TOURISM IN THE FACE OF COVID-19
TOURISM AND COVID-19

• The world faces an unprecedented global health emergency, which will have an unparalleled economic impact and a deep social and development cost.

• 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.
According to UNWTO’s Report on COVID – 19 Related Travel Restrictions, as of 20 April, 100% of all worldwide destinations have introduced travel restrictions in response to the pandemic.

- 97 destinations (45%) have totally or partially closed their borders for tourists.
- 65 destinations (30%) have suspended totally or partially international flights.
- 39 destinations (18%) are implementing the closing of borders in a more differentiated manner by banning the entry for passengers from specific countries of origin.”
2020 FORECAST

INTERNATIONAL TOURIST ARRIVALS, WORLD (%CHANGE)

Source: UNWTO     (e) Estimate

2001 Sept 11th attacks
2003 SARS epidemic
2009 Global economic crisis
2020 (estimate)
COVID-19
-20% to -30%

COVID-19
2020 FORECAST

INTERNATIONAL TOURIST ARRIVALS, WORLD (MILLIONS)

International tourism could drop back to levels of 2012-2014

Source: UNWTO  [e] Estimate

- SARS 2003
- Global economic crisis 2009
- COVID-19 2020 (estimate)

-3 million
-0.4%
-37 million
-4.0%
-290 to -440 million
-20% to -30%
- 290 to 440 million International Tourist Arrivals
- 5 to 7 years loss in number of tourists
- 300 to 450 US$ bn Tourism Exports (receipts)
- 1/3 of 1.5 US$ trillion loss in Tourism Exports
ICAO account of monthly seat capacity show sharp declines in all regions.

Monthly seat capacity change compared to 2019 by region (total international and domestic)

Source: International Civil Aviation Organisation (ICAO)
International passenger traffic collapses with unprecedented decline in history
Estimated impact on international passenger traffic and revenues by region for 2020

- **North America**
  - Capacity: -33% to -65%
  - Passenger: -65 to -120 million
  - Revenue (USD): -17 to -32 billion

- **Latin America and the Caribbean**
  - Capacity: -34% to -65%
  - Passenger: -50 to -90 million
  - Revenue (USD): -10 to -18 billion

- **Europe**
  - Capacity: -40% to -74%
  - Passenger: -419 to -731 million
  - Revenue (USD): -57 to -101 billion

- **Middle East**
  - Capacity: -39% to -72%
  - Passenger: -34 to -61 million
  - Revenue (USD): -7 to -13 billion

- **Asia and Pacific**
  - Capacity: -39% to -71%
  - Passenger: -238 to -420 million
  - Revenue (USD): -50 to -88 billion

Note: Compared to Baseline (business as usual, originally-planned)

Source: ICAO estimates
IATA’s forecasts Air Passengers to end 2020 at -48% with all regions affected in a very similar way, except North America

<table>
<thead>
<tr>
<th>Region of airline registration</th>
<th>RPKs 2020 (vs 2019 year-on-year change)</th>
<th>Passenger revenue $ billion 2020 vs. 2019 levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia-Pacific</td>
<td>-50%</td>
<td>-113</td>
</tr>
<tr>
<td>North America</td>
<td>-36%</td>
<td>-64</td>
</tr>
<tr>
<td>Europe</td>
<td>-55%</td>
<td>-89</td>
</tr>
<tr>
<td>Middle East</td>
<td>-51%</td>
<td>-24</td>
</tr>
<tr>
<td>Africa</td>
<td>-51%</td>
<td>-6</td>
</tr>
<tr>
<td>Latin America</td>
<td>-49%</td>
<td>-18</td>
</tr>
<tr>
<td><strong>Industry</strong></td>
<td><strong>-48%</strong></td>
<td><strong>-314</strong></td>
</tr>
</tbody>
</table>

Source: IATA Economics
Most affected countries account for 54% of all spending (over 50,000 cases), as of 2 May 2020

<table>
<thead>
<tr>
<th>Countries with more than 50K COVID-19 reported cases</th>
<th>Share of World Tourist Arrivals (%)</th>
<th>Tourism Share of Exports in the country (%)</th>
<th>Share of World Tourism Receipts (%)</th>
<th>Share of World Tourism Expenditure (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>5%</td>
<td>10%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Spain</td>
<td>6%</td>
<td>16%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Italy</td>
<td>4%</td>
<td>8%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>3%</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Germany</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>France</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>2%</td>
<td>8%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Turkey</td>
<td>3%</td>
<td>17%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Iran</td>
<td>1%</td>
<td>5%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Brazil</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>China</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
<td>19%</td>
</tr>
<tr>
<td>Canada</td>
<td>2%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>39%</strong></td>
<td><strong>42%</strong></td>
<td><strong>54%</strong></td>
<td><strong>54%</strong></td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO)

Note: Countries with more than 50K COVID-19 reported cases to 2 May 2020, according to the World Health Organization (WHO)
Impact of three previous crises on world arrivals

The recovery of lost arrivals was also the fastest after SARS (11 months)

**World** - Cumulative change in international arrivals (1000s), by months

Note: From month 0 onwards, cumulative change is compared to same month of year prior to each crisis. 

Source: UNWTO
Impact of three previous crises on **most affected regions:**

**The Americas was the slowest to recover its lost arrivals after a crisis**

(42 months after the Sept. 11th attacks)

Note: From month 0 onwards, cumulative change is compared to same month of year prior to each crisis.  
Source: UNWTO
Domestic demand expected to recover faster than international demand

International demand would recover by Q4 and mainly in 2021 according to the UNWTO Panel of Experts survey responses
Americas seasonality may affect recovery

Source: World Tourism Organization (UNWTO) ©
After the global economic crisis, employment in accommodation and food services grew 35% from 2010 to 2018, outpacing the overall employment growth (11%).

Source: UNWTO according to data from the International Labour Organization (ILO). Includes estimates by ILO.