WHAT IS AT STAKE?

100 to 120 MILLION direct tourism jobs at risk (UNWTO)

Loss of US$ 910 BILLION to US$ 1.2 TRILLION in exports from tourism – international visitors’ spending (UNWTO)

Loss of 1.5% to 2.8% OF GLOBAL GDP (UNCTAD)

A lifeline for SIDS, LDCs and many AFRICAN COUNTRIES tourism represents over 30% of exports for the majority of SIDS and 80% for some (UNWTO)

Critical RESOURCES FOR CONSERVATION of natural and cultural heritage

SOURCE: WORLD TOURISM ORGANIZATION (UNWTO), AUGUST 2020
INTERNATIONAL TOURIST ARRIVALS
JANUARY-MAY 2020

With 56% less international travellers US$ 320 billion were lost in exports from tourism in five months – over 3Xs what was lost in the 2009 economic crisis.

WORLD
2019: 1.5 BILLION (+4%)
JAN-MAY 2020: -56%

ASIA AND THE PACIFIC
2019: 361 MN (+4%)
JAN-MAY 2020: -60%

AMERICAS
2019: 220 MN (+2%)
JAN-MAY 2020: -47%

EUROPE
2019: 745 MN (+4%)
JAN-MAY 2020: -58%

AFRICA
2019: 73 MN (+6%)
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MIDDLE EAST
2019: 61 MN (+2%)
JAN-MAY 2020: -52%

International Tourist Arrivals (% change over same period of the previous year)

SOURCE: WORLD TOURISM ORGANIZATION (UNWTO), AUGUST 2020
RECOVERY TO BE GRADUAL

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

Gradual opening of borders and lifting of travel restrictions
- In July
- In September
- In December

*Actual data through May includes estimates for countries which have not yet reported data. Source: World Tourism Organization (UNWTO), July 2020

INTERNATIONAL TOURISM RISKS RETURNING TO LEVELS OF 20 YEARS AGO

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

2009 Global economic crisis
- 87 US$ billion
- -5.0% (real terms)

2003 SARS
- 48 US$ billion
- -2.0% (real terms)

2020 Scenarios
- Scenario 1: - US$ 910 billion, -62%
- Scenario 2: - US$ 1080 billion, -73%
- Scenario 3: - US$ 1170 billion, -79% (real)

The above are not forecasts but scenarios based on the possible opening of national borders and lifting of travel restrictions in July, Sept. and Dec. 2020 respectively.

* Estimate  (sc) Scenario-based

Source: World Tourism Organization (UNWTO), July 2020
## SIDS & LDCs MOST AT RISK

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Between 50% and 90%</th>
<th>Between 30% and 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macao (China)</td>
<td>90%</td>
<td></td>
</tr>
<tr>
<td>Palau</td>
<td>88%</td>
<td></td>
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<tr>
<td>Bahamas</td>
<td>86%</td>
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<tr>
<td>Saint Lucia</td>
<td>86%</td>
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<tr>
<td>Maldives</td>
<td>84%</td>
<td></td>
</tr>
<tr>
<td>Turks and Caicos</td>
<td>83%</td>
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<tr>
<td>Aruba</td>
<td>80%</td>
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</tr>
<tr>
<td>St. Maarten</td>
<td>75%</td>
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<tr>
<td>Anguilla</td>
<td>70%</td>
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<tr>
<td>Cabo Verde</td>
<td>67%</td>
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<tr>
<td>Antigua &amp; Barbuda</td>
<td>65%</td>
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<tr>
<td>São Tomé &amp; Príncipe</td>
<td>65%</td>
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<tr>
<td>Barbados</td>
<td>64%</td>
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<tr>
<td>Vanuatu</td>
<td>63%</td>
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<tr>
<td>Samoa</td>
<td>62%</td>
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<tr>
<td>Jamaica</td>
<td>54%</td>
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<td>Montenegro</td>
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<tr>
<td>Gambia</td>
<td>53%</td>
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<tr>
<td>Fiji</td>
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<tr>
<td>Comoros</td>
<td>51%</td>
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<tr>
<td>Dominica</td>
<td>50%</td>
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<tr>
<td>Tonga</td>
<td>47%</td>
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<tr>
<td>Ethiopia</td>
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<tr>
<td>Belize</td>
<td>46%</td>
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<tr>
<td>Lebanon</td>
<td>45%</td>
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<td>Montserrat</td>
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<td>Georgia</td>
<td>45%</td>
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<tr>
<td>French Polynesia</td>
<td>43%</td>
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<td>Jordan</td>
<td>41%</td>
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<tr>
<td>Mauritius</td>
<td>39%</td>
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<td>Seychelles</td>
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<td>Haiti</td>
<td>38%</td>
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<tr>
<td>Dominican Republic</td>
<td>37%</td>
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<td>Bermuda</td>
<td>37%</td>
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<td>Albania</td>
<td>36%</td>
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<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>35%</td>
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<td>Croatia</td>
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<tr>
<td>Tanzania</td>
<td>32%</td>
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<tr>
<td>Curacao</td>
<td>31%</td>
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<tr>
<td>Grenada</td>
<td>30%</td>
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<tr>
<td>St. Kitts and Nevis</td>
<td>30%</td>
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</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO), July 2020
The impact of COVID-19 on tourism

Small Island Developing States (SIDS), international tourism revenues, share of total exports (%)

Saint Lucia: 90%
Palau: 88%
Bahamas: 86%
Maldives: 84%
Barbados: 72%
Antigua & Barbuda: 69%
Cabo Verde: 67%
São Tomé & Príncipe: 65%
Vanuatu: 63%
Samoa: 58%
Jamaica: 54%
Fiji: 52%
Comoros: 51%
Tonga: 47%
Belize: 46%
Haiti: 38%
Seychelles: 38%
Dominican Rep.: 36%
St. Vincent & Gren.: 35%
Mauritius: 34%
Dominica: 31%
Grenada: 30%
St. Kitts & Nevis: 29%
Timor-Leste: 24%
Marshall Islands: 22%
Cuba: 18%
Kiribati: 13%
Bahrain: 12%
Solomon Islands: 5%
Guinea-Bissau: 5%
Trinidad & Tobago: 3%
Singapore: 3%
Suriname: 2%
Papua New Guinea: 0.03%

Note: No data available for Micronesia FSM, Tuvalu or Nauru.

Source: World Tourism Organization (UNWTO), July 2020
WOMEN, MAKING MOST OF TOURISM WORKFORCE, AMONG THE MOST VULNERABLE

Employment in the most affected sectors, 2018

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Source: World Tourism Organization (UNWTO), July 2020
International Tourist Arrivals

(% change over same period of the previous year)

Source: World Tourism Organization (UNWTO), July 2020
**RECOVERY TO BE GRADUAL**

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

- Actual data*
- Scenario 1: -58%
- Scenario 2: -70%
- Scenario 3: -78%

**Annual change**

**Gradual opening of borders and lifting of travel restrictions**
- in July
- in September
- in December

* Actual data through May includes estimates for countries which have not yet reported data.  
Source: World Tourism Organization (UNWTO), July 2020
International tourism risks returning to levels of 20 years ago

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

2000: 496
2001: 485
2002: 506
2003: 554
2004: 657
2005: 707
2006: 773
2007: 892
2008: 988
2009: 901
2010: 979
2011: 1.096
2012: 1.132
2013: 1.220
2014: 1.281
2015: 1.223
2016: 1.250
2017: 1.347
2018: 1.457
2019: 1.478
2020: 310
2021: 400
2022: 570

2020 Scenarios
COVID-19

Scenario 1: -US$ 910 bil. -62%
Scenario 2: -US$ 1080 bil. -73%
Scenario 3: -US$ 1170 bil. -79% (nominal)

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