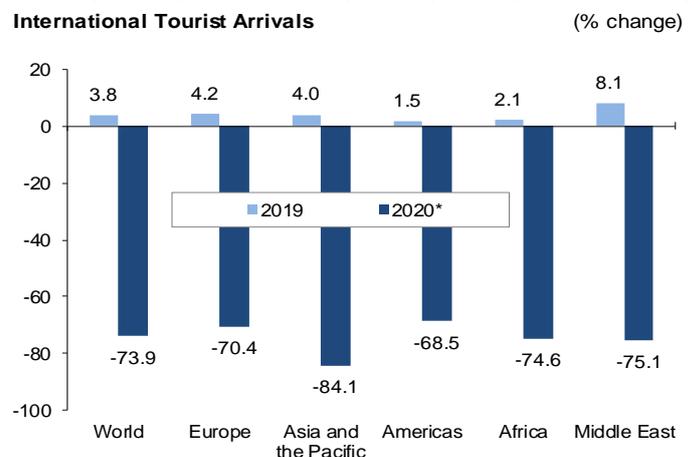




Tourism suffers its deepest crisis in 2020 with a drop of 74% in international arrivals

- Tourism suffered the greatest crisis on record in 2020 following an unprecedented health, social and economic emergency amid the outbreak of the COVID-19 pandemic.
- International tourist arrivals (overnight visitors) plunged by 74% in 2020 over the previous year due to widespread travel restrictions and a massive drop in demand.
- The collapse in international travel represents an estimated loss of USD 1.3 trillion in export revenues - more than 11 times the loss recorded during the 2009 global economic crisis.
- Asia and the Pacific saw an 84% decrease in international arrivals in 2020, about 300 million less than in the previous year. The Middle East and Africa both recorded a 75% drop in arrivals. In Europe arrivals declined by 70%, representing over 500 million fewer international tourists, while the Americas saw a drop of 69%.
- The latest UNWTO Panel of Experts survey shows a mixed outlook for 2021. Almost half of respondents (45%) envisaged better prospects for 2021 compared to last year, while 25% expect a similar performance and 30% foresee a worsening of results.
- The overall prospects for a rebound in 2021 seem to have worsened. 50% of respondents now expect a rebound to occur only in 2022 as compared to 21% in October 2020. The remaining half of respondents still see a potential rebound in 2021, though below the expectations shown in the October 2020 survey (79% expected a recovery in 2021).
- Experts foresee growing demand for open-air and nature-based tourism activities, with domestic tourism and 'slow travel' experiences gaining increasing interest.
- Looking further ahead, most experts do not see a return to pre-pandemic levels happening before 2023. In fact, 43% of respondents point to 2023, while 41% expect a return to 2019 levels in 2024 or later.
- UNWTO's extended scenarios for 2021-2024 indicate that it could take between two-and-a-half and four years for international tourism to return to 2019 levels.
- The gradual rollout of a COVID-19 vaccine is expected to help restore consumer confidence, contribute to ease travel restrictions and slowly normalize travel during the year ahead.



Source: World Tourism Organization (UNWTO) © * Provisional data



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UNWTO's membership includes 159 countries, 6 Associate Members, two Permanent Observers, and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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About the *UNWTO World Tourism Barometer*

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this *UNWTO World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

This report was prepared by the **UNWTO Tourism Market Intelligence and Competitiveness Department**, under the supervision of Sandra Carvão, Chief of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian, and Javier Ruescas.

For more information including copies of previous issues, please visit: www.e-unwto.org/loi/wtobarometereng.

We welcome your comments and suggestions at barom@unwto.org.

Data collection for this issue was closed at the end of January 2021.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published in March 2021.

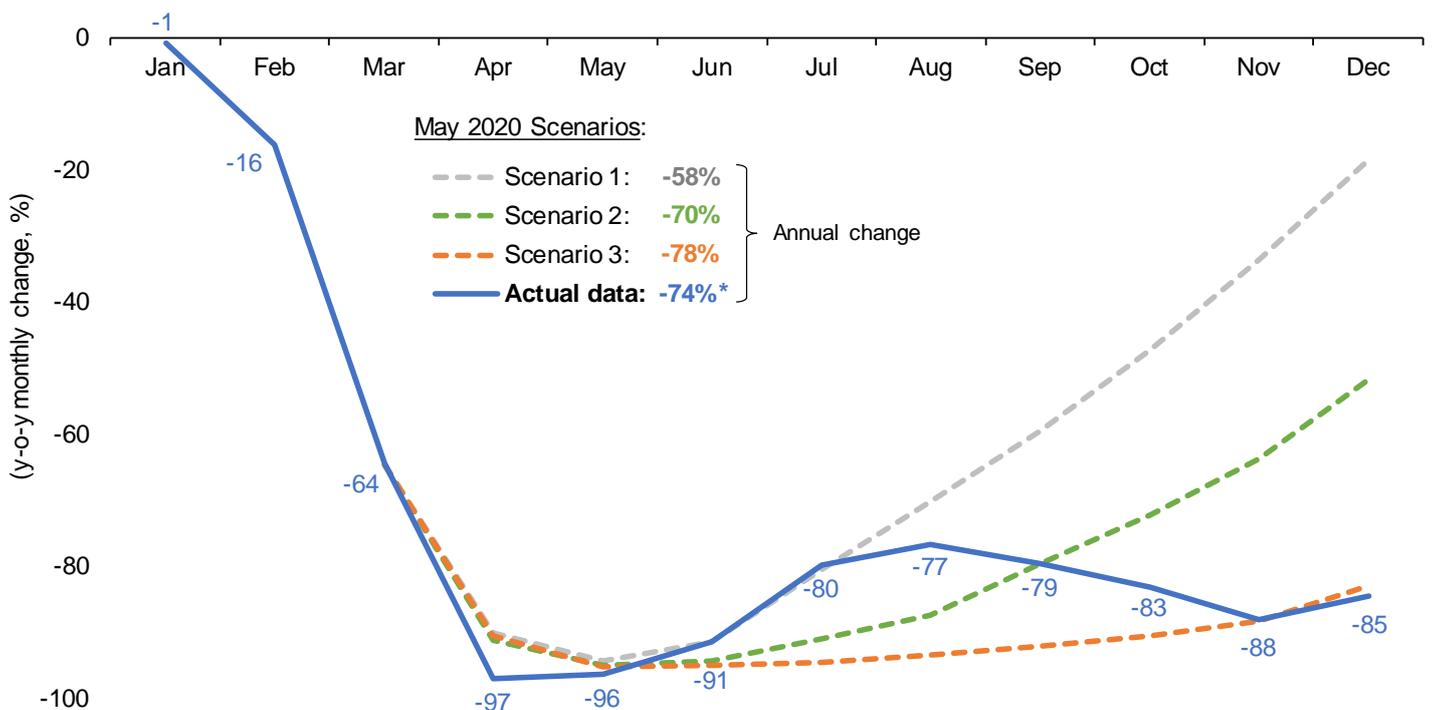
The document is available from the UNWTO elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

Inbound tourism

International arrivals plunged by 74% in 2020

- Tourism suffered the greatest crisis on record in 2020 following an unprecedented health, social and economic emergency amid the outbreak of the COVID-19 pandemic.
- International tourist arrivals (overnight visitors) plunged by 74% in 2020 over the previous year due to widespread travel restrictions and a massive drop in demand.
- This represents 1 billion fewer international arrivals and means a return of international tourism to levels of 30 years ago. It exceeds by far the drop of 4% in arrivals seen in 2009, which was the largest decline experienced by international tourism previous to the pandemic.
- The 74% decline in international tourist arrivals in 2020 puts yearly results between baseline Scenario 2 (-70%) and Scenario 3 (-78%) published in May 2020.
- The collapse in international travel in 2020 represents an estimated loss of USD 1.3 trillion in total export revenues - more than 11 times the loss recorded during the 2009 global economic crisis. This plunge in international tourism translates into an economic loss of US\$ 2 trillion in direct tourism gross domestic product (GDP), more than 2% of the world's GDP.
- The crisis has also put 100 to 120 million direct tourism jobs at risk, many of them in small and medium-sized enterprises and with a high share of women and youth.
- Data on international tourism expenditure reflects very weak demand for outbound travel last year, while some large markets such as China, France and India, shown comparatively more resilient results.
- While demand for international tourism dropped sharply and still remains subdued, domestic tourism started to pick up by mid-2020 and continued to grow in several large markets such as China, where domestic air travel has returned to pre-COVID levels.

International tourist arrivals in 2020: Scenarios and actual results (y-o-y monthly change, %)



Source: World Tourism Organization (UNWTO)

(Data collected January 2021)

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

International Tourist Arrivals by (Sub)region

							Monthly/quarterly data series									
	(million)			Share (%)	Change (%)		% change over same period of the previous year									
	2018	2019*	2020*	2020*	19*/18	20*/19	2020*									
							Q1	Q2	Q3	Q4	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
World	1,407	1,461	381	100	3.8	-73.9	-28.6	-94.6	-78.4	-85.2	-79.6	-76.6	-79.3	-83.1	-87.7	-85.3
Advanced economies ¹	761	777	206	53.9	2.1	-73.5	-29.9	-94.4	-74.6	-87.4	-75.6	-71.8	-76.8	-82.9	-91.0	-89.6
Emerging economies ¹	646	684	176	46.1	5.9	-74.3	-27.3	-94.7	-83.6	-83.1	-85.1	-83.0	-82.6	-83.3	-84.5	-81.5
<i>By UNWTO regions:</i>																
Europe	716.0	746.3	221.2	58.0	4.2	-70.4	-21.1	-93.5	-69.8	-82.6	-71.2	-66.9	-71.7	-77.3	-87.3	-85.3
Northern Europe	81.0	83.7	20.7	5.4	3.3	-75.3	-18.2	-95.1	-81.2	-88.9	-83.2	-78.8	-81.5	-83.6	-91.3	-92.7
Western Europe	200.2	205.4	74.0	19.4	2.6	-64.0	-19.7	-91.5	-61.4	-85.6	-60.2	-58.0	-67.1	-78.8	-91.0	-88.5
Central/Eastern Eur.	146.2	153.3	40.8	10.7	4.8	-73.4	-17.6	-95.0	-77.7	-81.1	-76.8	-77.1	-79.5	-80.9	-82.6	-79.9
Southern/Medit. Eur.	288.6	303.9	85.7	22.5	5.3	-71.8	-25.7	-93.6	-69.2	-79.2	-72.7	-65.6	-69.4	-73.4	-85.9	-83.1
- of which EU-28	562.5	580.1	177.3	46.5	3.1	-69.4	-21.6	-93.5	-67.5	-85.1	-67.8	-64.5	-71.4	-78.3	-89.3	-87.4
Asia and the Pacific	346.5	360.4	57.2	15.0	4.0	-84.1	-48.9	-98.1	-95.3	-95.2	-95.4	-94.6	-95.9	-95.7	-94.9	-95.1
North-East Asia	169.2	170.3	20.2	5.3	0.7	-88.1	-65.1	-98.9	-95.7	-92.8	-97.1	-95.6	-94.1	-93.4	-92.5	-92.6
South-East Asia	128.6	138.6	25.4	6.7	7.8	-81.7	-35.1	-96.9	-97.8	-97.9	-97.8	-97.8	-98.0	-98.0	-97.8	-98.0
Oceania	17.1	17.5	3.6	0.9	2.4	-79.3	-25.4	-99.0	-98.6	-98.4	-98.9	-98.5	-98.3	-98.2	-98.4	-98.6
South Asia	31.7	34.0	8.0	2.1	7.5	-76.5	-37.7	-97.5	-81.2	-93.7	-75.0	-74.6	-95.5	-96.7	-92.7	-91.9
Americas	215.9	219.1	69.0	18.1	1.5	-68.5	-16.7	-92.8	-86.4	-75.6	-88.4	-87.4	-82.7	-79.9	-77.5	-70.6
North America	142.2	146.4	48.3	12.7	3.0	-67.0	-14.3	-90.3	-84.2	-70.5	-86.9	-85.6	-78.9	-76.1	-72.3	-63.8
Caribbean	25.8	26.3	8.7	2.3	2.1	-66.8	-23.7	-96.7	-80.6	-73.7	-80.0	-81.3	-80.7	-76.7	-76.4	-69.6
Central America	10.8	10.9	2.8	0.7	0.8	-74.3	-17.5	-98.2	-99.1	-91.2	-99.5	-99.0	-98.6	-97.1	-92.0	-86.9
South America	37.1	35.5	9.2	2.4	-4.4	-74.1	-18.4	-99.4	-98.0	-93.5	-98.1	-98.1	-97.7	-95.0	-94.9	-91.3
Africa	68.7	70.2	17.8	4.7	2.1	-74.6	-12.9	-90.2	-86.4	-81.8	-88.7	-85.5	-84.4	-82.9	-82.5	-80.4
North Africa	24.1	25.6	5.6	1.5	6.4	-78.3	-18.6	-98.2	-90.3	-88.3	-93.3	-88.6	-87.7	-89.6	-91.3	-84.7
Subsaharan Africa	44.7	44.6	12.3	3.2	-0.2	-72.5	-10.3	-85.4	-83.1	-78.5	-84.0	-82.9	-82.4	-79.0	-78.3	-78.3
Middle East	60.3	65.2	16.2	4.2	8.1	-75.1	-21.7	-99.1	-93.0	-88.3	-93.8	-93.4	-91.5	-88.1	-87.0	-89.7

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, January 2021)

* Provisional data

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at www.imf.org/external/ns/cs.aspx?id=29.

See box in page 'Annex-1' for explanation of abbreviations and symbols used

2020: a year of closures

- On January 30th 2020, the World Health Organization (WHO) declared COVID-19 a global health emergency; by March 11th it declared it a global pandemic. International tourist arrivals fell by 29% in the first quarter of 2020 and decreased an unprecedented 95% during the second quarter of the year amid worldwide lockdowns and travel restrictions.
- International travel came to a near complete halt after the shutdown of most international borders in late March, with arrivals plunging 97% in April and 96% in May, the largest monthly declines on record. In April, virtually all world destinations had implemented some form of restriction to international travel: 82% with a complete shutdown of borders and 18% with a partial closure or other restrictions (percentages expressed in terms of global arrivals).
- As infection rates seemed to recede in the following months, many destinations eased travel restrictions ahead of the Northern Hemisphere summer, especially in the European Union, leading to a small and short-lived revival of international tourism. This

relative improvement was reflected in a global decline of 78% in international arrivals during the third quarter, with comparatively smaller decreases recorded in the months of July and August.

- Results worsened in September and the remaining months of the year due a spike in COVID-19 cases and the surge of new variants. As the year drawn to

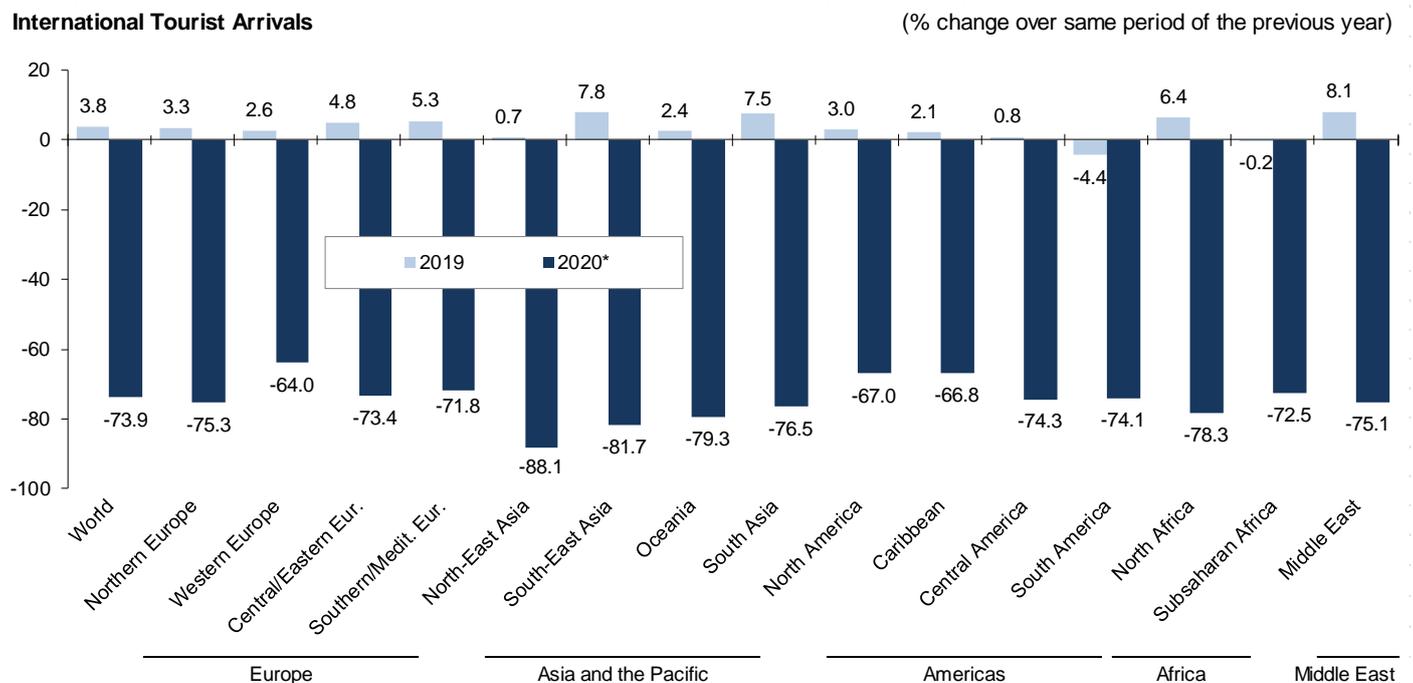
an end, many destinations reintroduced restrictions and advisories, slowing down the already weak pace of recovery. Despite a gradual easing of travel restrictions (70% of world destinations had eased travel restrictions as of 1 November) and a decrease in the number of destinations with complete closure of borders, the last quarter of 2020 saw a decline of 85% in arrivals.

All world regions severely impacted

- Asia and the Pacific (-83%), the first region to suffer the impact of the pandemic and the one with the highest level of travel restrictions currently in place, recorded the largest decrease in arrivals. The region saw 300 million fewer arrivals than in 2019.
- The Middle East and Africa both recorded a 75% drop in arrivals, the second largest decline among regions in percentage terms.
- Europe recorded a 70% decrease in arrivals, despite a small and short-lived revival in the summer of 2020. The region suffered the largest drop in absolute terms, with over 500 fewer international tourists in 2020.
- The Americas saw a 69% decrease in international arrivals, following somewhat better results in the last quarter of the year.
- Most world subregions saw drops of 70% to 80% in arrivals, with the exception of Western Europe, North America and the Caribbean, which recorded decreases below 70%.
- The Americas, Africa and the Middle East were the only regions to see a gradual improvement in arrivals from mid-2020 to the end of the year.

For regular updated data, please check the UNWTO Tourism Recovery Tracker:

<https://www.unwto.org/unwto-tourism-recovery-tracker>



Industry indicators continue at historic lows amid the resurgence of the virus

- Data from **IATA** shows a decline in international air demand of 75% in January-November 2020, in line with the decrease in international tourist arrivals during the same period. International passenger traffic measured in revenue passenger kilometers (RPKs) fell by 88% year-on-year (y-o-y) in November, weighed down by the resurgence of the virus and related restrictions in many international markets.
- Mixed results were recorded across regions, with Africa showing the most resilient outcome in November (-77% RPKs) driven by smaller RPK declines on Africa-Middle East routes. International air traffic in Latin America showed the fastest recovery positively impacted by improving demand on routes to and from Central America. On the other side of the spectrum, international RPKs in North America fell by 83% y-o-y in November, while Europe (-87%) saw further deterioration in international passenger traffic due to renewed virus outbreaks and travel restrictions. The Middle East (-86% RPKs) showed little improvement since long-haul traffic remained muted in November and Asia and the Pacific continued to post the largest decline for the fifth consecutive month, with international RPKs down 95%.
- Domestic markets overall continued to show a much better performance (-49% RPKs in January-November, -41% RPKs in November), though with significant differences across countries and regions. According to IATA, China was still the best performing domestic market in November (-5% RPKs) helped by lower fares, swift recovery in consumer confidence and successful control of the virus. In Russia, domestic RPKs fell by 23% y-o-y in November, twice as fast as in October, due to a spike in infection rates resulting in travel restrictions and slower demand. The contraction in RPK eased in Japan to -40% in November, while Brazil showed swift RPK recovery (-35% y-o-y) with the start of the summer season stimulating demand. In the United States, recovery remained slow (-60% RPKs) in November despite increased passenger traffic during Thanksgiving holidays, as well as in Australia (-80%).
- The comparatively better performance of the domestic air market is also reflected in the improvement of domestic capacity. According to **ICAO**, domestic air capacity fell by -35% during 2020, versus -63% for international capacity. Airlines have been cautious in adding capacity in response to sluggish demand. As a result, load factor in international traffic remains low overall (45%).
- Data from **STR** indicates record low levels in the accommodation industry during 2020, with little change in occupancy levels regions in the last months of the year. Occupancy in 2020 reached 28% in Africa, 31% in Europe, 39% in the Middle East, 41% in the Americas and 45% in Asia and the Pacific (data by region are based on STR statistical regions).

2021 recovery outlook remains cautious

- Due to the worsening of the pandemic with the surge of new variants, many countries are reintroducing stricter travel restrictions, including mandatory testing, quarantines and in some cases a complete closure of borders, all weighing on the resumption of international travel.
- The resurgence of the virus and related restrictions is impacting destinations and source markets alike as recent examples around the world show. The European Commission proposed on 25 January 2021 additional safeguards and requirements for international travellers into the European Union, including mandatory testing before departure (https://ec.europa.eu/commission/presscorner/detail/en/ip_21_194). The United States is now requiring international travelers to quarantine upon arrival and to secure a negative test result. Travellers to the United Kingdom need to self-isolate for 10 days upon arrivals and flights from several countries have been suspended due to the new COVID-19 strain. New Zealand and Australia temporarily suspended the travel bubble between the two countries. Domestic tourism is also being disrupted by a spike in cases in Russia resulting in air capacity cuts, as well as in Japan with the partial pause of the 'Go to travel' campaign and in many European countries due to internal restrictions to mobility between regions.

- The gradual rollout of a COVID-19 vaccine is expected to help restore consumer confidence, contribute to ease travel restrictions and slowly normalize travel.
- However, the outlook remains cautious amid high uncertainty. Consumer confidence is at record lows and prospects remain very weak for the period January-April, as shown in the latest survey of UNWTO Panel of Experts.
- New cases of COVID-19 continue to be reported worldwide, with some 100 million confirmed cases as of 27 January 2021, according to the World Health Organization.
- In order to contain the spread of the virus, many countries still remain with borders completely closed to international travel, among which major source markets such as China.
- The recovery of tourism in 2021 will be determined by the pace of the vaccination rollout, the coordination among countries on travel procedures and the economic situation.
- According to the latest prospects by the UN Department of Economic and Social Affairs (UN DESA), a modest rebound of 4.7% growth in world GDP is expected in 2021, barely offsetting the output losses of 2020. In its World Economic Outlook January update, the International Monetary Fund (IMF) projects the global economy to grow 5.5 percent in 2021, though renewed waves and new variants of the virus pose concerns for the outlook.

Latest update: 28/01/2021



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UNWTO TOURISM RECOVERY TRACKER

As tourism slowly restarts in an increasing number of countries, the World Tourism Organization (UNWTO) has developed the **first comprehensive tourism recovery tracker worldwide**, monitoring a number of relevant indicators throughout the recovery of tourism.



OVERVIEW



MONTHLY DATA
BY REGIONS



MONTHLY DATA
BY TOP 10 DESTINATIONS



MONTHLY DATA
BY TOP 10 SOURCE MARKETS



COMPARE INDICATORS

Methodology

Availability of data

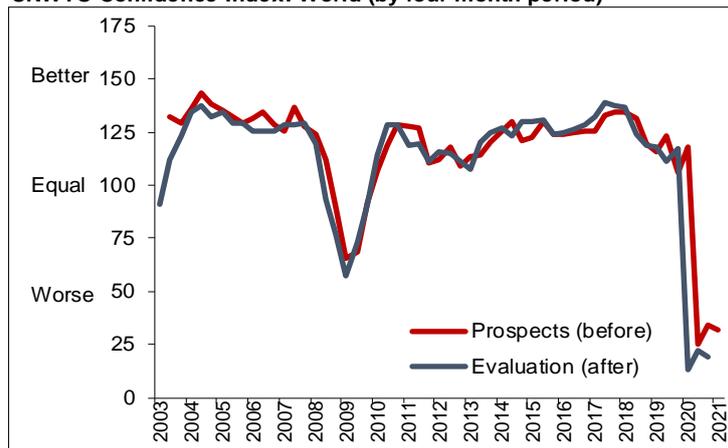
UNWTO Confidence Index

Cautious outlook for 2021 amid persisting low confidence levels

- Confidence in global tourism continued to hit record lows in the period **September-December 2020**, according to the first UNWTO Confidence Index survey of 2021. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the last four months of 2020 with a score of 19. An overwhelming majority (92%) of respondents evaluated the period September-December 2020 as much worse (73%) or worse (19%) than expected.
- This reflects a continued weak demand for international travel, curbed by slow virus containment, low traveller confidence and restrictions on travel still in place, due to the COVID-19 pandemic. Despite a gradual easing of restrictions to international travel (70% of world destinations had eased restrictions as of 1 November), confidence worsened in the last four months of the year, weighed down by the spike in COVID-19 cases and the spread of new variants.
- The result for September-December 2020 is in line with the overall performance of full-year 2020, which almost all experts (98%) rated as much worse (83%)

or worse (15%) than expected. 2020 was the worst year on record for international tourism, impacted by the pandemic in a way never seen before in the history of tourism.

UNWTO Confidence Index: World (by four-month period)



Source: World Tourism Organization (UNWTO) ©

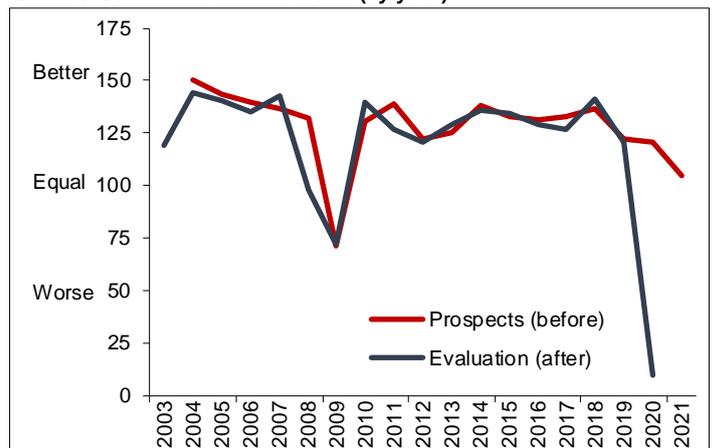
Expectations remain weak for January-April 2021

- Expectations remain very weak for the period **January-April 2021**, with 85% of respondents rating the period as worse (30%) and much worse (55%). The first four months of the year cover most of the Northern Hemisphere winter season and the Southern Hemisphere summer season, as well as major travel periods such as the Chinese New Year and Easter.
- UNWTO experts rated prospects with a score of 32 as compared to 34 for September-December, reflecting no major change in confidence levels for the first four months of the year. The worsening of the pandemic has resulted in stricter protective measures implemented by countries around the world at the beginning of the year, reflected in lockdowns, curfews and quarantine requirements. In addition, many major source markets and destinations remain with borders completely closed or have pulled some sort of relaxation on travel back.
- Despite the start of the vaccination in some parts of the world, experts do not see any major improvement in travel during January-April, given the slower-than-expected vaccination rollout. Few foresee some green shoots in Easter depending on the progress made with vaccination.
- Experts from Asia and the Pacific are the most pessimistic about January-April 2021, with 89% expecting worse or much worse results, followed by experts from Europe (86%), from the Americas (84%) and Africa (70%). Experts from the Middle East are the least pessimistic of all world regions, with 67% expecting a worsening of results in the first four months of 2021.

2021: High levels of uncertainty

- Responses from experts show a rather **mixed outlook** about 2021. Although almost half of respondents (45%) expressed better prospects for this year, 25% are rather uncertain about a trend reversal and 30% still consider 2021 prospects worse as compared to 2020.
- According to experts, the vaccine and a faster virus containment will positively contribute to a safe and effective restart of tourism. However, in the near- and short-term this should be accompanied by a coordinated response among countries on travel restrictions, standardized health and safety protocols including testing and vaccination certificates, reliable data and an evidence-based communication. On the other hand, the deteriorating economic environment reflected in job losses, business failures and cutbacks on tourism supply, as well as the narrowing margin of government support, is weighing on the recovery. The yet-to-be-seen impact of Brexit on travel, especially to and from EU, is also a concern for several experts from Europe. Air capacity cuts will represent a challenge as well.

UNWTO Confidence Index: World (by year)

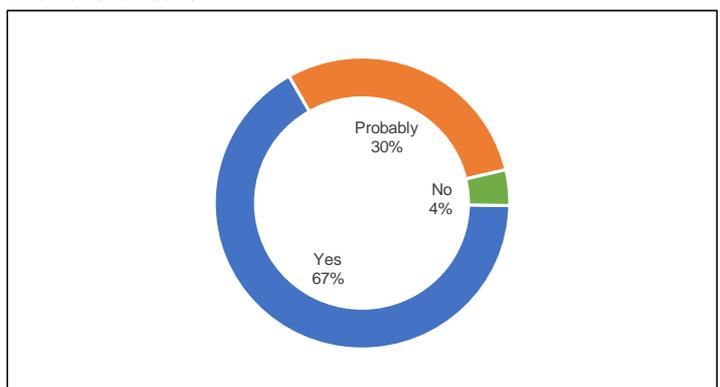


Source: World Tourism Organization (UNWTO) ©

Vaccine expected to accelerate recovery

- Two thirds of the respondents (67%) expect the **vaccine** to accelerate the recovery of international tourism, while some 30% consider it only probable. However, this will depend on the speed, scope and efficacy of the vaccination rollout. Experts suggest that vaccination in both source markets and destinations will be key to gradually lift travel restrictions, boost traveller confidence and resume travel demand.
- If a large share of the population gets vaccinated by summer, some experts believe that this could favour the resumption of international travel and unleash pent-up demand during the second half of 2021. In any case, respondents point out that short-haul travel, close to neighbouring countries and within the same region, would resume faster while the recovery of long-haul travel could take longer.

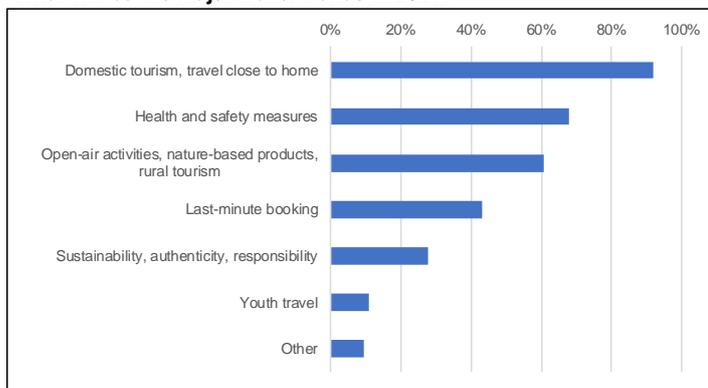
Do you expect the vaccine will contribute to accelerate the recovery of international tourism?



Leading role for domestic tourism and travel close to home in 2021

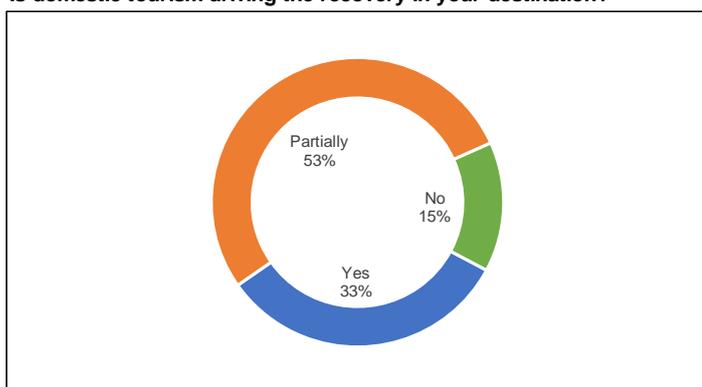
- Among the major travel trends identified by experts in 2021, **domestic tourism and travel close to home** continue to stand out. Domestic tourism has shown positive signs in many markets since people tend to travel for 'staycations' or vacations close to home.

What will be the major travel trends in 2021?



- Domestic tourism continues to drive the recovery of several destinations but in most cases only partially, as it is not compensating for the drop in international demand. The resumption of domestic tourism is helping the recovery of destinations with a sheer domestic size, though domestic tourism is not strong enough to drive the recovery in destinations heavily relying on inbound tourism. Furthermore, the pandemic has severely disrupted domestic travel in some countries, due to local lockdowns.

Is domestic tourism driving the recovery in your destination?



- Domestic tourism has also boosted the demand for **open-air activities, nature-based products and rural tourism**, which have emerged as a popular travel choice. Experts mentioned the rise of 'slow travel' and community-based tourism, linked to a more **sustainable, authentic and responsible** experience.

- **Health and safety measures** continue to be a major concern for travel in 2021. Experts pointed out the importance of consumer protection, flexibility and digitalization. Travel corridors and bubbles were also mentioned as 'safe' alternatives to resume international travel.
- Due to the uncertain and volatile situation caused by the pandemic and related travel restrictions, the predominance of **last-minute bookings** is expected to remain in 2021.
- Other trends identified by experts were youth travel, visiting friends and relatives as purpose for travel, rail travel in the framework of the 'European Year of Rail 2021', travel for 'bleisure'.

UNWTO / GTERC Asia Tourism Trends



2020 Edition

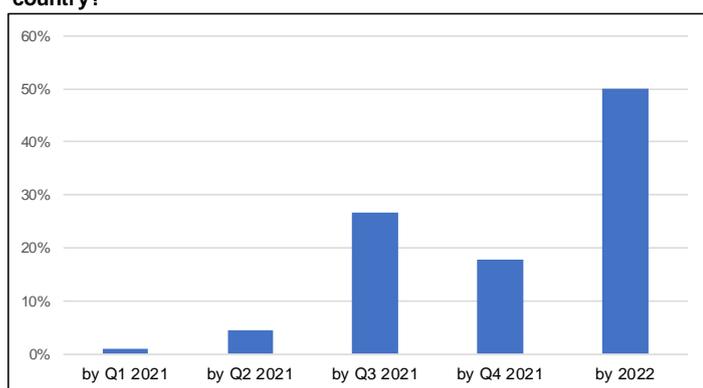
This publication and its Executive Summary are available at: www.e-unwto.org

In light of the severe impacts that the COVID-19 pandemic has had on the tourism sector, the first chapter of this seventh volume of the series, provides an analysis on the socioeconomic environment in Asia and the Pacific, supported by the latest international tourism trends for the region. The second chapter offers an overview of the recovery measures being taken in Asia and the Pacific to mitigate the effects of the pandemic and explore how the crisis may affect the achievement of the Sustainable Development Goals. The final chapter focusses on community development through tourism in rural settings. It offers a set of guidelines for policymakers and highlights the potential for the development of cultural routes across Asia and the Pacific.

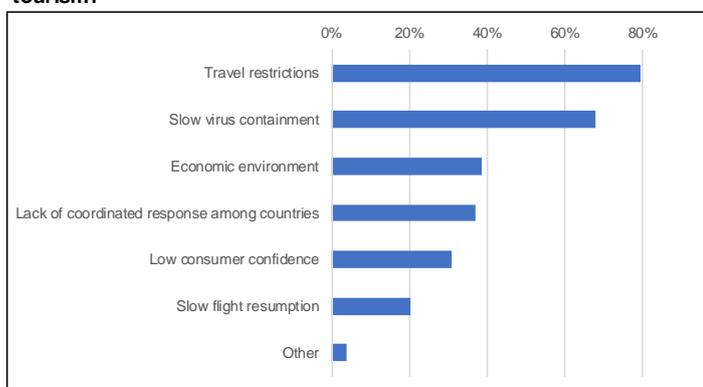
Half of respondents sees a rebound in international tourism in 2022

- Prospects for a rebound in 2021 seem to have worsened. 50% of respondents now expects a **rebound** to occur in 2022, as compared to 21% in October 2020. The remaining half of respondents still see a potential rebound in 2021, though below the expectations shown in the October 2020 survey (79% expected recovery in 2021).

When do you expect a rebound in international tourism in your country?



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



- This suggests that the worsening of the pandemic and strict travel restrictions could be delaying the potential rebound of international tourism and that the vaccination pace would help to determine whether the change in trend could start by the second half of 2021 or in 2022.
- Looking ahead, most experts do not to see a **return to pre-pandemic 2019 levels** happening before 2023. 43% of respondents point to 2023, while 41% expect that a return to 2019 levels will only happen in 2024 or later. Prospects for recovery in 2023 or later are stronger compared to what experts expressed in October. By regions, the largest share of experts

pointing to a return to 2019 levels in 2023 or later are in Europe (86%), the Americas (81%) and Asia and the Pacific (81%). In Africa and the Middle East this share is 80% and 50% respectively. (For region graphs please see the Statistical Annex).

- According to experts, **travel restrictions** continue to be the main barrier weighing on the recovery of international tourism, along with slow virus containment. Nonetheless, other factors have been equally identified such as the low consumer confidence, the deteriorating economic environment, the lack of coordinated response among countries to ensure harmonized protocols and coordinated restrictions, as well as the slow flight resumption. Many experts have pointed out that all factors are interrelated and represent important obstacles to restore confidence and resume international travel.

UNWTO Confidence Index and survey:

UNWTO conducts a Panel of Tourism Experts' survey to track global tourism performance and business sentiment every four months. In each survey, Panel members are asked to rate both the performance of the previous 4 months and the outlook for the coming 4 months on the following scale: [0] much worse; [50] worse; [100] equal; [150] better, [200] much better. The result is a Confidence Index for the tourism sector which has been published since April 2003. The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey are kindly invited to contact us at unwtotpanel@unwto.org.

In the most recent survey, additional questions were made to the UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery. The survey was conducted during the second week of January 2021 and follows a prior survey conducted in October 2020.

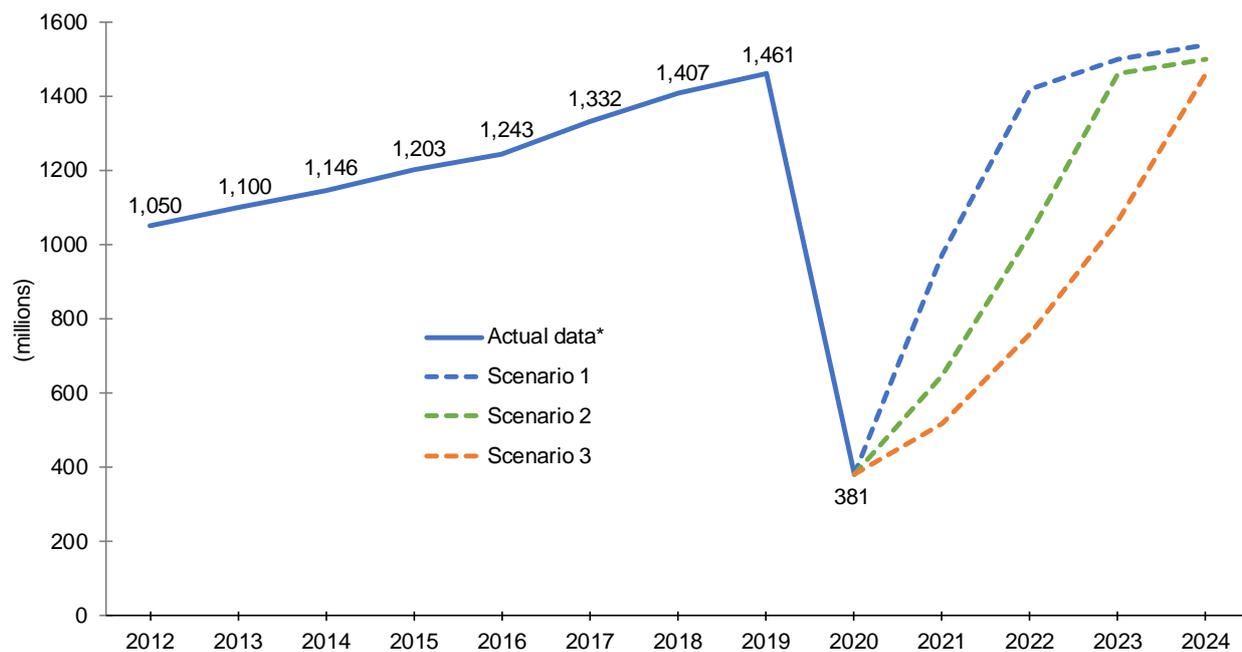
Outlook for 2021

- After the collapse of international tourism in 2020 due to the coronavirus pandemic, prospects for 2021 are mixed and still largely contingent on the evolution of the health crisis. A rebound is expected towards the second half of the year if the pandemic is gradually brought under control and travel restrictions are lifted. But the latest surge of infections and the emergence of new strains of the virus could slow the recovery.
- Effective vaccination against COVID-19 and other medical advances will be crucial to reduce the risk of contagion and restore confidence among travelers. Coordination of health and safety protocols among governments, including testing and tracing also remain paramount.
- Based on the latest tourism and economic trends, as well as the expectations by the UNWTO Panel of

Experts, three forward-looking scenarios were presented in the December 2020 UNWTO World Tourism Barometer which point to a return of international tourism to pre-pandemic levels in two and a half, three, and four years respectively, depending on the extent of the above factors.

- Our central scenario (number 2) shows international tourism modestly bouncing back in 2021 to levels which are still less than half of those in 2019. This assumes a gradual reversal of the pandemic by the second half of the year, including the rollout of COVID-19 vaccines, a significant improvement in global traveler confidence and major lifting of travel restrictions. According to this scenario, pre-pandemic levels would be recovered by the end of 2023.

International tourist arrivals: Scenarios for 2021-2024 (millions)



Source: World Tourism Organization (UNWTO)

(Data collected January 2021)

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

- The latest survey of UNWTO Panel of Experts shows 45% of respondents expecting a rebound in international tourism by the second half of 2021 and 50% in 2022. In terms of a return to 2019 levels, 43% of experts see this happening in 2023, in line with scenario 2 described above, while 41% point to 2024 or later. By regions, experts from the Middle East (50%) mostly point to a recovery in 2022 and those

from Europe (51%) and Africa (50%) in 2023. In the Americas (49%) and Asia (42%) the largest number of responses point to 2024 or later.

- The recovery of tourism is also dependent on the evolution of economic conditions which deteriorated greatly. The world economy shrunk by an estimated 4.3% in 2020 according to the World Economic Situation and Prospects (WESP) 2021 by the UN

Department of Economic and Social Affairs¹. This is the sharpest contraction since the 1930s Great Depression and exceeds the 1.7% decline during the global economic and financial crisis of 2009.

- Unemployment also rose sharply in 2020, mostly due to the lockdown measures introduced to contain the pandemic. An estimated 420 million full-time equivalent jobs were lost on average during the second and third quarters of 2020 according to WESP, citing the International Labour Organization (ILO). Accommodation and food services is the most affected activity, with a loss of 33% and 17% working hours in those two quarters of the year, according to ILO². In tourism overall, 100 to 120 million direct jobs are estimated to have been threatened by the crisis.
- World output is projected to recover to 4.7% in 2021 as conditions normalize and activity bounces back, though unemployment could remain high in most economies compared to pre-crisis levels. In a context of weak employment and wage growth, the upturn is also dependent on continued fiscal support.
- Like other sectors, international tourism will be largely impacted by the current health crisis in 2021, as well as by social, economic and policy factors. The recovery may be slow and irregular at first, as was the case throughout 2020. However, large pent-up demand after almost a year of restricted travel is expected to accelerate the recovery once traveler confidence improves and the pandemic is largely contained. Effective collaboration among countries on health and travel protocols will continue to be key.

¹ UN Department of Economic and Social Affairs, *World Economic Situation and Prospects 2021*, available at: www.un.org/development/desa/dpad/publication/world-economic-situation-and-prospects-2021

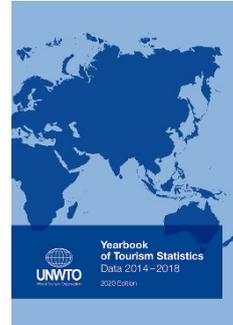
² International Labour Organization (2021), *ILO Monitor: COVID-19 and the world of work. Seventh edition*, available at: www.ilo.org/global/topics/coronavirus/impacts-and-responses/WCMS_767028/lang--en/index.htm



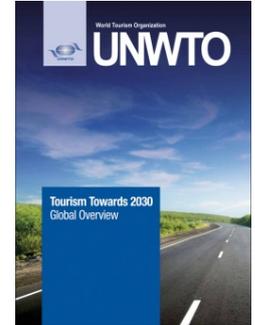
UNWTO World Tourism Barometer



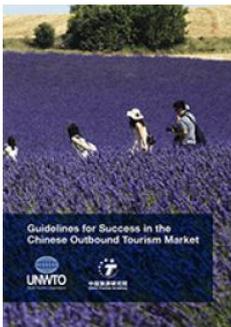
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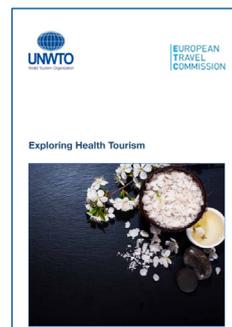
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Guidelines for Success in the Chinese Outbound Tourism Market (2019)



Exploring Health Tourism (2018)



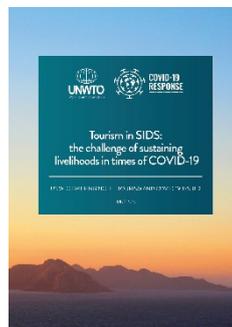
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



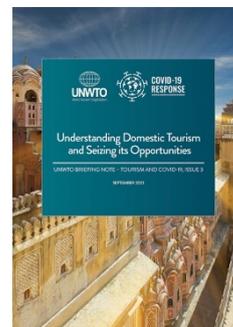
European Union Tourism Trends (2018)



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UNWTO/GTERC Asia Tourism Trends, 2019 Edition

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