



UNWTO
World Tourism Organization

World Tourism Barometer

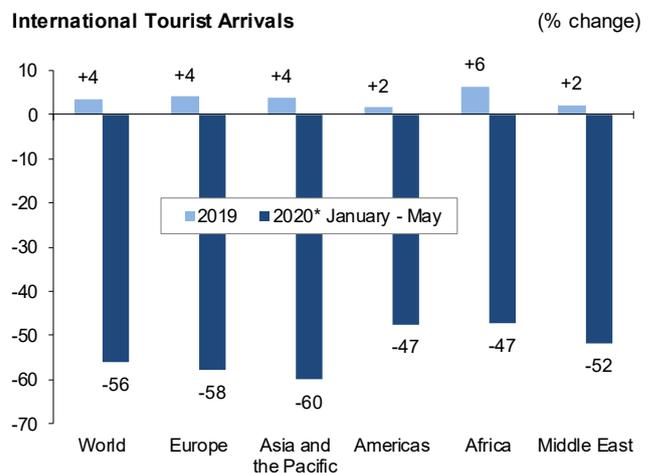
Volume 18 • Issue 4 • July 2020 Update

Tourism slowly restarting, after a 98% drop in international arrivals in May

- International tourist arrivals (overnight visitors) saw a decrease of 56% in the first five months of 2020 over the same period of last year, according to data reported so far by destinations worldwide.
- International arrivals declined 98% in the month of May, reflecting travel restrictions in nearly all destinations worldwide, amid measures to contain the spread of the COVID-19 pandemic.
- This represents 300 million fewer international tourist arrivals in January-May 2020 compared to the same period in 2019, which translates into US\$ 320 billion lost international tourism receipts (export revenues), more than three times what was lost in the whole of 2019 under the impact of the global economic crisis
- By regions, Asia and the Pacific, the first region to suffer the impact of the pandemic, saw a 60% decrease in arrivals in January-May 2020. Europe recorded the second strongest decline with 58% fewer arrivals, followed by the Middle East (-51%), the Americas and Africa (both -47%).
- Tourism is showing signs of a gradual and cautious change in trend during the Northern Hemisphere summer peak months, as reflected in the gradual lifting of travel restrictions in several countries around the world, particularly in Europe, the resumption of a number of international flights and the restart of some domestic and intraregional markets.
- However, the UNWTO Confidence Index has dropped to record lows, both for the evaluation of January-April 2020 and prospects for May-August. Most UNWTO Panel Experts expect international tourism to recover by the second half of 2021,

followed by those who expect a rebound in the first part of next year.

- Experts mentioned downside factors such as travel restrictions and border shutdowns still in place in most destinations, major outbound markets such as the United States and China being at standstill, safety concerns associated with travel, the resurgence of the virus and risks of new lockdowns or curfews. They also referred to the lack of reliable information and a deteriorating economic environment as factors weighing on consumer confidence.
- Domestic tourism is expected to resume faster. Half of respondents see a recovery of domestic tourism by the second half of 2020, in line with the restart of tourism in many destinations in June and July, yet the other half expect a recovery throughout 2021.
- Experts also mentioned changes being witnessed in consumer behaviour such as trips closer to home or proximity travel, bookings closer to the departure dates of the trip, or a preference to travel by car.



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



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.

Copyright © 2020 World Tourism Organization
C/ Poeta Joan Maragall 42, 28020 Madrid, Spain

UNWTO World Tourism Barometer

ISSN: 1728-9246

Published and printed by the World Tourism Organization, Madrid, Spain - First printing: 2020 (version 28/07/20)
All rights reserved

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the Secretariat of the World Tourism Organization (UNWTO) concerning the legal status of any country, territory, city or area, or of its authorities or concerning the delimitation of its frontiers or boundaries.

All UNWTO publications are protected by copyright. Therefore and unless otherwise specified, no part of a UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications. For permission to photocopy UNWTO material, please refer to the UNWTO website at www.unwto.org/publications

The contents of this issue may be quoted, provided the source is given accurately and clearly. Distribution or reproduction in full is permitted for own or internal use only. Please do not post electronic copies on publicly accessible websites. UNWTO encourages you to include a link to www.unwto.org/market-intelligence

World Tourism Organization

C/ Poeta Joan Maragall 42, 28020 Madrid, Spain
Tel (34) 91 567 81 00 / Fax (34) 91 131 17 02
info@unwto.org - www.unwto.org

Follow us on:

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 in mid-July 2020.

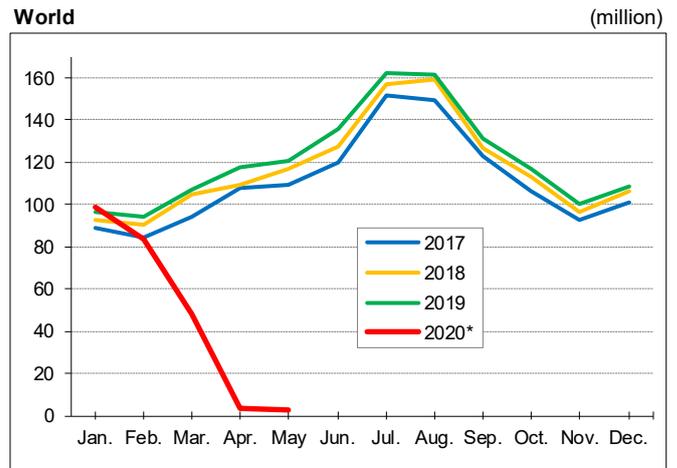
The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published in September 2020.

The document with the Statistical Annex is available free of charge for UNWTO Members and subscribers from 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.

International tourism down 56% in January-May 2020 amid COVID-19

- The COVID-19 pandemic has caused an unprecedented disruption to travel and tourism, reflected in the collapse of global travel since mid-March.
- International tourist arrivals (overnight visitors) saw a decrease of 56% in the first five months of 2020 over the same period of last year, according to data reported so far by destinations.
- In the month of May international arrivals were down an unprecedented 98%, reflecting widespread travel restrictions in nearly all destinations worldwide, amid measures to contain the spread of the COVID-19 pandemic. This follows an already massive 97% drop in international tourist arrivals in the month of April.
- All world regions and subregions saw a decrease in international arrivals in May for the second consecutive month, in the range of 90% to 100%. The decline amounts to 120 million fewer international arrivals in May, after a drop of 113 million in April.
- By regions, Asia and the Pacific, the first region to suffer the impact of the pandemic, saw a 60% decrease in arrivals in January-May 2020. Europe recorded the second strongest decline with 58% fewer arrivals, followed by the Middle East (-51%), the Americas and Africa (both -47%).

International Tourist Arrivals by month

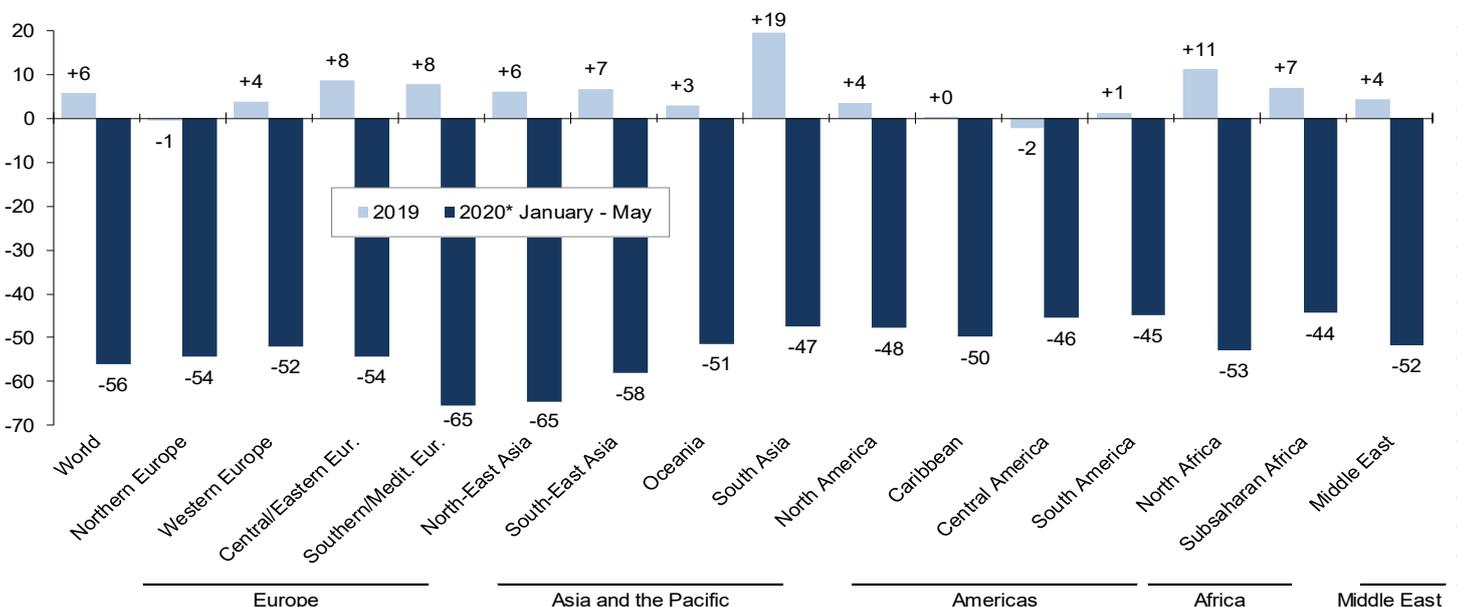


Source: World Tourism Organization (UNWTO) ©

- At the subregional level, Southern-Mediterranean Europe (-66%) and North-East Asia (-65%) suffered the largest drop. Arrivals in South-East Asia, Oceania, the Caribbean, Northern Europe, Western Europe, Central and Eastern Europe were down 50% or more.

For regular updated data on international tourism please check <https://www.unwto.org/international-tourism-and-covid-19>

International Tourist Arrivals



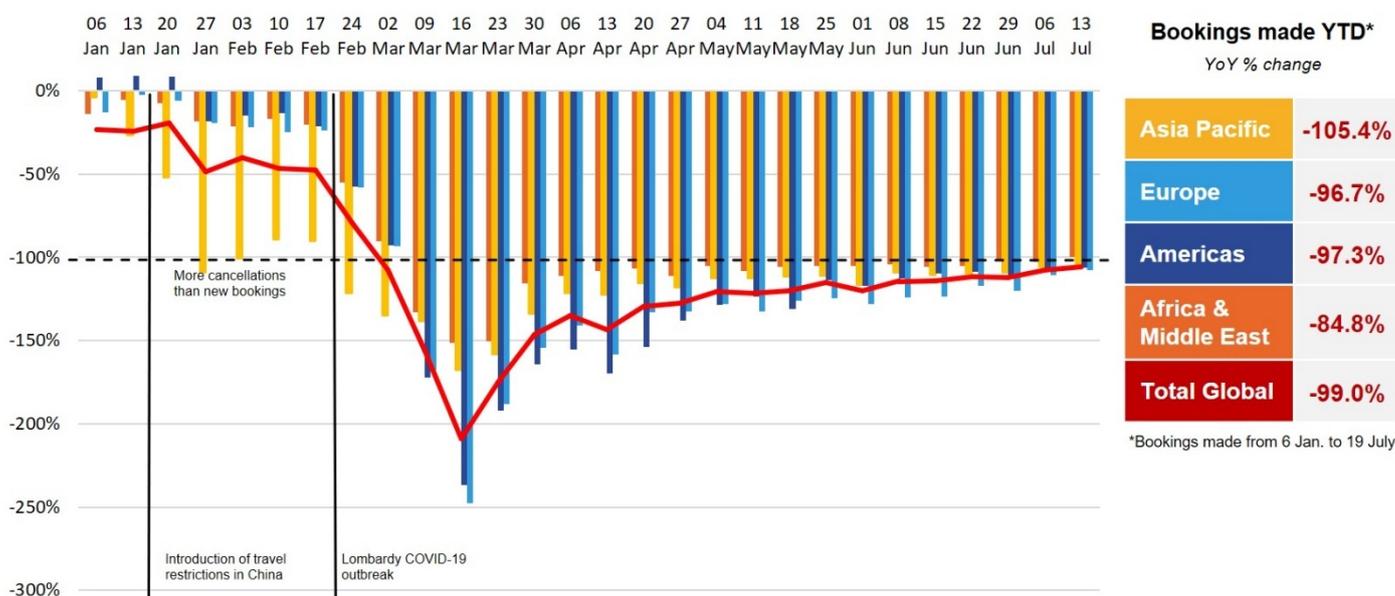
Source: World Tourism Organization (UNWTO) ©

Industry indicators continued at record lows in May

- Data from **IATA** shows that international passenger demand measured in revenue passenger kilometers (RPKs) fell close to 100% year-on-year in May for the second consecutive month. International air demand declined 55% in January-May 2020, with a 98% drop in May, in line with the decline in international tourist arrivals. All regions posted declines in international RPKs close to 100% in May. Global passenger demand fell faster than capacity, despite flight cancellations and aircraft grounding. Capacity (in available seat-kilometres) worldwide fell an estimated 86% year-on-year in May 2020, according to **ICAO**.
- Domestic air travel demand showed early signs of recovery, as the domestic market performed comparatively better than international routes in May. According to IATA, domestic RPKs contracted by 79% year-on-year in May, compared to an 86% in April, with an improvement of the Chinese and USA markets.
- Data from **ForwardKeys** shows a massive 99% year-on-year drop in international air bookings made between 6 January and 19 July 2020 for travel in any period of the year. The data indicates almost as many cancellations as new bookings since the beginning of March. By departure region, Asia Pacific (-105%) suffered the biggest drop. Bookings from the Americas and Europe (both -97%), as well as Africa and the Middle East (-85%) all recorded severe decreases in the period covered.
- According to **STR**, the hotel industry continued to suffer large double-digit declines in three metrics namely revenue per available room (RevPAR), average daily rate (ADR) and occupancy, with performance low levels across all world regions during May 2020. Occupancy in May reached record lows of 13% in Europe, 14% in Africa, 15% in Central and South America, 33% in the United States, and 36% in both Asia and the Pacific and in the Middle East.



Bookings made for International travel by departure region
6 January to 19 July 2020, Year on Year change



Booking made from 6 January to 19 July 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.

© ForwardKeys, 2020. All Rights Reserved.

Note: Percentage declines larger than 100% reflect more cancellations than new bookings.

Gradual and cautious restart of tourism

- Tourism is showing signs of a gradual but still cautious change in trend in the Northern Hemisphere peak summer season, particularly in Europe.
- As of 15 June 2020, 22% of all destinations worldwide (48 destinations including seven Small Island Developing States) had started to ease restrictions, with Europe leading the way. However, most destinations worldwide continued to have their borders completely closed to international tourism. The Canada-US-Mexico border, one of the busiest borders in the world, has remained closed to non-essential travel since March. The closure has been extended at least until 21 August.
- Domestic and intraregional travel is resuming in Europe, further to the gradual reopening of internal borders across the European Union, following the recommendation made on 15 June 2020 by the European Commission (https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1035). On 30 June, the European Council adopted a recommendation on the gradual lifting of the temporary restrictions on non-essential travel into the EU to a group of 15 third countries (<https://www.consilium.europa.eu/en/press/press-releases/2020/06/30/council-agrees-to-start-lifting-travel-restrictions-for-residents-of-some-third-countries/>)
- According to air booking data from ForwardKeys, the Caribbean and the European Union are showing encouraging signs of recovery. The Caribbean recorded four consecutive weeks of positive net bookings (between 15th June and 12th July) and in the week of 13th July, the European Union saw more bookings than cancellations from Europe as well as from Africa and the Middle East.
- However, the outlook is still highly uncertain as new cases of COVID-19 continue to be reported worldwide. Some countries have returned to partial lockdowns and curfews, and borders remain closed in the majority of countries, all in a context of deep economic recession in 2020.
- As reported in the May 2020 issue of the UNWTO World Tourism Barometer, forward-looking scenarios point to possible declines of 58%, 70% or to 78% in international arrivals in 2020. These are mostly dependent on the containment of the pandemic, the duration of travel restrictions and the gradual reopening of borders, though uncertainty remains high.
- UNWTO calls for the need to reopen tourism in a responsible, safe, coordinated and seamless manner, as travel restrictions are lifted. Restoring confidence and trust in the sector remains crucial.



International Tourist Arrivals by (Sub)region

	(million)				Share (%)	Change		Monthly/quarterly data series						
						%		% change over same period of the previous year						
	2010	2017	2018	2019*	2019*	18/17	19*/18	2020*	YTD	Q1	Jan.	Feb.	Mar.	Apr.
World	956	1,333	1,409	1,460	100	5.7	3.6	-55.9	-22.8	2.0	-11.6	-55.0	-96.9	-97.6
Advanced economies ¹	515	732	762	777	53.2	4.1	2.0	-60.6	-27.5	-0.1	-13.9	-62.1	-97.5	-98.3
Emerging economies ¹	441	601	647	683	46.8	7.7	5.5	-50.9	-18.4	3.8	-9.5	-47.7	-96.3	-96.8
<i>By UNWTO regions:</i>														
Europe	490.6	677.0	716.4	745.2	51.1	5.8	4.0	-57.9	-18.1	4.8	2.3	-53.5	-97.1	-97.8
Northern Europe	57.0	79.1	78.7	80.2	5.5	-0.6	2.0	-54.3	-16.9	4.0	3.9	-51.5	-96.7	-97.3
Western Europe	154.4	192.7	200.2	204.8	14.0	3.9	2.3	-52.0	-10.7	8.2	6.0	-40.2	-97.8	-96.9
Central/Eastern Eur.	102.2	137.3	148.9	156.1	10.7	8.5	4.8	-54.3	-16.1	1.0	-2.0	-45.6	-96.0	-96.4
Southern/Medit. Eur.	177.1	267.9	288.6	304.1	20.8	7.7	5.4	-65.5	-26.1	4.9	1.4	-69.5	-97.4	-99.2
- of which EU-28	385.9	540.9	562.9	579.8	39.7	4.1	3.0	-57.9	-18.2	4.4	3.1	-53.8	-97.0	-97.9
Asia and the Pacific	208.2	324.1	347.7	360.7	24.7	7.3	3.7	-60.0	-34.9	-2.1	-37.1	-64.4	-98.6	-99.2
North-East Asia	111.5	159.5	169.2	170.6	11.7	6.1	0.8	-64.7	-39.7	-12.3	-48.1	-57.8	-99.3	-99.4
South-East Asia	70.5	120.6	128.6	137.4	9.4	6.7	6.8	-58.0	-33.6	6.9	-35.9	-72.0	-97.9	-99.2
Oceania	11.5	16.6	17.0	17.5	1.2	2.8	2.4	-51.3	-25.3	5.5	-20.2	-60.0	-97.9	-99.3
South Asia	14.7	27.5	32.8	35.2	2.4	19.4	7.4	-47.4	-22.1	6.9	-4.1	-70.2	-97.3	-97.7
Americas	150.3	210.8	215.9	219.4	15.0	2.4	1.6	-47.5	-16.2	0.5	2.9	-49.0	-93.2	-93.9
North America	99.5	137.4	142.2	146.4	10.0	3.5	3.0	-47.8	-14.3	3.7	4.1	-45.1	-91.2	-91.4
Caribbean	19.5	25.8	25.8	26.7	1.8	0.1	3.6	-49.8	-20.9	-2.0	0.3	-55.4	-96.8	-99.5
Central America	7.8	11.1	10.8	10.9	0.7	-2.2	0.8	-45.6	-17.1	-2.7	5.2	-52.6	-92.7	-99.0
South America	23.5	36.6	37.1	35.3	2.4	1.3	-4.8	-44.9	-18.3	-5.3	1.2	-56.4	-98.6	-99.6
Africa	50.4	63.3	68.7	73.1	5.0	8.4	6.4	-47.3	-13.6	2.6	1.8	-44.2	-95.8	-98.5
North Africa	19.7	21.7	24.1	26.1	1.8	11.1	8.5	-52.9	-17.5	5.3	4.8	-56.6	-97.2	-99.4
Subsaharan Africa	30.7	41.7	44.6	46.9	3.2	7.0	5.2	-44.4	-11.8	1.6	0.4	-37.8	-95.0	-98.0
Middle East	56.1	57.6	60.1	61.4	4.2	4.3	2.1	-51.6	-20.2	8.8	-23.4	-44.9	-98.2	-98.6

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, July 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.

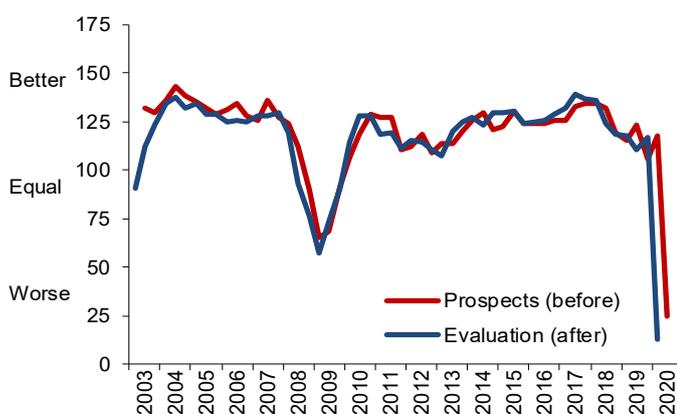
See box in page 'Annex-1' for explanation of abbreviations and symbols used

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

Confidence plunges to historic lows

- Confidence in global tourism reached record lows in the first months 2020 amid the COVID-19 pandemic, according to the latest **UNWTO Confidence Index** survey. On a scale of 0 to 200, the UNWTO Panel of Tourism Experts rated the period January-April with a score of 13, the lowest in the historical series. Despite a strong start of the year in many destinations, an overwhelming majority (95%) of respondents evaluated the period **January-April 2020** as much worse (83%) or worse (12%) than expected.
- This reflects the severe impact of the COVID-19 pandemic on tourism in all regions of the world, mainly in March and April. Experts from the Middle East were somewhat less pessimistic, as almost half of respondents perceived performance to be equal or better.
- Despite a gradual and cautious restart of tourism in some parts of the world, prospects for the period **May-August 2020**, which covers the Northern Hemisphere peak summer season, remain worse (26%) or much worse (65%), according to a majority of UNWTO Panel of Experts. Experts rated prospects for the period May-August with a score of 25, also the lowest in the series.

UNWTO Confidence Index: World



Source: World Tourism Organization (UNWTO) ©

- Respondents from all regions consider prospects of tourism performance to be worse or much worse than expected, being Africa and the Americas the

most pessimistic. Asia and the Pacific and Europe are slightly more optimistic, while in the Middle East some experts see equal performance.

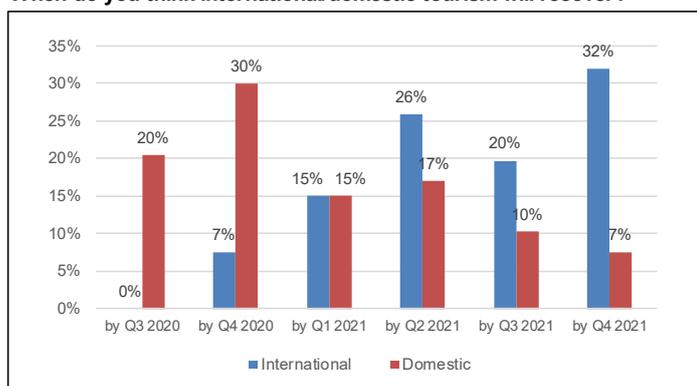
- Confidence levels are the lowest ever recorded since the UNWTO Confidence Index historical series starting in 2003, exceeding the low rates registered in 2008-2009. In January, experts were expecting a positive year for tourism, rating prospects for 2020 with an overall score of 121.
- Experts mentioned downside factors as travel restrictions and border shutdowns still in place in most destinations, major outbound markets such as the United States and China being at standstill, safety concerns associated with travel, the resurgence of the virus and risks of new lockdowns or curfews, the lack of reliable information and a deteriorating economic environment weighing on consumer confidence.

Domestic tourism is expected to recover faster but would only partially compensate for the drop in international demand

- The UNWTO Panel of Experts expects **international tourism** to recover by 2021, which confirms the sentiment already expressed in the previous survey in April. Only a small number of respondents see some hope of recovery by the last quarter of 2020. Responses are split over the first half and the second half of 2021, but slightly more experts expect the recovery to occur by H2 2021.
- This reflects the uncertainty about the resurgence and spread of the virus, the different epidemiological stages across regions, the travel restrictions still in place in most destinations, and the lag between the restart of tourism and the gradual return to expected levels. According to views expressed by some experts, this could potentially defer a return to pre-crisis levels well beyond 2021.
- By region, most respondents in Asia and the Pacific (63%) expect a recovery in international tourism toward the second half of 2021, as well as most experts from the Americas (56%). In Europe, respondents see tourism recover throughout 2021

mostly in the last quarter. Experts from the Middle East (83%) see a clear recovery in the first half of 2021, while experts from Africa are divided between those who think that the recovery would happen during the first half of 2021 and by the last quarter of 2021. Only a small number of respondents in Europe, Asia and the Pacific and the Americas see signs of recovery in Q4 2020.

When do you think international/domestic tourism will recover?



- When compared to international tourism, **domestic tourism** is expected to resume faster, as was already expressed in the previous survey to experts last April. Half of respondents see a recovery of domestic tourism by the second half of 2020, in line with the restart of tourism in many destinations in June and July. The remaining half expect a recovery throughout 2021.
- By region, experts from all regions already consider a potential recovery in domestic tourism in the second half of 2020. Panel experts from Europe and Asia and the Pacific see a start of the recovery in the third quarter of 2020.
- However, the majority of experts expressed that domestic tourism would only partially (52%) compensate the temporary drop in international tourism or not at all (42%).

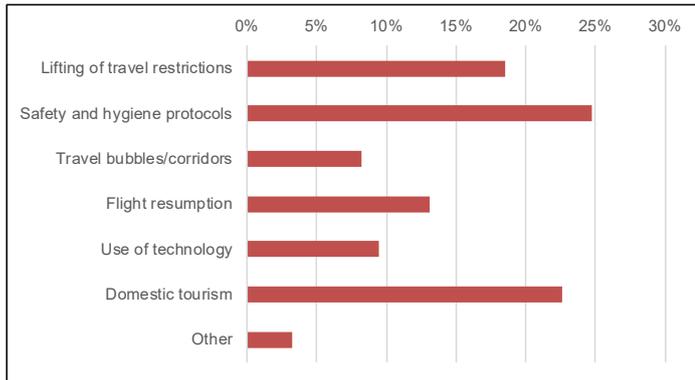
Safety and hygiene protocols, domestic tourism and easing of travel restrictions priorities in restarting tourism

- According to Experts, a wide variety of measures are being implemented in the destinations or businesses worldwide in order to restart tourism. Safety and hygiene protocols, the promotion of domestic tourism and the lifting of travel restrictions are the most implemented, combined with other measures such as flight resumption, travel bubbles/corridors and the

use of technology. Travel corridors or bubbles appear to be less implemented, according to experts (See details of measures implemented in over 150 countries at <https://www.unwto.org/international-tourism-and-covid-19>).

- By region, safety and hygiene protocols are being put in place in all regions to restart tourism. The promotion of domestic tourism has been undertaken in all regions, mostly in Asia and the Pacific, Europe and the Americas, though comparatively less in Africa and the Middle East.
- According to experts, the lifting of travel restrictions has been gradually implemented across regions, mainly in Europe. Flight resumption and the use of technology are more frequently mentioned by experts from the Middle East, while travel corridors/bubbles have been implemented mostly in Asia and the Pacific.
- At the same time, experts mentioned some changes being witnessed in consumer behaviour such as trips closer to home or proximity travel, bookings closer to the departure dates of the trip or a preference to travel by car.
- Experts pointed out that fiscal (e.g. tax reductions, exemptions or deferral), monetary (e.g. lines of credit), employment, as well as marketing and promotion actions continued to be overwhelmingly implemented across regions to stimulate tourism recovery. Public and private partnerships, as well as market intelligence and other measures have also been carried out, though to a lesser extent.
- A wide range of measures have been implemented to stimulate domestic tourism being the most quoted safety and hygiene protocols in all regions and marketing products along with travel vouchers, tourism products and use of technology.
- Experts from Japan mentioned the 'Go To' campaign to stimulate domestic travel demand within Japan. Part of the domestic travel expenses would be covered by the Japanese government.
- The Greek government is allocating EUR 30 million to subsidize holidays for citizens through the social tourism programme 'Tourism for All', addressed to low-income Greeks.
- Italy approved a holiday bonus (Bonus Vacanze) for families under certain conditions that would allow them to travel within the country and reactivate demand in Italian tourism industry.

What types of measures are being implemented in your destination/business to restart tourism?



- The Romanian government has decided to maintain the Tourist Pass holiday initiative (holiday vouchers for public employees similar with the meal tickets, with which employees can buy tourist services in Romania, i.e. accommodation, meals and transport) and the validity of vouchers granted between March 2019 – December 2019 has been extended by law until May 31, 2021.
- Serbia has set aside 2.8 billion RSD for 560,000 tourist vouchers worth 5,000 RSD intended for citizens of Serbia who wish to spend their vacation in the country.
- Under an economic stimulus package, the Malaysian government has introduced several incentives for domestic tourism implemented as of June 10 to restart domestic tourism, among them an allocation of US\$113 million (RM500 million) worth of travel discount vouchers to encourage domestic tourism among Malaysians, complemented with a personal tax relief of up to US\$227 (RM1,000) for expenditure related to domestic tourism for all Malaysians.
- The government of Thailand will subsidize 5 million nights of hotel accommodation at 40% of normal room rates, with the subsidy limited to 3,000 baht per night for up to five nights.
- Macao (China) has launched a local tour project entitled 'Macao Ready Go! Local Tours' encouraging Macao residents to sign up for tours run by local travel agencies. Under this project, Macao permanent and non-permanent residents can enjoy a grant of 560 patacas (US\$70) to join two tours – with 280 patacas per tour – scheduled between June 22 and September 30 organized by participating travel agencies.

UNWTO Confidence Index and survey:

UNWTO conducts a Panel of Tourism Experts' survey to track global tourism performance and business sentiment every four months. In each survey, Panel members are asked to rate both the performance of the previous 4 months and the outlook for the coming 4 months on the following scale: [0] much worse; [50] worse; [100] equal; [150] better, [200] much better. The result is a Confidence Index for the tourism sector which has been published since April 2003. The UNWTO Secretariat's aim is to continuously expand and improve the Panel sample. Experts interested in participating in the survey are kindly invited to contact us at unwtotpanel@unwto.org.

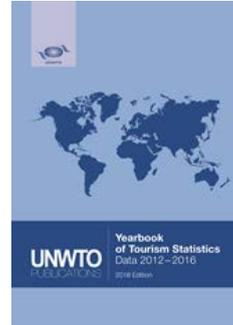
In the most recent survey, additional questions were made to the UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery. The survey was conducted during the first week of July 2020 and follows a prior survey conducted in April.



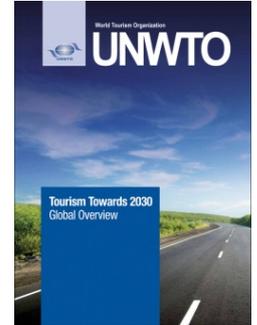
UNWTO World Tourism Barometer



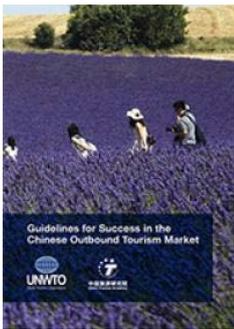
International Tourism Highlights, 2019 Edition



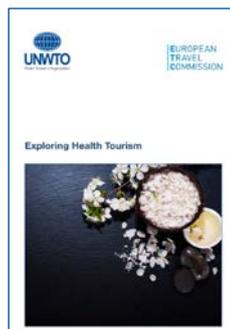
Compendium of Tourism Statistics Yearbook of Tourism Statistics



Tourism Towards 2030 Global Overview



Guidelines for Success in the Chinese Outbound Tourism Market (2019)



Exploring Health Tourism (2018)



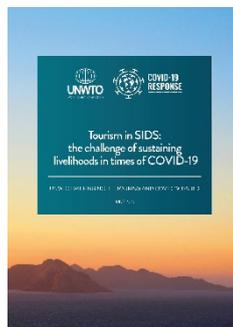
The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)



European Union Tourism Trends (2018)



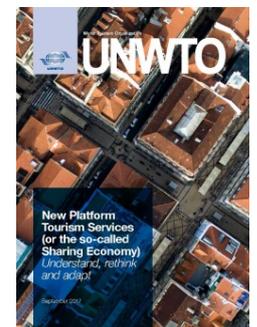
How are countries supporting tourism recovery? Tourism and Covid-19, Issue 1 (2020)



Tourism in SIDS: the challenge of sustaining livelihoods in times of Covid-19 (2020)



UNWTO/GTERC Asia Tourism Trends, 2019 Edition



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