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# Impact of the Russian offensive in Ukraine on international tourism

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UNWTO Tourism Market Intelligence and Competitiveness Department  
Issue 3 · 28 April 2022

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## Overall assessment of the impact on tourism

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Added risk to a weak and uneven tourism recovery



Lower consumer confidence particularly in more risk-averse markets and segments



Weaker economic growth and higher inflation:  
Higher oil prices + inflation + interest rates = higher travel costs for consumers & pressure on businesses, specially MSMEs



Disruption of Russian & Ukrainian outbound travel which accounts for some 3% of global spending = US\$ 14 billion in 2020



Impact on traditional destinations but also emerging ones especially island and coastal destinations



Threatens tourism-related jobs and businesses impacting livelihoods

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## A risk to the ongoing recovery of tourism

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- First and foremost, our concern is for the **human tragedy** in Ukraine. Our thoughts go to the people suffering from this conflict.
- It is early to assess the impact of the Russian Federation's military offensive in Ukraine, though it represents **a major downside risk** for international tourism that could **delay the sector's already weak and uneven recovery**.
- The conflict could slow the recovery despite the lifting or easing of travel restrictions by many destinations (a total of 22 countries had lifted all COVID-19 related restrictions as of 22 April 2022).
- The military offensive risks **hampering the return of confidence to global travel**. The US and Asian source markets could be particularly impacted, especially regarding travel to Europe, as these markets are historically more risk averse.

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## A possible loss of US\$ 14 billion for the tourism economy

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- As source markets, Russia and Ukraine represent a combined 3% of global spending on international tourism as of 2020. A prolonged conflict could translate into a loss of US\$ 14 billion in tourism receipts globally in 2022.
- In 2019, Russian spending on travel abroad reached US\$ 36 billion and Ukrainian spending US\$ 8.5 billion. In 2020, these values were down to US\$ 9.1 billion and US\$ 4.7 billion, respectively.
- As tourism destinations, Russia and Ukraine account for 4% of international tourist arrivals in Europe but only 1% of Europe's international tourism receipts.
- The importance of both markets is significant for neighboring countries, but also for European sun and sea destinations. The Russian market gained significant weight during the crisis in long-haul destinations such as Maldives, Seychelles and Sri Lanka.

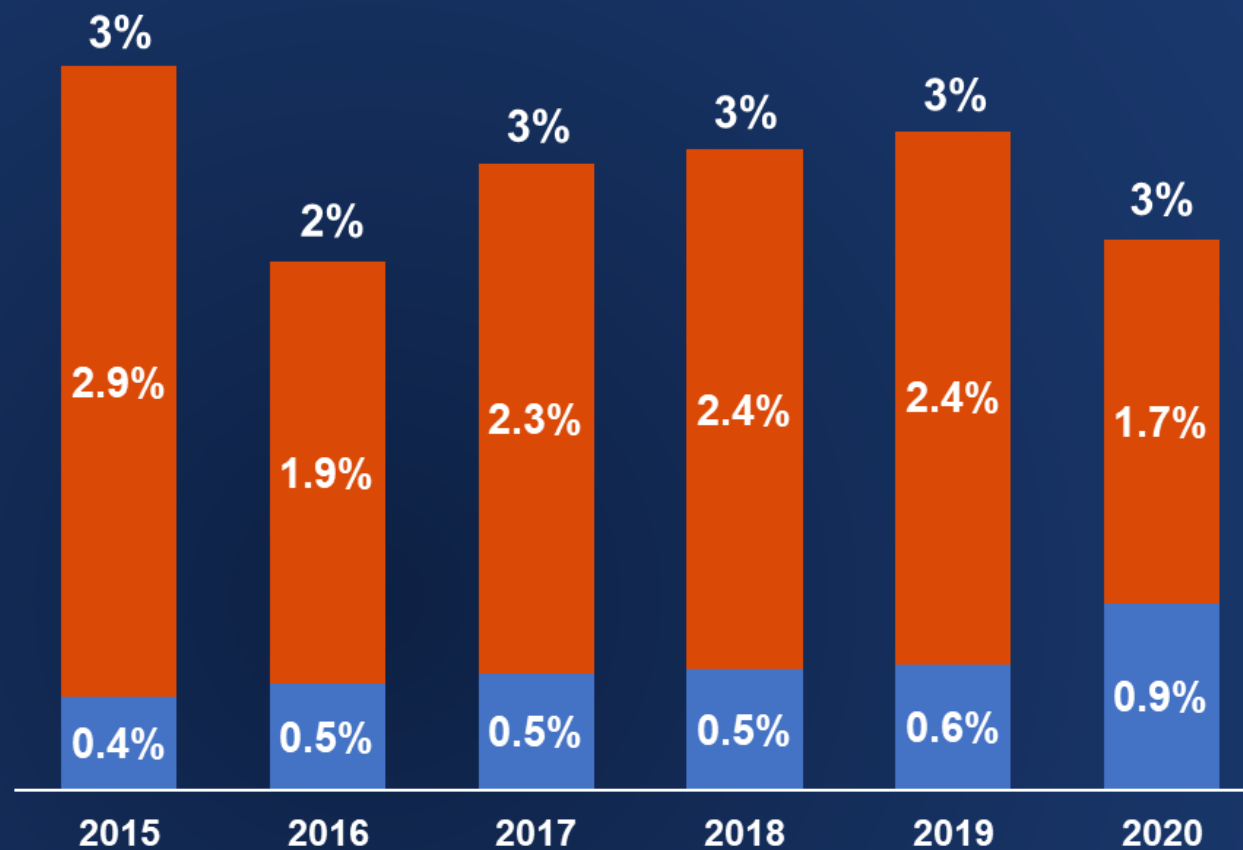
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Russia and Ukraine's  
international tourism  
spending  
(% of world total)

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Source: UNWTO



## Destinations with highest share of Russian visitors (%) (various indicators) 2019-2021

■ 2019  
■ 2021 or 2020

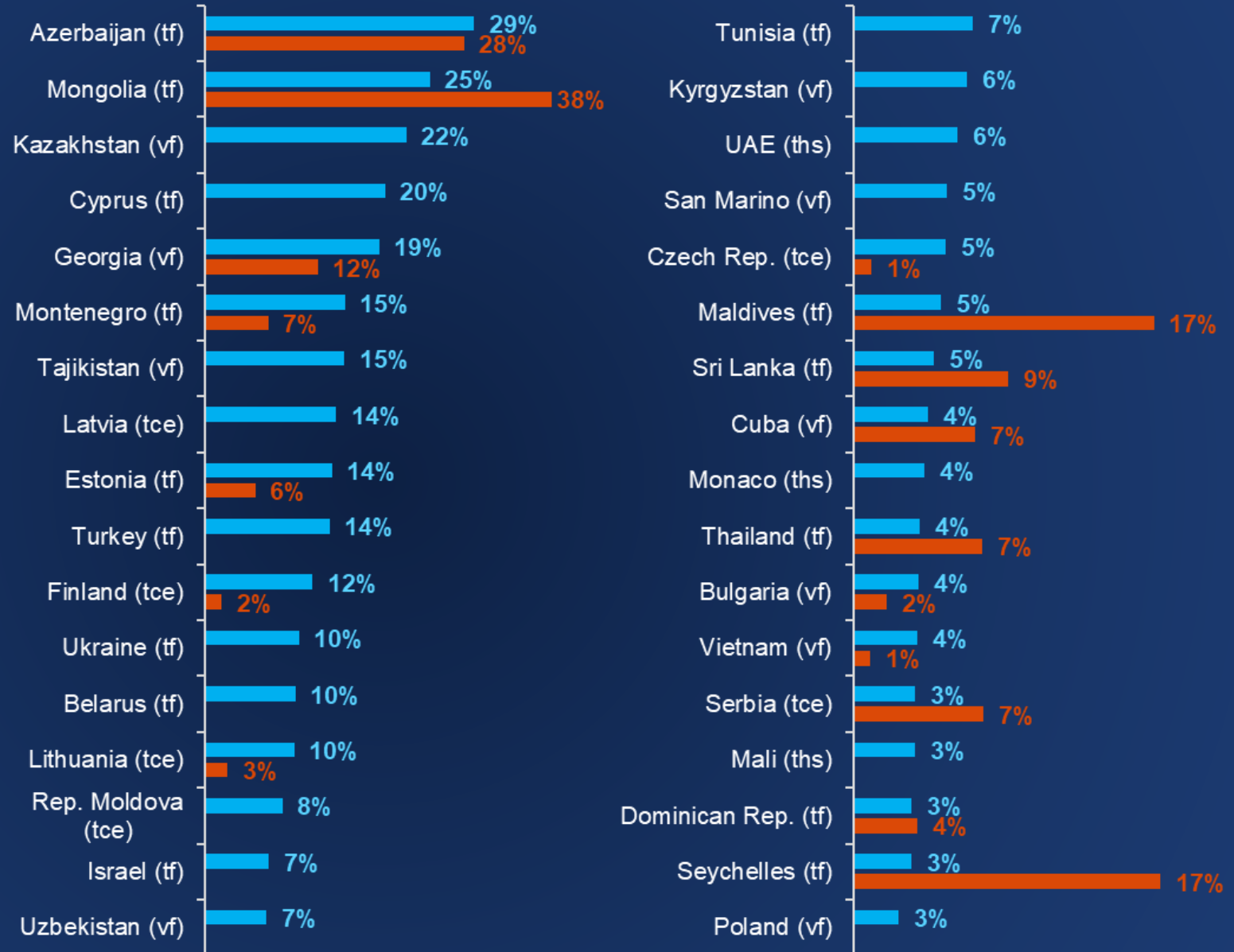
**tf:** international tourists at frontiers (overnight visitors)

**vf:** international visitors at frontiers (overnight and same-day visitors)

**tce:** international tourists at commercial establishments

**ths:** international tourists at hotels and similar establishments

Source: UNWTO

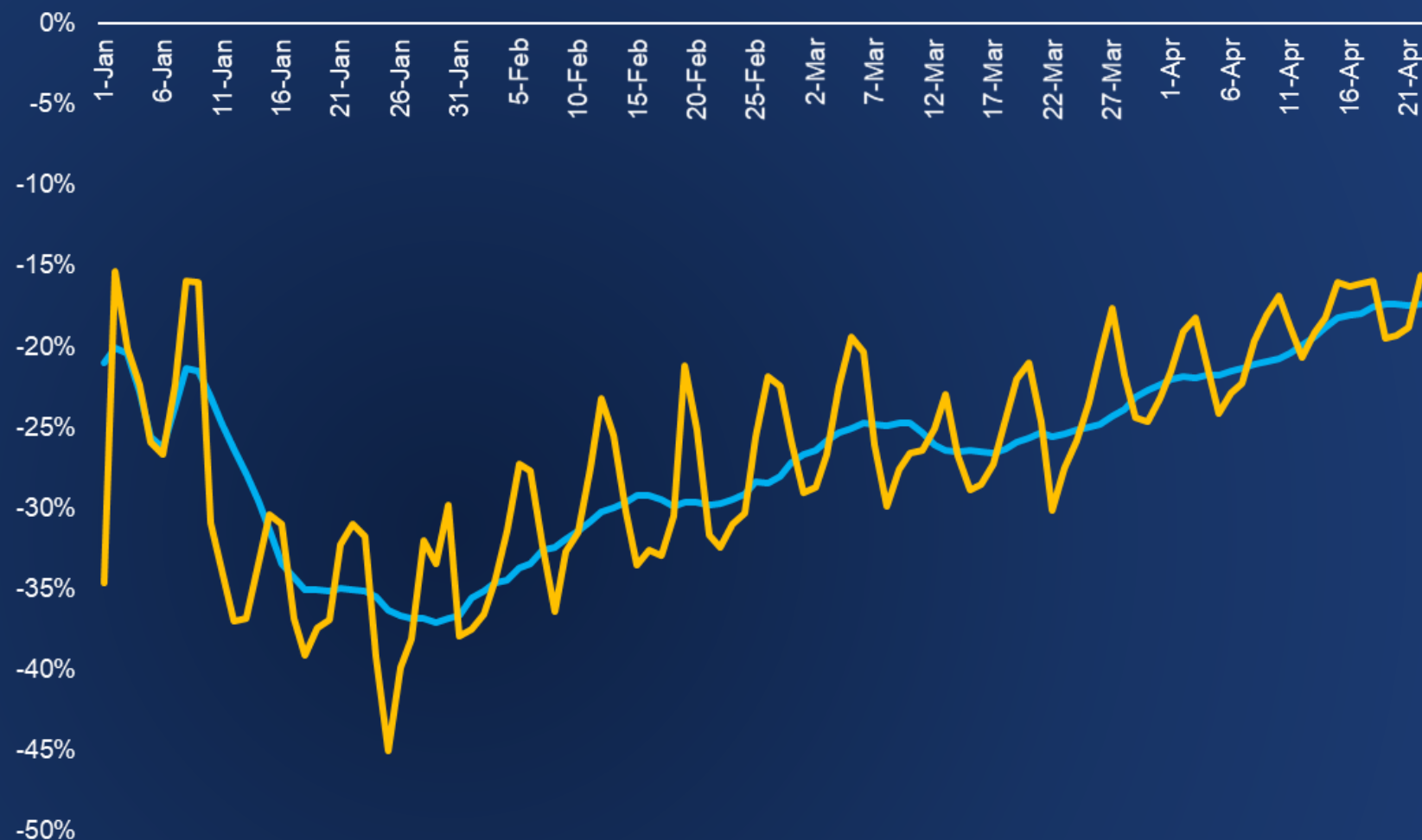


## European flights, January- April 2022 (% change vs. 2019)

■ Daily change (%)  
■ 7-day moving average

Source: compiled by UNWTO  
from Eurocontrol

Based on 41 countries covered by  
Eurocontrol

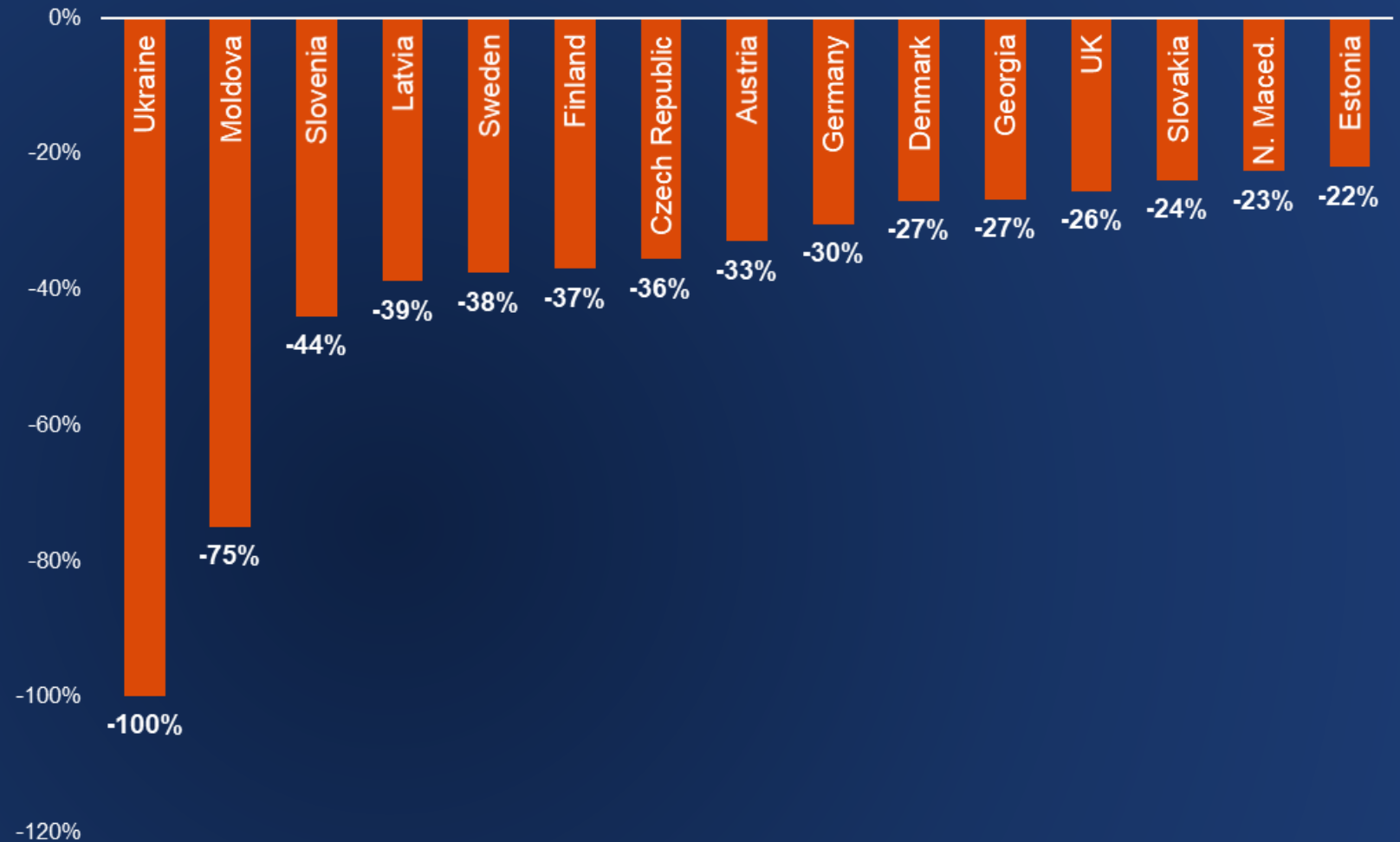




## European countries with largest decline in number of flights, 24 Feb - 22 Apr 2022 (% change vs. 2019)

Source: compiled by UNWTO  
from Eurocontrol

Based on 41 countries covered by  
Eurocontrol



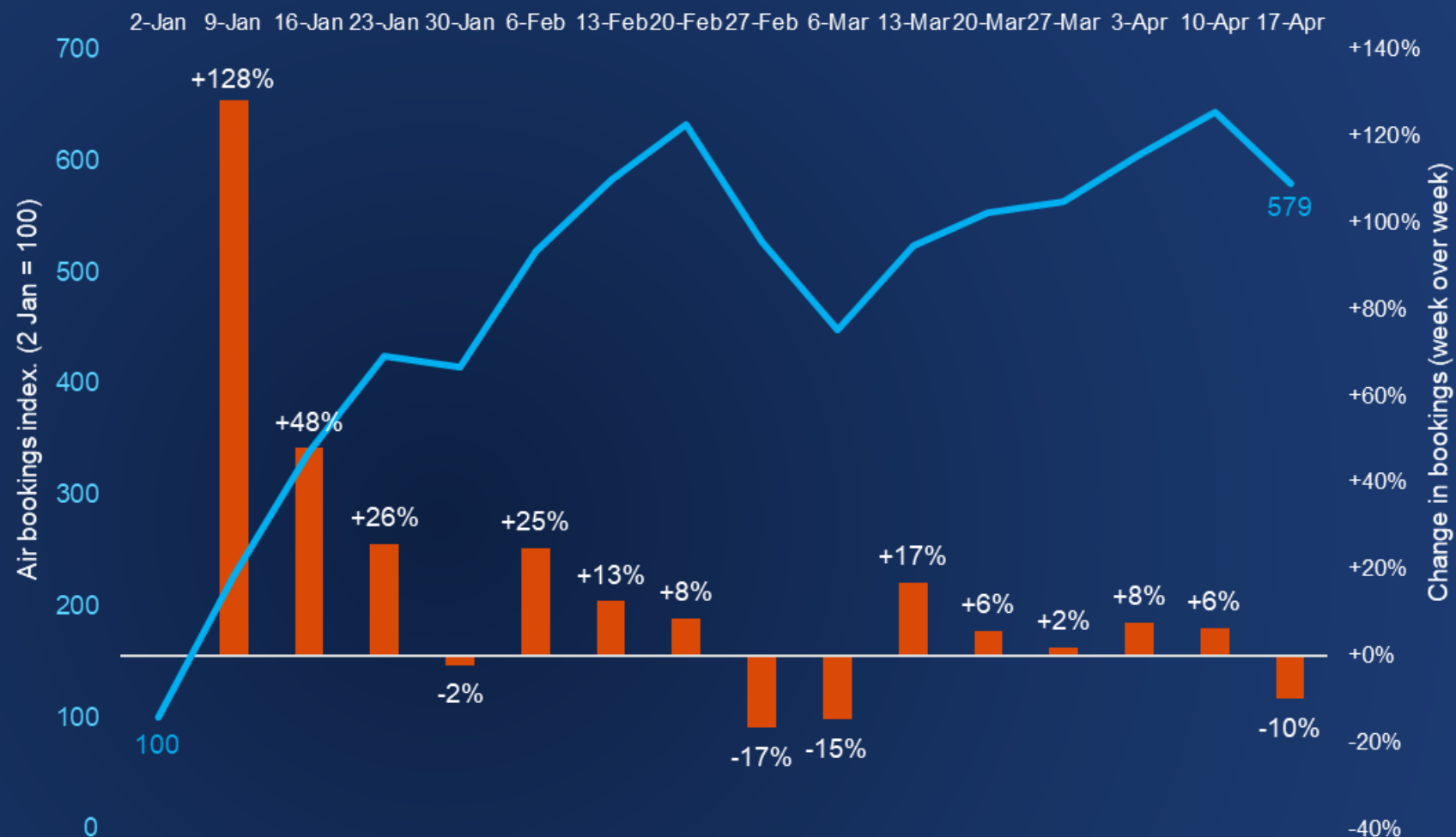


# Air bookings for intra-European travel, January to April 2022 (index)\*

- % change from prev. week (R axis)
- Air bookings (L axis)

Source: compiled by UNWTO from ForwardKeys data.

\* Bookings from week ending 2 January to 17 April 2022.

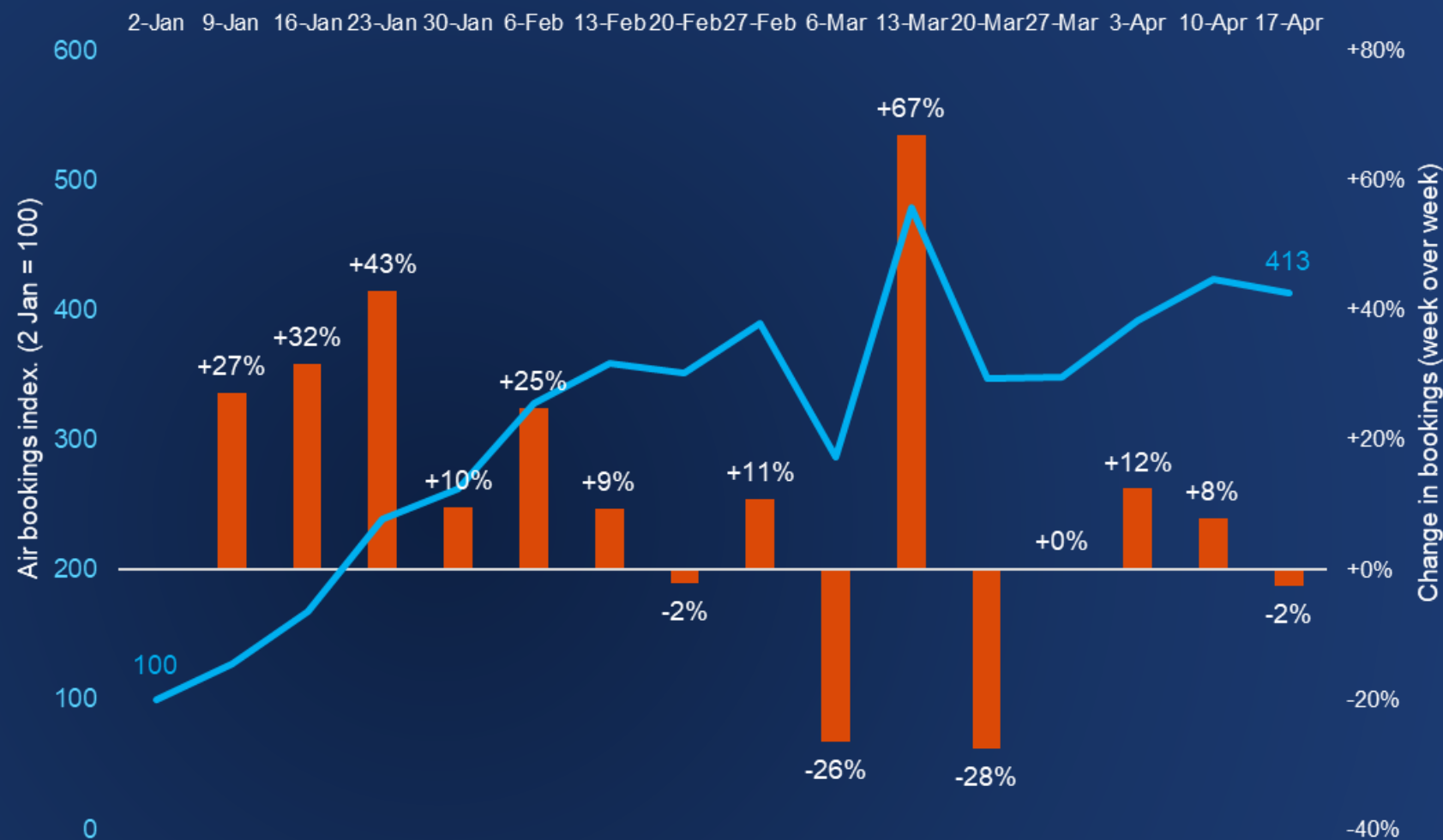


## Air bookings for travel from US to Europe, January to April 2022 (index)\*

- % change from  
prev. week (R axis)
- Air bookings (L axis)

Source: compiled by UNWTO  
from ForwardKeys data.

\* Bookings from week ending  
2 January to 17 April 2022.

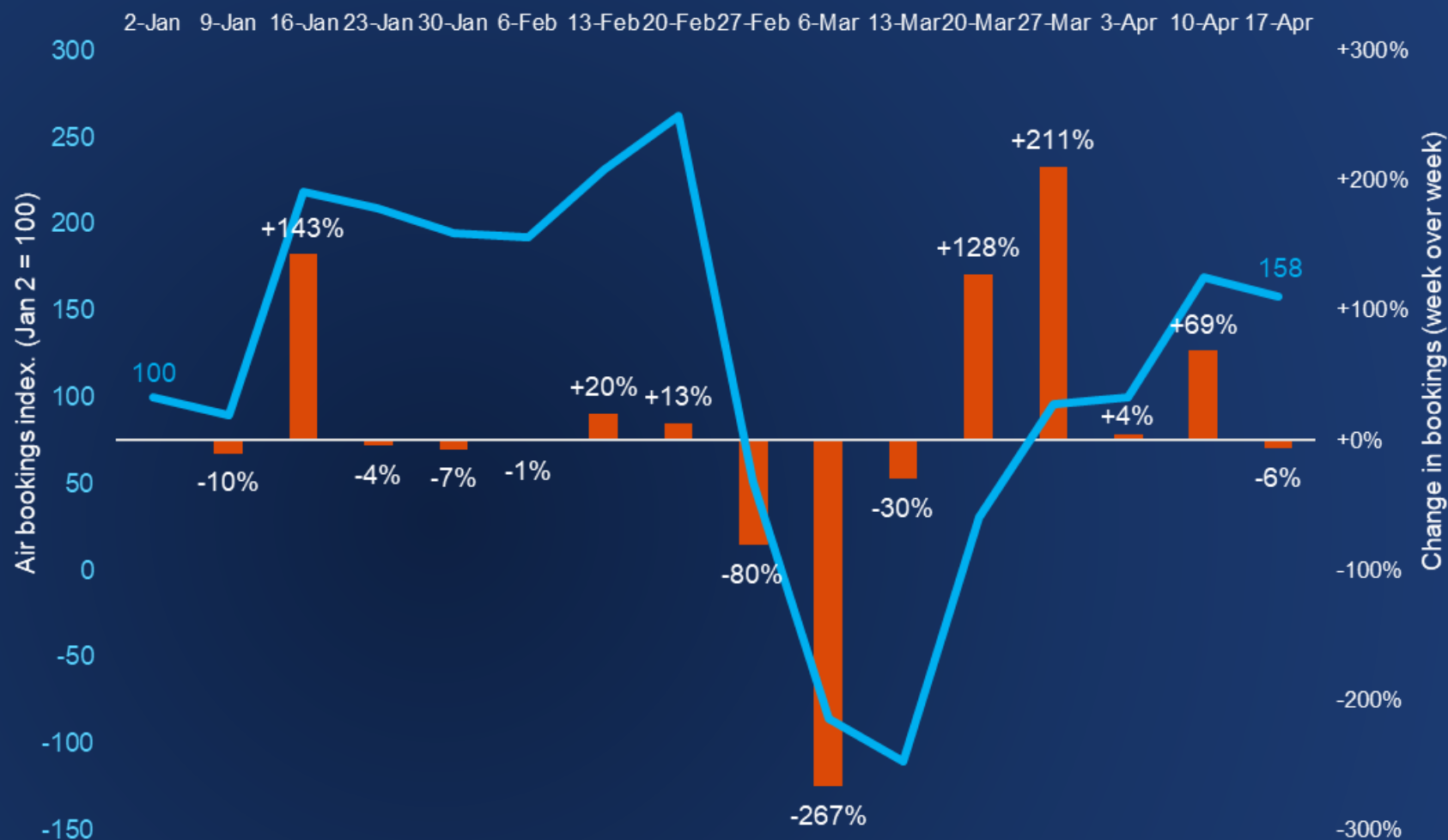


# Air bookings for all outbound travel from Russia, January to April 2022 (index)\*

- % change from prev. week (R axis)
- Air bookings (L axis)

Source: compiled by UNWTO from ForwardKeys data.

\* Bookings from week ending 2 January to 17 April 2022.

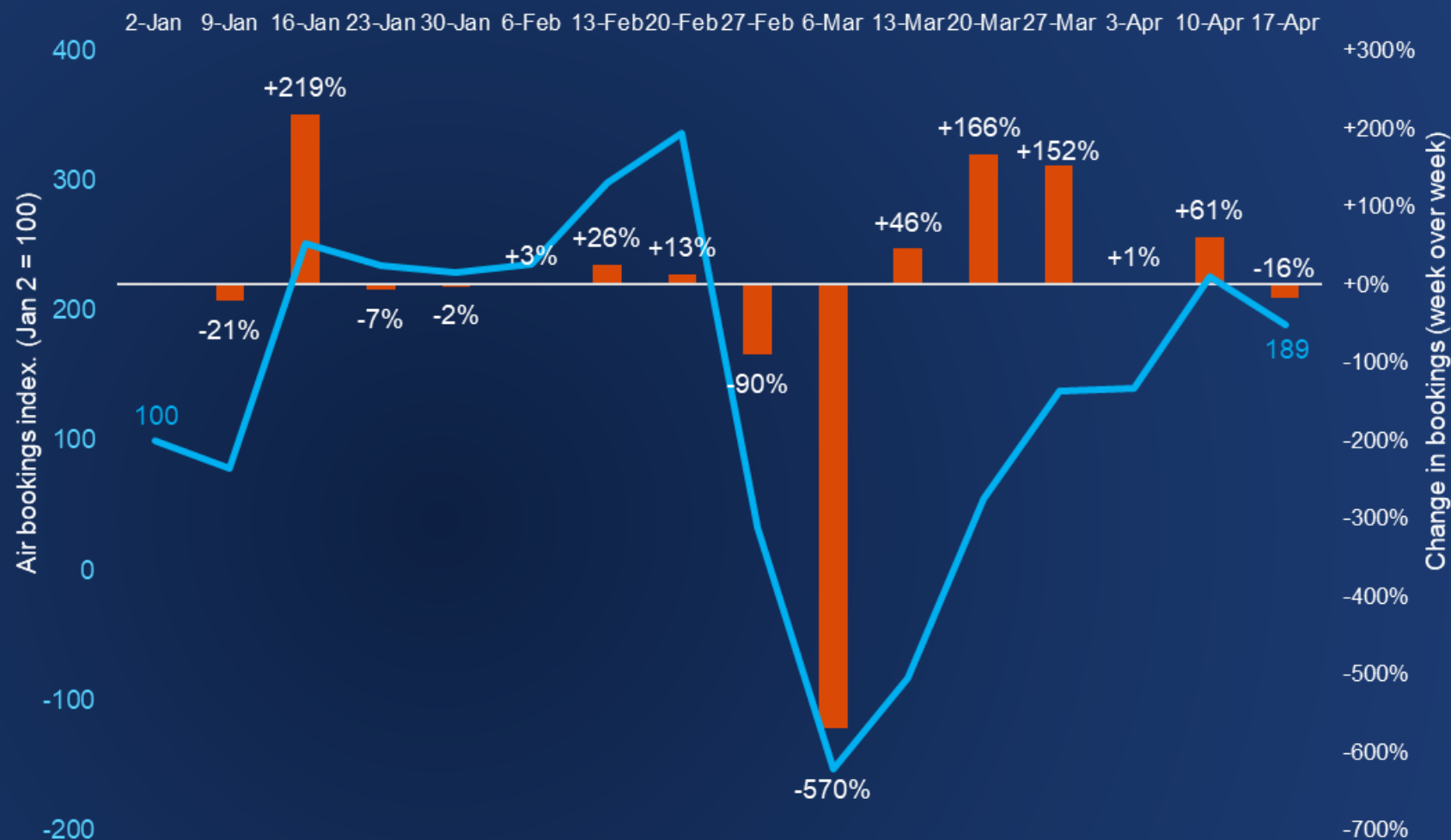


# Air bookings for Russian outbound travel to European destinations, January to April 2022 (index)\*


- % change from prev. week (R axis)
- Air bookings (L axis)


Source: compiled by UNWTO from ForwardKeys data.

\* Bookings from week ending 2 January to 17 April 2022.



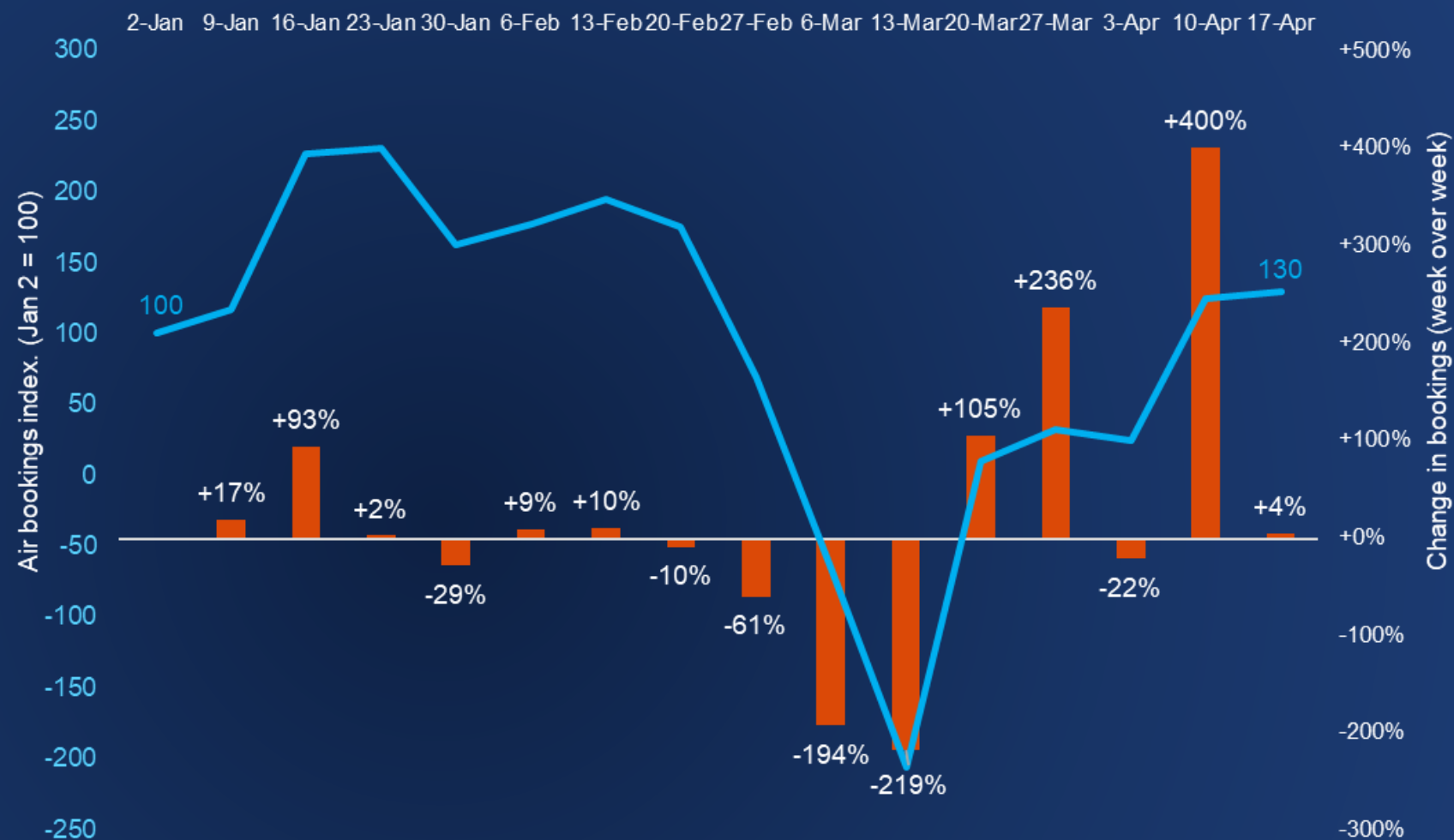
# Air bookings for Russian travel to Asia Pacific destinations, January to April 2022 (index)\*

 % change from prev. week (R axis)



 Air bookings (L axis)

Source: compiled by UNWTO from ForwardKeys data.

\* Bookings from week ending 2 January to 17 April 2022.

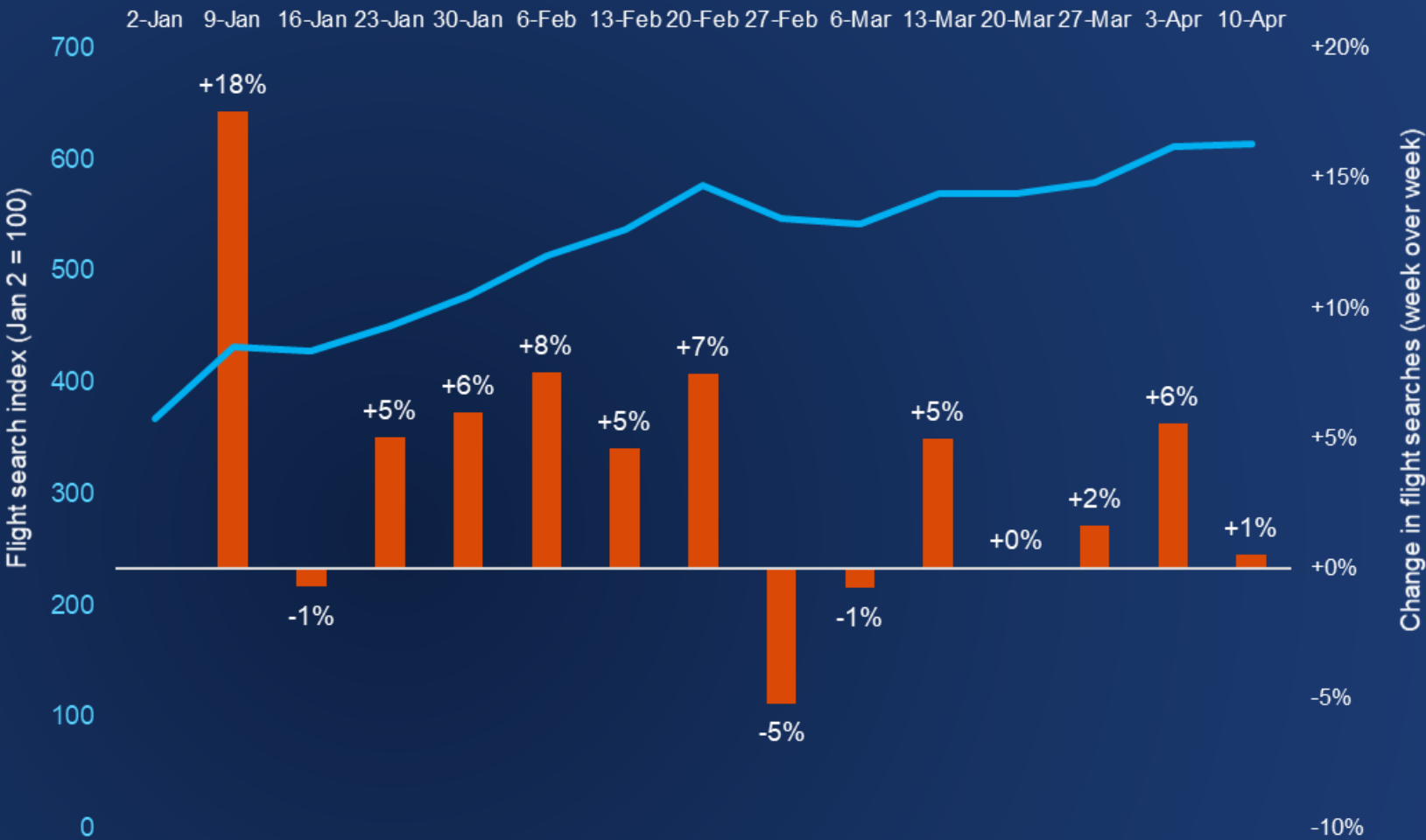


# Flight searches for all international travel, January to March 2022 (index)\*

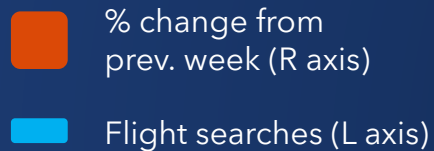
-  % change from prev. week (R axis)
-  Flight searches (L axis)

Source: compiled by UNWTO from Google Travel Insights data.

\* Searches from week ending 2 January to 10 April 2022.

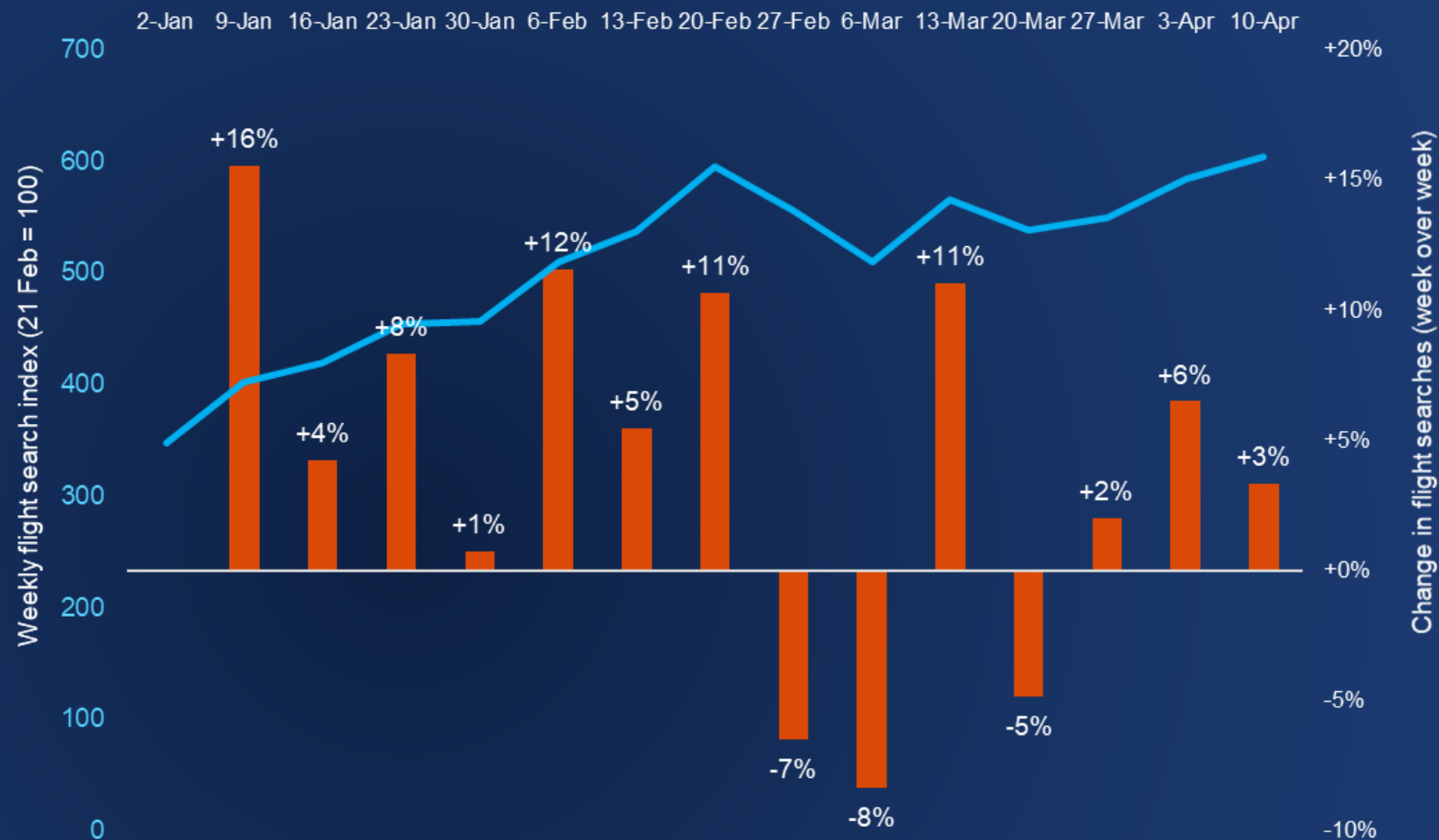


## Flight searches for US travel to Italy, January to March 2022 (index)\*





Source: compiled by UNWTO from Google Travel Insights data.

\* Searches from week ending 2 January to 10 April 2022.



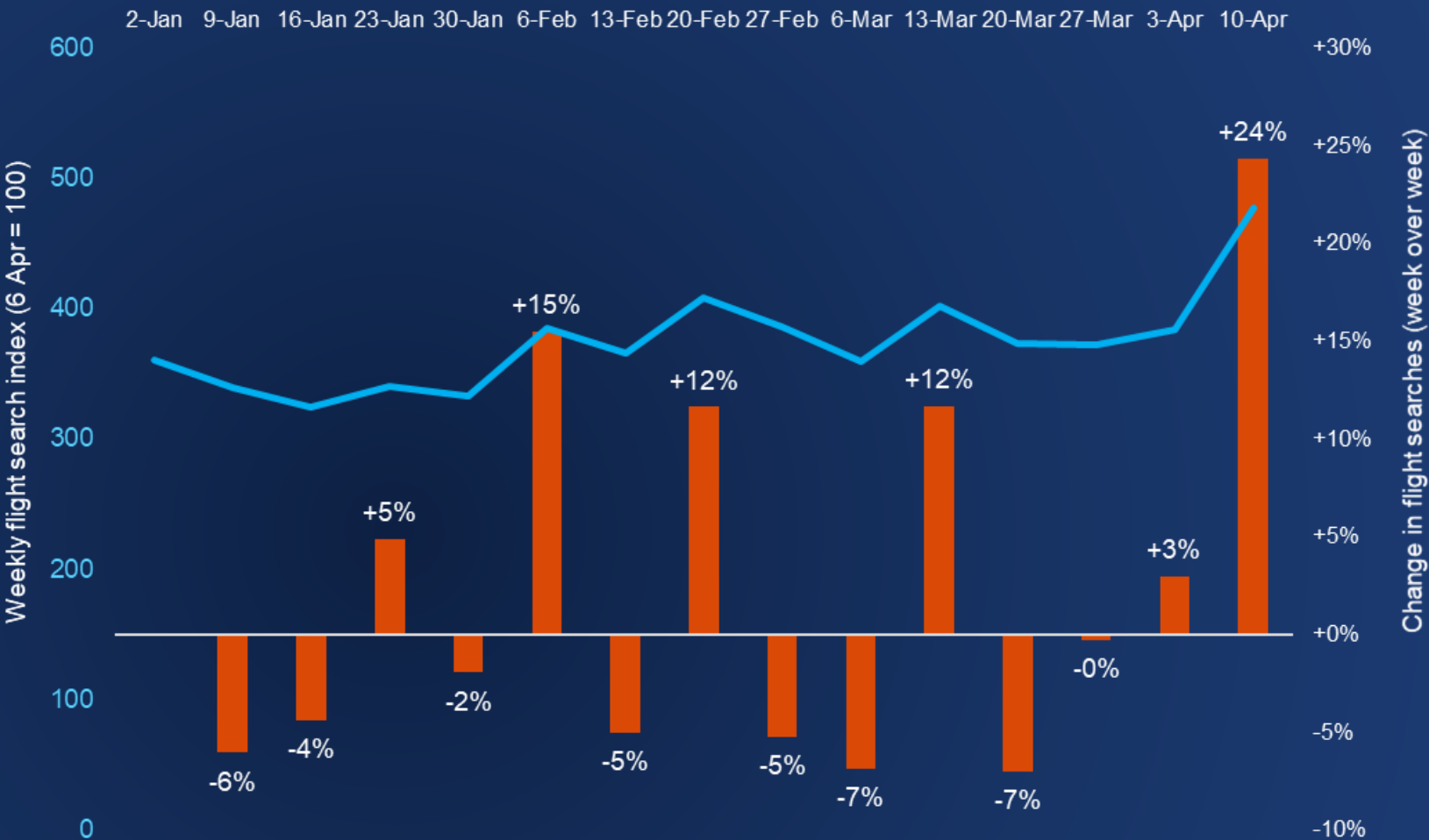


# Flight searches for US travel to France, January to March 2022 (index)\*



-  % change from prev. week (R axis)
-  Flight searches (L axis)

Source: compiled by UNWTO from Google Travel Insights data.

\* Searches from week ending 2 January to 10 April 2022.

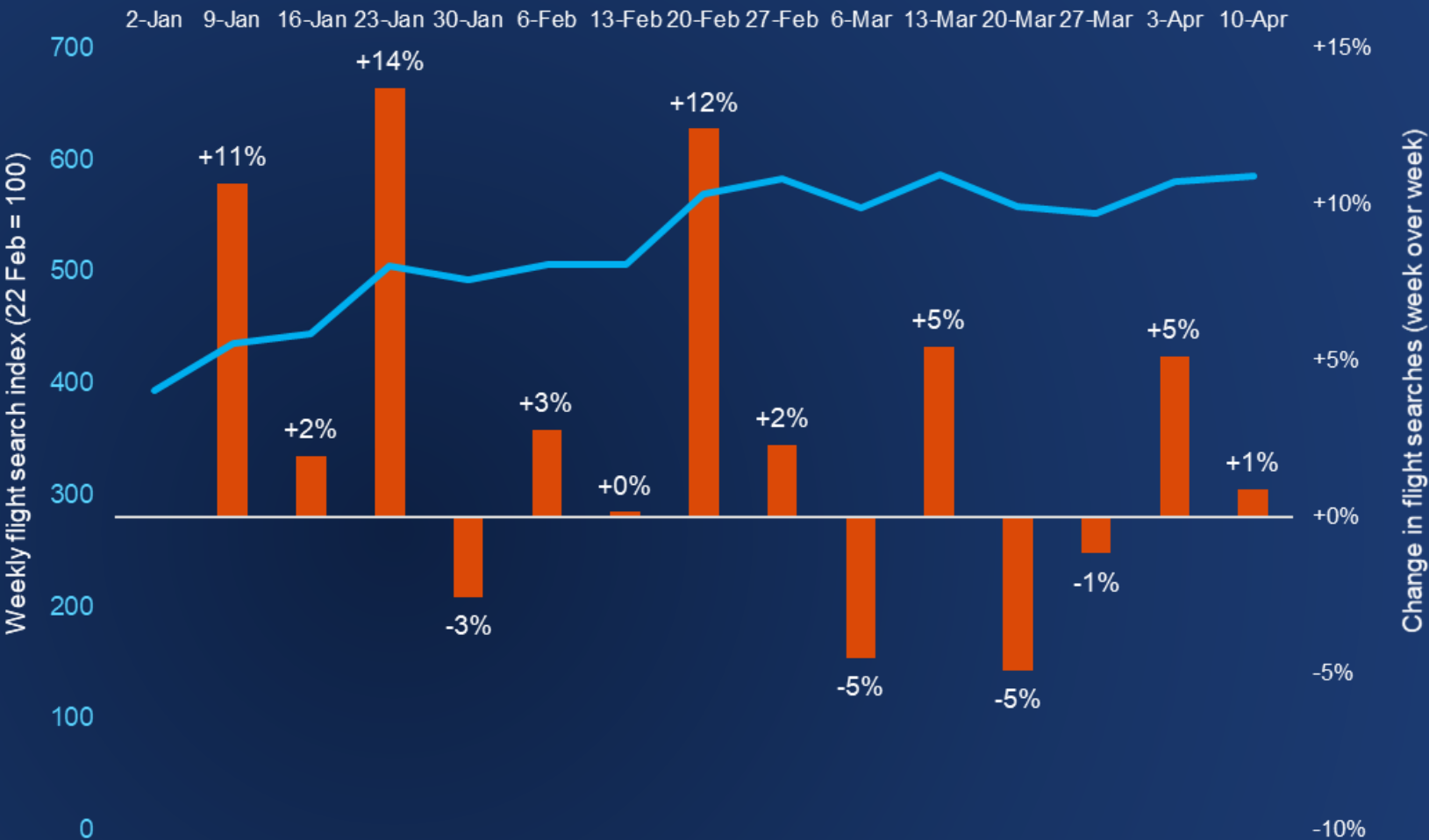


# Flight searches for US travel to the UK, January to March 2022 (index)\*

-  % change from prev. week (R axis)
-  Flight searches (L axis)

Source: compiled by UNWTO from Google Travel Insights data.

\* Searches from week ending 2 January to 10 April 2022.



## Brent Crude Oil Spot Price (Europe) Dec 2021-Apr 2022 (US\$ per barrel)

Source: compiled by UNWTO  
from U.S. Energy Information  
Administration



# Monthly Inflation (CPI) Annual growth rate Jan 2017-Feb 2022 (%)

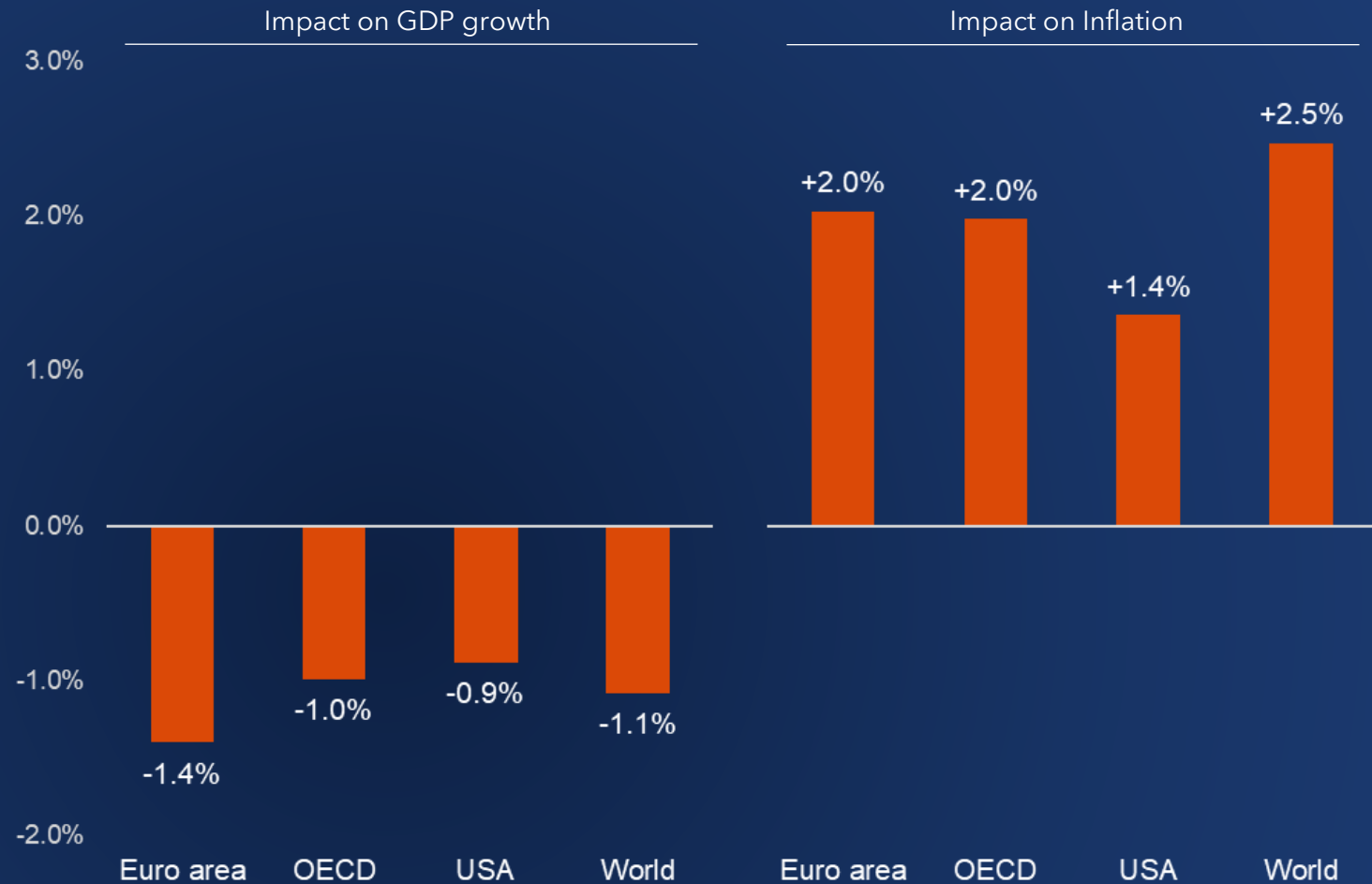
— OECD  
— Euro area  
— USA

Source: Organisation for Economic  
Co-operation and Development  
(OECD)



## Simulated impact of the offensive on Ukraine on GDP and inflation, first full year after start of conflict (%)

Source: OECD (2022)  
OECD Economic Outlook, Interim Report, March 2022



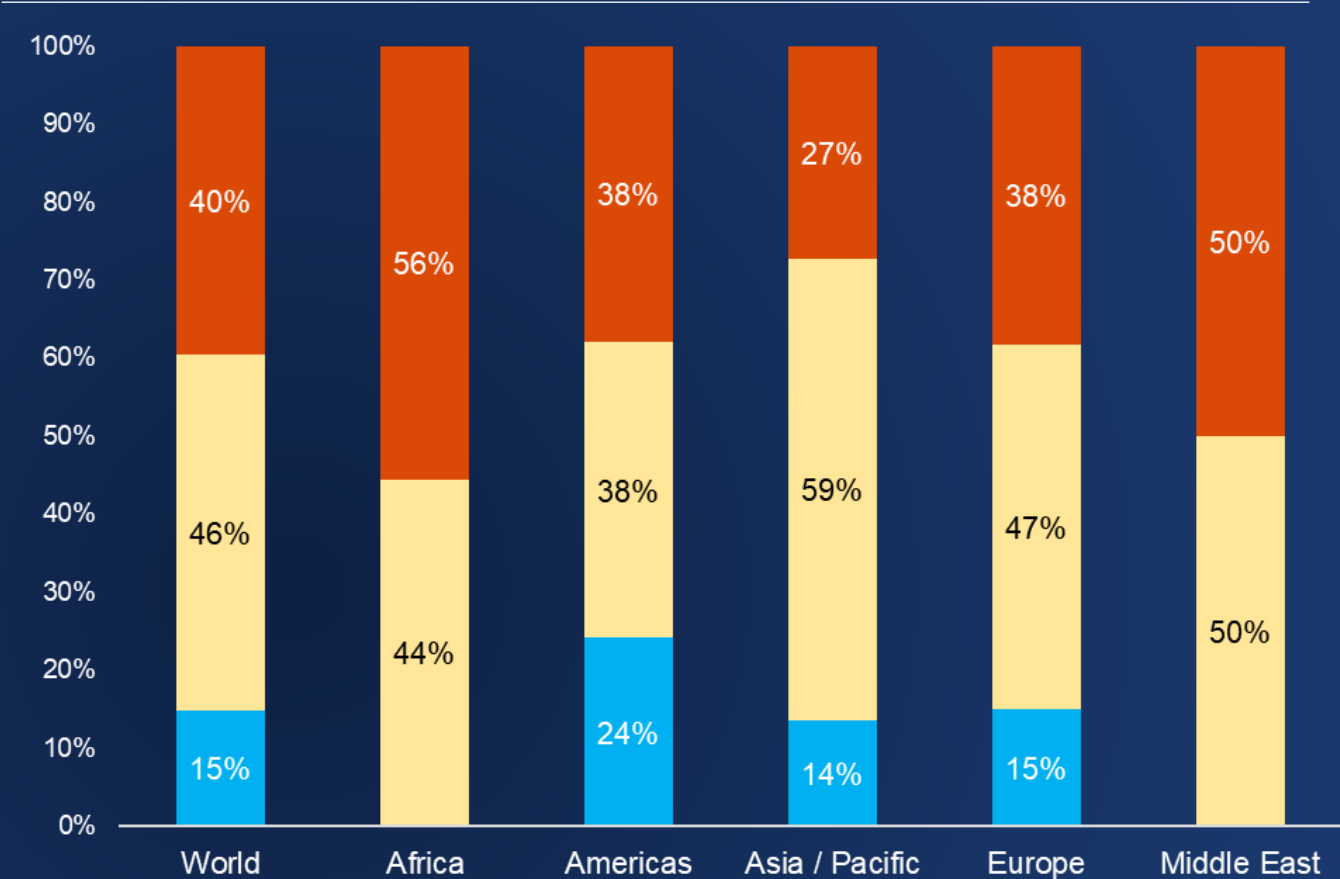
Do you think the offensive on Ukraine will affect the Northern Hemisphere summer season?

- Yes
- Probably
- No

Source: UNWTO Panel of Experts survey on the impact of the Ukraine conflict on international tourism (April 2022)



Percentage of responses by world region

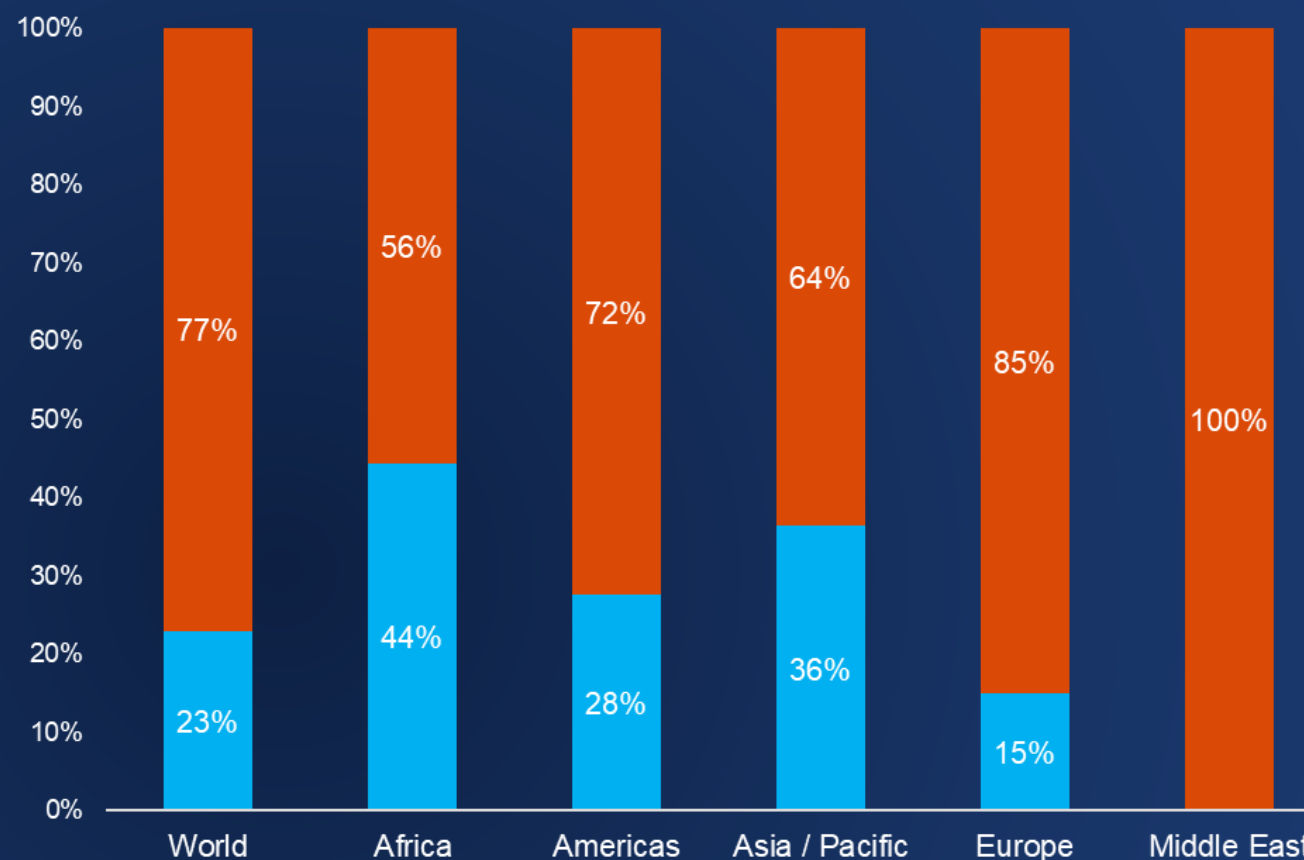


Percentage of responses by world region

Do you think the offensive on Ukraine will weigh on the overall recovery of international tourism in 2022?

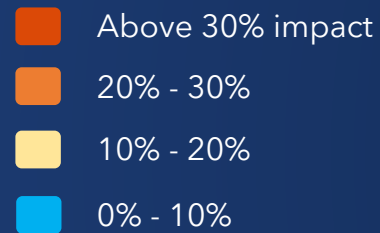
Yes  
No

Source: UNWTO Panel of Experts survey on the impact of the Ukraine conflict on international tourism (April 2022)



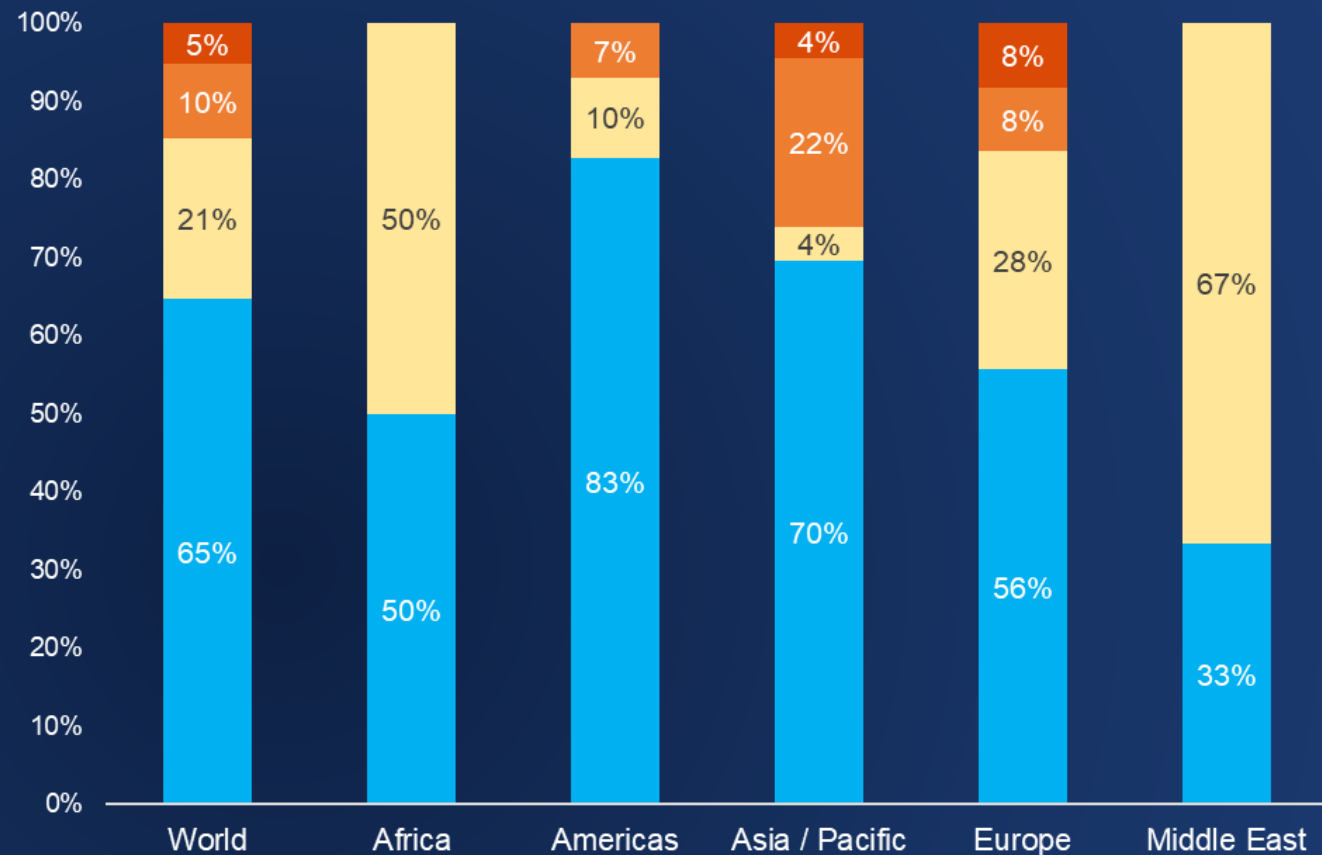


To what extent do you think the offensive on Ukraine will impact international tourism in your destination in 2022?



Source: UNWTO Panel of Experts survey on the impact of the Ukraine conflict on international tourism (April 2022)

Percentage of responses by world region



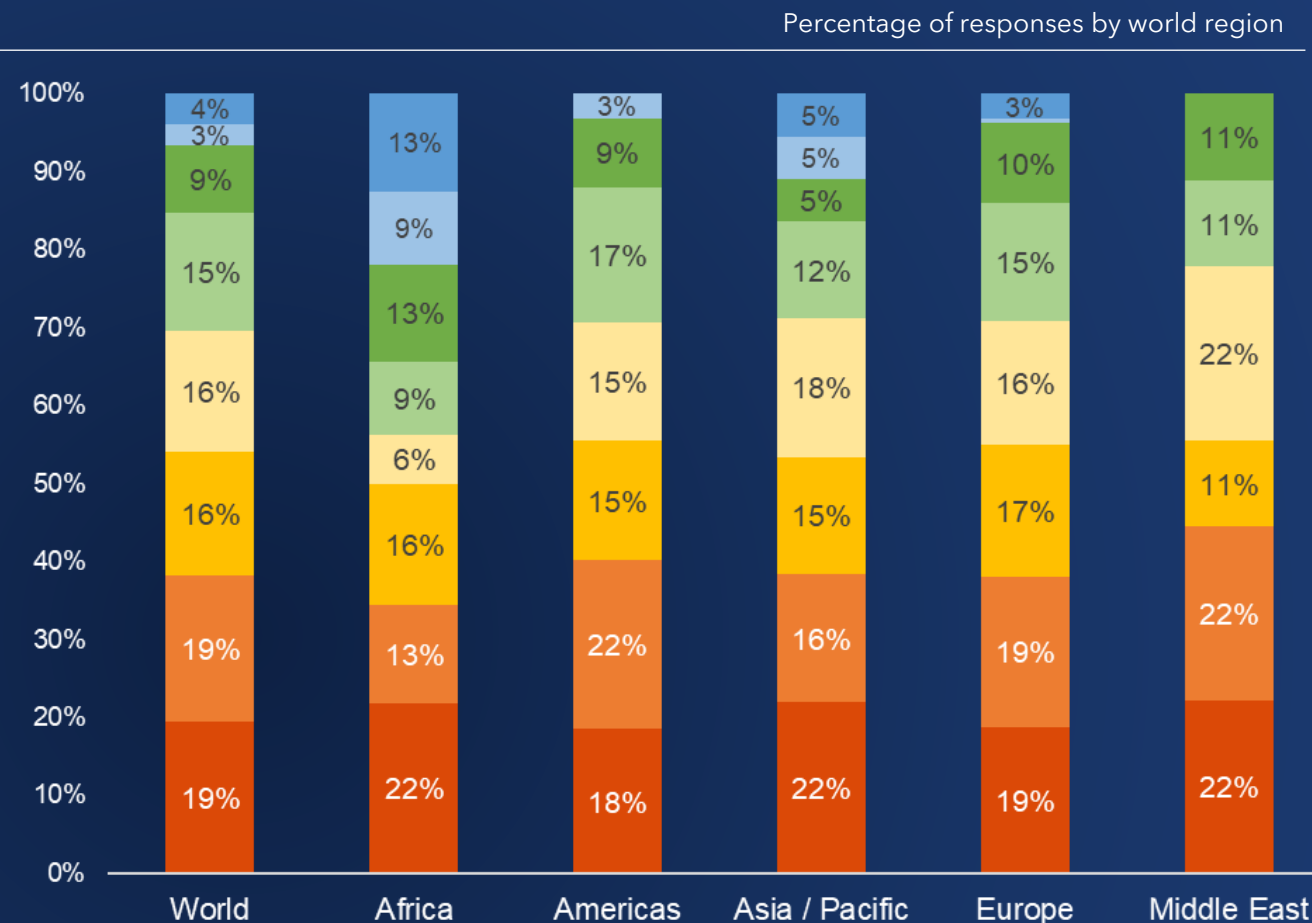
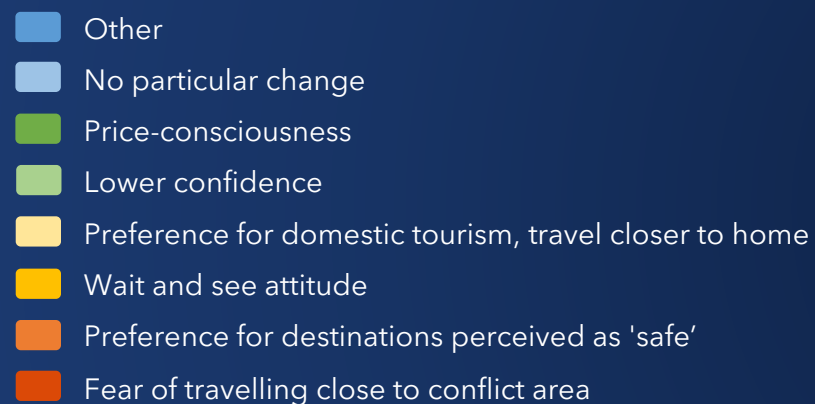
## What changes in consumer behaviour could be triggered by the offensive on Ukraine?

Source: UNWTO Panel of Experts survey on the impact of the Ukraine conflict on international tourism (April 2022)

Percentage of responses: Global

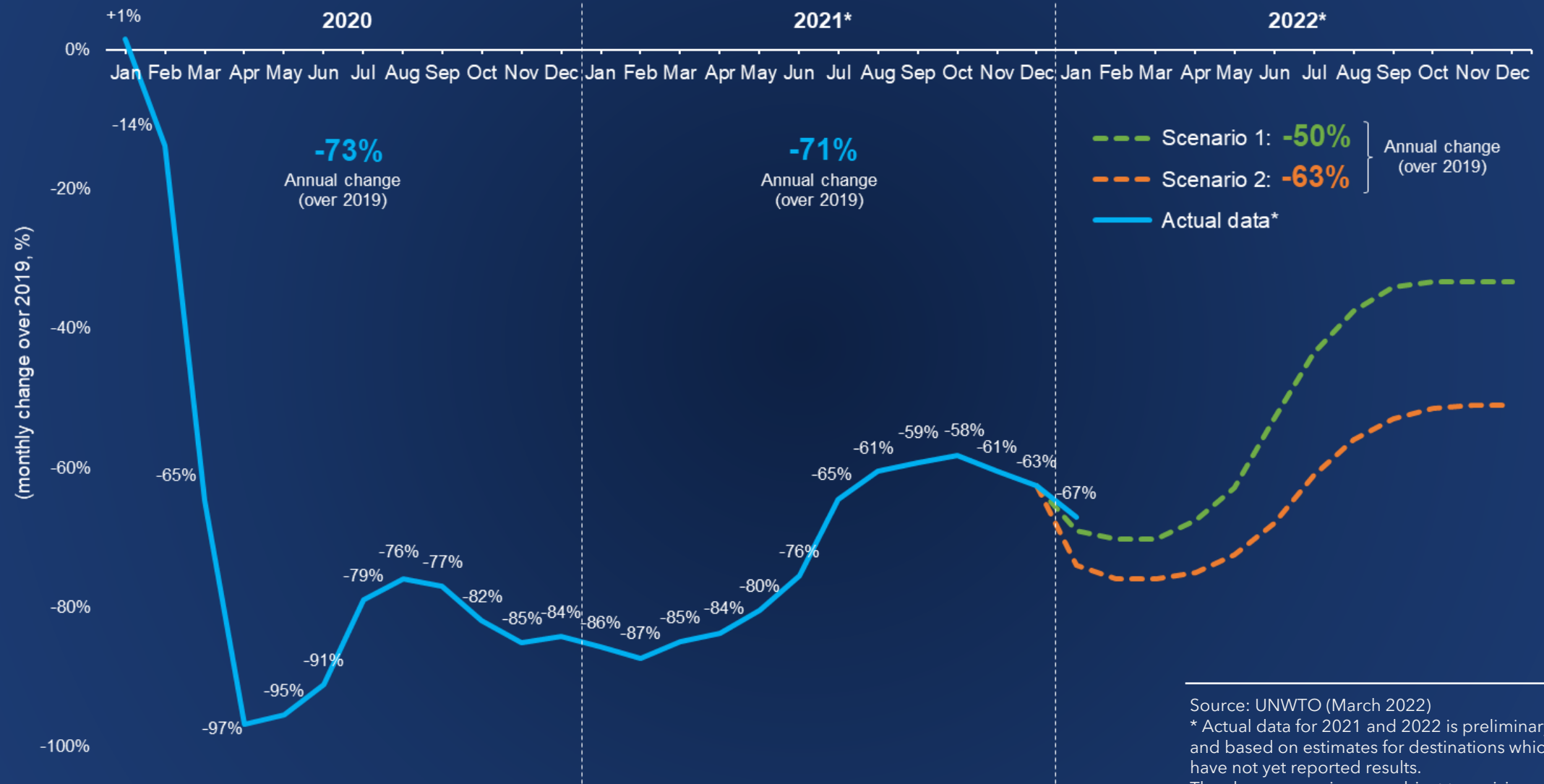


## What changes in consumer behaviour could be triggered by the offensive on Ukraine?



Source: UNWTO Panel of Experts survey on the impact of the Ukraine conflict on international tourism (April 2022)

## International tourist arrivals: 2020, 2021 and Scenarios for 2022 (monthly % change over 2019)





**COVID-19  
RESPONSE**

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