



COVID-19 - a global insight on travel and tourism impacts
UNWTO & Data Partners
21 April 2020



TOURISM AND COVID-19

- We are facing an unprecedented global health, social and economic emergency.
- Travel and tourism is among the most affected sectors with airlines on the ground, hotels closed and travel restrictions implemented in most countries around the world.
- This report gathers a collation of data partners committed to support the sector in getting a better and more comprehensive understanding of the impacts of COVID 19 on travel and tourism at global level over the last three months.



TRAVEL RESTRICTIONS

96% of worldwide destinations have introduced travel restrictions in response to the pandemic.

- According to **UNWTO's Report on COVID – 19 Related Travel Restrictions**, as of 6th April, around 96% of all worldwide destinations have introduced travel restrictions in response to the pandemic.
- About 43% (90 destinations) have completely or partially closed their borders.
- About 21% (44 destinations) have introduced travel bans to passengers coming from certain destinations that have been affected by COVID-19.
- About 27% (56 destinations) have suspended all or partially international flights into the destination.



EVOLUTION OF TRAVEL RESTRICTIONS



Source: World Tourism Organization (UNWTO)

INTERNATIONAL TOURIST ARRIVALS & RECEIPTS

- Considering the unparalleled and fast-evolving nature of the crisis, it is extremely challenging to estimate the impact of the COVID-19 on international tourism.
- On 24 March, **UNWTO** estimated **international tourist arrivals would decline by 20% to 30% in 2020, back to the levels of 5 to 7 years ago.**
- This would translate into a **loss of 250 to 400 US\$ billion in international tourism receipts – almost a third of the US\$ 1.5 trillion generated globally.**
- UNWTO will update its impact assessment of COVID-19 on international tourism on 5 May 2020.

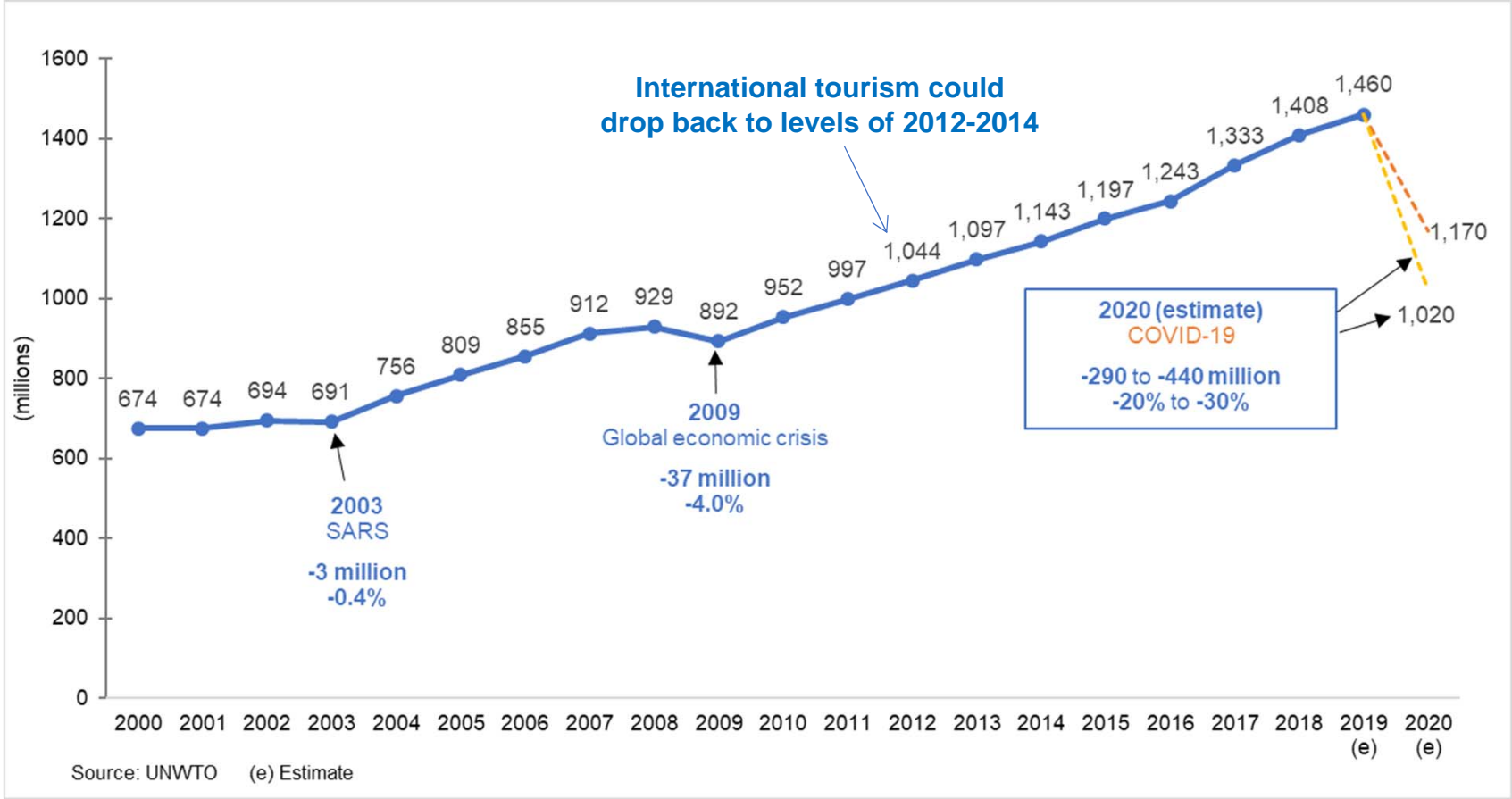


UNWTO 2020 forecast - international tourist arrivals, world (% change)

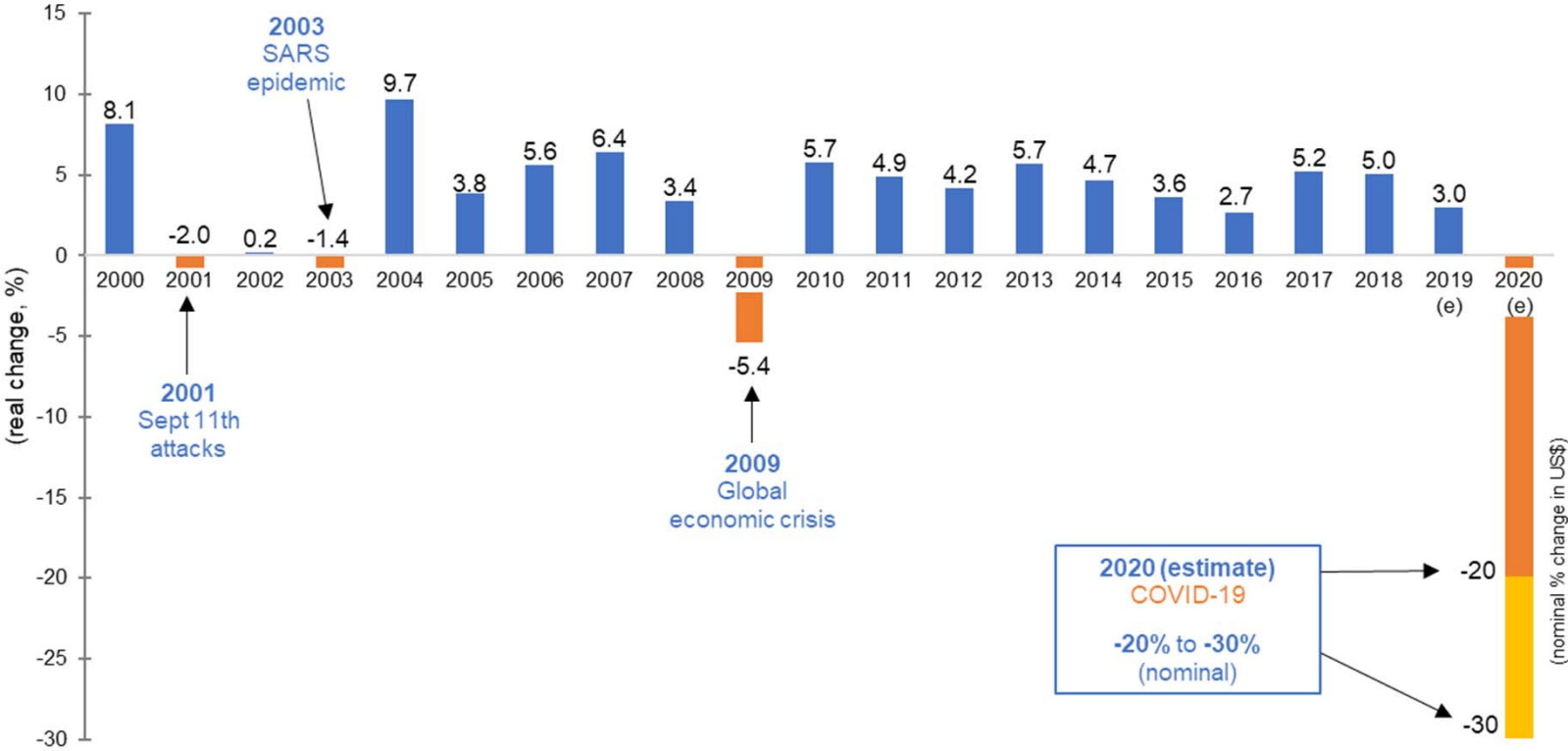


Source: UNWTO (e) Estimate

UNWTO 2020 forecast - international tourist arrivals, world (millions)

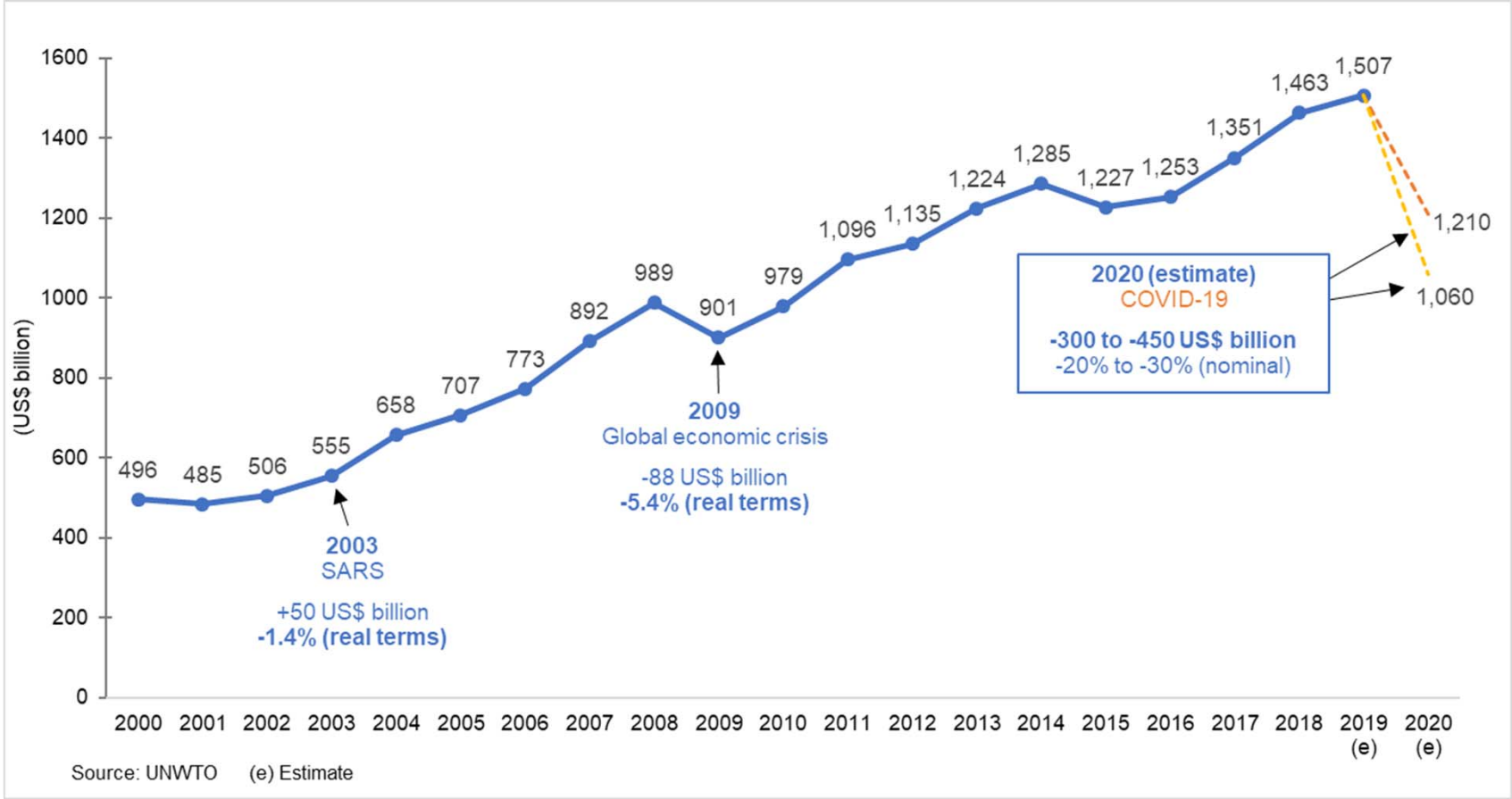


UNWTO 2020 forecast - international tourism receipts, world (real change, %)



Source: UNWTO (e) Estimate

UNWTO 2020 forecast - international tourism receipts, world (US\$ billion)



Importance of international tourism in countries with most confirmed cases of COVID-19 (over 30,000 cases), as of 14 April 2020

As of 14 April 2020, a total of 213 countries, areas or territories have reported cases of COVID-19

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%
Italy	4%	8%	3%	2%
Germany	3%	3%	3%	7%
France	6%	8%	4%	3%
United Kingdom	3%	6%	4%	5%
China	4%	1%	3%	19%
Iran	1%	5%	0%	1%
Turkey	3%	17%	2%	0%
Belgium	1%	2%	1%	1%
Total	36%		40%	50%

Source: World Tourism Organization (UNWTO)

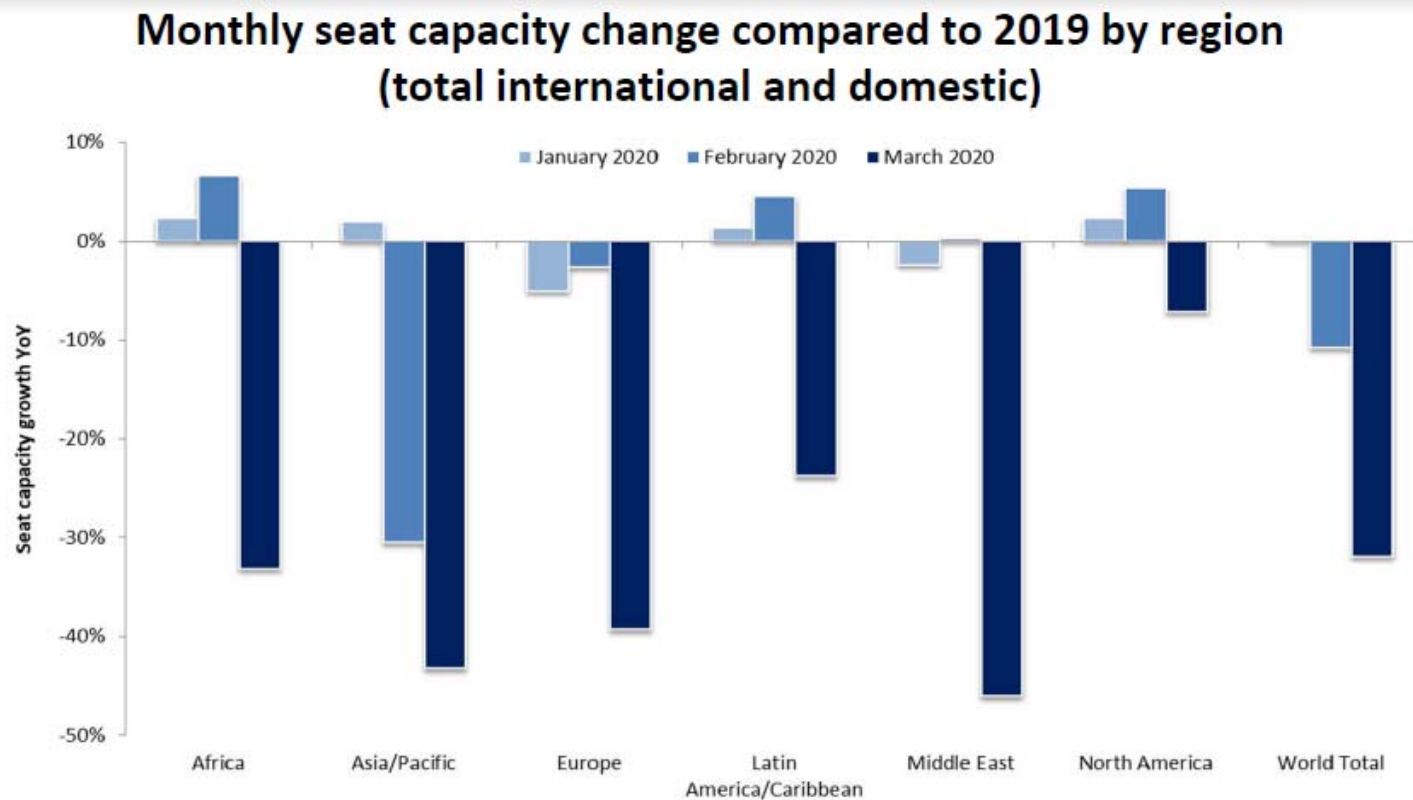
Note: Countries with more than 30K COVID-19 confirmed cases to 14 April 2020, according to the World Health Organization (WHO)

AIR TRAVEL

- **ICAO** data shows a sharp decline in air capacity in all regions in March, with drops of 40% to 50% in Asia, Europe and Middle East.
- **IATA's** forecast total air passengers (RPKs) to end the year at -48%.
- International visitor **arrivals** (based on air bookings) by **ForwardKeys** shows a 38% decline worldwide in January-March: Asia (-49%) posed the biggest drop followed by Europe (-36%), Americas, Africa and the Middle East (-29%).
- **Q1 Air bookings** show a massive 80% decline worldwide. 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.



ICAO account of monthly seat capacity show sharp declines in all regions



Source: International Civil Aviation Organisation (ICAO)

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

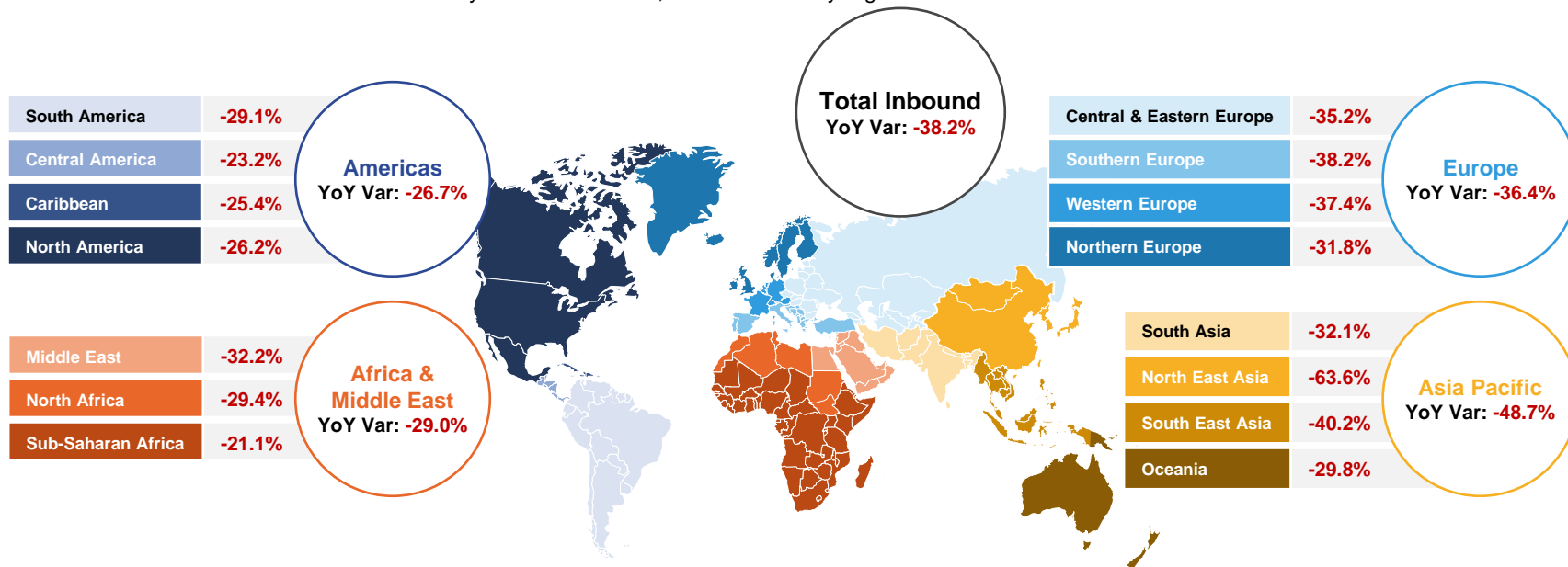
Region of airline registration	RPKs 2020 (vs 2019 year-on-year change)	Passenger revenue \$ billion 2020 vs. 2019 levels
Asia-Pacific	-50%	-113
North America	-36%	-64
Europe	-55%	-89
Middle East	-51%	-24
Africa	-51%	-6
Latin America	-49%	-18
Industry	-48%	-314

Source: IATA Economics

International arrivals dive worldwide in Q1 2020




Arrivals to world regions Jan-Mar 2020*

1 January to 31 March 2020; Market shares by region and Year-on-Year variations



Subregion	YoY variation
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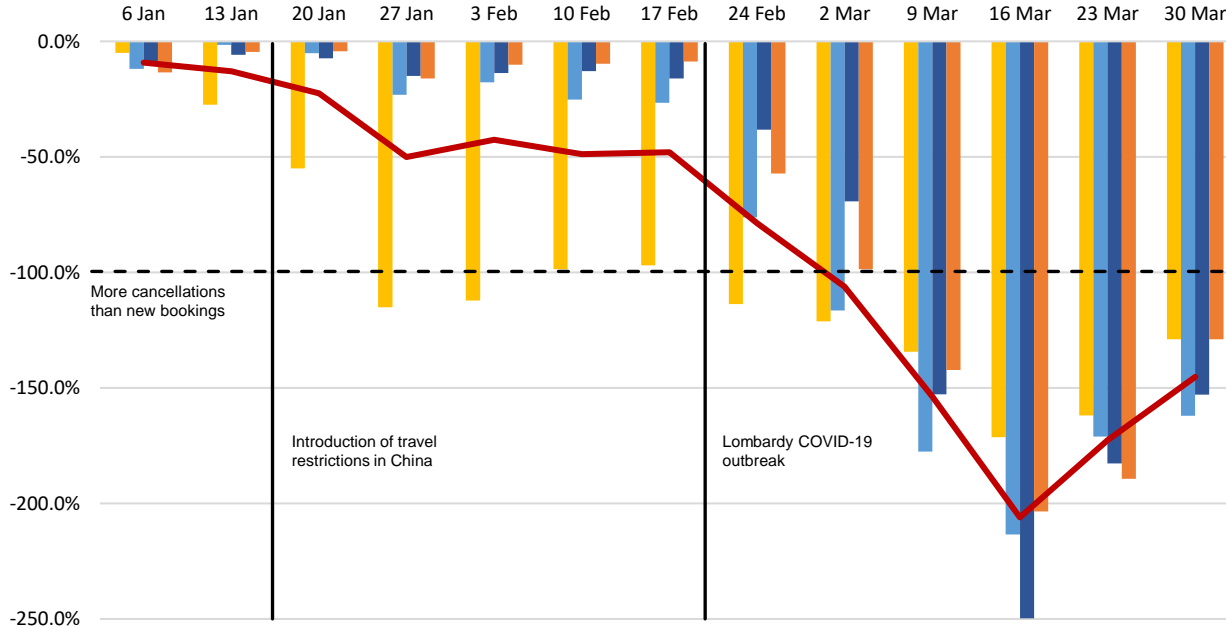
* excluding domestic

 Arrivals from 1 January to 31 March 2020 vs same period in 2019.
  Only considered pax staying 1 to 21 nights at destinations.
  Source: ForwardKeys air reservation data.

International bookings take a sharp halt

Bookings made for International travel by departure region

6 January to 5 April, Year on Year variations



Bookings made in Q1*

YoY % change

Asia Pacific	-98.2%
Europe	-75.9%
Americas	-66.9%
Africa & Middle East	-64.8%
Total Global	-80.4%

*Bookings made from 6 January to 5 April



Booking made from 6 January to 5 April 2020 vs same period in 2019 for future travel at any time.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

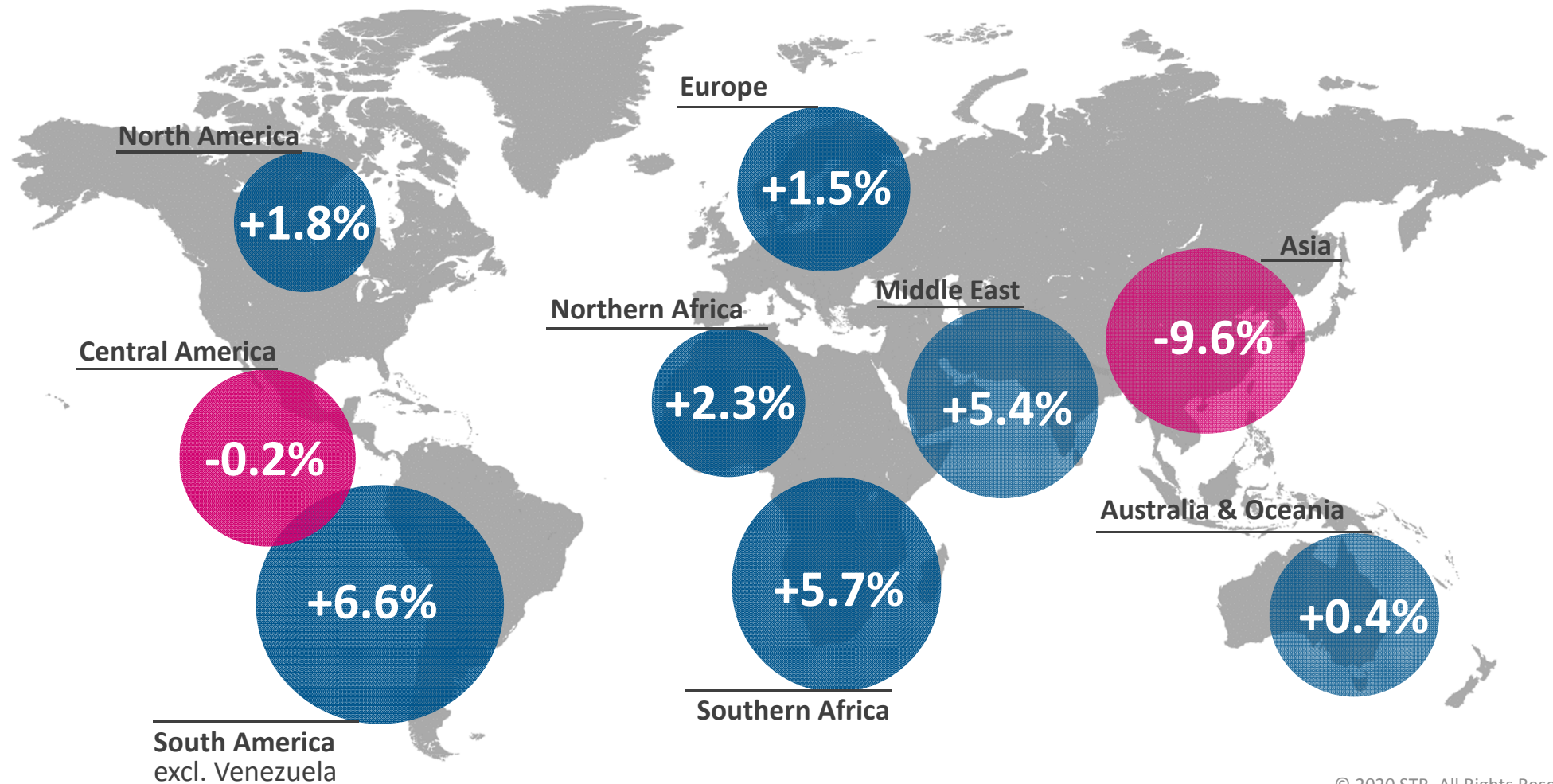
HOSPITALITY

- According to **STR**, the impact of COVID-19 on the global hotel industry in January 2020, measured in change in revenue per available room (RevPAR), was apparent in Asia (-9.6%), but not in other world regions.
- By March, the hotel industry in all world regions recorded large double-digit declines in global RevPAR, with Asia (-67.8%) and Europe (-61.7%) posting the biggest decreases.
- According to **ADARA**, the hotel industry peaked at -75% in terms of bookings in week 12 compared to the same period of last year, amid the COVID-19 impact.
- Hotel future check-in dates in 2020 are much weaker compared to the previous year and have declined significantly from end of March, remaining almost flat through the remainder of year.



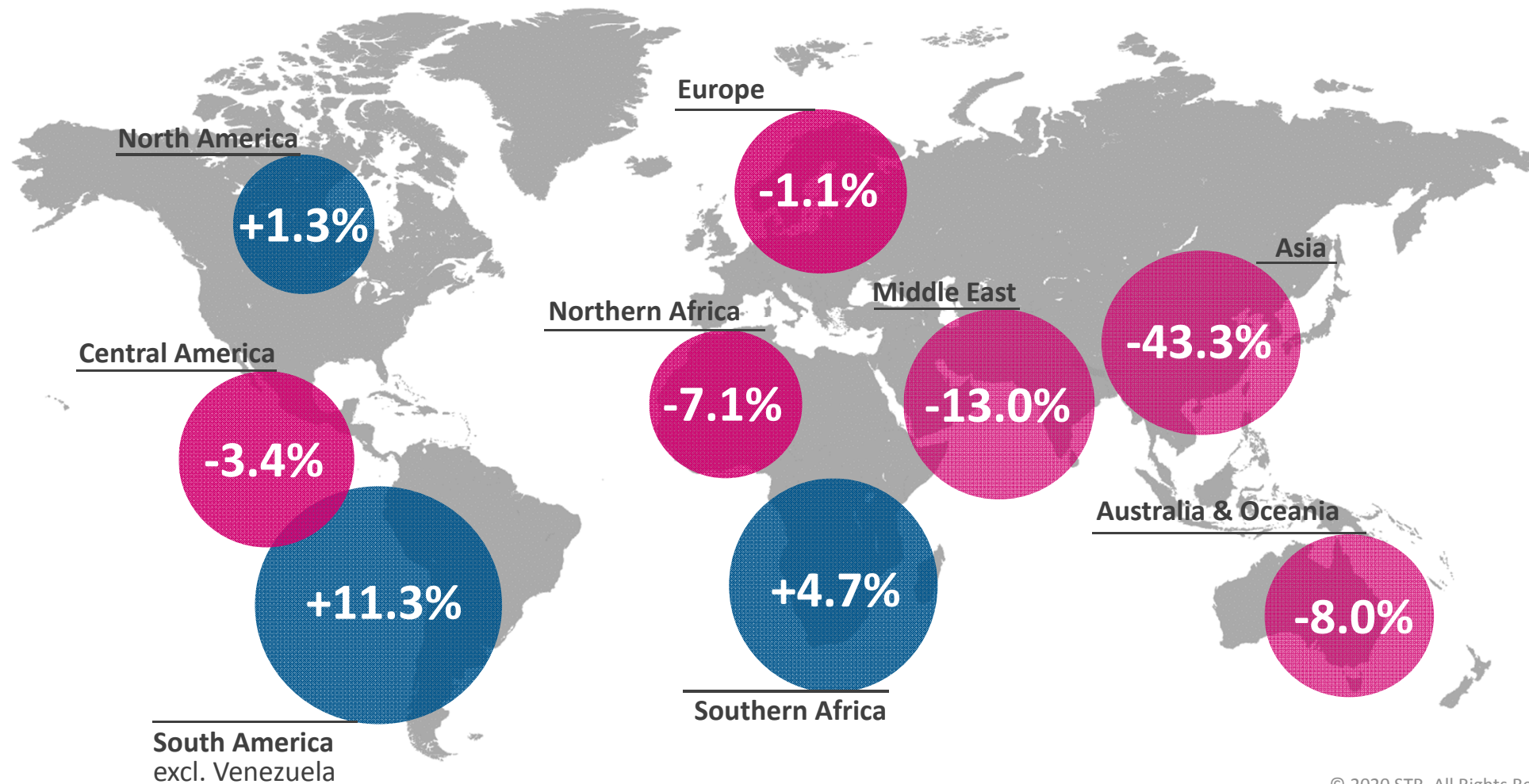
In January, impact of COVID-19 apparent in Asia, but not elsewhere

Global RevPAR % Change, USD, Europe in EUR, Constant Currency, January 2020



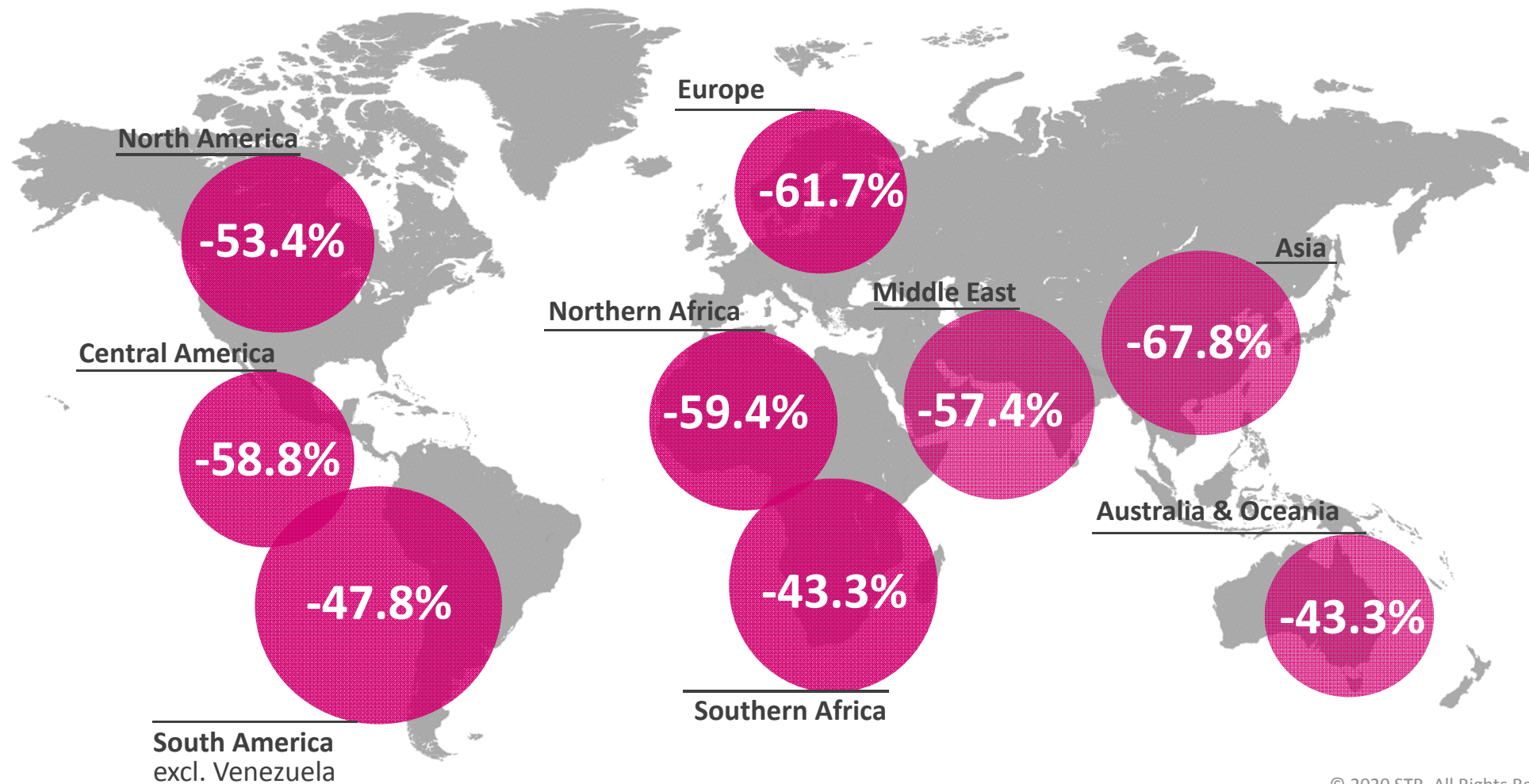
By February, COVID-19 spreading to the Middle East and Europe

Global RevPAR % Change, USD, Europe in EUR, Constant Currency, February 2020



COVID-19 tightens its grip on every continent in March

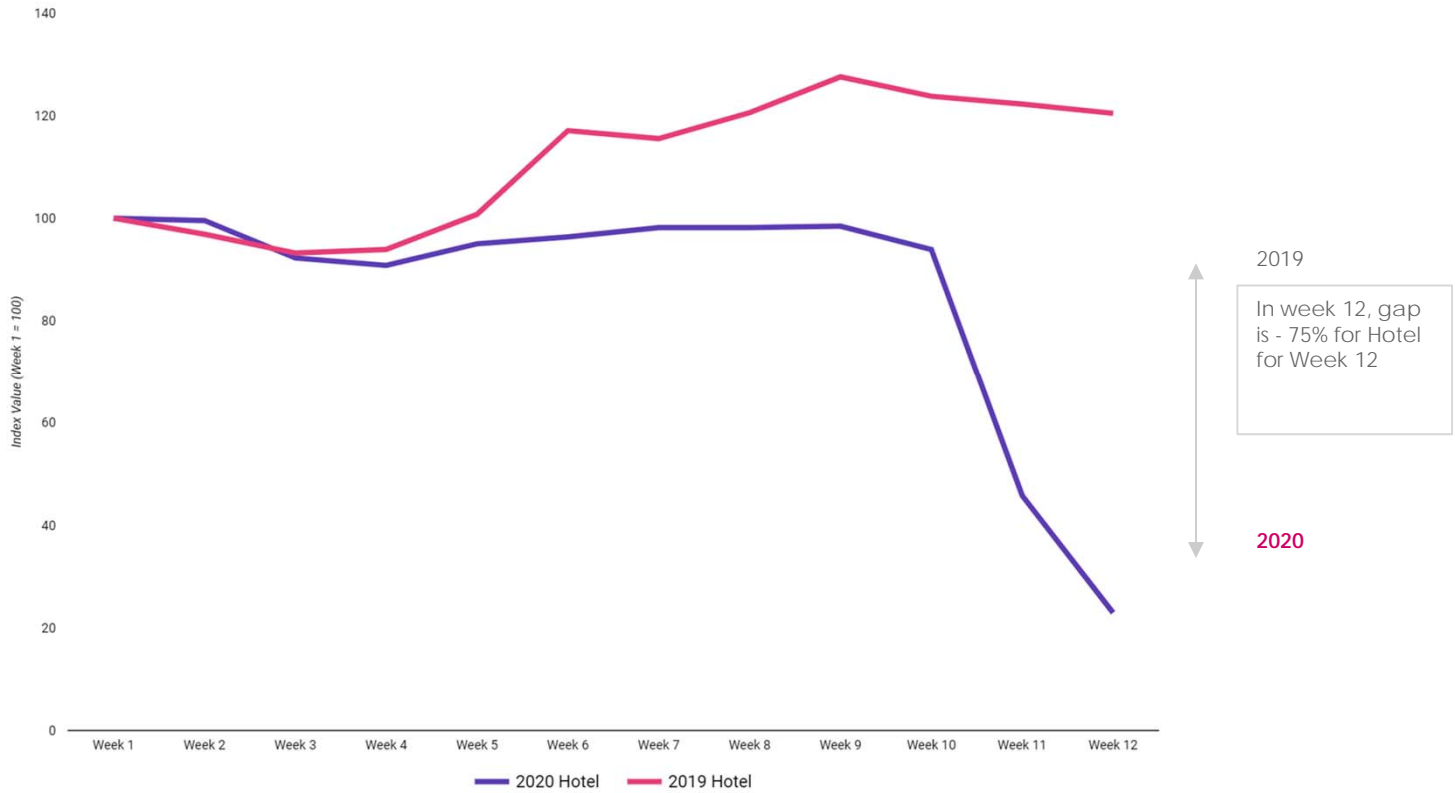
Global RevPAR % Change, USD, Europe in EUR, Constant Currency, March 2020



Global YoY Trend - Bookings

BOOKINGS

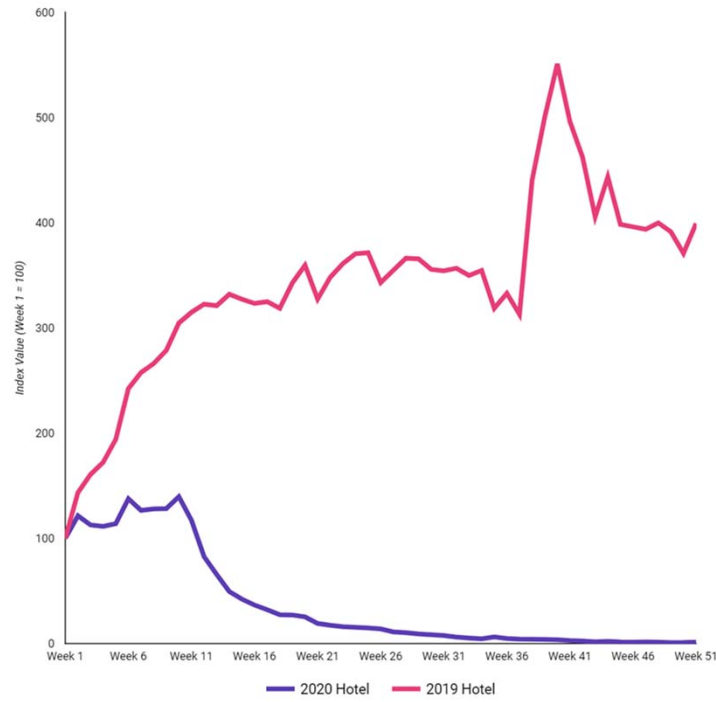
All combined, the hotel industry is losing about 75% of bookings in relation to last year



Global Trends

Hotels future check-in dates

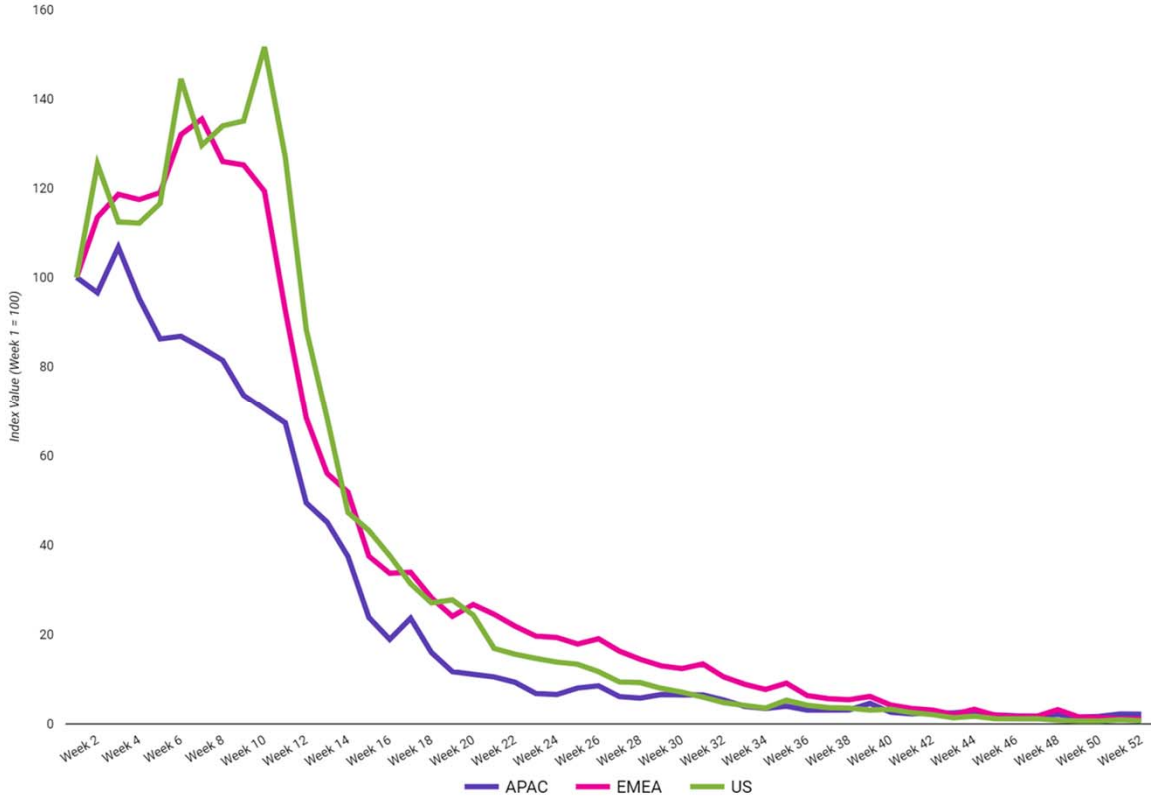
BOOKINGS



1 = base value, above growth, below negative in relation to base value (e.g: 1.1 = 10% growth)
Note: Weeks matched YoY for the analysis

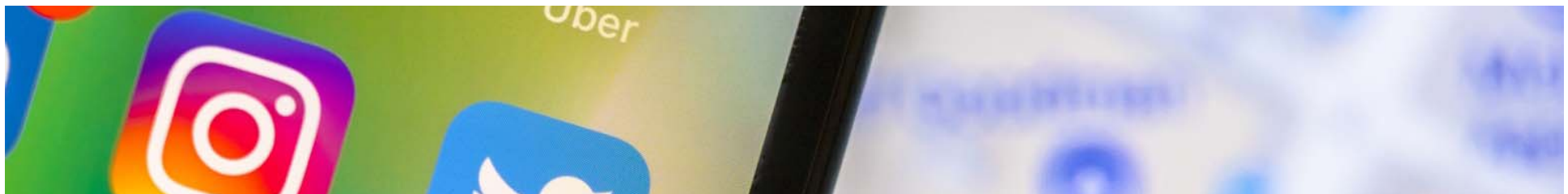
ADARA private & confidential

Global Hotel Booking Trends - By Region

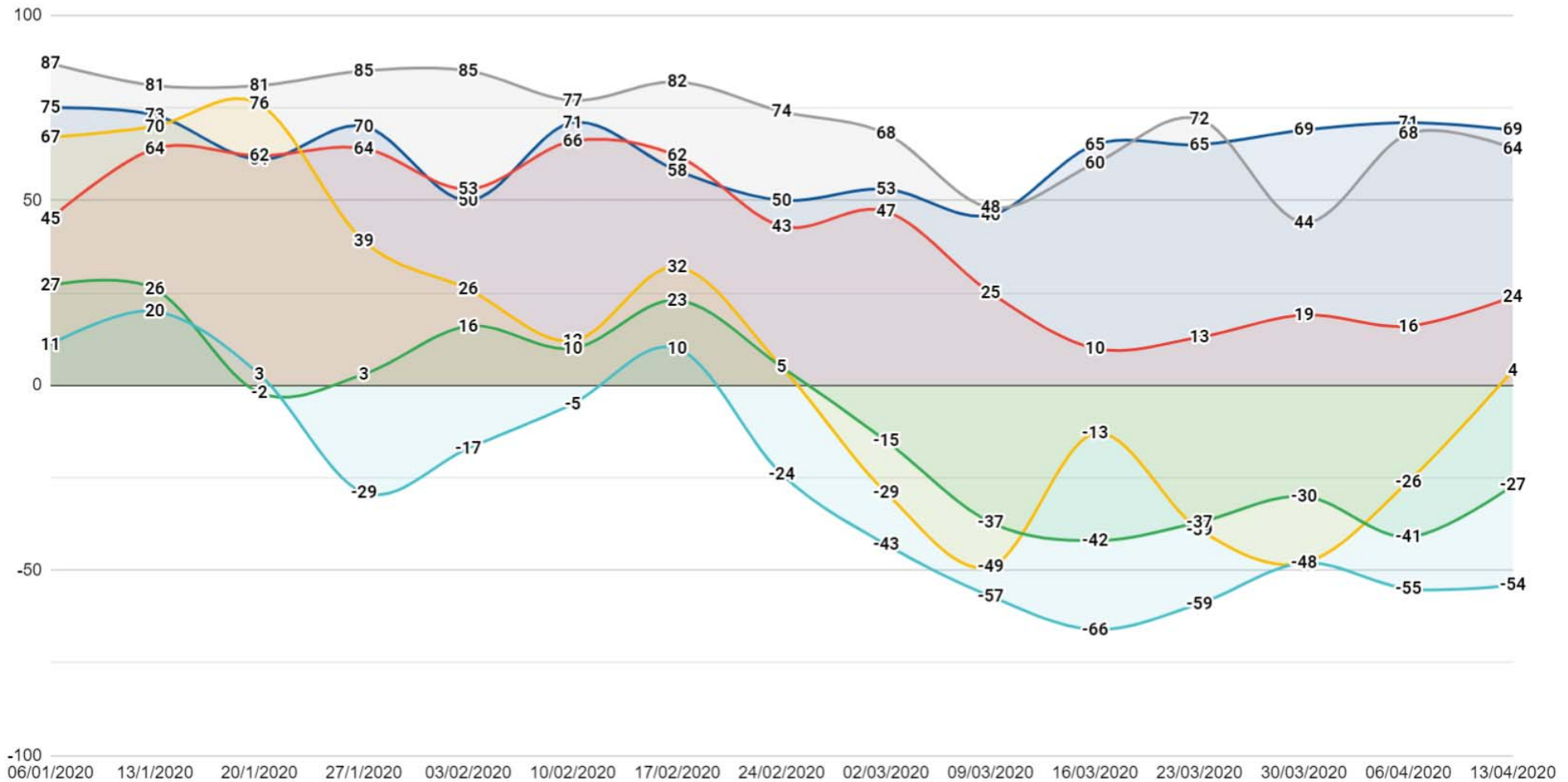


TRAVEL SENTIMENT

- The net sentiment index from **Travelsat** which measures the polarity of web social conversations (positive and negative) in relation to the sector shows the sharp downward trend in travel sentiment overall, yet with diverse magnitude and rebound dynamics depending on verticals and destinations.
- The index for China started to fall by the week of 6 January and continued downwards up to the week of 6 April. The index also reflects the impact of the outbreak and of travel restrictions in the United States, Italy, Spain and France. The index is comparatively less negative in those destinations. Italy and France seem to show an improvement of travel sentiment with more positive posts than negative during the week of 6 April.

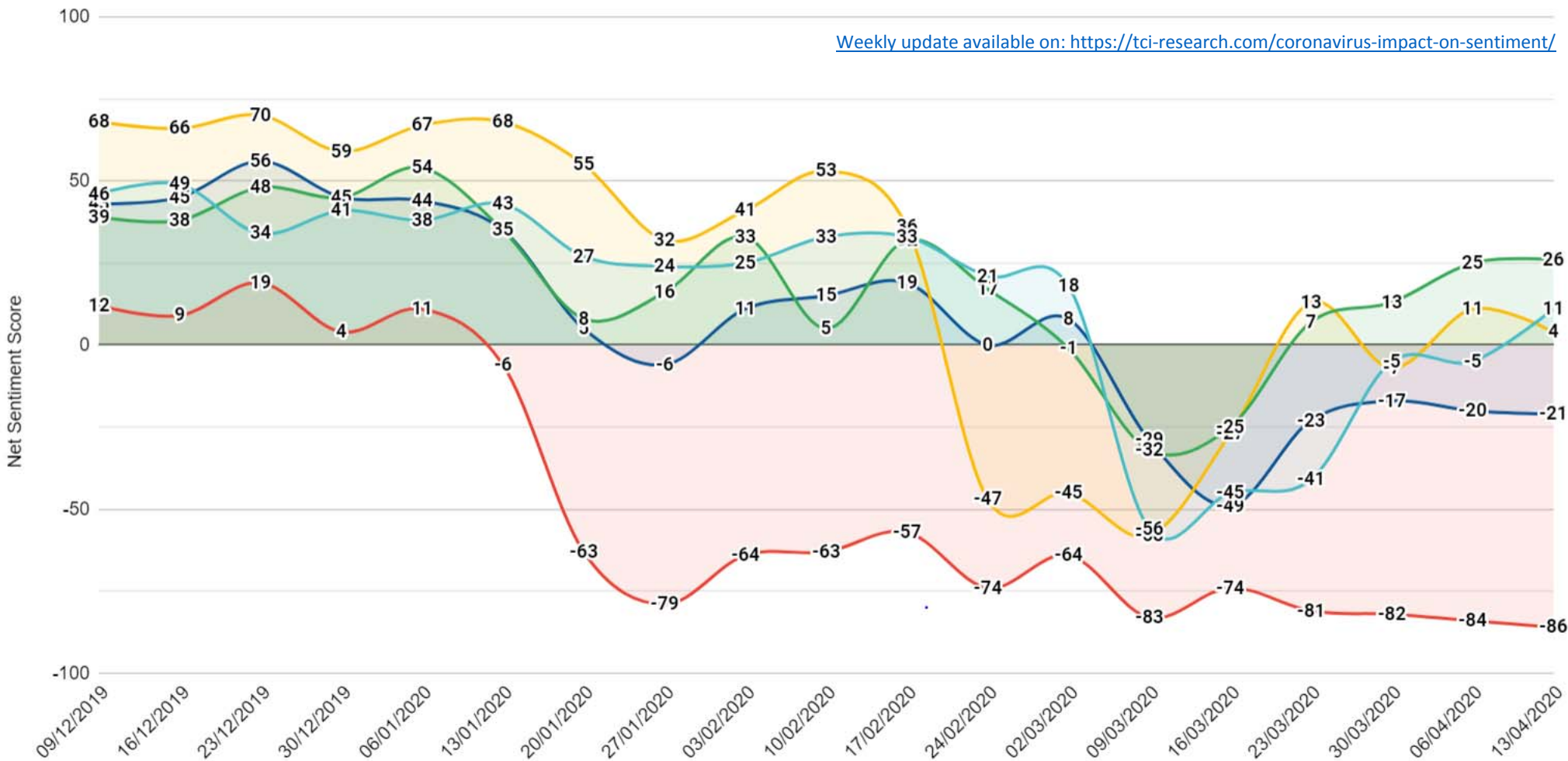


■ THEME/AMUS. PARKS
 ■ HOSPITALITY
 ■ CRUISE
 ■ AIRPORTS
 ■ AIRLINES
 ■ CULTURAL ATTR.



(*) The Net Sentiment Index measures the polarity of web social conversations in relation to the sector (% positive – % negative posts)

■ USA
 ■ CHINA
 ■ ITALY
 ■ FRANCE
 ■ SPAIN



(*) The Net Sentiment Index measures the polarity of web social conversations in relation to the destination (% positive – % negative posts)

DATA
PARTNERS



Data Partners | ADARA



At ADARA, we partner with 250+ top travel companies worldwide (hotel chains, airlines, OTAs, meta searches, GDS, etc.), which translates into seeing 850M+ unique profiles in our platform every month. We help more than 200+ destinations globally to:

- **LEARN** about traveller's behaviour and trends
- **ACT** with personalized digital advertising
- **MEASURE** the impact in terms of searches and bookings of both paid and own digital channels

For more information please contact:

Sara Pastor, MD Destinations, sara.pastor@adara.com

ADARA Covid19 Resource Center: <https://adara.com/traveler-trends-tracker/>

Data Partners | STR



STR provides premium data benchmarking, analytics and marketplace insights for global hospitality sectors. Founded in 1985, STR maintains a presence in 15 countries with a corporate North American headquarters in Hendersonville, Tennessee, an international headquarters in London, and an Asia Pacific headquarters in Singapore.

With data from more than 68,000 hotels across 180 countries, STR has the most comprehensive, up-to-date hotel data in the world. We hold ourselves to the highest standards for all of our data collection and reporting, including:

Confidentiality - Complete protection of all proprietary data.

Accuracy - Highest data integrity obtained directly from the source.

Timeliness - Relevant and immediately actionable data, processed on an annual, quarterly, monthly and even daily basis.

Impartiality - Our goal is to help industries reach new heights. All of our clients across all segments receive the same high level of service.

For more information contact Thomas Emanuel – temanuel@str.com

STR COVID-19 Resource Center: <https://str.com/data-insights-blog/coronavirus-hotel-industry-data-news>

Data Partners | ForwardKeys data solutions



ForwardKeys helps its clients measure and improve the effectiveness of their marketing & operations; anticipate the impact of events; and capitalise on future trends. Its data scientists do so by analysing an unparalleled amount of air travel information to produce valuable insights into the profile, behaviour and impact of past, present and future travellers.

Sources include airline capacity plus over 17m booking transactions and 7m flight searches per day. Customers are destination marketing organizations, brands, retailers, duty-free specialists, financial institutions, media agencies and travel marketers worldwide.



Check out the latest fresh analysis at www.forwardkeys.com
Or contact us at info@forwardkeys.com

Data Partners | TCI Research



Data are sourced from the TRAVELSAT© Sentiment Index, an advanced social listening-based technique applied to travel and destinations. The “sentiment” reflects the state and dynamic of destinations’ and travel brands’ e-reputation as expressed in global web social conversations “at large” (i.e. shared by media, consumers, companies, citizens, brands, officials...). While the sentiment should not be taken alone as predictive of travelers’ planning, a positive e-reputation is essential to generate favorability towards destinations and travel brands, particularly in post-crisis management context

TCI Research is a leading Travel Data Intelligence Agency awarded by UNWTO and trusted by over 100 destinations, travel brands and organizations globally. TCI fuels destinations’ success through data, setting global proprietary standard analytic solutions for all-size DMOs and travel verticals, with a focus on visitor experience, destination reputation and resident sentiment, combining hybrid analytics sourced from surveys and big data.

Contact: olivier.henry-biabaud@tci-research.com



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