



Travel & Tourism | Cities

COVID-19: pandemic impacts on European city tourism

Economists

Sarah-Jane Trimble
Economist

Kieran Ferran
Senior Economist

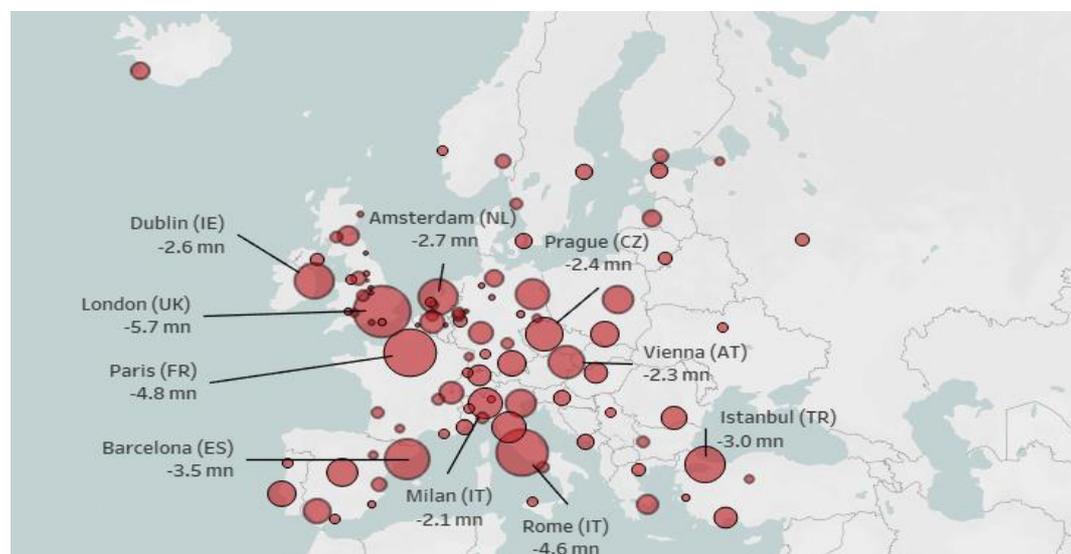
Helen McDermott
Director of
Global Forecasting
Tourism Economics

An estimated 74 million fewer international visitors will travel to European cities in 2020.

Key points

- The COVID-19 global pandemic has led to one of the largest global crises since the second world war. The spread of the virus spans 185 countries, many of which have implemented a range of measures to slow the spread, at a cost of major disruption to the global economy and to global travel.
- European inbound arrivals are expected to decline 39% in 2020, with a loss of 287mn visitors compared to 2019.
- Collectively, European city visitor arrivals are forecast to decline 37% in 2020 compared to 2019, equating to a loss of 74mn visitors for the 98 cities included in our GCT service.
- European cities on average have a lower dependency on long-haul tourists compared to other regions, with less than a quarter of international visits coming from long-haul source markets. This may allow European cities to enjoy a faster recovery if demand for short-haul travel (including staycations) returns more quickly than for long-haul.
- The declines in the 15 largest European city destinations for international visitor arrivals represent a decline of more than 42mn visitors compared to 2019, with the largest declines in London (5.7mn), Paris (4.8mn) and Rome (4.6mn).
- Domestic city visitor arrivals are forecast to decline 23% in 2020, a loss of 40 million visitors. Most European countries have imposed strict travel restrictions and it is likely that these restrictions will be eased first for domestic travel, therefore advancing the popularity of staycations across the region.

Decline in international European city tourist arrivals (mn), 2019-2020



To access the full report, please follow this [link](#).

Contact: Sarah-Jane Trimble | sjtrimble@oxfordeconomics.com

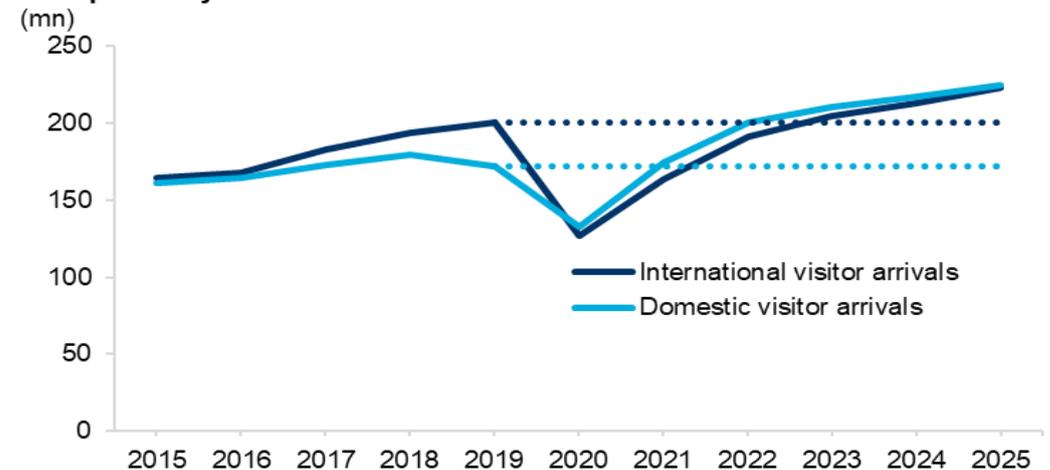
Impact on city inbound travel

Europe has dominated attention in recent months as the virus has spread across the region, causing most nations to impose lockdown measures to stop any further spread of the virus. These measures are starting to be eased in some countries such as Austria and Denmark; however, travel restrictions will likely take longer to be lifted. Therefore, international arrivals to European cities are forecast to decline, with London expected to see the largest decline in international visits at 5.7mn, followed by Paris and Rome with declines of 4.8mn and 4.6mn.

Recovery of city travel

The global pandemic has devastated Europe's tourism industry, which provides a key source of GDP revenue and employment across the region. European countries, such as the United Kingdom, Italy and Spain, are among the worst affected globally and will consequently struggle to stimulate travel demand. International visitor arrivals will not return to 2019 levels until 2023. Domestic visitor arrivals will have a faster recovery, exceeding 2019 levels by 2021, as tourists substitute international trips for staycations.

European city international vs domestic visitor arrivals



Source: Tourism Economics

European cities are less dependent on long-haul markets than many cities elsewhere, with long-haul visitors accounting for an average of only 23% of international arrivals. This may facilitate a less volatile recovery as long-haul trips will likely take longer to rebound than short-haul travel.

European domestic visitor arrivals to cities will surpass 2019 levels in 2021 but international visitor arrivals will not until 2023.