Pre-COVID-19 situation

Impact of COVID-19 on tourism Activity
  - Global impact
  - Impact on SIDS

Impact of COVID-19 on tourism statistics
  - Statistics activities
  - Thematic priorities
Pre-COVID situation

Global

USD 1.5 trillion receipts in destinations

USD 255 billion passenger transport

7% of global exports

USD 1.7 trillion exports from international tourism in 2019

28% of world's services exports

Average annual growth: employment in tourism industries

Data for 97 countries available since 2000

Average by region (percent)

<table>
<thead>
<tr>
<th>Region</th>
<th>All Countries</th>
<th>Central and Southern Asia</th>
<th>Oceania (excl. Australia and New Zealand)</th>
<th>Eastern and South-Eastern Asia</th>
<th>Australia and New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase (%)</td>
<td>1.4%</td>
<td>4.4%</td>
<td>0.7%</td>
<td>1.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Decrease (%)</td>
<td>5.8%</td>
<td>1.1%</td>
<td>1.2%</td>
<td>2.2%</td>
<td></td>
</tr>
<tr>
<td>5-10% increase (%)</td>
<td>1.3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&gt;10% increase (%)</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

UNWTO
World Tourism Organization
Arrivals and tourism expenditure in the Americas, by subregion

North America
- +3% tourist arrivals
- -1% tourism receipts

Caribbean
- +3% tourist arrivals
- +5% tourism receipts

Central America
- +1% tourist arrivals
- +3% tourism receipts

South America
- -4% tourist arrivals
- 0% tourism receipts

Note: Change over 2018. Receipts in real terms.
Impact on Tourism Activity

Global impact

- 1.1 billion fewer arrivals, levels of 1990
- 1.3 trillion USD lost in expenditure
- 11 times the loss of the 2009 crisis
- 100 – 120 million direct Tourism Jobs at risk
Impact on Tourism Activity

Global impact

Expected to return to 2019 levels in 2.5 to 4 years
Impact on Tourism Activity

Global impact

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

- By Q1 2021: 1%
- By Q2 2021: 2%
- By Q3 2021: 4%
- By Q4 2021: 9%
- By 2022: 58%

When do you expect international tourism to return to pre-pandemic 2019 levels in your country?

- 2021: 1%
- 2022: 15%
- 2023: 33%
- 2024 or later: 49%
Impact on tourism activity

Situation in SIDS and the Caribbean

Tourism, especially international tourism, is extremely important in the Caribbean.
SOURCE MARKETS ARE NOT VERY DIVERSIFIED IN SIDS AND IN THE CARIBBEAN
INTERNATIONAL TOURISM IN THE CARIBBEAN RELIES HEAVILY IN THE UNITED STATES AND EUROPE, REQUIRING LONG-HAUL AIR TRAVEL
Impact on tourism activity

Situation in SIDS and the Caribbean


<table>
<thead>
<tr>
<th>Country</th>
<th>Inbound</th>
<th>Domestic</th>
<th>Percent Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabo Verde</td>
<td>4,922</td>
<td>196</td>
<td>4%</td>
</tr>
<tr>
<td>Cuba</td>
<td>19,486</td>
<td>4,614</td>
<td>19%</td>
</tr>
<tr>
<td>Fiji</td>
<td>3,773</td>
<td>889</td>
<td>19%</td>
</tr>
<tr>
<td>Seychelles</td>
<td>2,880</td>
<td>40</td>
<td>1%</td>
</tr>
<tr>
<td>Timor-Leste*</td>
<td>27</td>
<td>4</td>
<td>13%</td>
</tr>
</tbody>
</table>

Very little data available

GENERALLY SIDS HAVE RELATIVELY SMALL DOMESTIC TOURISM MARKETS

Main characteristics:
- High economic importance of Tourism
- Undiversified source markets
- International Tourism requires long-haul air travel
- Small domestic Tourism markets

VERY DIFFICULT TO REACT TO THE GLOBAL CRISIS!
Impact on tourism activity

Impact on Caribbean countries

Source: UNWTO Barometer, Jan 2021

* Preliminary data

** Notes:
(1) Based on preliminary data up to Sept 2020
(2) Based on preliminary data up to Oct 2020
(3) Based on preliminary data up to Nov 2020
(4) Based on preliminary data up to Dec 2020
Impact on Tourism statistics

Statistical activities

| Source: UNWTO Survey, 62 respondent countries |

**Other impacts:**
- Some sources may not be as reliable during restrictions - e.g., Bank cards
- Impact on these sources may affect compilation of TSA 2020
- Many countries relied on previous TSA exercises for assessing impact
Impact on the measurement of Tourism:

Novel situations emerging from the unprecedented COVID-19 context require that some clarifications be made to the UN standards on tourism to maintain as far as possible data consistency and to ensure international comparability.

Examples:
- quarantine stays,
- COVID-related expenditure,
- treatment of activity changes in the tourism industries

Result of a consultation process within the UNWTO Committee on Statistics, the United Nations task team on Business Dynamics, Demography and Entrepreneurship, the Travel Workshop, some international organizations and additional countries.

• IMPORTANCE OF TSA TO ASSESS IMPACT OF CRISSES

• CLOSE DIALOGUE BETWEEN USERS AND PRODUCERS OF DATA

• ENSURE CONTINUITY OF DATA COLLECTION ACTIVITIES
  - NEW COLLECTION MODES
  - NEW SOURCES OF DATA

• IMPORTANCE OF (MEASURING) DOMESTIC TOURISM

• IMPORTANCE OF SUSTAINABLE TOURISM POLICIES AND MONITORING / MEASURING
Thank you for your attention!