COVID-19 AND TOURISM

2020: A year in review

January 2021
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

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THE IMPACT OF COVID-19 ON INTERNATIONAL TOURISM
2020
a timeline marked by closures

23 JANUARY
Wuhan lockdown

30 JANUARY
WHO declares the outbreak a global health emergency

11 MARCH
WHO declares the outbreak a pandemic

20 APRIL
100% of worldwide destinations have introduced travel restrictions

1 NOVEMBER
27% of all destinations worldwide keep their borders completely closed for international tourism
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)

SOURCE: VARIOUS (SEE INDICATOR)

JANUARY 2021

(e) Estimate

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

SARS EPIDEMIC (2003)
-2 MILLION
-0.4%

GLOBAL ECONOMIC CRISIS (2009)
-37 MILLION
-4.0%

COVID-19 PANDEMIC (2020)
-1.1 BILLION
-74%

(1990 LEVELS)
IMPACT OF COVID-19 ON INTERNATIONAL TOURISM 2020

INTERNATIONAL TOURIST ARRIVALS

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
International tourism back to levels of 30 years ago

-74% International tourist arrivals

International tourism could plunge to levels of 1990s

Loss of international tourist arrivals 1 billion

Loss in export revenues from international tourism US$ 1.3 trillion

Estimated loss in global GDP over US$ 2 trillion

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: VARIOUS (SEE INDICATOR)

JANUARY 2021

- TRAVEL SENTIMENT - TCI RESEARCH: 28%
- SHORT-TERM RENTALS - AirDNA: -7%
- HOTEL BOOKINGS - SOJERN: -47%
- HOTEL SEARCHES - SOJERN: -47%
- OCCUPANCY RATES - STR: 40%
- ACTUAL AIR RESERVATIONS - FORWARDKEYS: -81%
- SEAT CAPACITY - INTERNATIONAL - ICAO: -63%
- SEAT CAPACITY - DOMESTIC - ICAO: -35%
- INT. TOURIST ARRIVALS - UNWTO: -74%
LOOKING AHEAD
2021–2024 SCENARIOS

2½ 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
Most tourism experts do not expect international tourism to return to pre-COVID levels before 2023.
What are the main factors weighing on the recovery of international tourism?

- Travel restrictions: 80%
- Slow virus containment: 60%
- Economic environment: 40%
- Lack of coordinated response among countries: 35%
- Low consumer confidence: 25%
- Slow flight resumption: 20%
- Other: 5%

Source: UNWTO Panel of Experts survey, UNWTO World Tourism Barometer, January 2021
Progressive decline in number of completely closed destinations.
WHAT HAS CHANGED?
Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for ‘staycations’ or vacations close to home.

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

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 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.