

Agenda item 3(a)

**Current trends and prospects of international tourism**

CE/113/3(a)  
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**Executive summary**

According to data available as of the date of this report, international tourist arrivals declined 70% in the first eight months of 2020 over the same period of last year, amid global travel restrictions including many borders fully closed, to contain the COVID-19 pandemic.

Arrivals plunged 81% in July and 79% in August, traditionally the two busiest months of the year and the peak of the Northern Hemisphere summer season. Despite such large declines, this represents a relative improvement over the 90% or greater decreases registered in the previous months, as some destinations started to reopen to international tourism, mostly in the European Union. This trend is expected to have been reversed from October onwards due to renewed lockdown measures in many European countries and ongoing border closures in Asia and the Pacific.

The decline in January-August 2020 represents 700 million fewer international tourist arrivals compared to the same period in 2019, and translates into a loss of US\$ 730 billion in export revenues from international tourism, more than eight times the loss in 2009 under the impact of the global economic crisis.

Asia and the Pacific, the first region to suffer the impact of the pandemic and the region with the highest share of closed destinations to date, saw a 79% decrease in arrivals in January-August 2020. Africa and the Middle East both recorded a 69% drop this eight-month period, while Europe saw a 68% decline and the Americas 65%.

Based on the latest trends, a decrease in international arrivals close to 70% for the whole of 2020 is expected, in line with the May scenarios developed by UNWTO, which pointed to a decline of 60% to 80%. This immense impact on international tourism places 100 million to 120 million direct tourism jobs at risk.

The UNWTO Confidence Index continues at record lows. Most UNWTO Panel Experts expect a rebound in international tourism by the third quarter of 2021 and a return to pre-pandemic 2019 levels not before 2023. Experts consider travel restrictions as the main barrier weighing on the recovery of international tourism, along with slow virus containment and low consumer confidence.

On the positive side, there are important signs of significant pent-up demand which is reflected in the surge of bookings when conditions allow for it as well as in the growth of the domestic markets.

**DRAFT DECISION<sup>1</sup>**

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(document CE/113/3(a))

*The Executive Council,*

*Having examined* the report,

1. *Takes note* of the information provided; and
2. *Requests* the Secretary-General to continue monitoring the impact of COVID-19 on tourism.

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<sup>1</sup>This is a draft decision. For the final decision adopted by the Council, please refer to the Decisions document issued at the end of the session.

## I. International tourism January-August 2020

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1. According to the October issue of the [UNWTO World Tourism Barometer](#), the monthly monitoring on international tourism by the Secretariat, international tourist arrivals declined 70% in the first eight months of 2020 over the same period of last year, amid global travel restrictions including many borders fully closed, to contain the ongoing COVID-19 pandemic.
2. International arrivals plunged 81% in July and 79% in August, traditionally the two busiest months of the year and the peak of the Northern Hemisphere summer season. Despite such large declines, this represents a relative improvement over the 90% or greater decreases of the previous months, as some destinations started to reopen to international tourism, mostly in the European Union.
3. The decline in January-August 2020 represents 700 million fewer international tourist arrivals compared to the same period in 2019, and translates into a loss of US\$ 730 billion in export revenues from international tourism, more than eight times the loss in 2009 under the impact of the global economic crisis.
4. Asia and the Pacific, the first region to suffer the impact of the pandemic, saw a 79% decrease in arrivals in January-August 2020. Africa and the Middle East both recorded a 69% drop this eight-month period, while Europe saw a 68% decline and the Americas 65%.
5. In July and August, Europe recorded comparatively smaller declines of 72% and 69%, due to the gradual reopening of international borders, mostly in EU destinations. The slight recovery was short-lived, however, as travel restrictions and advisories were reintroduced amid an increase in contagions. On the other side of the spectrum, Asia and the Pacific recorded the largest declines with -96% in both July and August, reflecting continued closure of borders in China and other major destinations in the region.
6. At the subregional level, North-East Asia (-86%), South-East Asia, North Africa (both -74%) Northern Europe (-72%) suffered the largest drop in January-August 2020. Arrivals in most world subregions recorded drops from -60% to -70%.
7. Despite a gradual reopening of international borders in June and July, the rebound in travel was mostly limited to Europe and proved to be short-lived, due to a spike in contagions. Many destinations have since reintroduced travel advisories which is slowing down the already weak pace of recovery.
8. Based on the three UNWTO scenarios published in May 2020 indicating declines of 58% to 78% in international tourist arrivals in 2020 latest trends continue to place the expected end year results of international tourist arrivals between Scenarios 1 and 2 (-58% to -70%).
9. Considering the decrease of 70% in arrivals through August and an estimated 75% drop in September, latest trends suggest a decline in international tourist arrivals closer to 70% for the whole 2020.

### Industry indicators confirm sluggish recovery

10. The [UNWTO Tourism Recovery Tracker](#) data on air travel and accommodation confirm the above trends.
11. Data from IATA shows that international air demand declined 72% in January-September 2020, yet international demand lagged the positive developments on domestic routes. Domestic markets drove the total passenger market rebound, posting a decline of 51% y-o-y in RPKs.
12. Air capacity data measured in available seats by the International Civil Aviation Organization (ICAO) confirms this trend with capacity down by 61% between January and October, while capacity on domestic routes was down 39% in the same period.
13. Data from STR indicates some slight improvement was observed in July and August in hotel occupancy, although performance across world regions remain at low levels compared to 2019. Year-to-date occupancy in October reached 41% worldwide: 28% in Africa, 33% in Europe, 39% in the Middle East, 42% in the Americas, and 43% in Asia and the Pacific.

14. Data from ForwardKeys indicates an 81% year-on-year drop in international air bookings made between January and October 2020 for travel in any period of the year. The data shows slightly more new bookings than cancellations.
15. By departure region, Asia and the Pacific (-82%) suffered the biggest drop, followed by Europe (-81%). Bookings from Africa (-76%) and the Middle East (-75%), as well as the Americas (-76%) recorded comparatively smaller decreases.

#### **Prospects remain weak amid increased number of cases, travel restrictions and low confidence levels**

16. The outlook is still highly uncertain and volatile as new cases of COVID-19 continue to be reported worldwide and despite the positive news regarding the vaccines in mid-November. Many destinations have reintroduced travel restrictions since October after the resurgence of COVID-19 outbreaks, particularly in Europe.
17. Some countries have returned to partial lockdowns and curfews, borders remain closed in many countries and some of the major outbound markets such as the United States and China remain at a standstill, all in a context of economic recession in 2020.
18. According to IMF's October World Economic Outlook, the global economy would contract by 4.4% in 2020 and partially recover in 2021 (+5.2%). Consumer confidence is at record lows and prospects remain extremely weak for the period September-December, as expressed by the UNWTO Panel of Experts' latest survey.
19. In view of supporting a safe restart of tourism, an increasing number of destinations have put in place different measures, including safety and hygiene protocols, the promotion of domestic tourism and the creation of travel corridors or bubbles (for detailed information, see the [UNWTO Policy Tracker on COVID-19: Measures to Support Travel and Tourism](#)).
20. According to the European Commission, a well-coordinated approach to the adoption of restrictions on freedom of movement is necessary to prevent the spread of the virus. In this regard, on 13 October 'EU ministers reached an important agreement that will provide more clarity and predictability on measures that restrict free movement due to the coronavirus pandemic'.

#### **International tourism expected to rebound by Q3 of 2021**

21. A majority of experts consulted in the scope of the [UNWTO Panel of Experts Survey](#) sees a rebound in international tourism in 2021, in particular by the third quarter of 2021, while around 20% expect it to occur only in 2022.
22. Most experts do not see a return to pre-pandemic 2019 levels happening before 2023. By regions, the largest share of experts pointing to a return to 2019 levels in 2023 or later are in Europe (74%) the Americas (71%) and Asia and the Pacific (66%). In Africa and the Middle East this share is 60% and 50% respectively. Half of respondents from the Middle East and 40% from Africa expect the recovery to 2019 levels to take place by 2022.
23. Experts consider travel restrictions as the main barrier weighing on the recovery of international tourism, along with slow virus containment and low consumer confidence. The lack of coordinated response among countries to ensure harmonized protocols and coordinated restrictions, as well as the deteriorating economic environment were also identified by experts as important obstacles for recovery. Slow flight resumption was considered comparatively less determinant among factors mentioned.
24. Domestic tourism is driving the recovery of several destinations but in most cases only partially, as it is not compensating for the drop in international demand. Among regions, respondents from Asia and the Pacific were the most positive regarding the contribution of domestic tourism to the recovery of destinations. Experts mentioned that domestic tourism has boosted the demand for nature-based products, such as rural and coastal areas, though meetings and conferences as well as urban tourism continued to struggle due to the lack of international visitors.
25. The resumption of domestic tourism is helping the recovery of destinations with a sheer domestic size, though domestic tourism is not strong enough to drive the recovery in destinations heavily relying on inbound tourism. Furthermore, the pandemic has severely disrupted domestic travel in some countries, due to local lockdowns.