



Impact assessment of the COVID-19 outbreak on international tourism

Updated 24 March 2020

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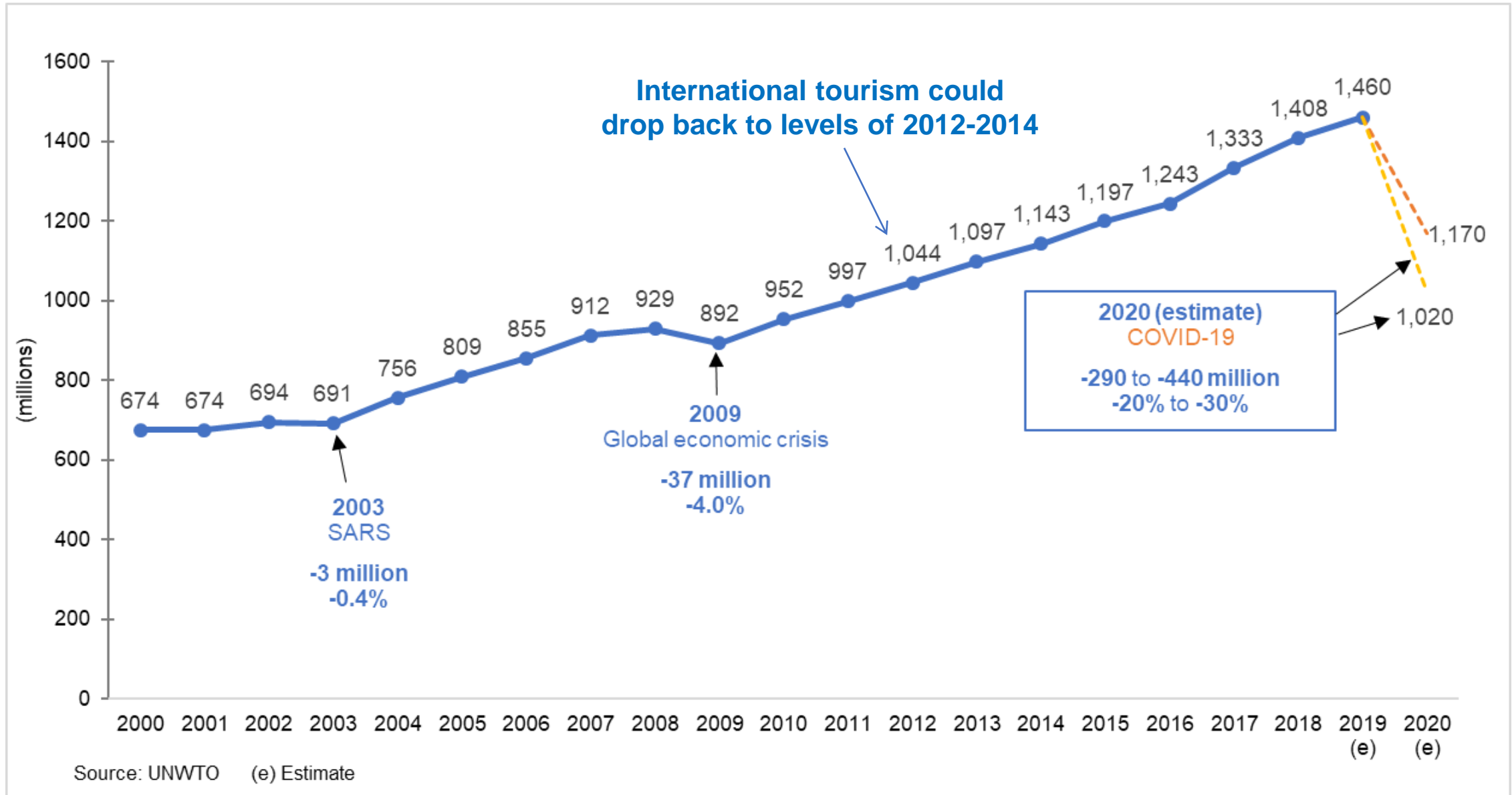
KEY MESSAGES

- We are facing an unprecedented global health emergency. The containment of the pandemic is the utmost priority and the tourism sector is committed to support all measures taken to curb the outbreak. [UNWTO is working closely with the World Health Organization \(WHO\)](#), its Members States and the industry to ensure a coordinated and effective response.
- The COVID-19 outbreak has brought our world to a standstill with unparalleled and unforeseen impact in our lives, our economies, our societies and our livelihoods and there are growing risks of a global recession and a massive loss of jobs.
- Any assessment of the impact of this unparalleled crisis on the tourism sector is quickly surpassed by the fast-changing reality.

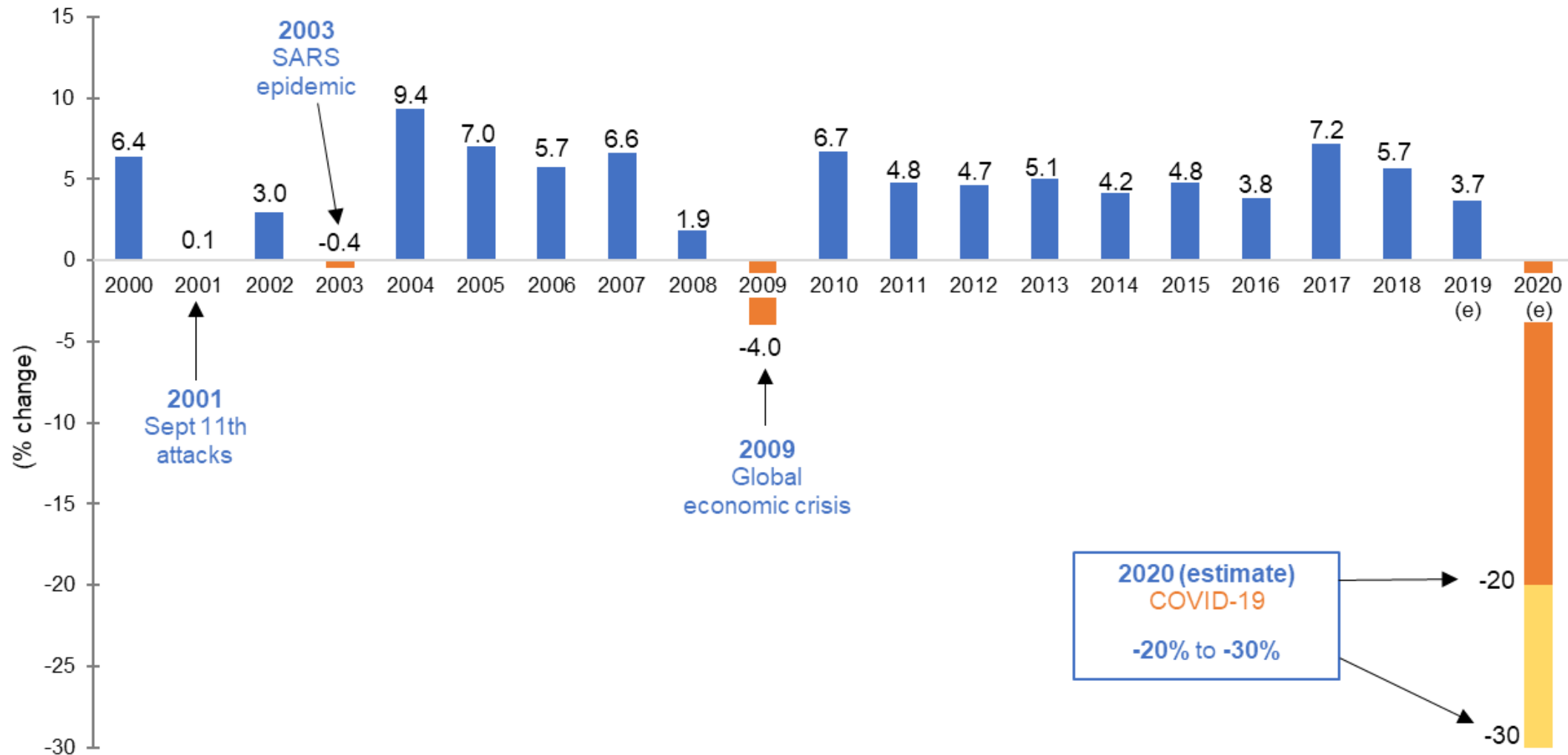
KEY MESSAGES

- Considering the unparalleled and fast-evolving nature of crisis, it is extremely challenging to estimate the impact of COVID-19 on international tourism.
- Based on the latest developments (quarantine measures, travel bans & border closures in most of Europe, which represents 50% of international tourism, and in many countries of the Americas, Africa and the Middle East), the evolutions in Asia and the Pacific and the patterns of previous crises (2003 SARS and 2009 global economic crisis), **UNWTO estimates international tourist arrivals could decline by 20% to 30% in 2020.**
- **This would translate into a loss of 300 to 450 US\$ billion in international tourism receipts (exports) – almost one third of the US\$ 1.5 trillion generated globally in the worst-case scenario.**
- These estimates should be interpreted with caution in view of the magnitude, volatility and unprecedented nature of this crisis. SARS and the 2009 global economic crisis are the existing references, but this crisis is like no other. UNWTO will continue to monitor the impact of COVID-19 on international tourism.

2020 forecast - international tourist arrivals, world (millions)

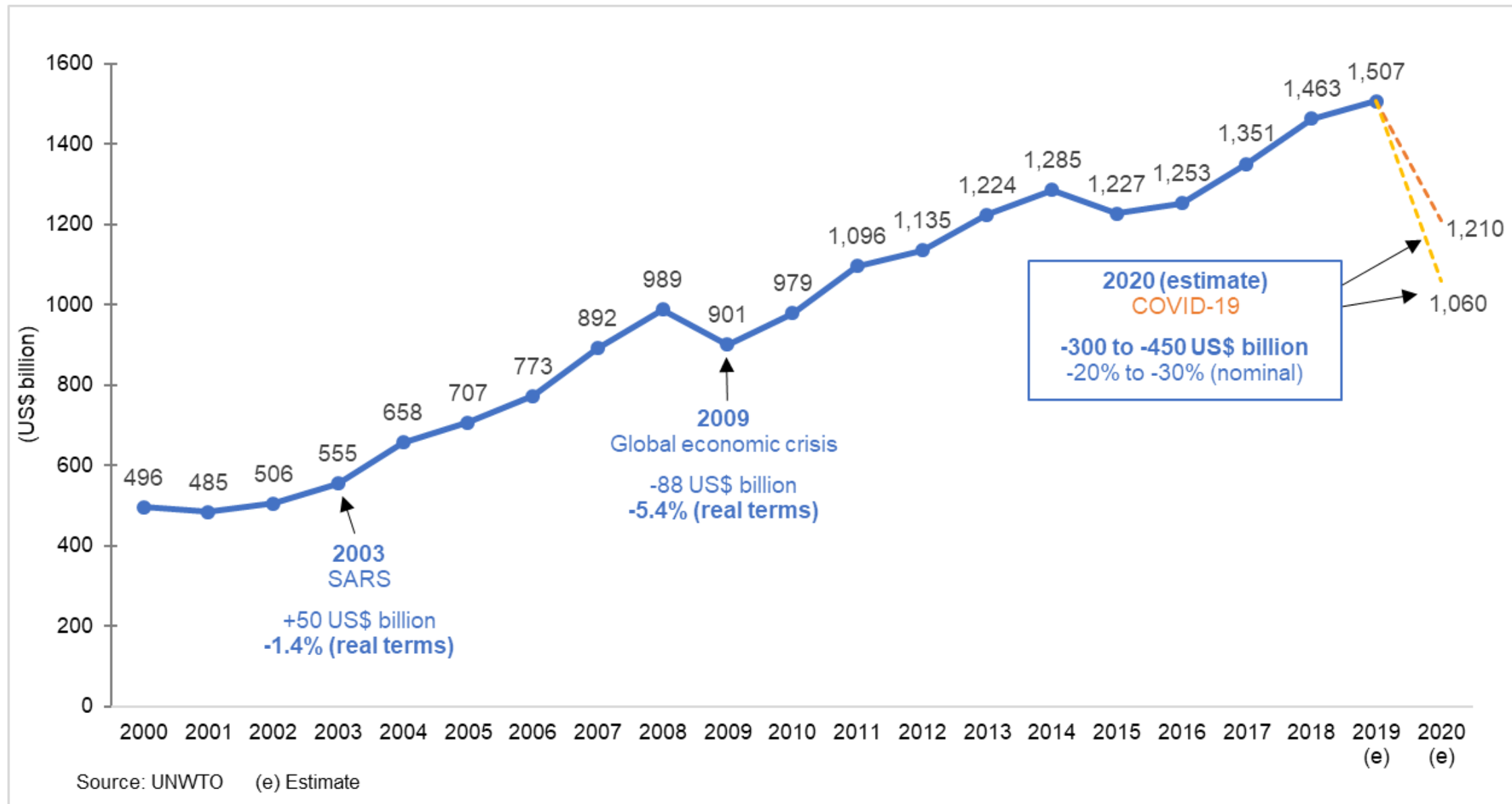


2020 forecast - international tourist arrivals, world (% change)

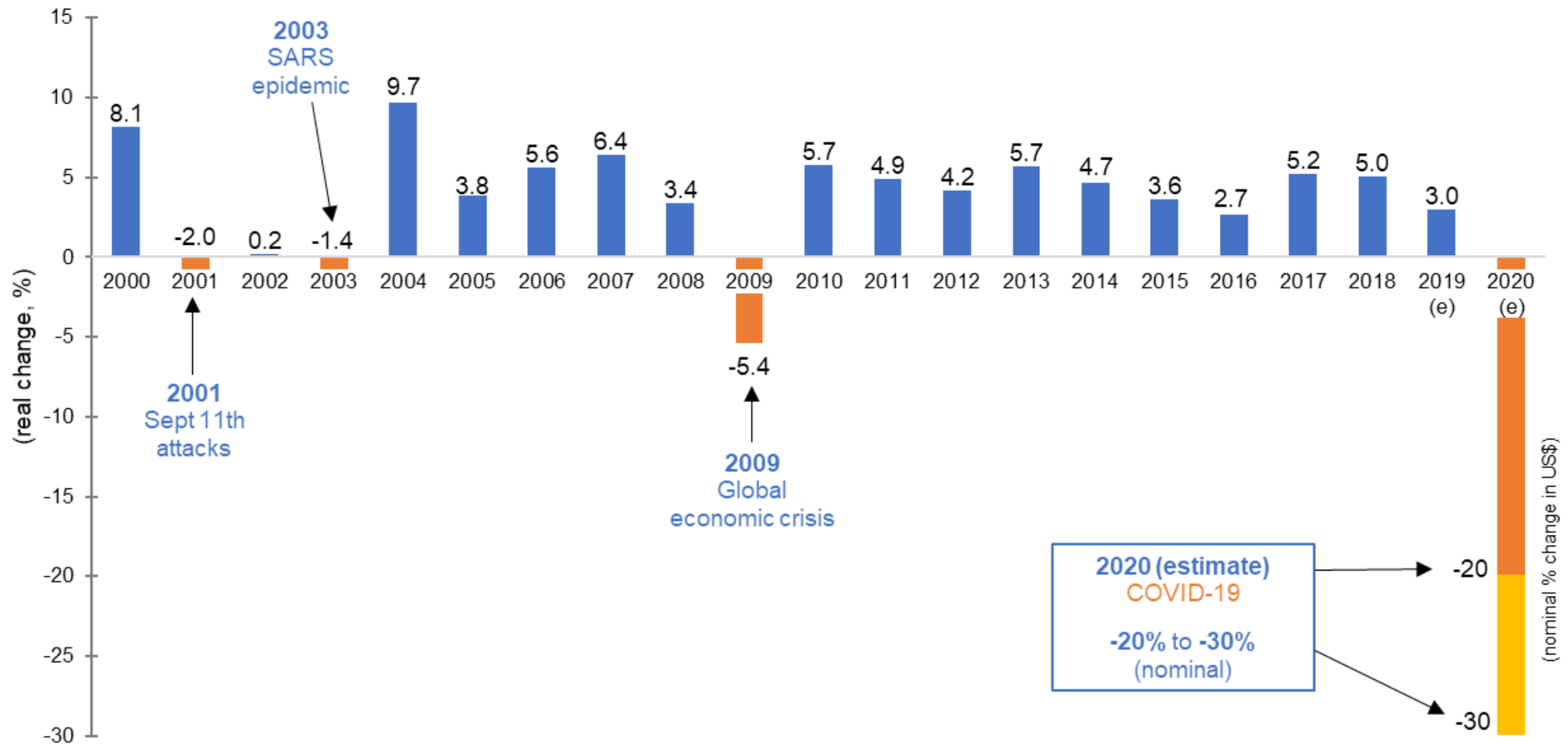


Source: UNWTO (e) Estimate

2020 forecast - international tourism receipts, world (US\$ billion)



2020 forecast - international tourism receipts, world (real change, %)



Source: UNWTO (e) Estimate



Estimated Global Impact

- 290 to 440 million

International Tourist Arrivals

5 to 7 years

lost in number of tourists

- 300 to 450 US\$ bn

Tourism Exports (receipts)

1/3 of 1.5 US\$ trillion

lost in Tourism Exports

Estimated impact of COVID-19 on air transport in 2020 (RPKs and air passenger revenue loss), IATA

Region of airline registration	% Change in RPKS (2020 vs. 2019)	Est. Impact on pass. revenue 2020 vs. 2019 (US\$ billion)
Africa	-32%	-4
Asia Pacific	-37%	-88
Europe	-46%	-76
Latin America	-41%	-15
Middle East	-39%	-19
North America	-27%	-50
Industry	-38%	-252

Source: IATA

Importance of international tourism in countries with most reported cases of COVID-19 (over 5,000 cases), 24 March 2020

As of 24 March 2020, a total of 196 countries and territories have reported cases of COVID 19

Countries with more than 5K COVID-19 reported cases	Share of World Tourist Arrivals (%)	Tourism Share of Exports in the country (%)	Share of World Tourism Receipts (%)	Share of World Tourism Expenditure (%)
China	4%	1%	3%	19%
Italy	4%	8%	3%	2%
United States	5%	10%	15%	10%
Spain	6%	16%	5%	2%
Germany	3%	3%	3%	7%
Iran	1%	5%	0%	1%
Republic of Korea	1%	3%	1%	2%
France	6%	8%	4%	3%
Switzerland	1%	5%	1%	1%
United Kingdom	3%	6%	4%	5%
Total	34%		39%	52%

Source: World Tourism Organization (UNWTO)

Note: Countries with more than 5K COVID-19 reported cases to 24 March 2020, according to the World Health Organization (WHO)

SUPPORTING RECOVERY

- What we don't know - we don't know when we will see the end of this crisis.
- What we do know: we know that millions of jobs are at risk, that we need to protect the most vulnerable segments such as SMEs, self-employed, women and youth. That we need to create survival mechanisms for companies.
- We know we need strong support in navigating the unparalleled social and economic impact of COVID-19. In the immediate, we need urgent fiscal and monetary measures that help protect jobs, sustain the self-employed and support companies' liquidity and operations and accelerate recovery in the future.
- Tourism is a major job creator, especially for more vulnerable groups - women and youth. It is also a sector with proven capacity to bounce back and multiply recovery to other sectors.
- Coordinated and strong mitigation and recovery plans to support the sector can generate massive returns across the whole economy and jobs.



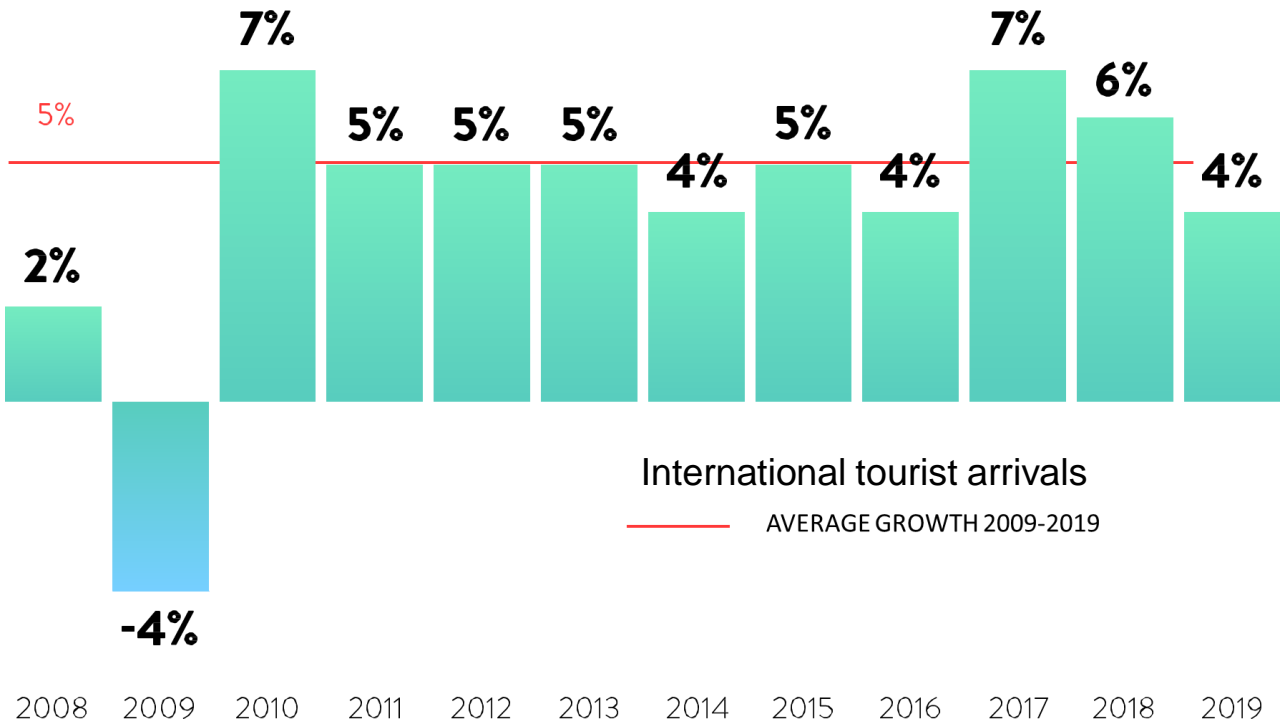
International
tourism:
an history of
continued
growth and
resilience

1.5 billion in 2019

Total International Tourist Arrivals

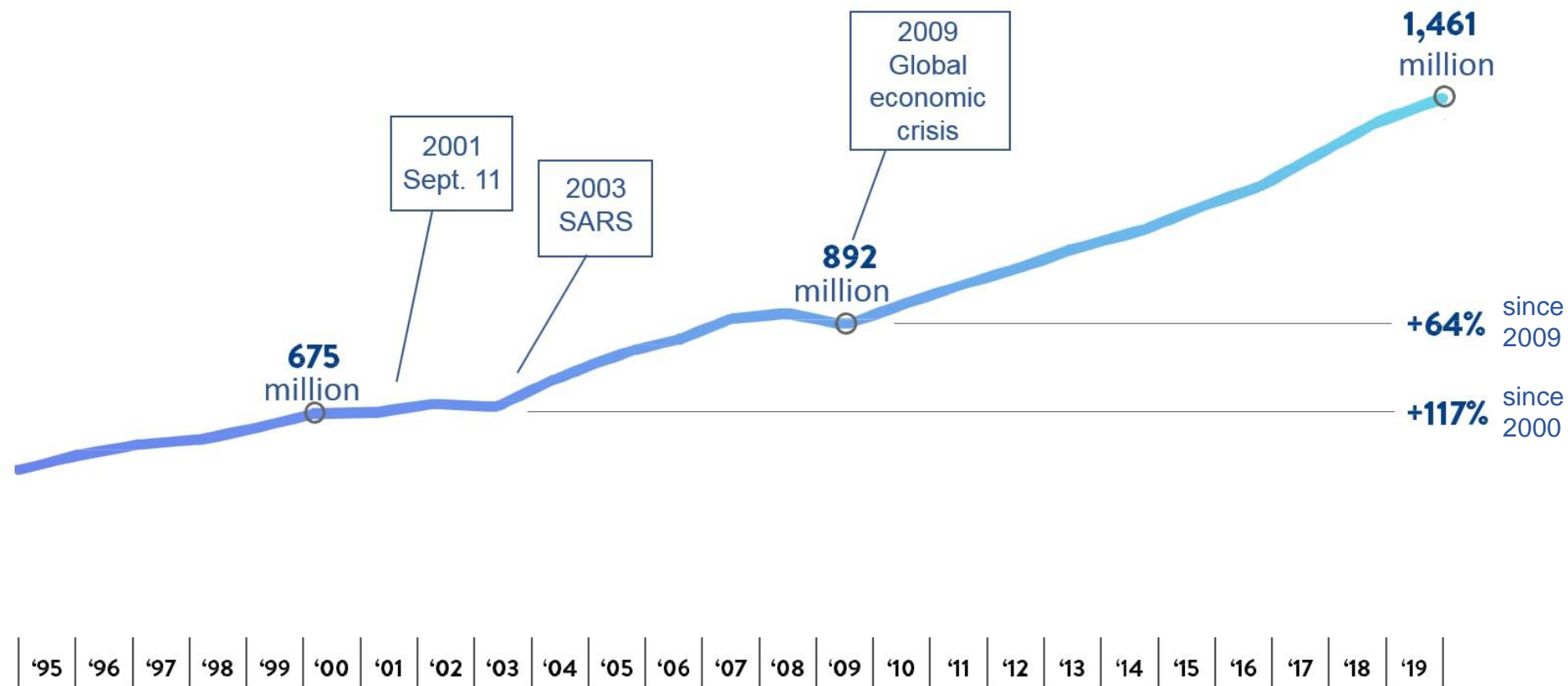
US\$ 1.7 trillion in 2018

Total International Tourism Exports (receipts & passenger transport)



International tourism - growth and resilience

International Tourist Arrivals (1995-2019)

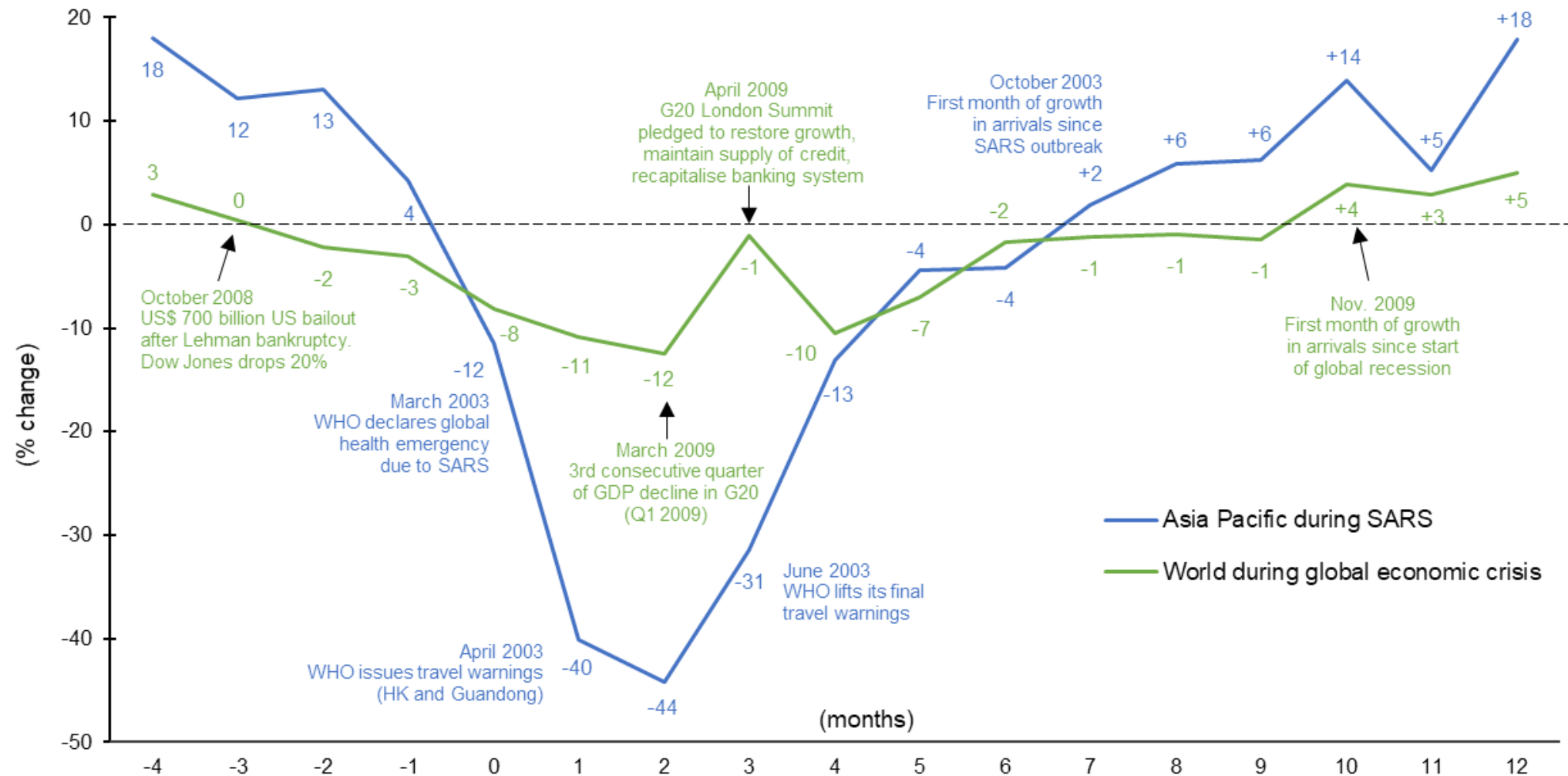


International tourism has seen continued expansion, despite occasional shocks, demonstrating the sector's strength and resilience and benefiting all world regions.

Yet this crisis is like no other and requires strong and coordinated action

International tourism & previous crises

International tourist arrivals in Asia Pacific during SARS and worldwide during 2009 global economic crisis, monthly growth (%)

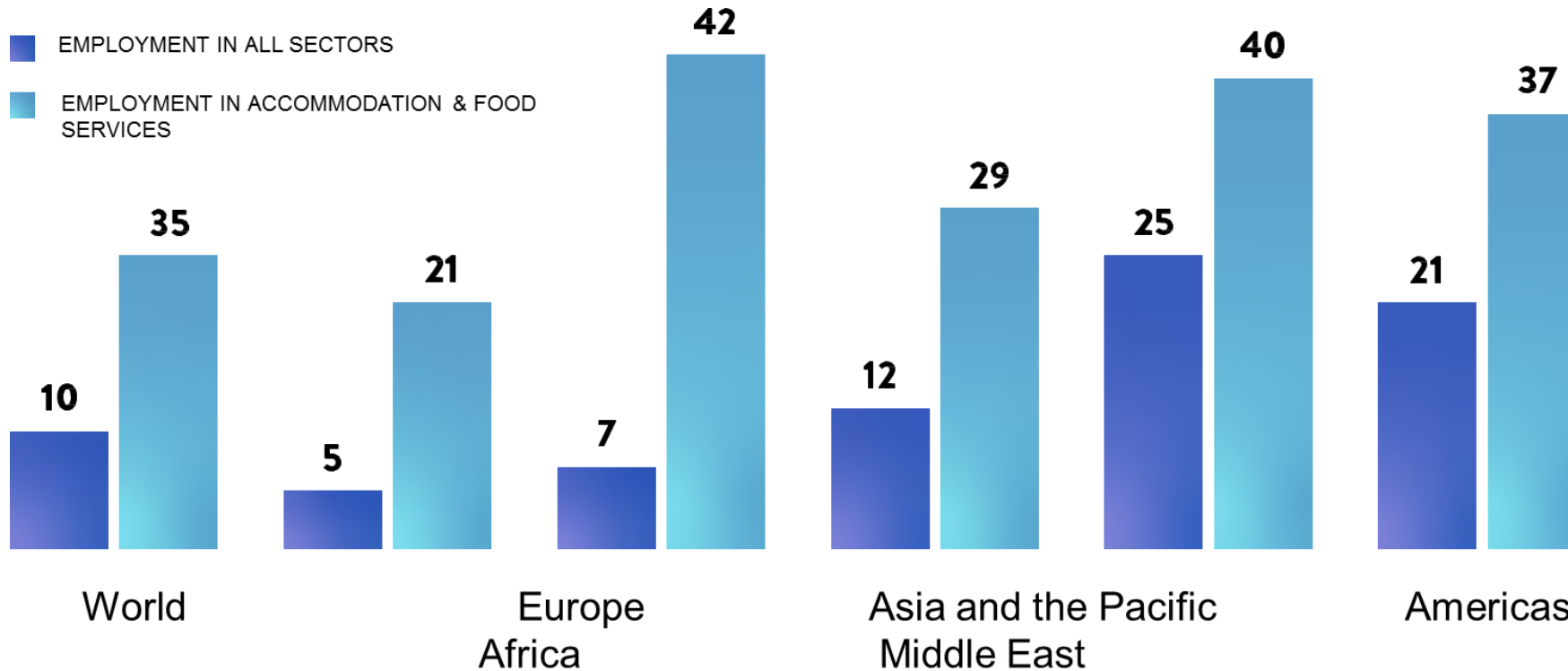


Source: World Tourism Organization (UNWTO)

Note: Month 0 (zero) is considered to be March 2003 for SARS (Asia Pacific) and January 2009 for global economic crisis (World)

TOURISM CAN ACCELERATE JOB CREATION...

GROWTH IN GLOBAL EMPLOYMENT, 2010-2018 (%)



After the global economic crisis, employment in all sectors grew by 11% between 2010 and 2018 while employment in accommodation and food services grew 35%



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