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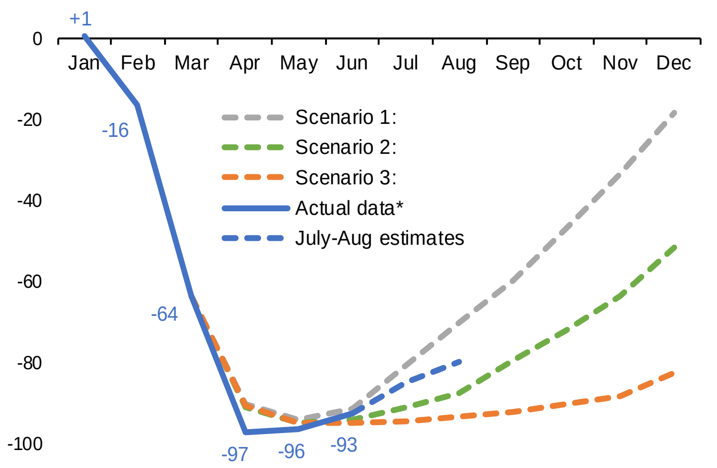
International tourism down 65% in first half of 2020

- International tourist arrivals (overnight visitors) declined 65% in the first half of 2020 over the same period last year, with arrivals in June down 93%, according to data reported by destinations.
- Despite the gradual reopening of an increasing number of destinations during the second half of May and the month of June, ahead of the Northern Hemisphere summer season, the expected improvement in June was almost unperceived compared to May.
- The massive fall in international travel demand during the first half of 2020 translates into a loss of 440 million international arrivals and about USD 460 billion in export revenues from international tourism. This represents over five times the loss in receipts recorded in 2009 amid the global economic and financial crisis.
- The contraction in international demand is also reflected in double-digit declines in international tourism expenditure. Major outbound markets such as the United States and China continue to be at a standstill, though some markets such as France and Germany have shown some improvement in demand for international travel in June.
- While the recovery of international tourism remains sluggish, demand for domestic tourism is rising in many large markets such as China where air capacity in July rebounded to around 90% the level of 2019. In Russia air capacity has also been underpinned by rising domestic travel.
- Based on the three UNWTO scenarios published in May 2020 pointing to declines of 58% to 78% in international tourist arrivals in 2020, current trends point to a decline in international arrivals closer to 70% for 2020.
- Extended scenarios for 2021-2024 point to a strong rebound in the year 2021 based on the assumption of a reversal in the evolution of the pandemic, significant improvement in traveller confidence and major lifting of travel restrictions by the middle of the year. Nonetheless, the return to 2019 levels in terms of international arrivals would take 2½ to 4 years.

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



Source: UNWTO
*Actual data includes estimates for countries which have not yet reported results.
Dotted blue line corresponds to UNWTO estimates for July and August 2020.

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.

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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 early September 2020.

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

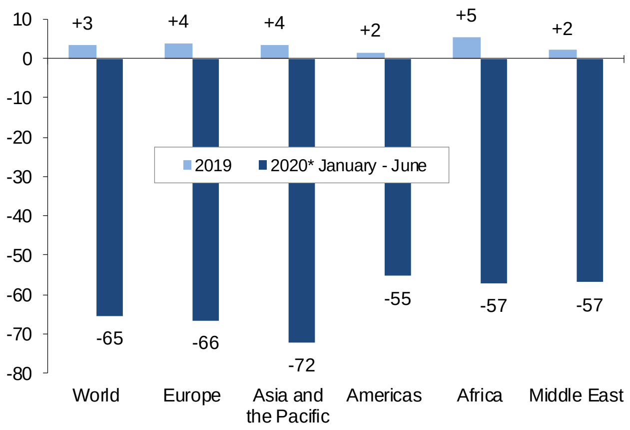
The document is available from the UNWTO elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

Inbound tourism: January-June 2020

International arrivals declined 65% in January-June 2020

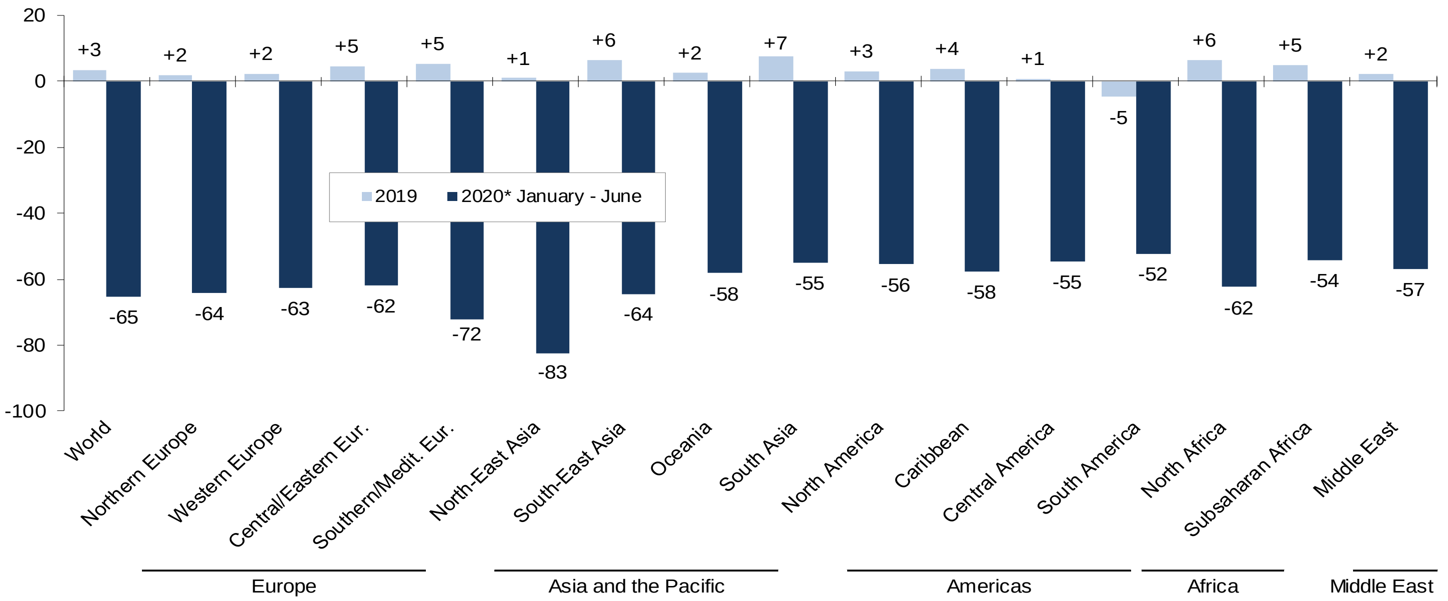
- International tourist arrivals (overnight visitors) saw a decline of 65% in the first half of 2020 over the same period of last year, with arrivals in June down by 93%, according to data available.
- International arrivals decreased an unprecedented 95% during the second quarter of the year, following a drop of 28% in the first quarter. Results reflect widespread travel restrictions and lockdowns in nearly all destinations worldwide, mostly from the second half of March and the months of April (-97%) and May (-96%) amid measures to contain the spread of the COVID-19 pandemic.
- Despite the gradual reopening of an increasing number of destinations during the second half of May and the month of June, ahead of the Northern Hemisphere summer season, the expected improvement in June was almost unperceived compared to May.
- By contrast, some large European destinations reporting data for June such as Austria, the Netherlands, Germany or Croatia, saw a slight improvement in arrivals compared to May, further to the gradual reopening of borders across the European Union, which helped intraregional travel.
- The massive fall in international travel demand during the first half of 2020 translates into a loss of 440 million international arrivals and about USD 460 billion in export revenues from international tourism. This represents over five times the loss in receipts registered in 2009 amid the global economic and financial crisis.
- According to preliminary estimates for July (-85%) and August (-80%), the decline in international demand in January-August 2020 would reach 70% and translate into a loss of 705 million international arrivals and some US$ 730 billion in export revenues, 8 times the income loss of 2009.
- By regions, Asia and the Pacific, the first region to suffer the impact of COVID-19, saw a 72% decrease in arrivals in the first half of 2020. The second-hardest hit was Europe with a 66% decline, followed by the Americas (-55%), Africa and the Middle East (both -57%).
- At the subregional level, North-East Asia (-83%) and Southern Mediterranean Europe (-72%) recorded the largest declines in international arrivals. Most subregions worldwide saw declines of more than 50% in the first half of the year.
- The contraction in international demand is also reflected in double-digit declines in international tourism expenditure among large markets. Major outbound markets such as the United States and China continue to be at a standstill, though some markets such as France and Germany have shown some improvement in June.
- While the recovery of international tourism remains sluggish, demand for domestic tourism is rising in many large markets such as China where air capacity offered in July rebounded to around 90% the level of 2019. In Russia air capacity has also been underpinned by rising domestic travel.
- According to UNWTO's seventh report on travel restrictions as of 1 September 2020 a total of 115 destinations (53% of all destinations worldwide) had eased COVID-19 related travel restrictions for international tourism. This is an increase of 28 destinations compared to 19 July 2020.

International Tourist Arrivals (% change)

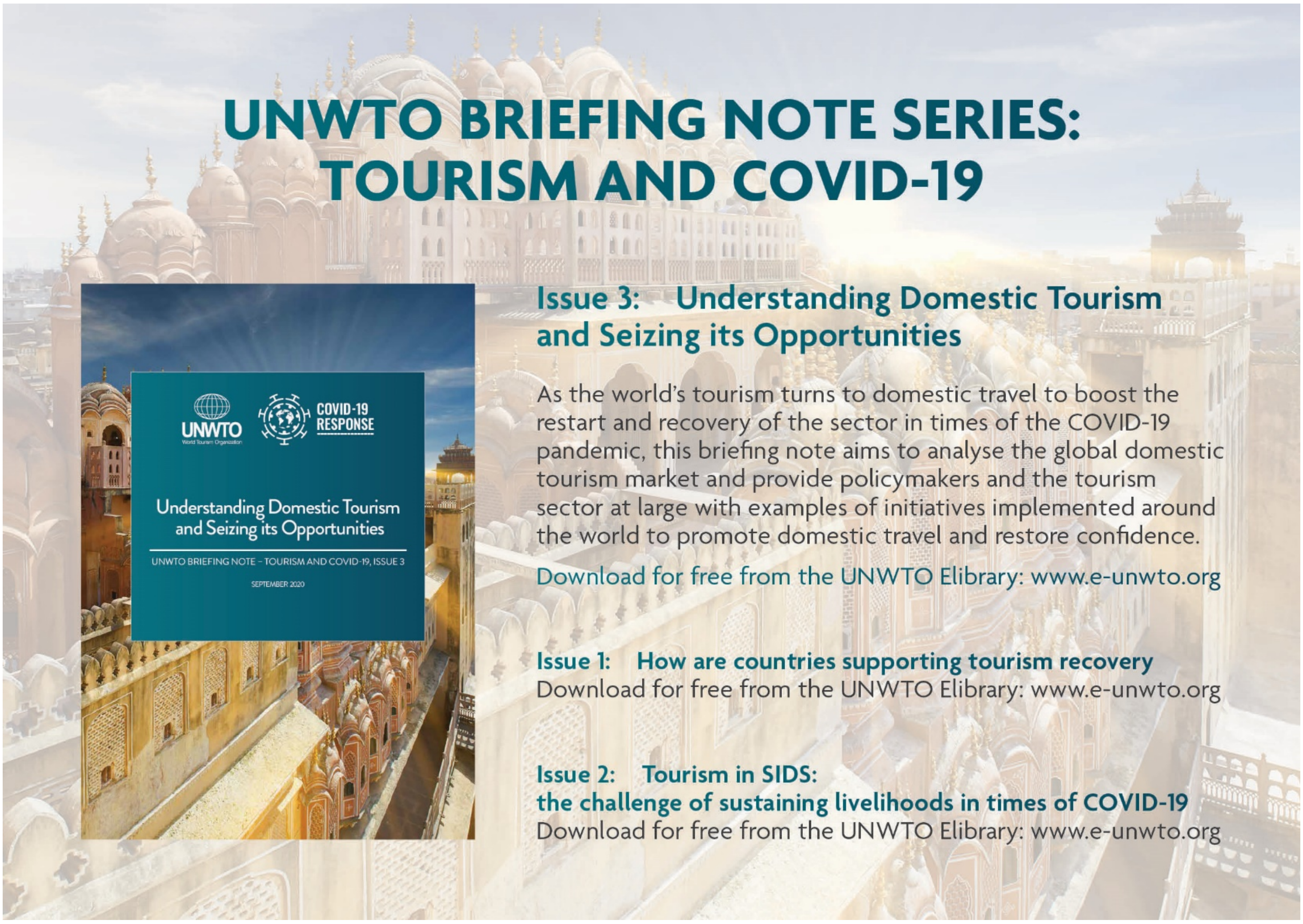


Source: World Tourism Organization (UNWTO) © * Provisional data

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



Source: World Tourism Organization (UNWTO) ©



International air demand slowly recovering but still well below 2019 levels

- **IATA** indicates that global air passenger demand dropped 67% in January-July 2020 and is slowly recovering from its April low. Demand declined 92% in July year-on-year (y-o-y), which represents only a slight improvement over the 97% drop recorded in June as most international routes remained closed or had reduced flight frequencies. An increase in COVID-19 cases in several countries led to a re-imposition of travel restrictions. Market reopening in the Schengen area helped to boost international demand in Europe, but other international markets showed little change compared to June.
- A small recovery in global air demand continues to be driven primarily by domestic markets, most notably Russia and China.
- **ICAO** indicates that international air capacity worldwide fell by 59% y-o-y in January-July 2020 measured in available seat-kilometres. International capacity in July (-75%) improved from the decline recorded in June (-88%). However, load factors remained much lower (46%) than 2019 levels, as the decline in traffic was stronger than the reduction in capacity.
- According to **STR**, the hotel industry continued to suffer double-digit declines in the three metrics, namely revenue per available room (RevPAR), average daily rate (ADR) and occupancy, with performance at low levels across all world regions in July 2020. Occupancy in July reached record lows of 17% in Africa, 19% in Central and South America, 27% in Europe, 35% in the Middle East, 46% in Asia and the Pacific and 47% in the United States.

Current trends point to a decline in international arrivals closer to 70% for the whole of 2020

- Based on the three UNWTO scenarios published in May 2020 indicating declines of 58% to 78% in international tourist arrivals in 2020, current trends point to a decline in international arrivals closer to 70% (Scenario 2). The expected reopening of several destinations in June was mostly limited to the European Union, while borders remained fully closed in 43% of the world's destinations as of 1 September. Furthermore, many destinations have reintroduced travel restrictions after the resurgence of COVID-19 outbreaks. As a result, Scenario 1 (-58%) seems unlikely if current trends remain.
- The outlook remains highly uncertain due to the evolution of the pandemic and the possibility of a future vaccine. Consumer confidence is at record lows, while the deteriorating economic environment is having a negative impact on jobs and disposable income. Travel restrictions are still in place in many destinations and virus containment is slow. Some 29 million COVID-19 confirmed cases worldwide have been reported to date, according to the World Health Organization.
- Extended scenarios for 2021-2024 point to a change in trend next year, based on the assumptions of a gradual and linear lifting of travel restrictions and a significant rebound of traveller confidence by mid-2020, given a reversal in the evolution of the pandemic and the availability of a vaccine or effective treatment. Nonetheless, it would take 2½ to 4 years for international tourist arrivals to return to 2019 levels.
- In view of supporting a safe restart of tourism, an increasing number of destinations are putting in place different measures including safety and hygiene protocols, targeted marketing and promotion campaigns, tourism recovery plans, the promotion of domestic tourism, the ease of travel restrictions, the provision of travel insurance or the creation of travel corridors or bubbles.
- 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.

For regular updated data on international tourism please check

https://www.unwto.org/es/unwto-tourism-dashboard
https://www.unwto.org/tourism-covid-19

International Tourist Arrivals by (Sub)region

	(million)			Share (%)	Change	(%)	Monthly/quarterly data series % change over same period of the previous year 2020*								
	2017	2018	2019*	2019*	18/17	19*/18	YTD	Q1	Q2	Jan.	Feb.	Mar.	Apr.	May	Jun.
World	**1,333**	**1,408**	**1,458**	**100**	**5.7**	**3.5**	**-65.3**	**-27.8**	**-95.2**	**0.7**	**-16.3**	**-63.6**	**-97.1**	**-96.4**	**-92.6**
Advanced economies[1]	*732*	*761*	*776*	*53.3*	*4.1*	*2.0*	*-68.2*	*-29.9*	*-95.2*	*0.0*	*-13.9*	*-68.7*	*-97.7*	*-96.6*	*-92.1*
Emerging economies[1]	*601*	*647*	*681*	*46.7*	*7.7*	*5.3*	*-62.1*	*-25.8*	*-95.2*	*1.4*	*-18.5*	*-58.3*	*-96.3*	*-96.1*	*-93.2*
By UNWTO regions:															
Europe	***676.6***	***716.0***	***744.3***	***51.1***	***5.8***	***3.9***	***-66.5***	***-21.0***	***-94.1***	***5.0***	***2.3***	***-61.4***	***-97.5***	***-96.3***	***-89.8***
Northern Europe	81.0	81.0	82.6	5.7	0.0	1.9	-64.2	-18.2	-95.7	5.4	4.3	-56.6	-96.7	-96.6	-94.2
Western Europe	192.7	200.2	204.7	14.0	3.9	2.3	-62.7	-19.8	-91.5	8.2	6.0	-64.4	-98.1	-96.6	-82.4
Central/Eastern Eur.	135.0	146.2	152.9	10.5	8.3	4.5	-61.9	-16.2	-94.1	1.0	-2.1	-45.6	-97.3	-97.0	-88.7
Southern/Medit. Eur.	267.9	288.6	304.1	20.9	7.7	5.4	-72.4	-26.2	-95.4	4.8	1.3	-69.5	-97.4	-95.7	-93.8
- of which EU-28	540.5	562.5	579.0	39.7	4.1	2.9	-66.5	-21.8	-94.2	4.6	3.1	-63.3	-97.3	-95.9	-89.0
Asia and the Pacific	***324.1***	***347.7***	***360.1***	***24.7***	***7.3***	***3.6***	***-72.2***	***-46.7***	***-98.6***	***-5.4***	***-51.5***	***-82.1***	***-98.7***	***-98.6***	***-98.5***
North-East Asia	159.5	169.2	170.6	11.7	6.1	0.8	-82.5	-65.1	-98.9	-19.4	-80.2	-94.4	-99.3	-98.9	-98.5
South-East Asia	120.6	128.6	136.8	9.4	6.7	6.4	-64.4	-33.6	-98.3	6.9	-35.9	-72.0	-98.2	-98.2	-98.4
Oceania	16.6	17.0	17.5	1.2	2.8	2.4	-58.2	-25.3	-98.6	5.5	-20.2	-60.0	-97.8	-99.2	-99.0
South Asia	27.5	32.8	35.2	2.4	19.4	7.4	-55.0	-22.1	-98.2	6.9	-4.1	-70.2	-97.3	-97.7	-99.6
Americas	***210.8***	***215.9***	***219.4***	***15.1***	***2.4***	***1.6***	***-55.2***	***-16.4***	***-93.0***	***0.5***	***3.0***	***-49.4***	***-93.5***	***-93.0***	***-92.4***
North America	137.4	142.2	146.4	10.0	3.5	3.0	-55.5	-14.3	-90.3	3.7	4.1	-45.1	-91.2	-90.1	-89.5
Caribbean	25.8	25.8	26.8	1.8	0.1	3.8	-57.7	-21.6	-98.5	-2.2	0.3	-57.2	-97.6	-99.3	-98.6
Central America	11.1	10.8	10.9	0.7	-2.2	0.8	-54.7	-17.5	-97.9	-2.7	6.6	-55.0	-96.0	-99.1	-99.1
South America	36.6	37.1	35.3	2.4	1.3	-4.8	-52.3	-18.3	-99.3	-5.3	1.2	-56.4	-98.8	-99.6	-99.6
Africa	***63.3***	***68.7***	***72.4***	***5.0***	***8.4***	***5.4***	***-57.1***	***-13.5***	***-99.0***	***2.2***	***1.4***	***-43.2***	***-98.6***	***-99.4***	***-99.0***
North Africa	21.7	24.1	25.6	1.8	11.1	6.4	-62.4	-17.5	-98.2	5.3	4.8	-56.6	-97.2	-99.4	-98.3
Subsaharan Africa	41.7	44.6	46.8	3.2	7.0	4.9	-54.1	-11.7	-99.5	1.0	-0.2	-36.3	-99.6	-99.5	-99.5
Middle East	***57.6***	***60.1***	***61.4***	***4.2***	***4.3***	***2.1***	***-56.9***	***-21.7***	***-94.1***	***5.3***	***-24.7***	***-44.6***	***-94.1***	***-94.3***	***-93.8***

 (Data as collected by UNWTO, September 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

Europe

- International tourist arrivals in Europe, the world's most visited destination, were down 66% in the first half of 2020 over the same period last year, with a 97% drop in the second quarter. Widespread travel restrictions and lockdowns in nearly all destinations during the second half of March and the months of April and May weighed heavily on the results of the first half of the year.
- Results in June (-90%) showed only a slight improvement compared to May (-96%), reflecting a very slow and irregular reopening of borders mostly in the European Union by mid-June.
- Some large European destinations reporting data for June such as Austria, the Netherlands, Germany or Croatia, saw a slight improvement in arrivals compared to May, further to the gradual reopening of borders across the European Union, which helped intraregional travel.
- Domestic tourism has resumed in many European countries, driving overall tourism demand in those with large domestic markets and reflecting a still cautious attitude toward cross-border travel.
- Europe suffered a loss of 213 million international arrivals through June, compared to the same period in 2019.
- By subregion, international arrivals fell an estimated 72% in Southern and Mediterranean Europe and 64% in Northern Europe this six-month period. A slight improvement during the month of June helped to slow down the pace of decrease in arrivals in Western Europe (-63%) and Central and Eastern Europe (-62%).
- Despite the gradual reopening of destinations across the European Union starting in June, travel restrictions or quarantines were re-imposed in July by a number of countries amid a resurgence of cases, affecting destinations that had recently opened their borders.
- As of 1 September of 2020, 44 destinations in Europe, including 25 out of 26 Schengen Member States had eased travel restrictions, according to UNWTO's seventh report on travel restrictions. Europe is the region with the highest number of destinations easing restrictions so far (81%).
- Non-essential travel from third countries into the EU was temporarily restricted on 16 March and extended further. On 30 June the European Council adopted a recommendation for the gradual lifting of the temporary restrictions on non-essential travel from third countries into the EU. According to the European Council, travel restrictions should be lifted for countries listed in the recommendation as from 1 July. Upon revision by Member States and the Council, the list is reviewed every two weeks. (https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response/travel-and-transportation-during-coronavirus-pandemic_en#travel-restrictions).
- On 4 September, the Commission has adopted a proposal for a Council Recommendation to ensure that any measures taken by Member States that restrict free movement due to the coronavirus pandemic are coordinated and clearly communicated at the EU level (https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1555)

Air travel and accommodation indicators

- International passenger demand in Europe measured in revenue passenger kilometres (RPKs) plunged 68% in January-July 2020, according to **IATA**. Demand improved in July (-87%) from a 97% drop in June, reflecting the relaxation of travel restrictions in the Schengen area and a rise in traffic within Europe. Traffic capacity dropped 79% and load factor fell to 55%.
- The upturn in traffic demand is reflected on the increase of daily flights reported by **Eurocontrol**: on 31 July, 54% less daily traffic was reported.
- The gradual reopening across the region was also felt in the accommodation sector, but with low performance, according to **STR**. Europe posted a decrease of 66% in revenue per available room (RevPAR, in euro constant currency) in July. Occupancy recorded a 66% drop to 27% and Average Daily Rate (ADR) fell 21% in July to euro 96. The absolute occupancy and RevPAR levels were up from June but remained the lowest for any July on record in Europe

Asia and the Pacific

- Asia and the Pacific recorded 72% fewer international tourist arrivals in January-June 2020 or a loss of 171 million compared to the same period last year.
- Asia and the Pacific was the first region to be impacted by COVID-19 and the massive drop of international demand was already felt in February. International arrivals fell 99% in the second quarter following a massive 52% decline in the first quarter.
- North-East Asia (-83%) recorded the largest decrease among world subregions in the first half of 2020, according to available data. South-East Asia followed with a 64% decline, while Oceania and South Asia recorded a drop of 58% and 55% respectively.
- Most destinations in the region reporting data for June and July show results close to 100%, reflecting travel restrictions to international travel amid efforts to contain virus outbreaks.
- As 1 September, there were 28 destinations in Asia and the Pacific (61%) with closed borders closed. Only 13 destinations in the region (including 5 Small Island Developing States) had eased restrictions.
- Outbound travel from China, the world's top source market and for many countries in Asia the main source of international visitors, remains at a halt. Domestic travel, by contrast, is showing dynamism, with domestic air capacity in China reaching 90% of July 2019 levels.
- Travel bubbles or corridors are starting to be put in place or planned among some countries in the region taking into consideration their epidemiological situation. On 1 September, Singapore opened a travel corridor with New Zealand and Brunei, allowing quarantine-free travel. Hong Kong (China) is discussing travel corridors with eleven destinations. Japan relaxed its re-entry restrictions to foreign residents on September 1st.

Air travel and accommodation indicators

- According to **IATA**, Asia and the Pacific recorded a 97% drop in international passenger traffic in July, virtually unchanged from a 97% drop in June, and the steepest contraction among regions. Capacity fell 92% and load factor reached 35%. By contrast, China's domestic traffic has been recovering steadily and the country is one of the few domestic markets where load factors recovered from record lows.
- **STR** indicates that hotels in the Asia and the Pacific region reported occupancy fell 37% to 46% in July, ADR decreased 31% and RevPAR dropped 56%. The region reported continued improved performance from previous months but at overall low levels during July.

The Americas

- The Americas saw a 55% decrease in international tourist arrivals in the first six months of the year, weighed down by an estimated 93% drop in the second quarter amid COVID-19 and travel restrictions. The Caribbean (-58%) and South America (-52%) suffered the worst decline among subregions, while arrivals in Central America decreased by 56% in North America and 55%.
- The Americas have lost 59 million international arrivals in the period January-June year-on-year.
- Several Caribbean destinations have reopened in June and July further to the implementation of hygiene and health protocols, though connectivity from major source markets is still limited.
- As of 1 September, UNWTO identified 27 destinations in the Americas, including 18 Small Island Developing States (SIDS) which had eased restrictions, though borders remained closed in 41% of destinations in the Americas. The Americas is currently the region with most confirmed COVID-19 cases to date, according to the World Health Organization.
- The United States has extended the closure of its borders with Canada and Mexico to non-essential travel until at least 21 September. On 6 August, the Department of State lifted the Global Level 4 Health Advisory initially put in place on 19 March 2020, which advised US citizens to avoid all international travel due to the global scale of COVID-19. The Department of State is returning to the previous system of country-specific levels of travel advice, with levels from 1 to 4 depending on individual country conditions (www.state.gov/lifting-of-global-level-4-global-health-advisory).

- This could potentially resume demand from the Unites States, a major outbound market for many destinations across the region.

Air travel and accommodation indicators

- According to **IATA**, international passenger demand in North America saw a 95% decline in July, a slight uptick from the 97% drop in June. Capacity fell 86% and load factor dropped to 35%, the second lowest among regions. International traffic in Latin America experienced a 95% drop in July, compared to the same month last year, versus a 97% drop in June. Capacity fell 93% and load factor reached 58% in Latin America, the highest among regions.
- **STR** indicates that the US hotel industry showed slightly better performance in July compared to the previous month, despite low levels overall. Occupancy dropped 36% to 47%, ADR declined 25% and RevPAR 52%. The absolute occupancy level was the lowest for any June on record in the US, but all three key metrics were up from June levels. The Central and South America hotel industry reported slight improvement y-o-y in July, but low performance overall. Occupancy declined 69% to 19%, while ADR dropped 34% and RevPAR 79%. The absolute occupancy and RevPAR levels were the lowest for any July.

Africa and the Middle East

- International tourist arrivals in Africa declined 57% in the first half of 2020, with an estimated 99% drop in the second quarter. North Africa (-62%) suffered the biggest impact in the first half, while arrivals in Subsaharan Africa declined an estimated 54%. Africa lost an estimated 18 million international arrivals y-o-y through June. Among the very few countries reporting data for June and July, Tunisia recorded a slight improvement in July.
- The Middle East saw a 57% decrease in January-June 2020 and has lost 19 million international tourist arrivals compared to the same period of the previous year. Major destinations such as Saudi Arabia and Egypt are restarting tourism. Egypt has resumed international flights on 1 July after three months of suspension while the campaign ‘Saudi Summer’ was launched to stimulate domestic tourism in Saudi Arabia.
- 26 destinations in Africa and 5 destinations in the Middle East had eased restrictions as of 1 September, according to UNWTO’s seventh report on travel restrictions. Borders in 27 destinations in Africa (51% of all destinations in Africa) and 8 destinations in the Middle East (62% of all destination in the Middle East) remain closed.

Air travel and accommodation indicators

- **IATA** indicates that international traffic in Africa dropped 95% in July, improving somewhat from a 98% contraction in June. Capacity contracted 85%, and load factor fell to 25%, which was the lowest among regions.
- Middle Eastern airlines posted a 93% traffic decline in July, compared with a 96% demand drop in June. Capacity decreased 86%, and load factor dropped to 38%.
- According to **STR**, the Middle East hotel occupancy fell 42% to 35% in July, ADR decreased 10% and RevPAR dropped 47%. Africa's hotels saw occupancy fall 73% to 17%, ADR declined 11 and RevPAR dropped 76%. The Africa hotel industry suffered a decline of 76% in RevPAR in March 2020. Occupancy recorded a 52% drop to 31% and ADR fell by 6%. Despite month-over-month improvements, both the Middle East and Africa saw their lowest absolute occupancy and RevPAR levels for any July on record.

Forward-looking Scenarios for 2020 and beyond

Scenarios for 2020

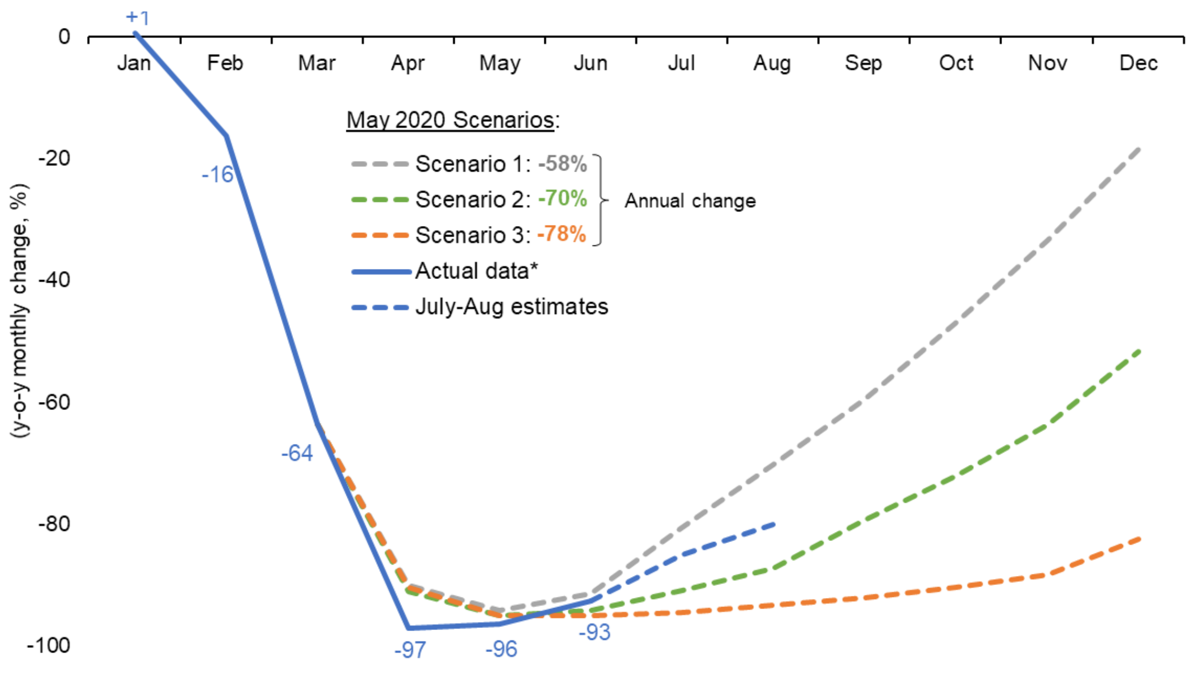
Three scenarios for international tourism in 2020 were presented in the May 2020 *UNWTO World Tourism Barometer,* which described alternative recovery paths after the global lockdown, based on possible lifting of travel restrictions in July, September and December 2020. They assumed no significant or long-lasting worsening of travel conditions thereafter.

Considering that international tourist arrivals declined an estimated 85% in July and 80% in August 2020 based on currently available information and the slow and irregular lifting of travel restrictions, international tourism results are currently between **Scenarios 1** and **2**.

International travel came to a near complete halt after the shutdown of most international borders in late March, with arrivals plunging 97% in April and 96% in May, according to data reported by destinations. The curve seems to have bottomed out during those months before edging up slightly to -93% in June and an estimated -85% in July.

Scenario 1 now seems unlikely despite the lifting of travel restrictions in some countries in June and July, as this was mostly limited to Europe and proved to be short-lived. In July and August several European destinations reintroduced quarantines and other measures in response to growing cases of Covid-19. By mid-September these restrictions had not been lifted in the most part, and major international tourist destinations in other parts of the world such as China and the United States remained closed.

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



Source: UNWTO
* Actual data through June includes estimates for countries which have not yet reported monthly results.
Dotted blue line corresponds to UNWTO estimates for July and August 2020.

Extended scenarios for 2021-2024

In the outlook beyond 2020, the above scenarios were extended into the future based on the latest information on tourism trends and travel conditions, economic forecasts and historical data on previous crises.

International arrivals are expected to bounce back from different lows depending on different year-end levels defined by the 2020 scenarios. The extended scenarios are presented in terms of yearly totals, not growth.

International tourism could recover the levels of 2019 in a period of 2½ to 4 years based on a variety of factors including 1) the rate of improvement of traveler confidence, mostly dependent on perceived safety and the evolution of the pandemic, 2) the gradual elimination of travel restrictions and 3) the prevailing economic conditions. Over time, the first two factors are expected to support recovery, while the deteriorating economic environment could put growing strain on the rebound.

In the first year, all scenarios suggest comparable rebounds in absolute terms, though quite different in relative terms as the 2020 starting points vary considerably. Scenario 1 points to a recovery of 2019 levels in 2½ years, counting from the end of 2020 (by mid-2023). Scenario 2 suggest a recovery after 3 years (end of 2023) and Scenario 3, the slowest, after 4 years (end of 2024). The recovery times are summarized below:

- Scenario 1: recovery in 2½ years (mid-2023)
- Scenario 2: recovery in 3 years (end of 2023)
- Scenario 3: recovery in 4 years (end of 2024)

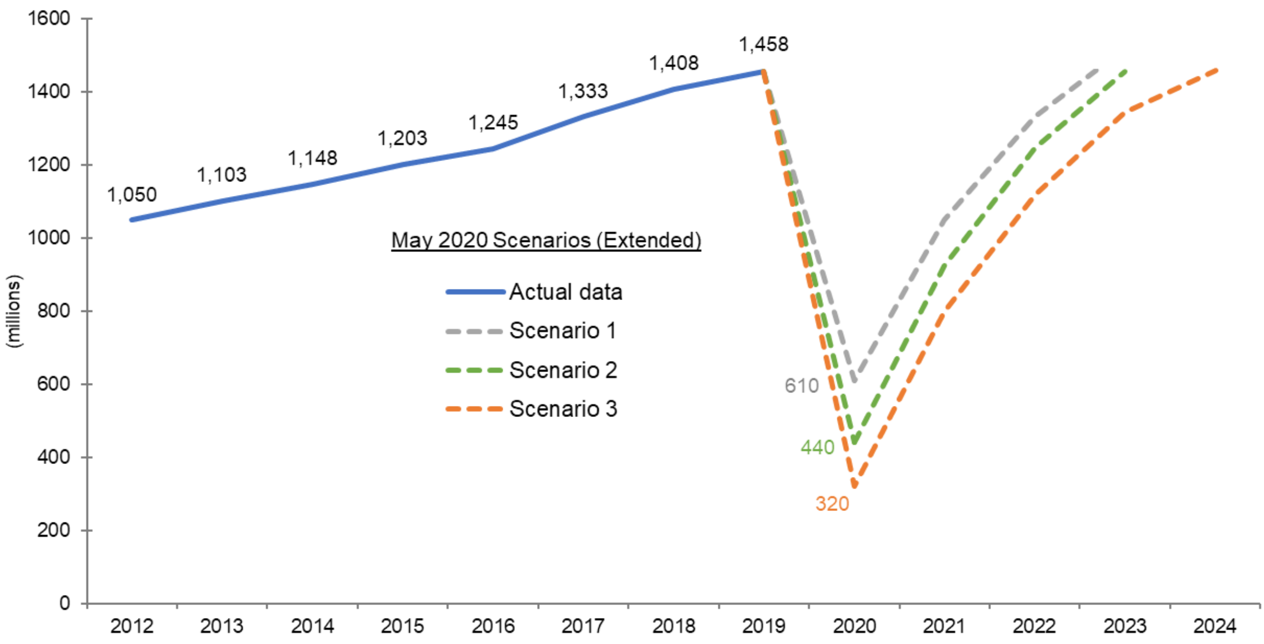
These recovery periods exceed in most part those seen in previous crises, both globally (11 to 19 months) and for the specific regions most hardly hit (1 to 3½ years).

As described in the May 2020 *UNWTO World Tourism Barometer*, it took eleven months for international arrivals to regain pre-crisis levels after the SARS epidemic of 2003, 14 months after the September 11th attacks of 2001, and 19 months after the global economic crisis of 2009. In the most impacted regions it took 1 to 3½ years for arrivals to climb back to the levels before the respective crises.

All scenarios for 2021-2024 point to a strong rebound in the year 2021 based on the assumption of a reversal of the evolution of the pandemic, significant improvement in traveler confidence and major lifting of travel restrictions by the middle of the year. The expected rebound is a consequence of the large pent-up demand following the unprecedented global lockdown and months of closed borders and travel bans.

Growth could remain in double digits in 2022 as international tourism continues to recover and travel conditions normalize, though at a slower pace compared to 2021. Despite the improvement, international arrivals are expected to remain below 2019 levels in 2021 and 2022 for all three scenarios, unless there is a major breakthrough in the treatment and prevention of COVID-19

International tourist arrivals: Future scenarios (millions)

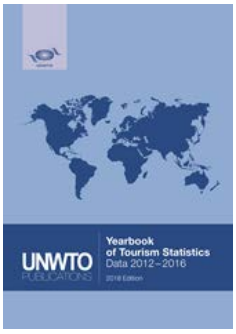


Source: UNWTO

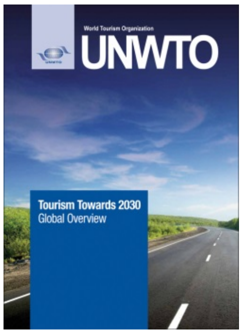
UNWTO World Tourism Organization Publications

UNWTO World Tourism Barometer

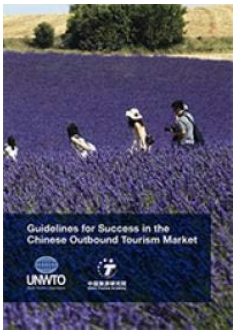
International Tourism Highlights, 2019 Edition



Compendium of Tourism Statistics Yearbook of Tourism Statistics



Tourism Towards 2030



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

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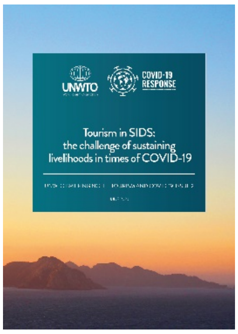

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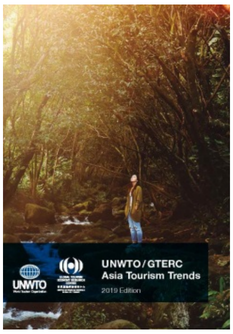

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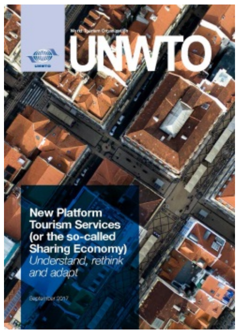

New Platform Tourism Services (or the so-called Sharing Economy) - Understand, rethink and adapt (2017)

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