HOW DO WE FACE THE FUTURE OF GASTRONOMY TOURISM?

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The context
EVOLUTION OF TRAVEL RESTRICTIONS

9 MARCH

13 MARCH

24 MARCH

20 APRIL
Forward-looking scenarios depend on re-opening of borders

International tourist arrivals in 2020: three scenarios (YoY monthly change, %)

- Actual data*  
- Scenario 1: -58%  
- Scenario 2: -70%  
- Scenario 3: -78%

Gradual opening of borders and lifting of travel restrictions: in July in September in December

* Actual data through March includes estimates for countries which have not yet reported data.

Source: UNWTO

Note: the scenarios presented in this graph 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, still subject to high uncertainty.
Summary of Potential Impacts in 2020

850 million to 1.1 billion fewer international tourist arrivals

US$ 910 billion to US$ 1.2 trillion loss in export revenues from tourism

100 to 120 million direct tourism jobs at risk
The Americas was the slowest to recover its lost arrivals after a crisis (42 months after the Sept. 11th attacks)

Impact of three previous crises on most affected regions:
Cumulative change in international arrivals (million), by months

- Asia during SARS: 14 months for recovery
- Europe during Global econ. crisis: 29 months for recovery
- Americas after Sept 11th attacks: 42 months for recovery


Source: UNWTO
Challenges & Opportunities

**STRENGTHS**
- Proven resilience of tourism in past crises
- Domestic tourism can be a buffer
- Adaptation capacity: safety and hygiene protocols, trips closer to home, value for money, responsible consumer behavior
- Government support to the sector

**WEAKNESSES**
- Segments potentially affected are also high spenders: international, long haul, business travel and events
- Major disruption in airline industry with airline failures and concentration
- Lack of references in previous downturns
- Perception of travel as a risk
- Low levels of demand when restarting tourism due to social distancing

**OPPORTUNITIES**
- Re-think business model
- Innovation and digitalization
- Sustainability and sustainable-oriented segments (rural, nature, health)
- De-escalation phases initiated by several countries toward the ‘new normal’
- Progress in adaptation plans in destinations & companies

**THREATS**
- Economic environment: world recession, rising unemployment and jobs at risk, closure of business mainly SMEs, disposable income, uncertainty weighing on consumer and business confidence
- Uncertain length of pandemic (including resurgence) and vaccine unavailability
- Extent of lockdowns and travel restrictions
- Unknown form of the ‘new normal’

**INTERNAL FACTORS**

**EXTERNAL FACTORS**

**POSITIVE**

**NEGATIVE**
UNWTO & Gastronomy Tourism
Research on Gastronomy Tourism
UNWTO events on Gastronomy Tourism
Tourism Tech Adventures

2nd UNWTO Gastronomy Tourism Startup Competition
First Edition Highlights

+ 300 participating startups

84 countries

Projects
New business model
Service
Physical product
Software

This Edition

Categories

Disruptive Startup
Social Innovation Startup
## Calendar

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<th>Date</th>
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<tr>
<td>Deadline for candidatures</td>
<td>30 May 2020</td>
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<tr>
<td>Selection and announcement of the 5 finalists</td>
<td>30 June 2020</td>
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<tr>
<td>Final pitch session and announcement of winners</td>
<td>December 2020</td>
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gastronomytourismventures.org
Guía para el desarrollo del turismo gastronómico

Guidelines for the Development of Gastronomy Tourism
Thank you!

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