Tourism and COVID-19
INTERNATIONAL TOURISM PLUNGED TO LEVELS OF 30 YEARS AGO

2020 International Tourist Arrivals: -73%

2020 Tourism Exports: -US$1.1 trillion

Decline to levels of:

1990s

Direct Tourism GDP 2020-2021:
- US$ 3.6 trillion

International tourist arrivals 2020:
-1.1billion

International Tourist Arrivals 2021:
- 70 to 75% vs 2019
- 20% vs 2020

SOURCE: UNWTO
* Provisional data, y-o-y monthly change by regions over 2019 (data as of November 2021)
2021 INTERNATIONAL TOURIST ARRIVALS
JANUARY - SEPTEMBER

**WORLD**
- 20% (VS 2020)
- 76% (VS 2019)

**EUROPE**
- 8% (VS 2020)
- 69% (VS 2019)

**AMERICAS**
+ 1.5% (VS 2020)
- 65% (VS 2019)

**ASIA & THE PACIFIC**
- 75% (VS 2020)
- 95% (VS 2019)

**AFRICA**
- 34% (VS 2020)
- 77% (VS 2019)

**MIDDLE EAST**
- 39% (VS 2020)
- 82% (VS 2019)

*PROVISIONAL DATA, Y-O-Y MONTHLY CHANGE BY REGIONS OVER 2019 (DATA AS OF NOVEMBER 2021)*
INTERNATIONAL TOURIST ARRIVALS: SCENARIOS FOR 2021
(Y-O-Y MONTHLY CHANGE OVER 2019, %)

* Actual data for 2021 is preliminary and based on estimates for destinations which have not yet reported monthly results.

SOURCE: UNWTO
(DATA AS OF SEPT 2020)
<table>
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<tr>
<th>Region</th>
<th>2019</th>
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<td>Middle East</td>
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**Source:** UNWTO Panel of Experts Survey, September 2021

(e) Preliminary estimates (data as of October 2021)
UNWTO TOURISM RECOVERY TRACKER

YTD CHANGE 2019 (%)

- **TRAVEL SENTIMENT**: 29 % - OCT 2021
- **SHORT-TERM RENTALS**: -11 % - OCT 2021
- **SEAT CAPACITY - DOMESTIC**: -25 % - OCT 2021
- **HOTEL BOOKINGS**: -40 % - OCT 2021
- **HOTEL SEARCHES**: -49 % - OCT 2021
- **SEAT CAPACITY - INTERNATIONAL**: -65 % - OCT 2021
- **INT. TOURIST ARRIVALS**: -76 % - SEP 2021
- **ACTUAL AIR RESERVATIONS**: -86 % - OCT 2021

SOURCE: UNWTO TOURISM RECOVERY TRACKER
WHEN DO YOU EXPECT **INTERNATIONAL TOURISM TO RETURN TO PRE-PANDEMIC 2019 LEVELS IN YOUR COUNTRY?**

![Bar chart showing the expected timeline for international tourism to return to pre-pandemic levels by region.](chart)

**Source:** UNWTO Panel of Experts Survey, September 2021
CHANGES IN CONSUMER TRENDS
SHORT-LIVED TRENDS OR HERE TO STAY?

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

More responsible
Sustainability, authenticity and localhood: travelers believe in the importance of creating a positive impact on local communities, increasingly searching for authenticity.

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.

Longer stays & higher spending
2021 has seen a significant increase in spending per trip and longer stays

SOURCE: UNWTO
* PROVISIONAL DATA, Y-O-Y MONTHLY CHANGE BY REGIONS OVER 2019 (DATA AS OF NOVEMBER 2021)
TOURISM KEY TO LEAD RECOVERY

DECLINE IN GLOBAL EXPORTS AND GDP, 2020 (US$ TRILLION)

**EXPORTS**

- 58%
- 42%
- US$ 2.6 TRILLION

**GDP**

- 30%
- 70%
- US$ 2.8 TRILLION

SOURCE: WORLD TOURISM ORGANIZATION (UNWTO) AND WORLD TRADE ORGANIZATION
96% OF GLOBAL DESTINATIONS IMPOSE TRAVEL RESTRICTIONS, APRIL 2020

SOURCE: WORLD TOURISM ORGANIZATION (UNWTO), IST UNWTO TRAVEL RESTRICTIONS REPORT
21% OF ALL DESTINATIONS WORLDWIDE STILL HAVE THEIR BORDERS COMPLETELY CLOSED, NOVEMBER 2021

SOURCE: WORLD TOURISM ORGANIZATION (UNWTO), 11TH UNWTO TRAVEL RESTRICTIONS REPORT