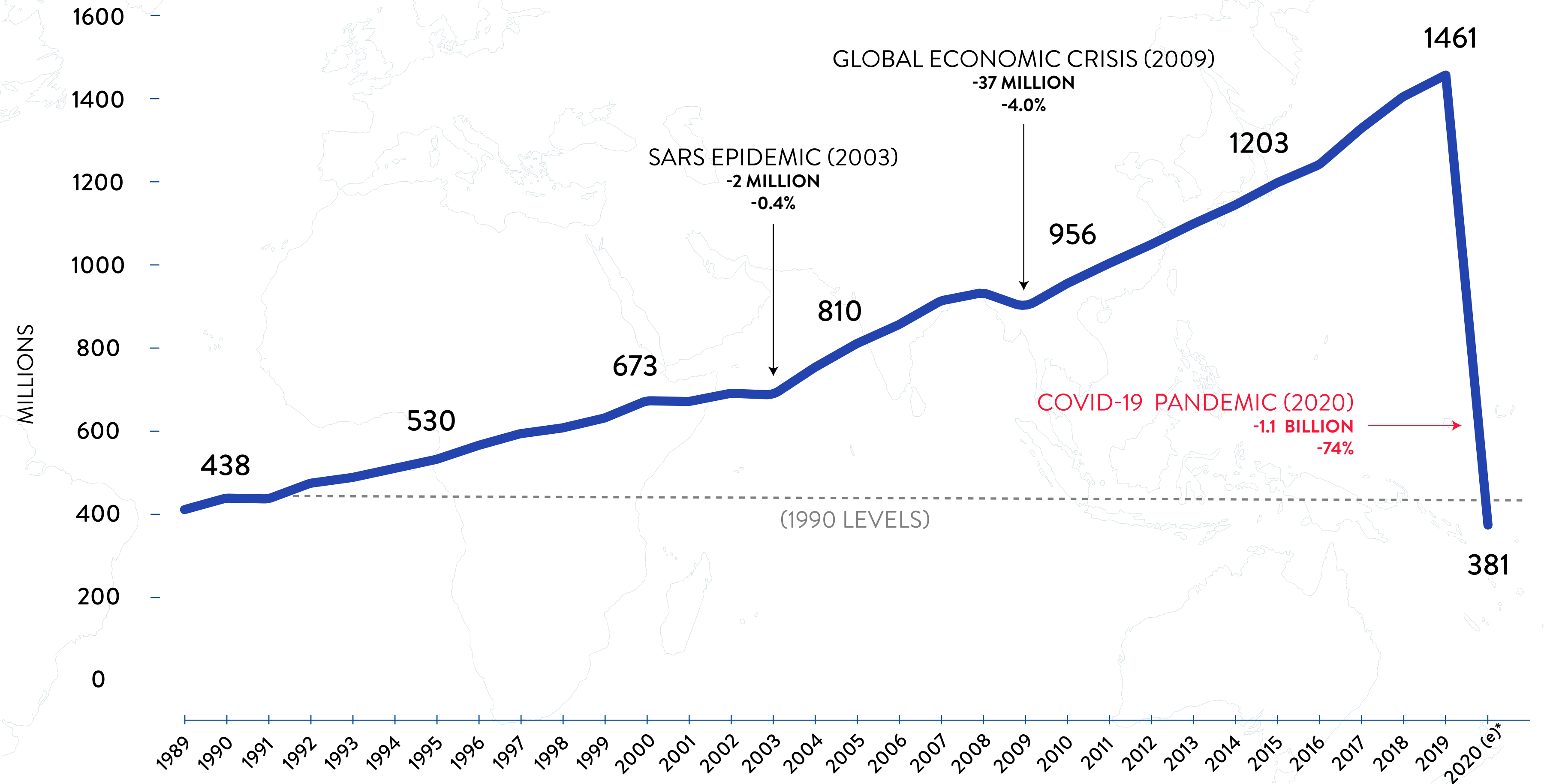
SOURCE: WORLD TOURISM ORGANIZATION (UNWTO), JANUARY 2021

# Unprecedented fall of international tourism



# INTERNATIONAL TOURIST ARRIVALS

(MILLIONS)



(e) Estimate

\* Data for 2020 is preliminary and based on estimates for countries which have not yet reported results.



SOURCE:  
SOURCE: VARIOUS (SEE INDICATOR)  
JANUARY 2021



# IMPACT OF COVID-19 ON INTERNATIONAL TOURISM 2020

## INTERNATIONAL TOURIST ARRIVALS, 2020

### RESULTS AND SCENARIOS

Note: These scenarios are not forecasts. They represent alternative monthly % change in arrivals based on the gradual opening of national borders and lifting of travel restrictions on different dates. (published in May 2020)

\* Actual data is preliminary and based on estimates for countries which have not yet reported full-year results.



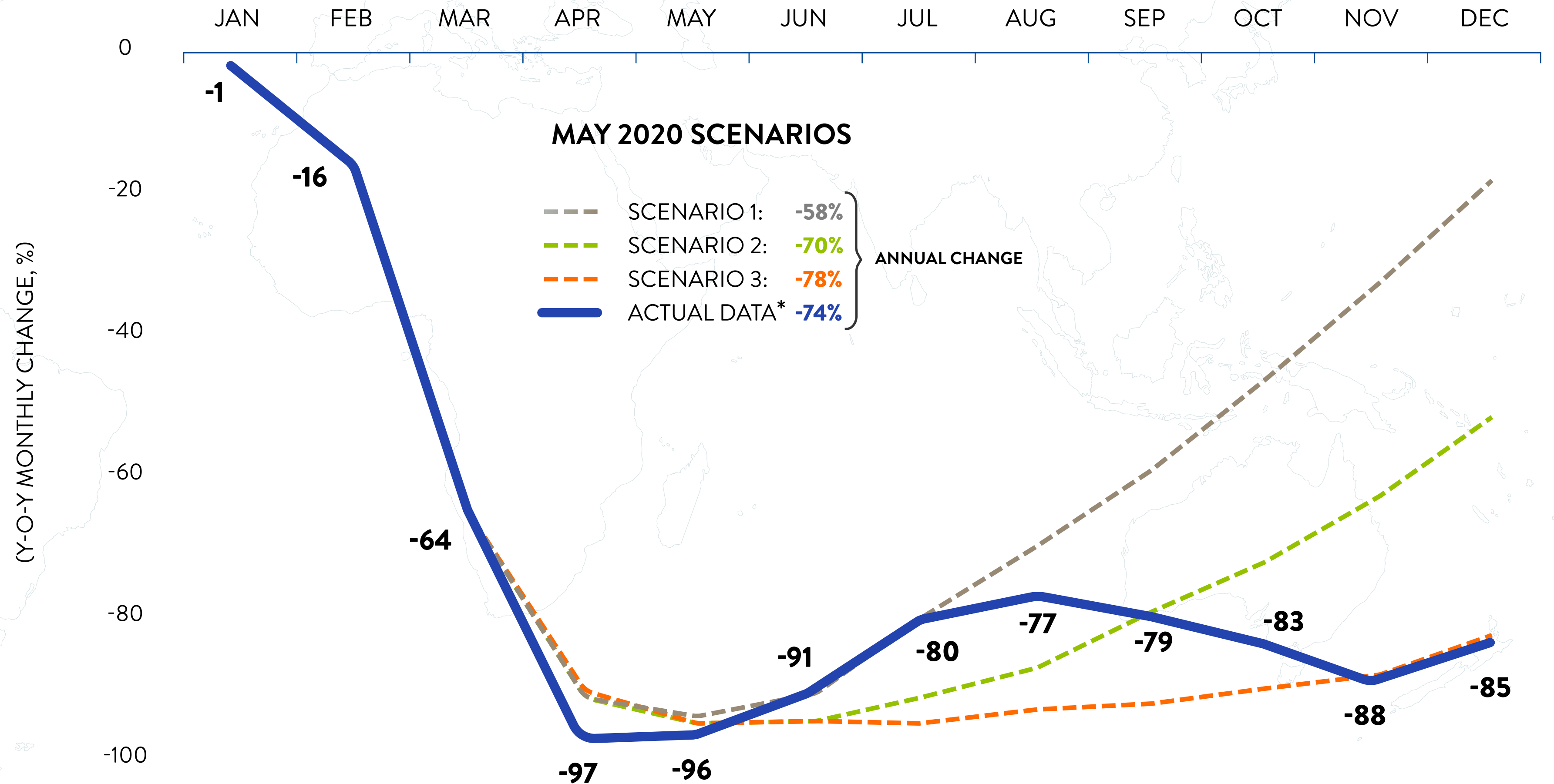
SOURCE:  
WORLD TOURISM ORGANIZATION (UNWTO)  
JANUARY 2021

**-74%**  
INTERNATIONAL TOURIST ARRIVALS

LOSS OF  
**1 billion**  
INTERNATIONAL TOURIST ARRIVALS

LOSS OF  
**US\$ 1.3 trillion**  
IN TOURISM EXPORTS

**11xs** THE  
INCOME LOSS  
OF THE 2009 ECONOMIC CRISIS





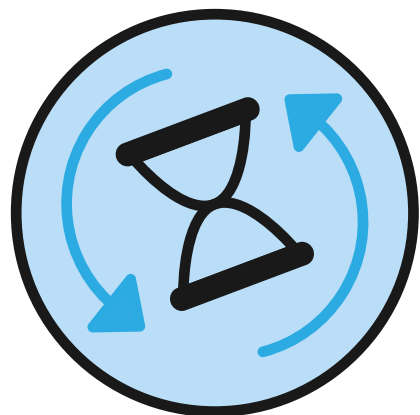
# International tourism back to levels of 30 years ago



**-74%**  
International tourist arrivals



Loss in export revenues from international tourism  
**US\$ 1.3 trillion**



International tourism could plunge to levels of  
**1990s**



Estimated loss in global GDP  
**over US\$ 2 trillion**



Loss of international tourist arrivals  
**1 billion**



**100-120 million**  
direct tourism jobs at risk



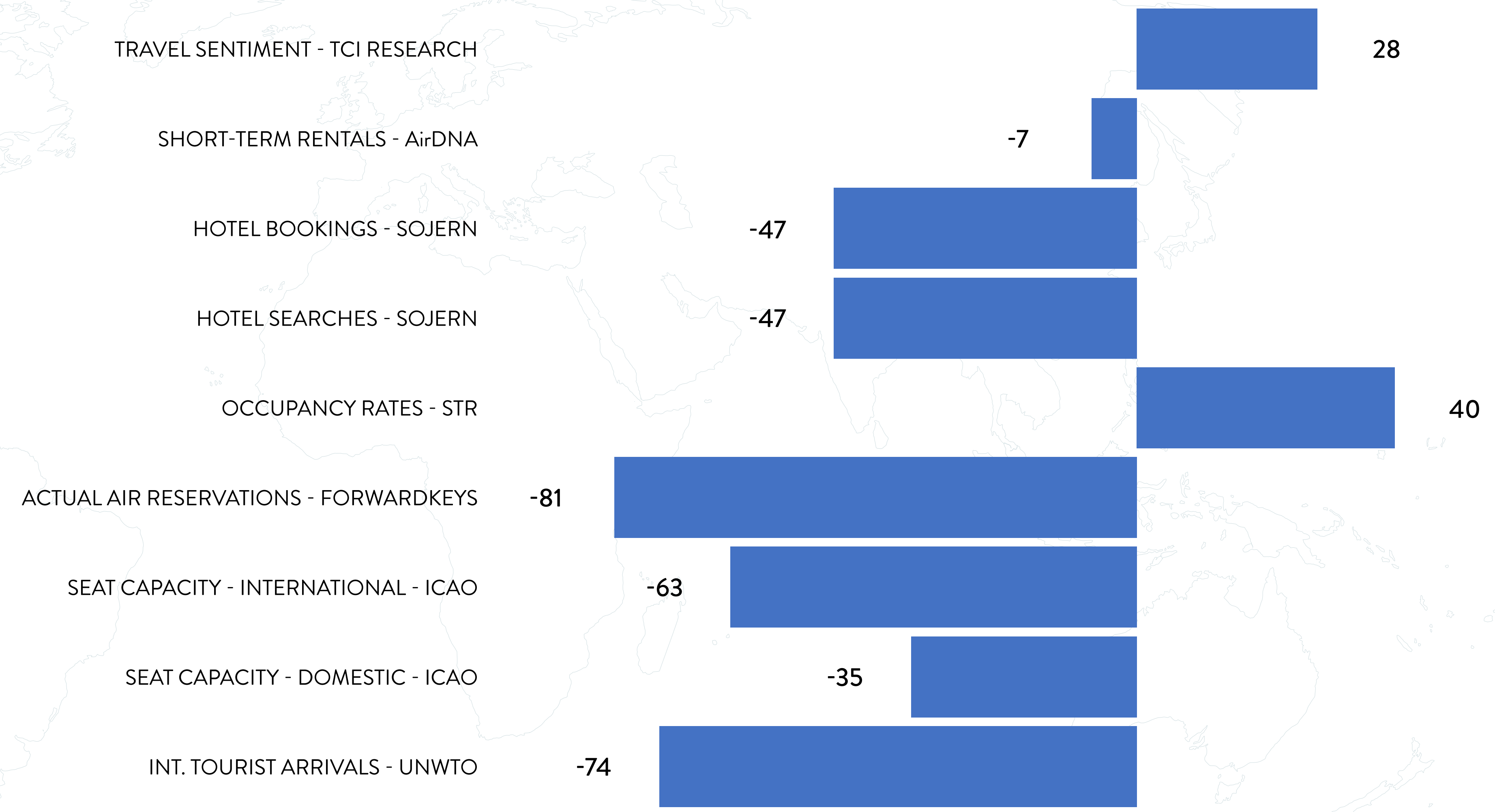
# SELECTED TOURISM INDICATORS 2020

(CHANGE, %)\*

\*change correspond to the period January through December 2020. All indicators refer to % change compared to last year whereas Occupancy and Travel Sentiment refer to the average value throughout 2020.



SOURCE:  
SOURCE: VARIOUS (SEE INDICATOR)  
JANUARY 2021





# LOOKING AHEAD



# 2021-2024 SCENARIOS

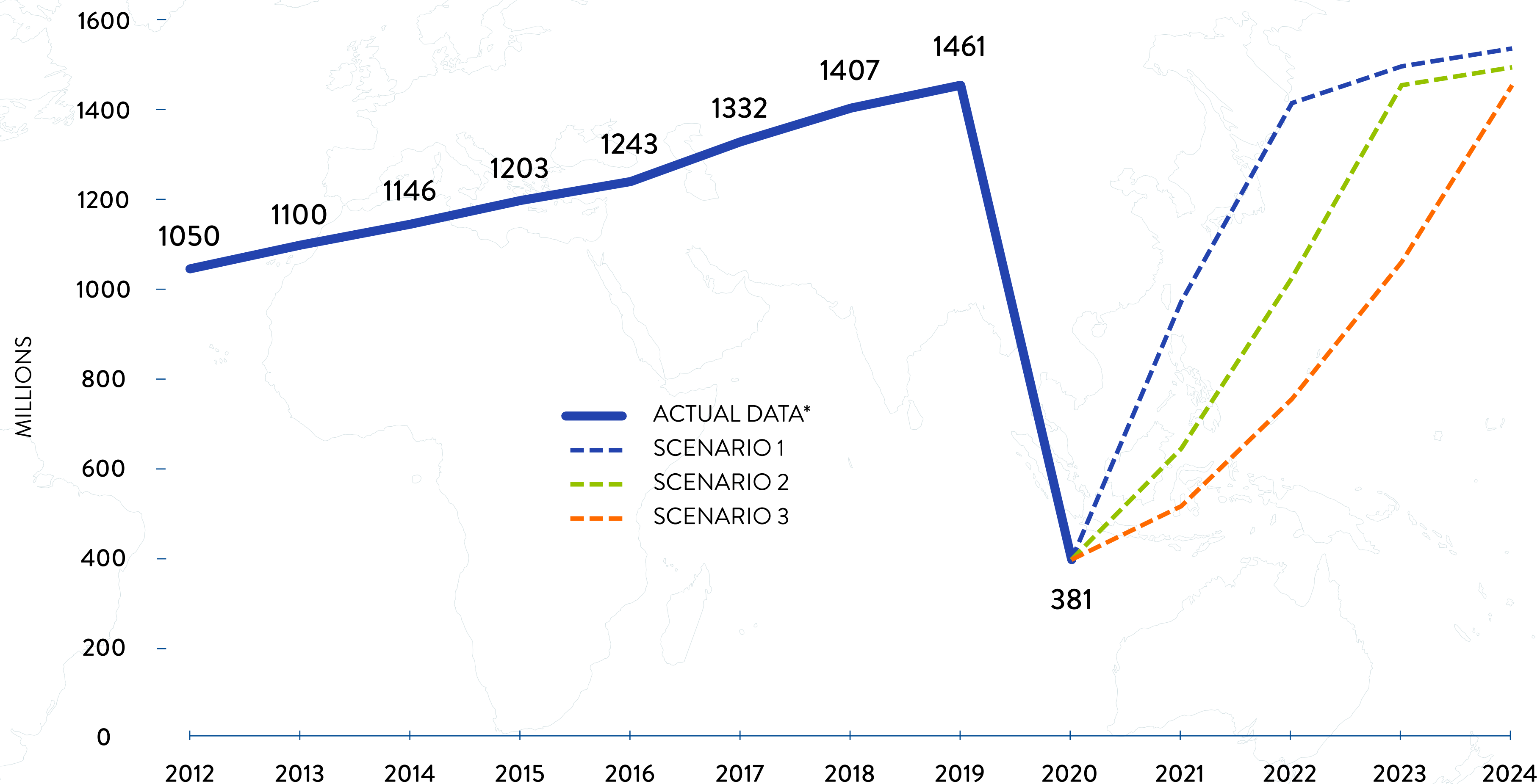
2 ½ TO 4 YEARS  
TO RECOVER 2019 LEVELS

INTERNATIONAL TOURIST  
ARRIVALS

\* Actual data for 2020 is preliminary and based on estimates for countries which have not yet reported results.

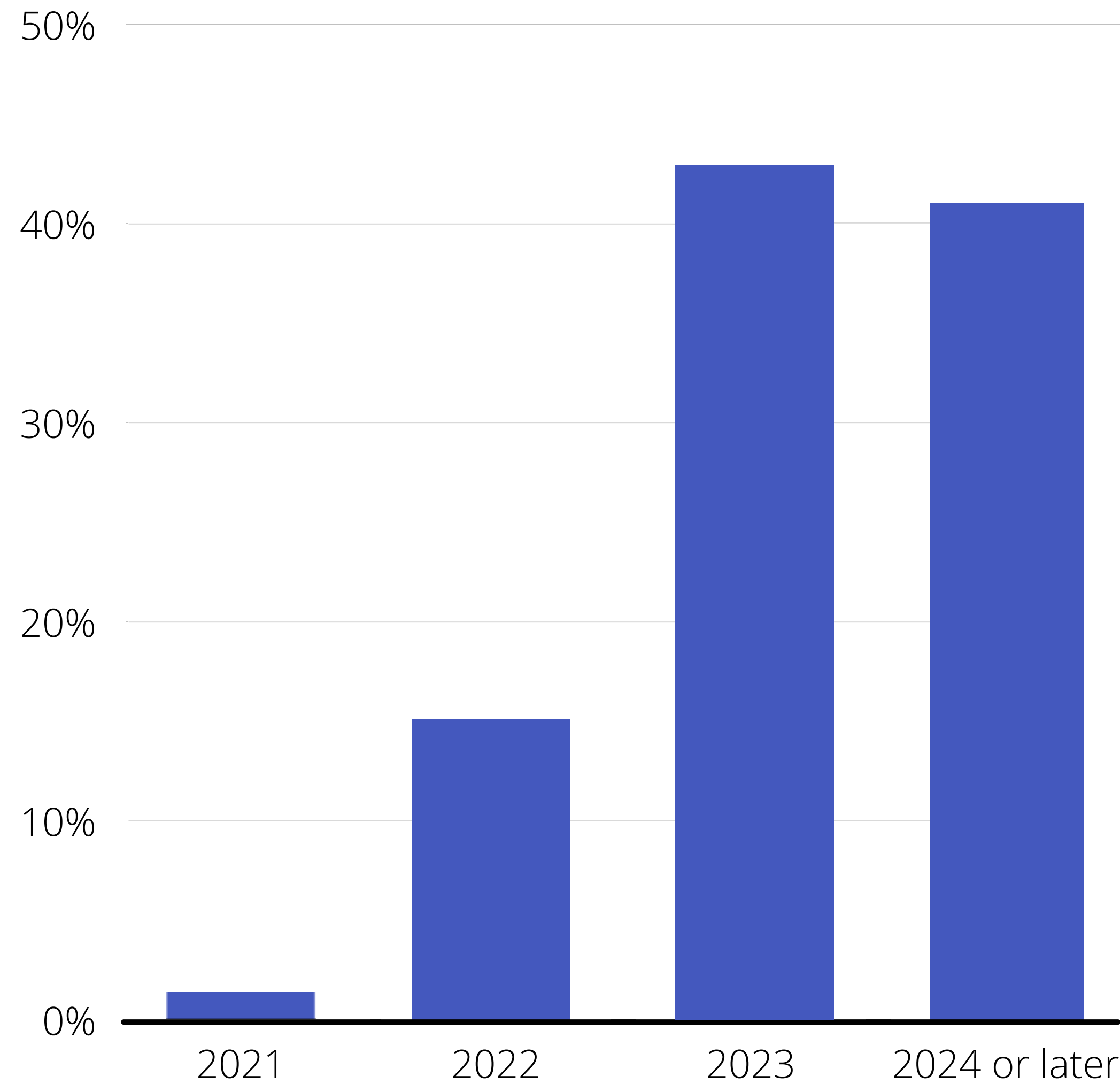


SOURCE:  
WORLD TOURISM ORGANIZATION (UNWTO)  
JANUARY 2021





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



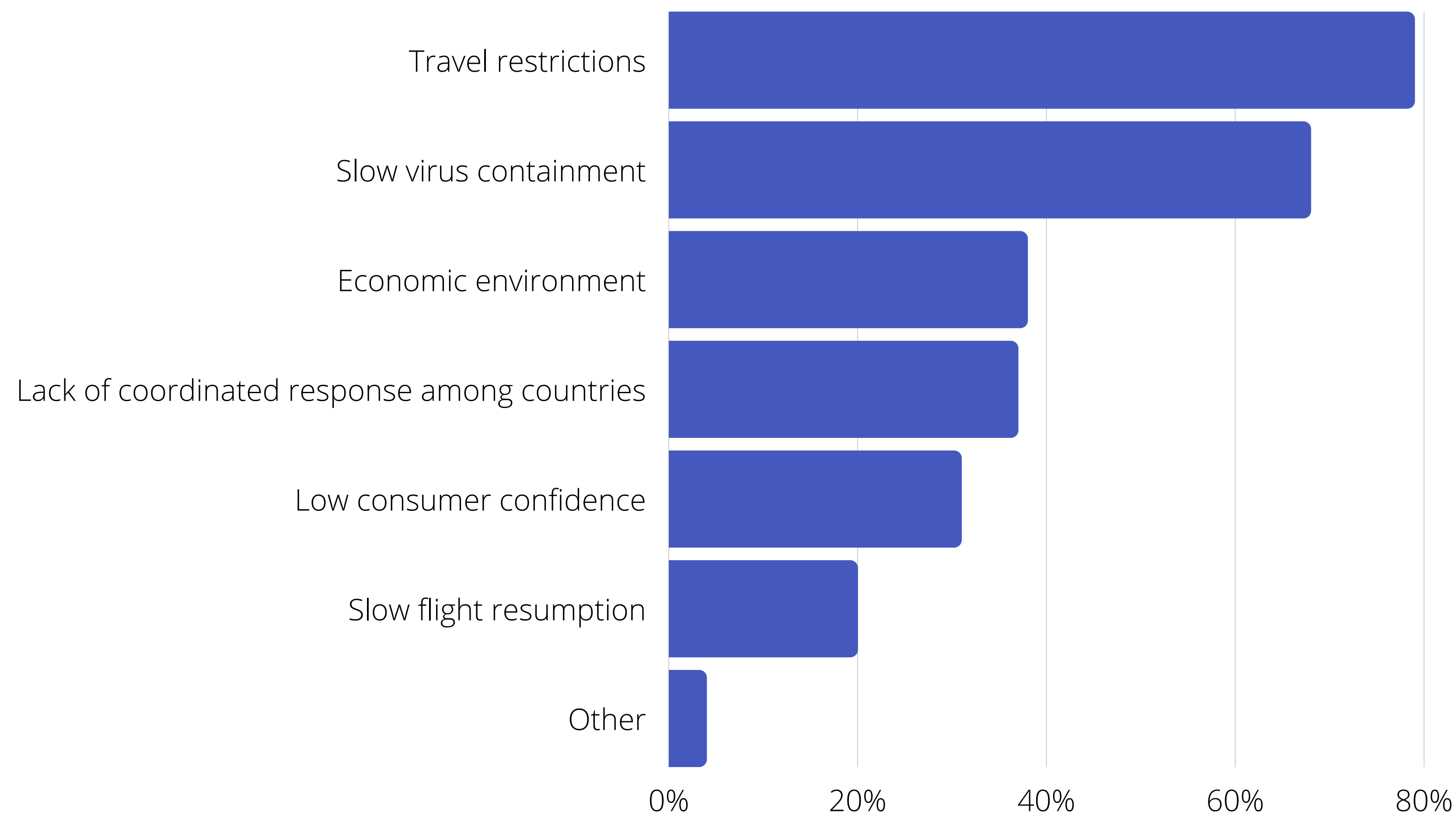
**Most tourism experts do not expect international tourism to return to pre-COVID levels before 2023**

Source: UNWTO Panel of Experts survey, UNWTO World Tourism Barometer, January 2021





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



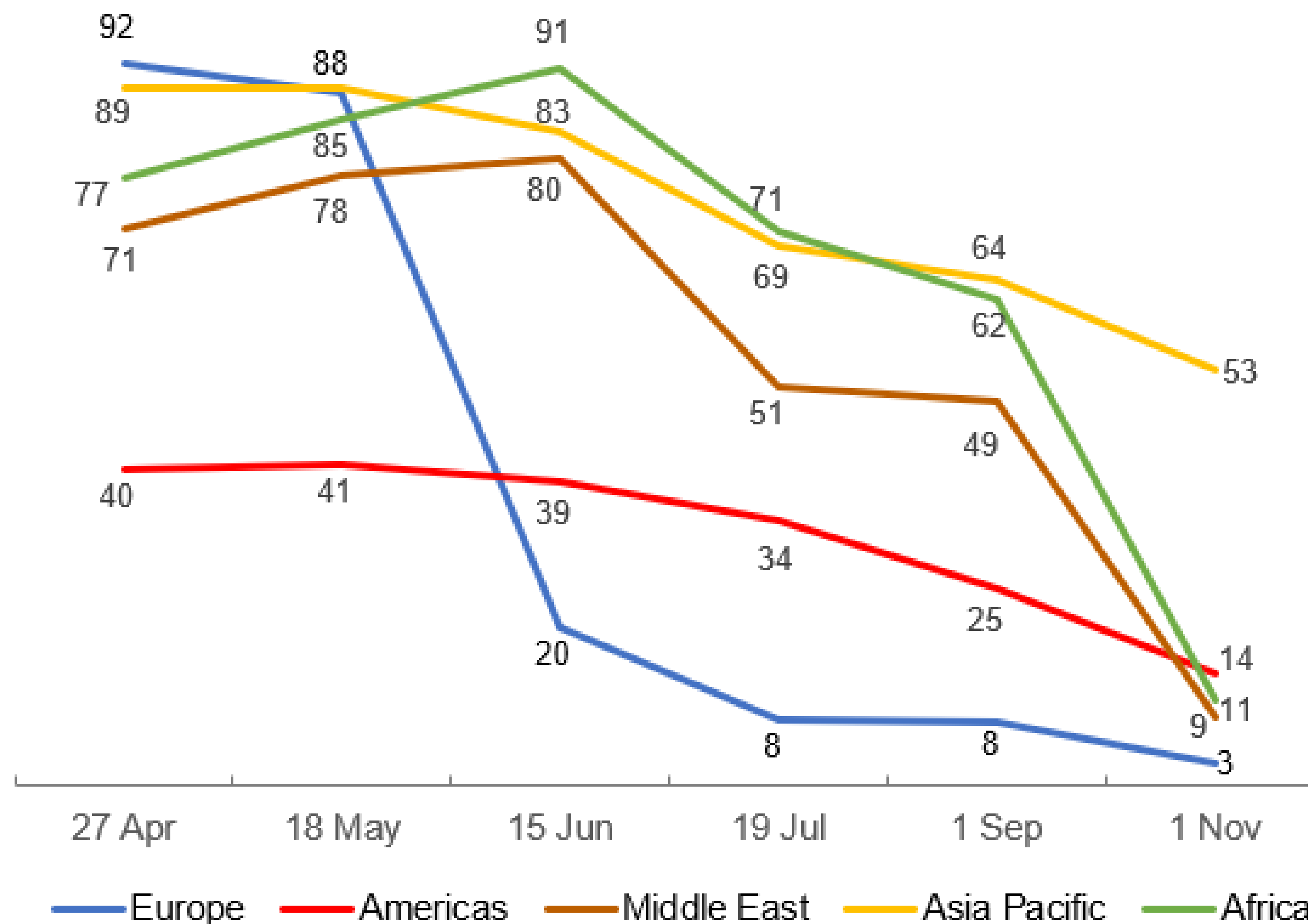
**Travel restrictions, slow virus containment and the economic environment: main barriers to the recovery of international tourism**



Source: UNWTO Panel of Experts survey, UNWTO World Tourism Barometer, January 2021



**Share of destinations with complete closure of borders, by region, 2020 (%)**  
 (% of region's arrivals)\*



**Progressive decline in number of completely closed destinations**

\*Shares calculated in terms of 2019 international arrivals

Source: UNWTO

E.g. European destinations with complete closure on 1 Nov. represent 3% of region's arrivals.



# WHAT HAS CHANGED?





# Changes in traveller behaviour in times of COVID-19

*-short-lived trends or here to stay?-*



## Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for '*staycations*' or vacations close to home.



## New concerns

Health & Safety measures and cancellation policies are consumers' main concerns.



## Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.



## Last minute

Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.



# Changes in traveller behaviour in times of COVID-19

*-short-lived trends or here to stay?-*



## Younger travellers most resilient

**Change in demographics:**

travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.



## More responsible

**Sustainability, authenticity and localhood:**

travellers have been giving more importance to creating a positive impact on local communities, increasing looking for authenticity.





**COVID-19  
RESPONSE**