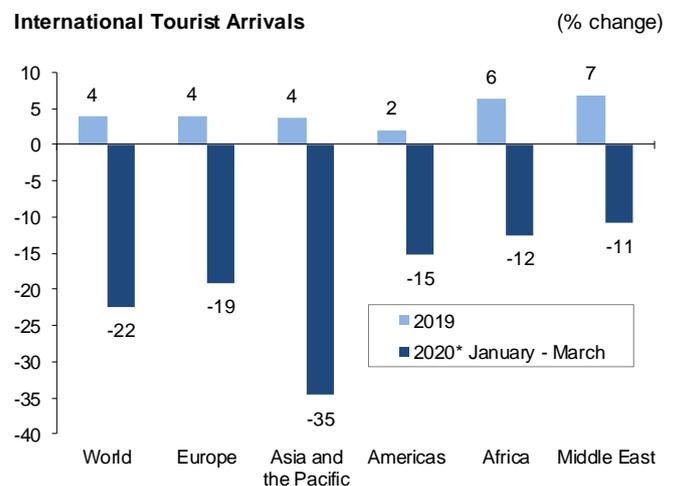




International tourism faces deepest crisis in history

- The world is facing an unprecedented global health, social and economic emergency due to the COVID-19 pandemic.
- Travel and tourism is among the most affected sectors. In an unprecedented shock to the tourism sector, the COVID-19 pandemic has cut international tourist arrivals in the first quarter of 2020 to a fraction of what they were a year ago.
- Available data points to a double-digit decrease of 22% in Q1 2020, with arrivals in March down by 57%. This translates into a loss of 67 million international arrivals and about USD 80 billion in export revenues from international tourism.
- By regions, Asia and the Pacific, the first region to suffer the impact of COVID-19, saw a 35% decrease in arrivals in Q1 2020. The second-hardest hit was Europe with a 19% decline, followed by the Americas (-15%), Africa (-12%) and the Middle East (-11%).
- Current scenarios for the year point to declines of 58% to 78% in international tourist arrivals in 2020, depending on the speed of the containment, the duration of travel restrictions and the re-opening of national borders, although the outlook remains highly uncertain.
- This would translate into a drop of 850 million to 1.1 billion international arrivals and a loss of US\$ 860 billion to US\$ 1.2 trillion in export revenues from tourism, the largest declines in the historical series.
- The plunge in international travel puts 100 to 120 million direct tourism jobs at risk.



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

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Statistical Annex

Annex-1 to Annex-25



The World Tourism Organization (UNWTO) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism.

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 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. Contributors 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 April 2020.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published on August/September 2020.

Full document is available free of charge in 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.

COVID-19 Related Travel Restrictions

COVID-19 has placed the whole world on lockdown

- For the first time in history, 100% of worldwide destinations have introduced travel restrictions in response to the pandemic, whether by totally or partially closing their borders for tourists, suspending international flights or closing of borders in a more differentiated manner.
- The spread of COVID-19 cases to an increasing number of countries was followed by a growing volume of travel restrictions. When on 30 January 2020 the World Health Organization declared COVID-19 a Public Health Emergency of International Concern (PHEIC), 11 destinations had already implemented travel restrictions directed at travellers coming from China. On 11 March 2020, when WHO declared COVID-19 a pandemic, a total of 85 destinations had different categories of travel restrictions in place. Two weeks after the declaration of the PHEIC, the number of destinations with restrictions more than doubled, from 85 to 181 destinations. From 24 March to 20 April 2020, all remaining destinations introduced travel restrictions bringing the total to 217 destinations, representing 100% of destinations worldwide.
- At present, 25% of all destinations worldwide have travel restrictions in place for at least a 3-month period and about 40% for at least a 2-month period. There are currently 156 destinations worldwide that have completely closed their borders for international tourism. As of 27 April 2020, while some destinations have started to lift national lockdown and quarantine measures, no destination has yet lifted or eased its international travel restrictions (UNWTO, COVID-19 Related Travel Restrictions, A Global Review for Tourism, third report as of 8 May 2020, <https://www.unwto.org/news/covid-19-world-tourism-remains-at-a-standstill-as-100-of-countries-impose-restrictions-on-travel>)

International tourist arrivals, January-March 2020

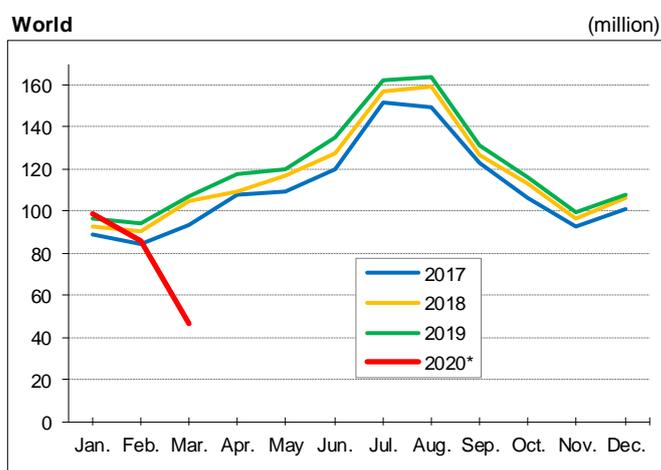
International tourism down 22% in Q1 2020 amid COVID-19

- The COVID-19 pandemic has caused an unprecedented disruption to travel and tourism, both domestic and international, bringing destinations and outbound markets worldwide to a standstill.
- International tourist arrivals (overnight visitors) saw a decrease of 22% in the first quarter of 2020 over the same period of last year, according to data reported so far by destinations.
- Arrivals in the month of March were down 57% following the start of lockdowns in many countries, widespread travel restrictions and the shutdown of airports and national borders, amid measures to contain the spread of the coronavirus.
- This represents a loss of 67 million international arrivals in the first three months of 2020 compared to the same period of last year, which translates into US\$80 billion in lost international tourism receipts (export revenues).
- By regions, Asia and the Pacific, the first region to suffer the impact of COVID-19, saw a 35% decrease in arrivals in Q1 2020. The second-hardest hit was

Europe with a 19% decline, followed by the Americas (-15%), Africa (-12%) and the Middle East (-11%).

- Although Asia and the Pacific shows the highest impact in both relative and absolute terms (-33 million arrivals), the impact so far in Europe is also quite high in volume (-22 million).

International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

- At the subregional level, North-East Asia (-40%) and South-East Asia (-33%) suffered the largest fall. Arrivals in Oceania, South Asia, Southern and Mediterranean Europe and the Caribbean were down 20% or more.

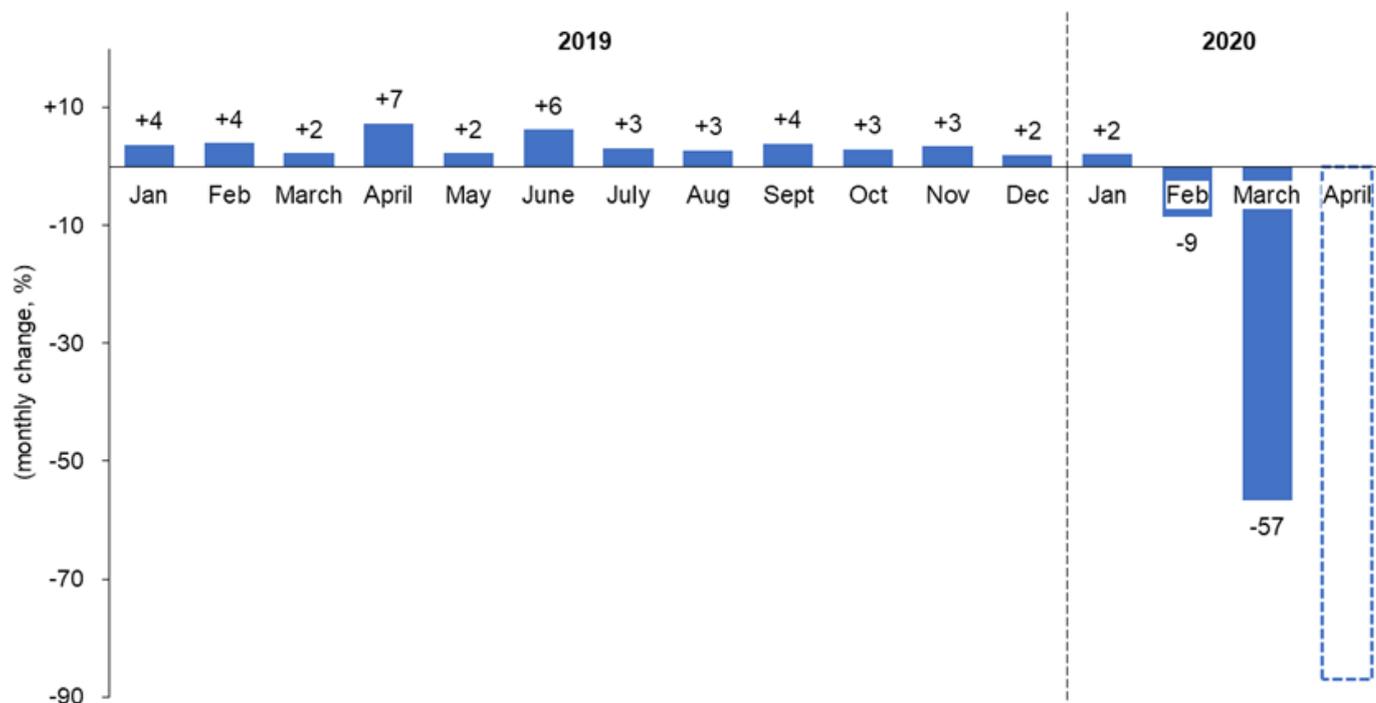
All industry indicators at historic lows

- The COVID-19 pandemic has caused a major disruption in air travel, reflected in the cancellation of flights, grounding of airplanes and the collapse of carriers under financial strain. The international air passenger market plummeted in February driven by Asia and the Pacific and by widespread border closures and travel restrictions in March.
- In terms of international passenger seat capacity, **ICAO** data shows a sharp 38% drop in March, with massive double-digit decreases across regions. International passenger numbers could decline 44% to 80% in 2020 according to ICAO.

IATA points to a decline of 22% in international passenger demand measured in revenue passenger kilometers (RPKs) in January-March, with a 56% drop in March, similar to the decline in international tourist arrivals. IATA forecasts global air passenger demand to end 2020 at -48%.

- According to **ForwardKeys**, air bookings recorded a massive 80% decline worldwide in Q1 2020. Asia and the Pacific (-98%) suffered the biggest drop and started to decline earlier, with the introduction of travel restrictions in China. Air bookings from Europe (-76%), the Americas (-67%), Africa and the Middle East (-65%) all had severe declines in the first quarter of 2020.
- **STR** indicates that the hotel industry recorded large double-digit declines in revenue per available room (RevPAR) across all world regions in March 2020, with Asia (-66.7%) and Europe (-61.6%) posting the biggest decreases.

International tourist arrivals (monthly change, %)



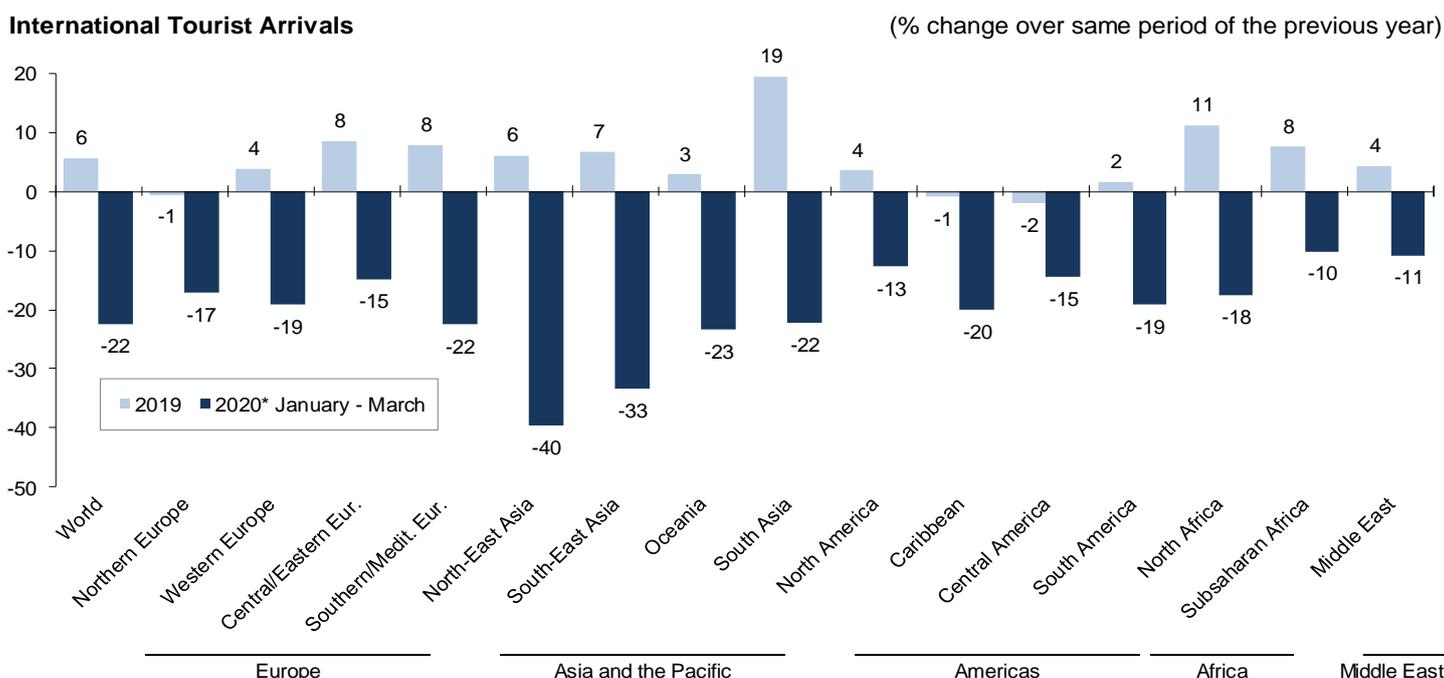
Source: World Tourism Organization (UNWTO)

International tourist numbers could fall 60 to 80% in 2020

- Prospects for 2020 have been downgraded several times since the outbreak of the pandemic and uncertainty continues to dominate.
- Forward-looking scenarios point to possible declines in arrivals of 58% to 78% for the year. These are dependent on the speed of containment, the duration of travel restrictions and the gradual re-opening of borders, though uncertainty still remains high.
- This is by far the worst result for international tourism in the historical series since 1950 and would put an abrupt end to a 10-year period of sustained growth since the 2009 economic and financial crisis.
- This huge loss of demand for international travel could translate into a drop of 850 million to 1.1 billion international tourists, and a loss of US\$910 billion to US\$1.2 trillion in export revenues from tourism. As a result, 100 to 120 million direct tourism jobs would be put at risk. This is particularly critical as around 80% of all tourism businesses are small-and-medium-sized enterprises (SMEs).

- Considerable challenges remain ahead, starting with the unknown duration of the pandemic and travel restrictions, in a context of global economic recession.
- The global economy is projected to contract sharply by 3% in 2020, weighing on the travel and tourism outlook, though it is expected to pick up in 2021, according to the International Monetary Fund (World Economic Outlook, April 2020).
- Sentiment expressed by the UNWTO Panel of Experts points to a start of the recovery of international tourism demand by the fourth quarter of 2020 and mostly in 2021. According to Panel Experts from around the world, domestic demand would recover faster than international demand.
- Based on previous crises, leisure travel is expected to recover quicker, particularly travel for visiting friends and relatives, compared to business travel.
- Countries around the world are implementing a wide range of measures to mitigate the impact of the COVID-19 outbreak and to stimulate the recovery of the tourism sector (see detailed information at <https://www.unwto.org/international-tourism-and-covid-19>)

International Tourist Arrivals



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series															
	(million)				Share (%)	Change (%)		Percentage change over same period of the previous year								
						18/17	19*/18	2020*					2019			
	2010	2017	2018	2019*	2019*			YTD	Q1	Jan.	Feb.	Mar.	Q1	Q2	Q3	Q4
World	952	1,333	1,408	1,462	100	5.7	3.8	-22.4	-22.4	2.0	-8.6	-56.7	3.3	5.3	3.2	2.7
Advanced economies ¹	515	732	761	777	53.1	4.0	2.0	-28.9	-28.9	-1.3	-14.3	-64.6	1.9	3.8	1.7	0.2
Emerging economies ¹	437	601	647	686	46.9	7.7	6.0	-16.2	-16.2	5.0	-3.2	-48.5	4.6	7.2	5.2	5.4
<i>By UNWTO regions:</i>																
Europe	487.0	676.6	715.9	744.3	50.9	5.8	4.0	-19.1	-19.1	5.6	5.7	-59.9	2.2	4.5	3.4	5.0
Northern Europe	57.0	79.1	78.7	79.9	5.5	-0.6	1.5	-17.2	-17.2	4.0	3.9	-52.3	0.6	0.5	2.9	2.5
Western Europe	154.4	192.7	200.2	204.3	14.0	3.9	2.1	-19.2	-19.2	7.0	7.1	-62.7	-1.7	4.7	2.5	4.2
Central/Eastern Eur.	98.6	136.9	148.5	156.2	10.7	8.5	5.2	-14.9	-14.9	5.7	6.2	-55.0	4.8	4.4	2.4	7.0
Southern/Medit. Eur.	177.1	267.9	288.6	304.0	20.8	7.7	5.3	-22.5	-22.5	4.9	4.6	-62.8	4.8	5.5	4.4	5.3
- of which EU-28	382.4	540.5	562.4	578.9	39.6	4.1	2.9	-19.6	-19.6	4.0	6.0	-59.7	1.5	3.4	2.4	4.4
Asia and the Pacific	208.2	324.1	347.7	360.6	24.7	7.3	3.7	-34.6	-34.6	-2.2	-37.1	-63.6	6.2	7.3	2.3	-1.0
North-East Asia	111.5	159.5	169.2	170.6	11.7	6.1	0.8	-39.6	-39.6	-12.2	-48.0	-57.8	8.0	7.9	-2.8	-9.4
South-East Asia	70.5	120.6	128.6	137.3	9.4	6.7	6.7	-33.3	-33.3	6.4	-36.4	-70.2	4.2	6.1	8.3	8.2
Oceania	11.5	16.6	17.0	17.5	1.2	2.8	2.4	-23.4	-23.4	5.5	-17.4	-57.0	-0.3	3.7	3.0	3.1
South Asia	14.7	27.5	32.8	35.3	2.4	19.4	7.4	-22.2	-22.2	6.9	-4.1	-70.6	9.3	10.4	5.0	5.2
Americas	150.3	210.9	215.9	220.2	15.1	2.3	2.0	-15.2	-15.2	0.3	2.7	-45.7	-0.6	4.1	2.4	2.2
North America	99.5	137.4	142.2	146.4	10.0	3.5	3.0	-12.7	-12.7	3.7	4.0	-40.7	-1.1	3.4	3.7	5.4
Caribbean	19.5	26.0	25.8	27.1	1.8	-0.9	4.8	-20.0	-20.0	-2.4	-0.6	-51.8	15.2	8.4	-2.9	-1.6
Central America	7.8	11.1	10.9	11.1	0.8	-2.0	2.2	-14.5	-14.5	-3.7	4.2	-43.0	-2.1	5.5	3.5	3.1
South America	23.5	36.4	37.0	35.6	2.4	1.6	-3.9	-19.1	-19.1	-5.2	0.9	-58.7	-7.8	2.9	-0.2	-7.4
Africa	50.4	63.3	68.8	73.2	5.0	8.8	6.4	-12.5	-12.5	4.2	3.6	-44.1	2.9	6.3	4.0	2.2
North Africa	19.7	21.7	24.1	26.1	1.8	11.1	8.5	-17.5	-17.5	5.3	4.8	-56.6	9.0	11.8	8.6	4.8
Subsaharan Africa	30.7	41.6	44.7	47.1	3.2	7.5	5.2	-10.1	-10.1	3.7	3.0	-37.6	0.3	3.1	0.5	1.0
Middle East	56.1	57.7	60.1	64.2	4.4	4.3	6.8	-10.8	-10.8	5.5	5.4	-41.0	8.3	7.4	7.2	6.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, May 2020)

* 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

Regional insights

International tourism in all world regions and subregions impacted by COVID-19

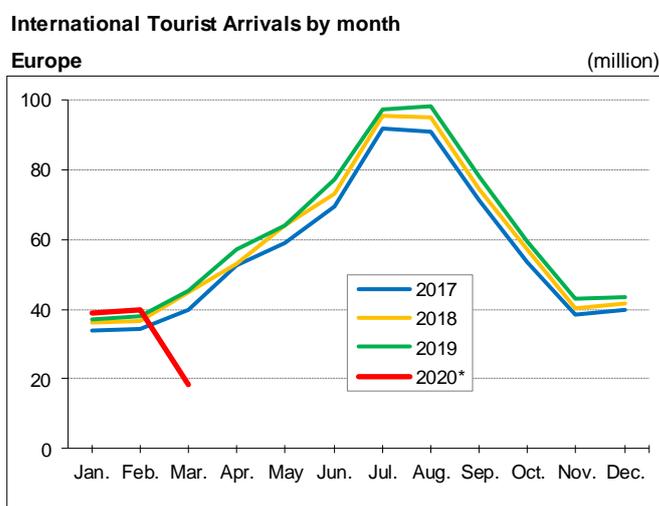
Europe

- International tourist arrivals in Europe, the world's most visited destination, went down 19% in the first quarter of 2020 over the same period last year. The robust results recorded in January and February were not able to offset the massive decrease of 60% posted in March.
- Europe was the second-hardest hit region after Asia and the Pacific, with a loss in volume of 22 million international arrivals through March. This reflects the impact of the lockdowns and border closures put in place in March across most countries in the region to contain the spread of COVID-19. Italy was the first country in Europe to enter lockdown early March and other countries followed throughout the month, mostly during the second half.
- Non-essential travel from third countries into the 'EU+ area' was temporarily restricted on 16 March for 30 days. On 8 April, the entry restriction was extended for 30 days until 15 May. On 8 May the European Commission invited Member States to extend the temporary restrictions on non-essential travel to the EU until 15 June. The 'EU+ area' includes a total of 30 countries: all Schengen Member States (including Bulgaria, Croatia, Cyprus, and Romania) plus the four Schengen Associated States (Iceland, Liechtenstein, Norway, and Switzerland).
- As of 27 April 2020, UNWTO has found that 83% of destinations in Europe have introduced complete closure of borders for international tourism (UNWTO, COVID-19 Related Travel Restrictions, A Global Review for Tourism, third report as of 8 May 2020, <https://www.unwto.org/news/covid-19-world-tourism-remains-at-a-standstill-as-100-of-countries-impose-restrictions-on-travel>).
- By subregions, Southern and Mediterranean Europe (-23%) recorded the largest decreases through March, followed by Western Europe and Northern Europe (both -19%) and Central and Eastern Europe (-15%).
- Larger European tourism destinations Spain, Italy, France, Germany, the United Kingdom, the Russian Federation and Turkey are among the most affected countries in the world by COVID-19, according data on confirmed cases by country reported by the World Health Organization (as of 11 May).



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

- A small number of European countries have reported data for the month of March. The results reported by country such as Israel (-81%), Turkey (-68%), Georgia (-56%), Austria (-69%) or Finland (-58%) portrays the overall picture for the region.



Source: World Tourism Organization (UNWTO) ©

- A number of European countries have initiated coronavirus de-escalation or lockdown exit process, amid a decreasing number of daily coronavirus-related fatalities, though the start of the lifting of international travel restrictions remains unknown.

Air travel and accommodation indicators

- International passenger demand in Europe measured in Revenue Passenger Kilometres (RPKs) plunged 54% in March, according to **IATA**, and 19% in the first quarter. Capacity dropped 42.9% and traffic within Europe was down around 55% year-on-year (y-o-y) in March. The Europe-US travel ban from mid-March led to a 57% decline in this market.
- **Eurocontrol** reported 41% less flights compared to March 2019 and a reduction of European daily traffic as low as 88%.
- International visitor arrivals (based on air bookings) to Europe reported by **ForwardKeys** showed a y-o-y 36% decline in Q1 2020, the largest decrease after Asia and the Pacific. Air bookings made from Europe to travel worldwide recorded a 76% decrease in the first quarter.
- The impact was also felt in the accommodation sector, with Europe (-61.6%) posting the second biggest decrease in revenue per available room (RevPAR, in euro constant currency) in March after Asia and the Pacific, according to **STR**. Occupancy recorded a 61.6% drop to 26.3% and Average Daily Rate (ADR) fell 8.1% in March. The absolute occupancy and RevPAR levels in Europe were the lowest for any month on record.

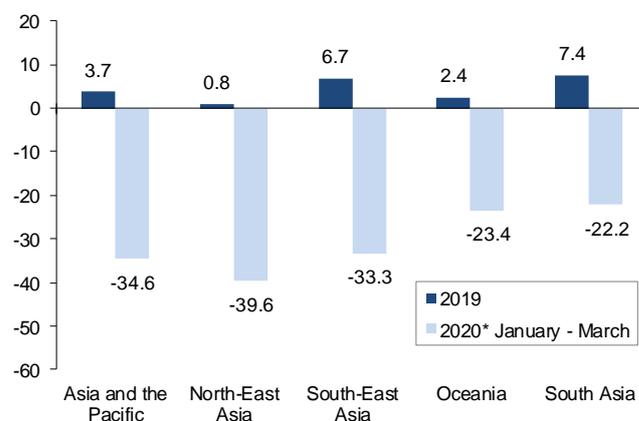
Asia and the Pacific

- Asia and the Pacific was the hardest hit among world regions in both relative and absolute terms, with 35% less international tourist arrivals in Jan-March 2020 or a loss of 33 million over the same period last year.
- Asia and the Pacific was the first region to be impacted by COVID-19 and the drop of international demand was already felt in January, most notably in China and destinations in which the Chinese outbound is of high importance. February saw a 37% decline in international arrivals to the region and March a steeper 64%.
- The lockdown on 23 January of the city of Wuhan in the Hubei province (China) led to subsequent travel restrictions and international flight suspensions to mainland China in late January. The spread of the coronavirus outbreak outside China to countries within the region also resulted in the cut of numerous routes to Asia and the Pacific, amid travel bans and a drop in demand for air travel. Outbound travel from

China, the top source market in the world and for many countries in the region, was put to a halt.

- North-East Asia (-40%) and South-East Asia (-33%) recorded the largest decreases among world subregions in Q1 2020, according to available data. Hong Kong (China) (-84%), Macao (China) (-68%), Japan (-51%) and the Republic of Korea (-47%) suffered sharp declines in the first quarter with inbound tourism at its lowest in March. Arrivals in South-Asia went down by 22% and Oceania by 23%.

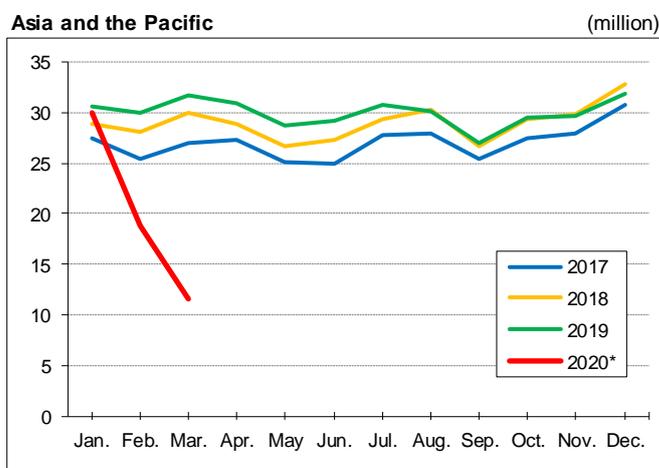
International Tourist Arrivals, Asia and the Pacific (% change)



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

- As of 27 April, 70% of destinations in Asia and the Pacific have introduced complete closure of borders for international tourism, according to UNWTO's third report on travel restrictions.

International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

- While China declared the end of the Wuhan lockdown in 7 April and some countries in the region such as New Zealand and Australia have implemented measures to ease lockdown, travel restrictions remain in place for international travel.
- The 2020 Tokyo Olympics, the major mega-event of the year to be held in the region, was postponed to 2021 due to COVID-19.

Air travel and accommodation indicators

- According to **IATA**, Asia and the Pacific remained the most impacted region in March, with a 66% drop in international passenger traffic. The rate of decline more than doubled compared with February showing that the drop accelerated as the global spread of COVID-19 forced China and other countries in the region to further restrict international air transport. Traffic was particularly impacted within the region (-80% in passenger volumes) and from Asia to North-America (-72%). On a more positive note, domestic RPKs showed a small rebound in China in March (-66%) compared to February (-85%), as some airlines have begun to resume domestic flights.
- International visitor arrivals (based on air bookings) to Asia and the Pacific reported by **ForwardKeys** showed a y-o-y 49% decline in Q1 2020, the largest decrease among world regions. Air bookings out of Asia and the Pacific to travel worldwide declined much steeper at -98% in Q1.
- According to **STR**, the impact of COVID-19 on the global hotel industry in January 2020, measured in change in RevPAR, was only apparent in Asia (-9.6%) among world regions. By March, RevPAR in Asia-Pacific was 66.7% down. Occupancy recorded a 59.5% drop in March to 28.3% and ADR fell by 18%. Reflecting the effects of the COVID-19 pandemic, the Asia-Pacific hotel industry reported all-time lows in the three key performance metrics during March 2020.

The Americas

- The Americas saw a 15% decrease in international tourist arrivals in the first three months of the year, weighed down by an estimated 46% drop in March amid COVID-19 and travel restrictions. The Caribbean (-20%) and South America (-19%) suffered the worst decline among subregions, while arrivals in Central America decreased by 15% and 13% in North America.
- Travel restrictions were implemented at different speeds across the region, as the impact of COVID-19 was felt at a relatively later stage in some countries or areas. Some destinations continued to show solid results in the first two months of the year such as Canada and Mexico in North America. Some small islands in the Caribbean such as Trinidad and Tobago, Saint Maarten and Dominica consolidated their rebound. In Central America, Costa Rica, El Salvador and Nicaragua also showed positive performance in the first two months of the year, as well as Argentina and Colombia in South America.

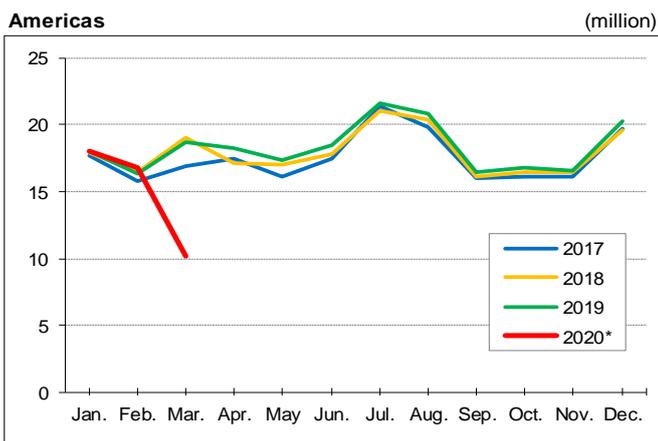
International Tourist Arrivals, Americas



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

- The United States reported COVID-19 cases already in January and the country restricted travel from China at the end of the same month. The country closed its borders with Canada and Mexico in March to non-essential traffic. A massive double-digit decline was recorded in March in arrivals from Mexico. The destination also recorded large decreases from European markets, as the entry of citizens from 26 European countries was banned in March, and from most of its other main overseas countries as well. The routine visa services was suspended as of 20 March.

International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

- Several countries went in lockdown during the second half of March, in an effort to contain the spread of the virus or ban the entry of visitors from affected countries.
- Although data for March is still missing for most countries in the region, the impact of lockdowns and travel restrictions will be reflected in March, as data for Peru, Bahamas or Costa Rica show (-50% to -70% drop in international arrivals in March).
- As of 27 April, 80% of destinations in Asia and the Pacific have completely closed their borders for international tourism, according to UNWTO's third report on travel restrictions.

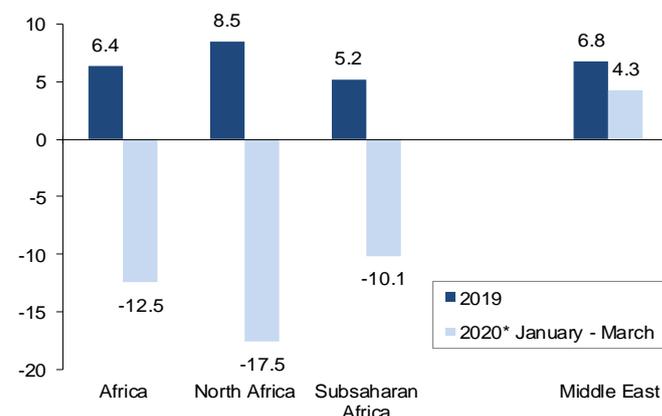
Air travel and accommodation indicators

- International passenger demand in North America decreased 54% in March and 20% in the first three months of 2020, according to **IATA**. International traffic in Latin America decreased 46% in March and 17% in Q1.
- International visitor arrivals (based on air bookings) to the Americas reported by **ForwardKeys** showed a y-o-y 28% decline in Q1 2020, the largest decrease after Asia and the Pacific and Europe. Air bookings made from the Americas for international travel recorded a 67% decrease in Q1.
- According to **STR**, the impact of COVID-19 on the Americas hotel industry in March 2020, measured in change in revenue per available room (RevPAR), went down 53% in North America, 59% in Central America and 48% in South America. In Central and South America, occupancy recorded a 0.9% increase to 57% in March to 28%. In its first month with a visible impact from the COVID-19 pandemic, occupancy in the US hotel industry decreased 42% to 39% in March.

Africa and the Middle East

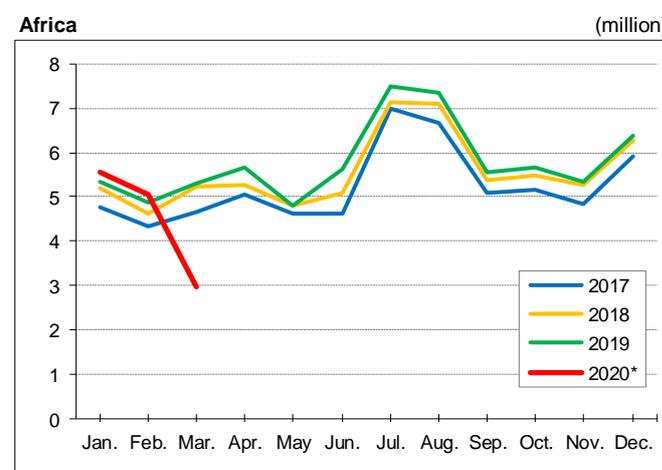
- International tourist arrivals declined 13% in the first quarter, with a massive drop of 44% in March. North Africa (-18%) suffered the biggest impact in Q1, while arrivals in Sub-Saharan Africa declined an estimated 10%.
- The Middle East saw a 11% decrease in the first quarter, weighed down by an estimated 41% decline in March. The major international exhibition Expo 2020 Dubai which was expected to start next October was finally postponed to 2021 due to the coronavirus.
- 57% of destinations in Africa and 62% in the Middle East had completely closed their borders as of 27 April, according to UNWTO's third report on travel restrictions.

International Tourist Arrivals, Africa & Middle East (% change)



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

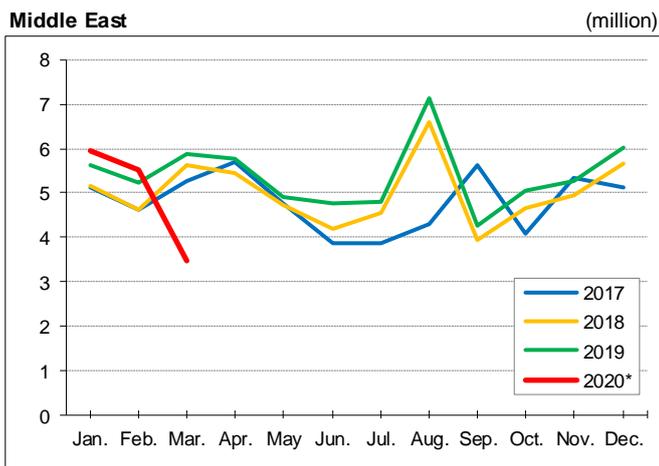
International Tourist Arrivals by month



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by month

Middle East

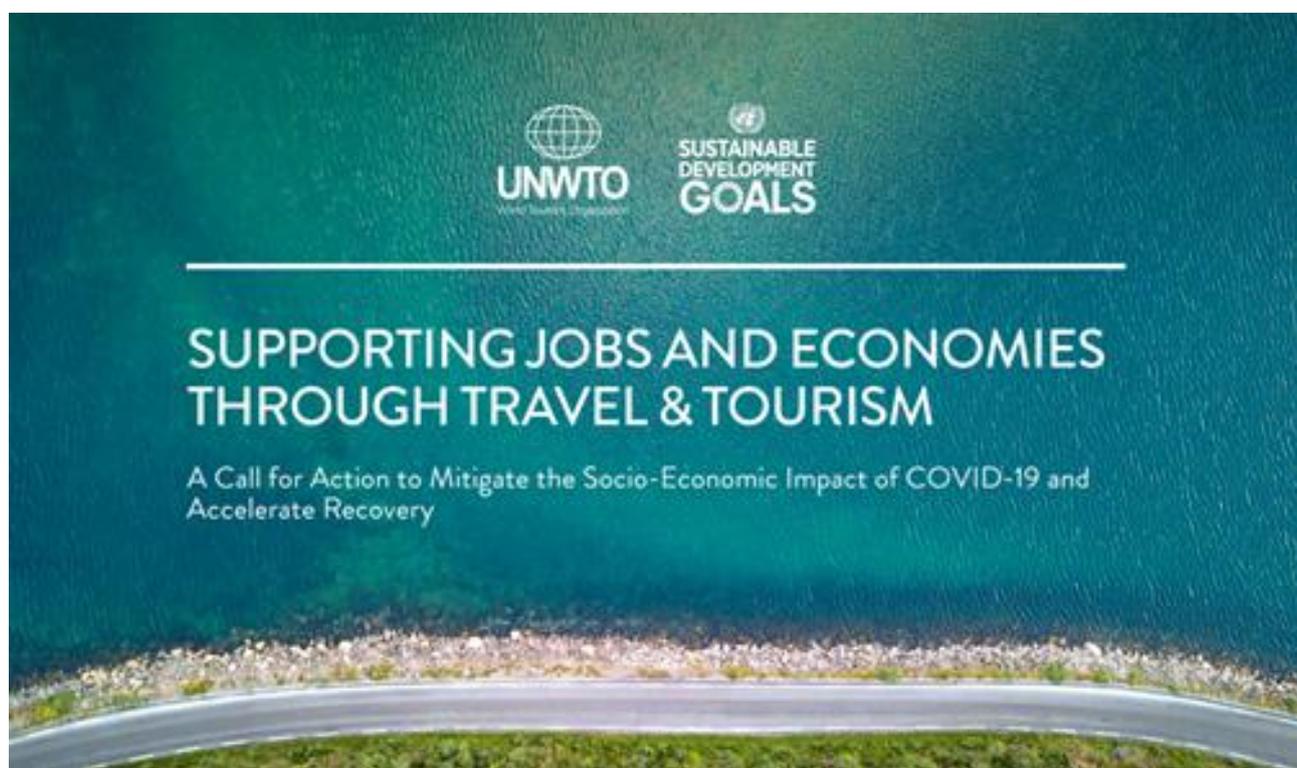


Source: World Tourism Organization (UNWTO) ©

- International visitor arrivals (based on air bookings) in North Africa reported by **ForwardKeys** showed a y-o-y 29% decline in Q1 2020 and in Sub-Saharan Africa -21%.
- Traffic from Africa to Asia was particularly affected. International visitor arrivals to the Middle East showed a y-o-y 32% decline in Q1 2020. Air bookings made from Africa and the Middle East for international travel went down 65% in Q1.
- According to **STR**, the Africa hotel industry suffered a decline of 55% in RevPAR in March 2020. Occupancy recorded a 51.6% drop to 31.1% and ADR fell by 6%. In the Middle East, RevPAR fell 60.8%, occupancy drop 51.5% to 36.6% and ADR -19%.

Air travel and accommodation indicators

- According to **IATA**, International air traffic in Africa declined 13% in international RPKs in the first quarter of 2020, with a drop of 43% in March. Traffic from Africa to Asia was particularly affected. International air traffic to the Middle East was down 13% in international RPKs in Q1 2020, with a drop of 46% in March in particular from key European and Asian markets.



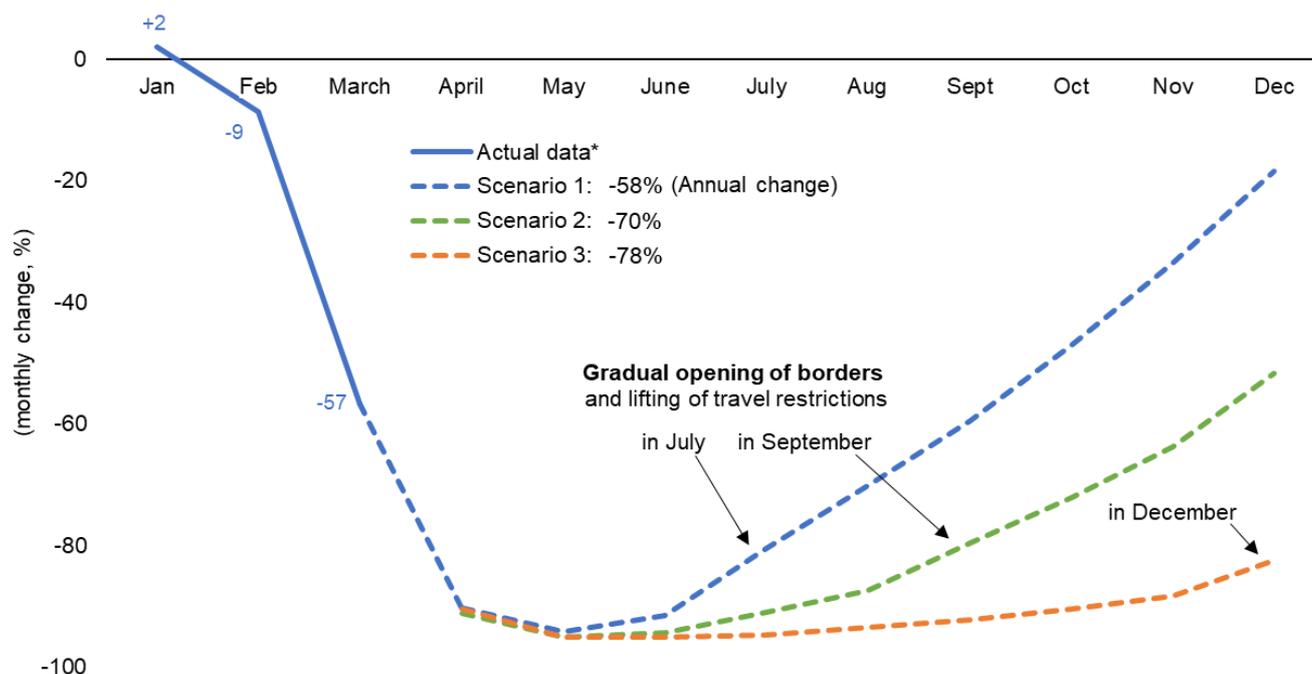
Forward-looking scenarios for 2020

- Prospects for international tourism in 2020 have been downgraded several times since the outbreak of the pandemic given the rapidly-evolving situation and high level of uncertainty.
- Current scenarios point to possible declines of 58% to 78% in international arrivals this year, based on the speed of the containment of the disease, the duration of travel restrictions and the pace of re-opening of borders. This would be by far the largest decline in arrivals in the historical series, eclipsing the 4% drop in 2009 following the global economic crisis, or the mild decrease of 0.4% after the SARS outbreak in 2003.
- The three scenarios described here are **not forecasts** and should not be interpreted as such.

They are based on possible dates of lifting of travel restrictions and gradual re-opening of international borders.

- The scenarios reflect possible patterns of monthly year-on-year change in arrivals from April to December 2020 supposing that travel restrictions start to be lifted and national borders opened in early July (Scenario 1), in early September (Scenario 2) or in early December (Scenario 3). They are based on available tourism data for January-March 2020 and other information such as the shutdown of all national borders as of late April, though still in a context of high uncertainty.

International tourist arrivals in 2020: three scenarios (y-o-y monthly change, %)



* Actual data through March includes estimates for countries which have not yet reported data.
Source: World Tourism Organization (UNWTO)

- The three scenarios reflect three very gradual paces of normalization in which monthly declines in arrivals start to recede in those respective months and there is no significant or long-lasting worsening of the pandemic that affects travel conditions thereafter. All scenarios consider declines in arrivals through December 2020, albeit to different extents.

- **Scenario 1** (-58% in arrivals in 2020) based on the gradual opening of international borders and easing of travel restrictions in early July
- **Scenario 2** (-70% in 2020) based on the same in early September
- **Scenario 3** (-78% in 2020) based on the same in early December.

- Under these scenarios, the drop in international travel demand would translate into:
 - Loss of 850 million to 1.1 billion international tourists
 - Loss of US\$ 910 billion to US\$ 1.2 trillion in export revenues from tourism
 - 100 to 120 million direct tourism jobs at risk
- This is by far the worst crisis that international tourism has faced since records began in 1950. The impact will be felt to varying degrees in different world regions and at overlapping times, with Asia and the Pacific expected to rebound first.

Scenario Assumptions

- The scenarios are based on models that consider different patterns of recovery for the different world regions, where Asia and the Pacific sees a change in trend earlier, as the pandemic hit Asia before other regions. Seasonality in Asia is also less significant than in other regions where the bulk of travel takes place in June-September.
- The models do not specifically incorporate economic factors on the patterns of monthly change, though the economic recession resulting from the pandemic is expected to have a major impact on international tourism in the near to middle term, affecting consumers' spending propensity.
- The data and assumptions of these scenarios could be adjusted as the situation evolves and more information becomes available.



UNWTO World Tourism Barometer May 2020

Special focus on the Impact of COVID-19



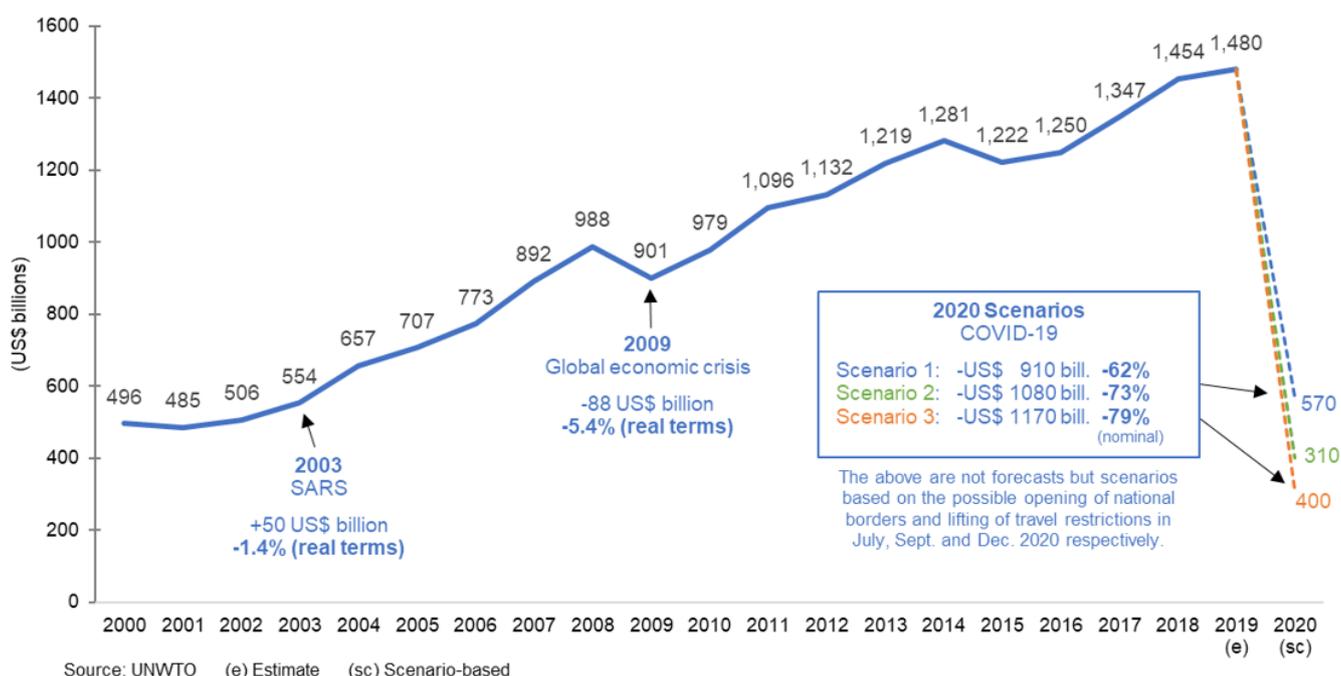
International tourism receipts could plunge by US\$ 1 trillion in 2020

- The slump in global travel due to the pandemic could slash export revenues from international tourism by US\$ 910 billion in the best-case scenario and up to US\$ 1.2 trillion according to three scenarios for 2020 outlined in this report. Visitor spending in destinations could plunge from US\$ 1,480 billion in 2019 to a range of US\$ 310-570 billion in 2020, depending on the pace of travel normalization and re-opening of national borders. This represents a drop of 62% to 79% in nominal terms, far much deeper than the 9% nominal drop in 2009 during the global economic crisis (-5% in real terms).
- This is by far the largest decline in tourism receipts in recorded history and could put 100 to 120 million direct tourism jobs at risk, particularly in emerging economy destinations where tourism is more labour

intensive. This crisis will have a severe impact on economies which are dependent on tourism for export revenues, such as Small Island Developing States (SIDS) and generally on countries with large tourism sectors. A decisive policy response from governments and international organizations is essential to minimize the impact on jobs, businesses and the livelihoods of millions.

- In 2019 international tourism receipts grew 2.8% in real terms to hit US\$ 1,480 billion, the highest figure ever. Total export revenues from tourism, which include US\$ 253 billion in passenger transport receipts, reached US\$ 1.7 trillion in 2019. This is 7% of the world's total exports and 28% of global services exports.

International tourism receipts, 2000-2019 and scenarios for 2020 (US\$ billions)



Small Island Developing States are highly vulnerable

- Tourism is a key economic sector and an important source of export revenues in many advanced and emerging economies.
- Destinations which have a high share of tourism as a source of export revenues, economic income, job

creation and investments, are particularly vulnerable to the impact of the COVID-19 pandemic.

- This is the case of many Small Island Developing States (SIDS), where the share of exports from international tourism in total exports of goods and services can be as high as 90%.

Share of exports from international tourism in exports of goods and services (2018, %)

Between 50% and 90%

Macao (China)	90%
Saint-Lucia	89%
Bahamas	86%
Maldives	84%
Grenada	84%
Antigua	83%
Aruba	80%
St Vincent	76%
St Maarten	75%
Vanuatu	70%
Cabo Verde	67%
Sao Tome	65%
Dominica	64%
Barbados	64%
Samoa	58%
St Kitts and Nevis	56%
Jamaica	54%
Montenegro	54%
Fiji	52%

Between 30% and 50%

Montserrat	50%
Gambia	48%
Tonga	47%
Ethiopia	46%
Belize	46%
Lebanon	45%
Georgia	45%
Jordan	41%
Mauritius	39%
Seychelles	39%
Haiti	38%
Dominican Rep	37%
Bermuda	37%
Albania	36%
Croatia	35%
Tanzania	32%
Curaçao	30%

Most affected countries by COVID-19 account for more than half of worldwide tourism spending

- Countries with the highest number of COVID-19 confirmed cases in the world (according to data reported by the World Health Organization as of 11 May 2020), account for 39% of world tourist arrivals, 42% of world tourism receipts and 54% of world tourism expenditure.
- Among the twelve more affected countries, 8 belong to the top 10 destinations, 6 to the top 10 world tourism earners and 8 to the top 10 world tourism spenders.
- The share of these countries in worldwide exports of goods and services reaches 17% in Turkey and 16% in Spain, while the United Kingdom, France, Italy and the United States represent between 6% to 10% of total worldwide exports.

Countries with highest COVID-19 confirmed cases	Share of World Tourist Arrivals (%)	Tourism Share of Exports in the country (%)	Share of World Tourism Receipts (%)	Share of World Tourism Expenditure (%)
United States	5%	10%	15%	10%
Spain	6%	16%	5%	2%
Russian Federation	2%	8%	1%	2%
United Kingdom	3%	6%	4%	5%
Italy	4%	8%	3%	2%
Germany	3%	3%	3%	7%
Brazil	0%	2%	0%	1%
Turkey	3%	17%	2%	0%
France	6%	8%	4%	3%
Iran	1%	5%	0%	1%
China	4%	1%	3%	19%
Canada	2%	5%	2%	2%
Total	39%		42%	54%

Source: World Tourism Organization (UNWTO)

Note: 12 countries with highest COVID-19 confirmed cases as of 11 May 2020 (more than 70K), according to the World Health Organization (WHO).

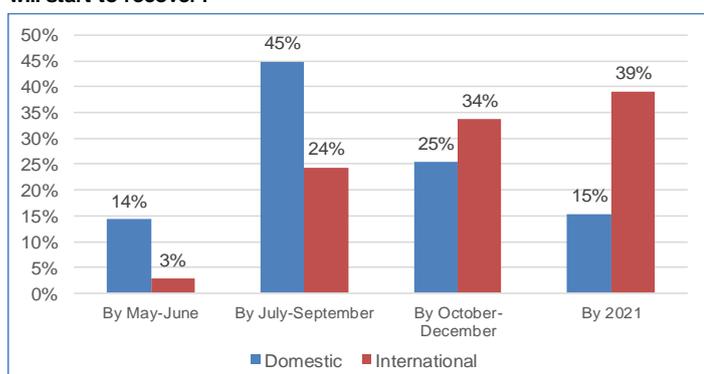
Countries are presented in descending order and data is reflected as reported by WHO on 11 May 2020. Around 4 million COVID-19 confirmed cases have been reported worldwide and 215 countries, areas or territories are affected, as of 11 May.

Evaluation of the impact of the COVID-19 on tourism by the UNWTO Panel of Tourism Experts

Domestic demand expected to recover faster than international demand

- According to the UNWTO Panel of Experts survey on the impact of COVID-19 on tourism, domestic demand is expected to recover faster than international demand, with the majority expecting to see signs of recovery in international tourism by the final quarter of 2020 but mostly in 2021.

When do you expect tourism demand in your destination will start to recover?

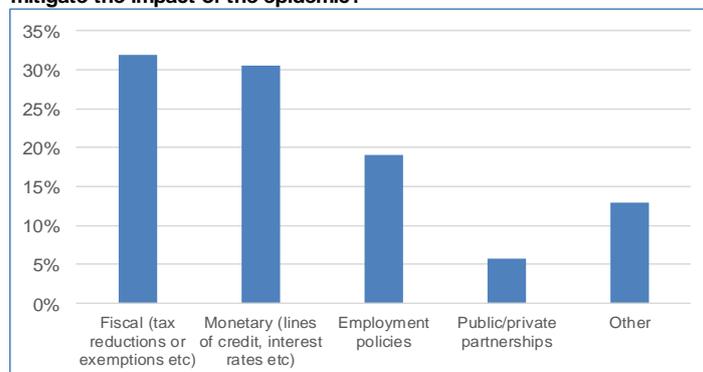


- The UNWTO Panel of Experts expects domestic demand to recover faster than international demand, according to the responses of around 280 participants to the survey on the impact of COVID-19 outbreak on tourism destinations. Almost half of the respondents (45%) point to July-September 2020 for the rebound in domestic tourism demand and 25% expect this will be in October-December. Over 70% of respondents expect international demand to start its recovery in Q4 2020 (34%) and mostly in 2021 (39%).
- All regions expect to see a recovery of international demand by the end of the year and in 2021. Expectations expressed by experts for a recovery of international demand in October-December are stronger in Africa (53%), while half of the respondents in the Americas point to 2021. In Europe and Asia the outlook is mixed, with half of the experts expecting to see recovery within this year. The Middle East is the only region to see some potential recovery by May-June, according to respondents in the region.

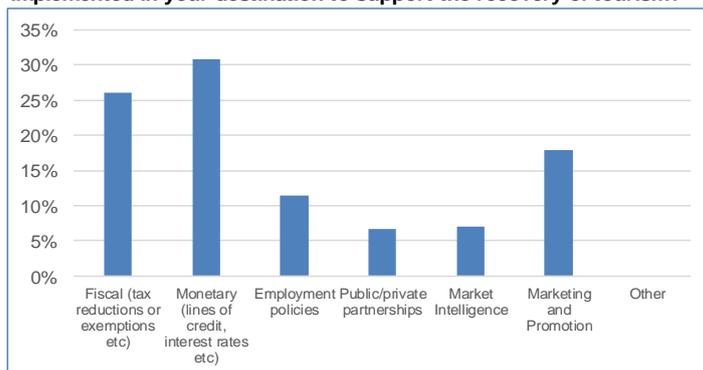
Fiscal, monetary and employment policies widely implemented to mitigate the impact of COVID-19 on tourism

- Respondents overall pointed out that fiscal (e.g. tax reductions or exemptions), monetary (e.g. lines of credit, interest rates) and employment policies are being overwhelmingly implemented to mitigate the impact of the epidemic.
- According to experts, fiscal measures are being put in place in all regions with a particularly high implementation in Asia and the Pacific and the Middle East. Respondents in Africa, the Americas and Europe mentioned the execution of employment policies. Public-private partnerships (PPPs) are being strongly encouraged in Africa and respondents in the Middle East consider that PPPs would be effective to mitigate the impact of COVID-19. See details of measures implemented in over 150 countries at <https://www.unwto.org/international-tourism-and-covid-19>.

What types of measures are being implemented in your destination to mitigate the impact of the epidemic?



What types of stimulus policies or actions are being planned or implemented in your destination to support the recovery of tourism?



Marketing and promotion, safety and hygiene protocols, PPPs and other actions are being planned in destinations to support the recovery of tourism

- A mix of actions and policies are being planned or implemented in all regions to stimulate the recovery of tourism. Fiscal measures have been largely implemented in particular in Africa, Asia and the Pacific and the Middle East. Over half of respondents in Africa think that monetary policies would be an effective stimulus measure, while a large share in the Middle East points to public-private partnerships (PPPs).
- Besides the main fiscal and monetary measures, experts also highlighted other measures of mitigation and stimulus such as the implementation of safety and hygiene protocols, the creation of contingency funds to support employment in SMEs, the postponement of trips rather than their cancellation, marketing and promotion targeted at

domestic tourism, vouchers to promote domestic travel and the use of market intelligence. Many respondents also stressed the fact that the effectiveness of measures implemented will depend on the evolution of the epidemic, the length of travel restrictions and the availability of a vaccine.

Note on the survey:

This survey was conducted between 24 March 2020 and 17 April 2020. Responses were received from around 280 Experts worldwide and aimed to evaluate the impact of COVID-19 on their respective destinations, the expected period of recovery, as well as to indicate the measures implemented to mitigate the impact and to stimulate recovery. For a full set of graphs showing the results to the questions of the survey, please see the Statistical Annex.



Economic environment

The world economy is expected to contract by 3.0% in 2020 after growing 2.9% in 2019, as a result of the pandemic, according to the latest World Economic Outlook (April 2020) by the International Monetary Fund (IMF). The decline is more profound than during the 2009 economic and financial crisis (-0.1%) as the health crisis is having a severe impact on output. Activity has come to a near halt in several sectors due to the necessary measures to curb contagion, such as isolation and lockdowns. Weaker global demand is driving commodity prices down sharply, adversely affecting commodity exporters. However, lower oil prices will benefit oil-importing countries and sectors such as transport and tourism. Advanced economies are forecast to contract by 6% in 2020 and emerging market economies by 1%.

In 2021 global output is forecast to grow 5.8% as activity normalizes, aided by effective policy support and assuming the pandemic gradually recedes in the second half of 2020. Certain sectors such as tourism will be more severely impacted than others and will require targeted policy support, including fiscal, monetary and financial measures. Policies need to cushion the impact on people, businesses and the financial system, and make sure that economic activity restarts quickly once the pandemic fades. International cooperation is also essential, especially to help financially constrained countries facing both health and funding shocks.

High uncertainty surrounds these projections according to the Fund, as they depend on factors which are hard to predict, such as the evolution of the pandemic, the effectiveness of containment efforts, the extent of supply disruptions and the tightening of global financial conditions, among others. Future growth is also dependent on evolving consumer confidence and changes in behaviour and spending patterns.

For more information please see World Economic Outlook (WEO), April 2020 by the International Monetary Fund (IMF) at: <https://www.imf.org/en/Publications/WEO/Issues/2020/04/14/weo-april-2020>

Economic growth projections, April 2020 WEO (real GDP, annual % change)

	2019	2020 (f)	2021 (f)
World	2.9	-3.0	5.8
Advanced Economies	1.7	-6.1	4.5
United States	2.3	-5.9	4.7
Euro Area	1.2	-7.5	4.7
Germany	0.6	-7.0	5.2
France	1.3	-7.2	4.5
Italy	0.3	-9.1	4.8
Spain	2.0	-8.0	4.3
Japan	0.7	-5.2	3.0
United Kingdom	1.4	-6.5	4.0
Emerging Market and Developing Economies	3.8	-1.1	6.6
China	6.1	1.2	9.2
India	4.2	1.9	7.4
Russia	1.3	-5.5	3.5
Brazil	1.1	-5.3	2.9
Mexico	-0.1	-6.6	3.0
Saudi Arabia	0.3	-2.3	2.9
Nigeria	2.2	-3.4	2.4
South Africa	0.2	-5.8	4.0

Source: World Economic Outlook (WEO), April 2020, IMF
(f) forecast

Looking into previous crises

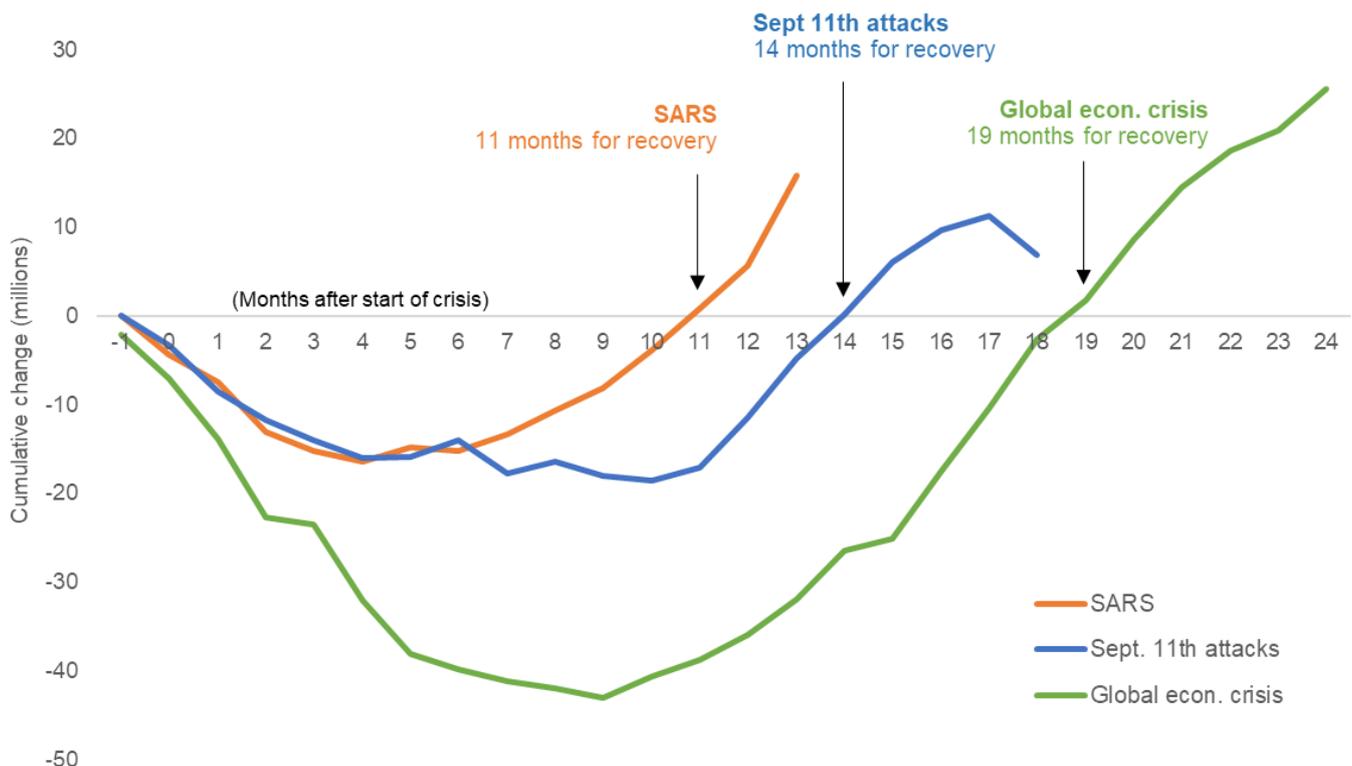
The analysis of previous crises shows that recovery times vary widely from one to another and across regions. The analysis of monthly year-on-year changes in international tourist arrivals reveals that worldwide arrivals returned to growth five months after the September 11th attacks in 2001 and five months after the SARS outbreak in 2003. Yet it took 10 months for arrivals to start growing again after the global economic crisis in 2009.

The time international tourism took to return to pre-crisis volumes also differs considerably in the three past crises. The loss in global arrivals after the September 11th attacks was recovered 14 months later, despite some months of growth in between (based on cumulative change in monthly arrivals). The decline after the SARS epidemic in 2003 was recovered 11 months after the start of the outbreak, while it took 19 months for worldwide arrivals to climb back to pre-crisis levels after the global economic crisis of 2008-09.

However, recovery times were longer for each of the individual regions most impacted by those respective crises. It took 14 months for arrivals in Asia and the Pacific to return to pre-crisis levels after the SARS outbreak. Europe required 29 months for its arrivals to regain the levels existing prior to the global the economic crisis. The slowest (most impacted) region to recover after a crisis was the Americas after the September 11th attacks. It took as much as 42 months (3.5 years) for the Americas to recover its lost arrivals after September 11th. In this case, it is important to note that the longer recovery time was also due to the impact of the 2001 economic crisis on some countries in the Americas, as well as the SARS outbreak in early 2003, which affected Canada and other destinations.

Recovery times of international tourism after three crises, (return to pre-crisis levels)

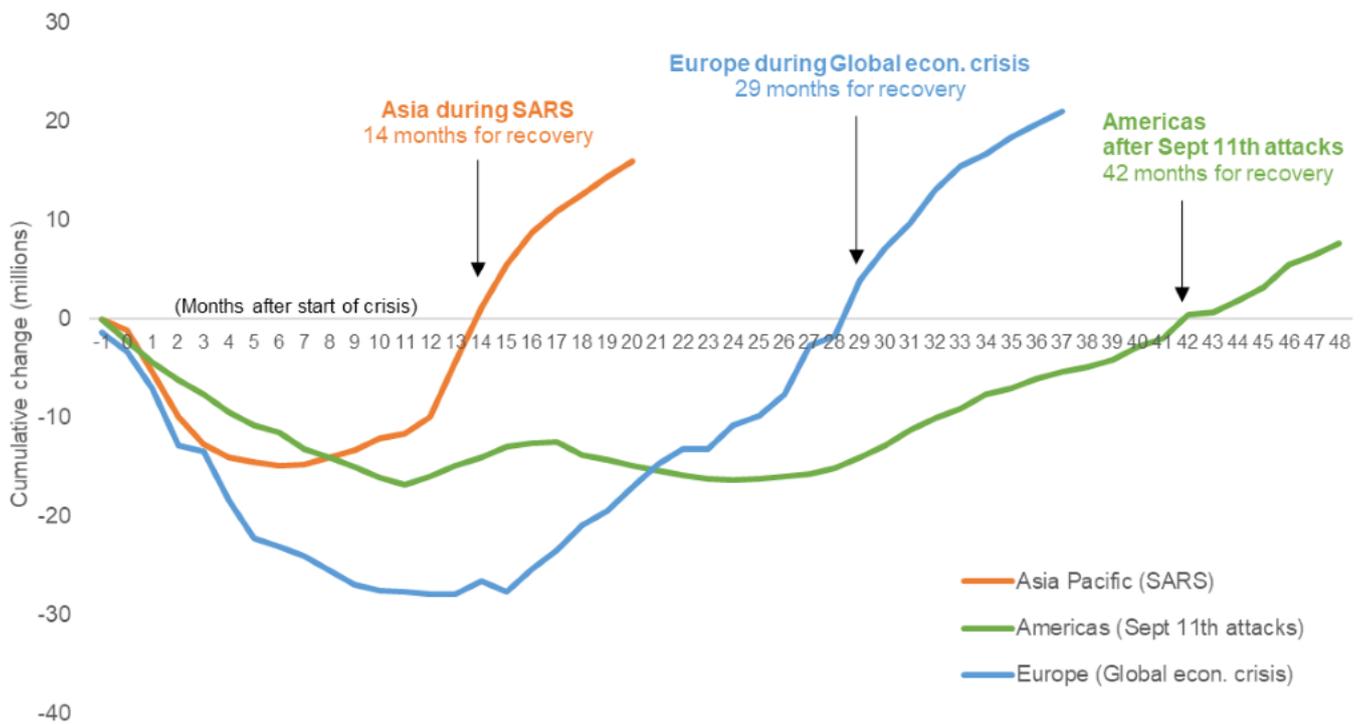
World: cumulative change in international tourist arrivals, by months after start of crisis (millions)



Month 0 for Sept 11th crisis = Sept. 2001; for SARS = March 2003; for Global economic crisis = Jan 2009.
Source: World Tourism Organization (UNWTO)

Recovery times in most impacted regions after respective crises (return to pre-crisis levels)

Cumulative change in international tourist arrivals, by months (millions)



Month 0 for Sept 11th crisis = Sept. 2001; for SARS = March 2003; for Global economic crisis = Jan 2009.
 Source: World Tourism Organization (UNWTO)

UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.

The dashboard displays several key metrics:

- International Tourism Map:** A world map showing regional tourism trends.
- Mode of Transport:** A bar chart showing the percentage of tourists using different transport modes (e.g., 58%, 37%, 4%, 2%).
- International Tourist Arrivals (monthly):** A line and bar chart showing monthly arrival trends.
- Outbound Tourism:** A bar chart showing outbound tourism statistics.
- International Tourism Expenditure:** A line and bar chart showing expenditure trends.
- International Tourism Receipts:** A line and bar chart showing receipts trends.

Consult the tourism dashboard at: www.unwto.org/unwto-tourism-dashboard

Tourism and COVID-19: Opportunities and Challenges

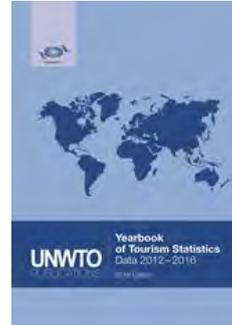
<p>Strengths</p> <ul style="list-style-type: none"> • Tourism's proven resilience in past crises, with a strong capacity to bounce-back rapidly • Domestic tourism can be a buffer, while international tourism recovers • Adaptation capacity: safety and hygiene protocols, trips closer to home, value for money, responsible consumer behavior • Leisure travel is expected to recover quicker, in particular VFR • Government and institutional support to the sector. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Segments potentially affected are also high spenders: international, long-haul, business travel and events • Major disruption in airline industry with airline failures and concentration • Lack of references in previous downturns • Perception of travel as a risk • Low levels of demand when restarting tourism due to social distancing.
<p>Opportunities</p> <ul style="list-style-type: none"> • Re-think business model • Innovation, digitalization and data • Sustainability and sustainable-oriented segments (rural, nature, health) • De-escalation phases initiated by several countries toward the 'new normal' • Progress in adaptation plans in destinations & companies. • Collaboration and Public-Private Partnerships. 	<p>Threats</p> <ul style="list-style-type: none"> • Economic environment: world recession, rising unemployment and jobs at risk, closure of business mainly SMEs, disposable income under pressure, uncertainty weighing on consumer and business confidence • Uncertain length of pandemic (including resurgence) and vaccine unavailability • Extent of lockdowns and travel restrictions • Unknown form of the 'new normal'.



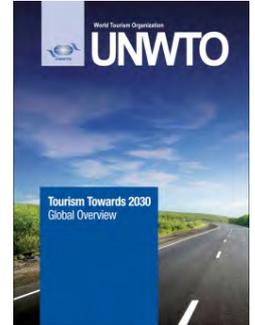
UNWTO World Tourism Barometer



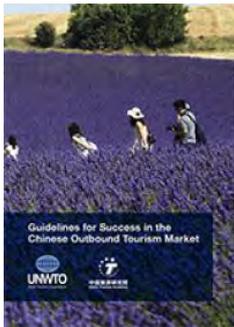
International Tourism Highlights, 2019 Edition



Compendium of Tourism Statistics Yearbook of Tourism Statistics



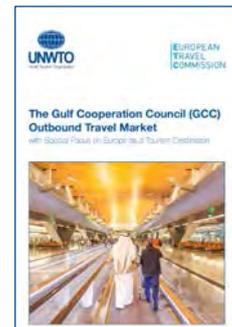
Tourism Towards 2030 Global Overview



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)



UNWTO/GTERC Asia Tourism Trends, 2019 Edition



'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions Volume 2: Case Studies (2019)



'Overtourism'? Understanding and Managing Urban Tourism Growth beyond Perceptions (2018)



New Platform Tourism Services (or the so-called Sharing Economy) - Understand, rethink and adapt (2017)