

Travel & Tourism | Cities

COVID-19: pandemic impacts in Europe

Economists

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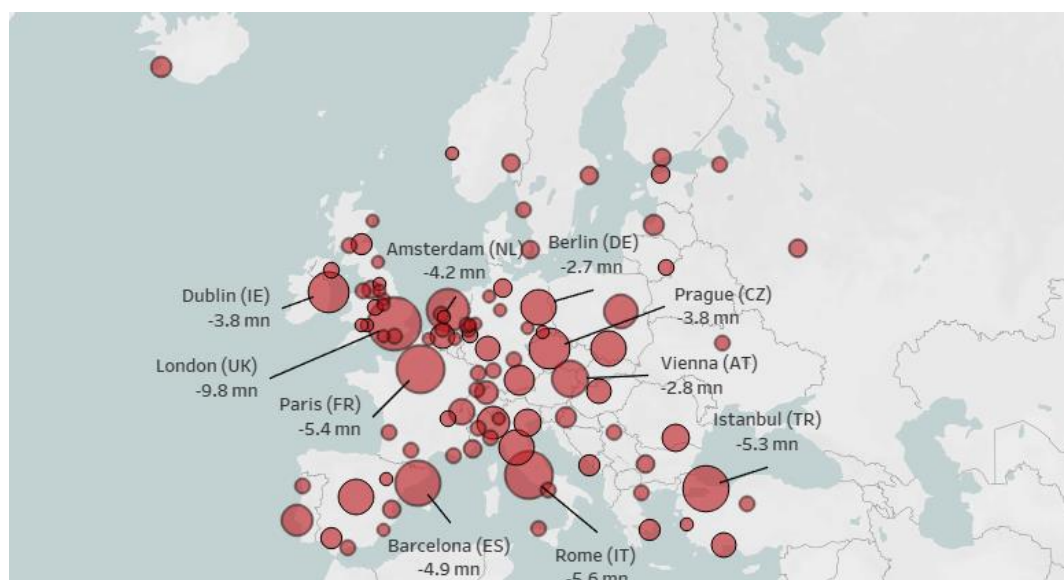
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Key points

- The global pandemic has devastated city tourism, with global city arrivals forecast to decline 58% in 2020, equivalent to the loss of 373mn visitor arrivals for the 309 cities covered in our GCT service.
- Inbound arrivals to Europe are expected to decline 56% in 2020, with a loss of 414mn visitors compared to 2019.
- Collectively, European city visitor arrivals are forecast to decline 52% in 2020, equating to a loss of 107mn visitors for the 98 cities included in our GCT service.
- European cities have a smaller reliance on long-haul tourists compared to other world regions, which should help facilitate a less volatile recovery. As borders have reopened to intra-regional travel, pent-up demand has been released. Tourist sentiment towards short-haul trips is showing signs of a quicker recovery compared to long-haul trips, which will likely face a more protracted recovery.
- However, international arrivals to only 72% of the European cities covered in the GCT service are set to surpass 2019 levels by 2024. This reflects some expected enduring antipathy towards densely populated city destinations, but the large number of UK cities covered within the GCT will also skew this statistic.
- Domestic city visitor arrivals are forecast to decline 36% in 2020, a loss of 67 million visitors. Domestic travel has benefited from considerable substitution effects, with many tourists opting for staycations over international trips due to enduring travel restrictions and heightened uncertainty regarding international travel arrangements.

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



An estimated 107 million fewer international visitors will travel to European cities in 2020.

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

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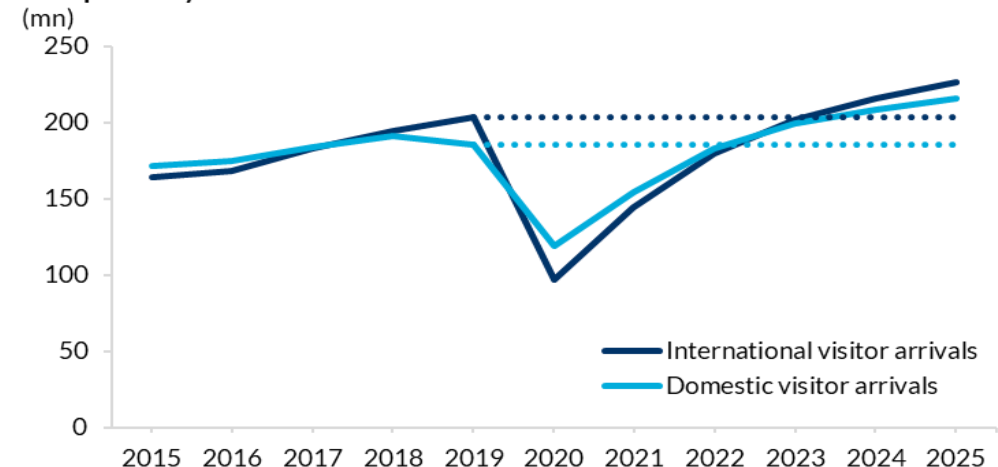
Impact on city inbound travel

The majority of Europe reopened to at least some travel throughout the summer months, attempting to recover some of the peak summer season travel. However, this reopening did not mark a return to normal, with many nations limiting visitor arrivals based on source markets, while a resurgence in coronavirus cases dampened the travel rebound. London is forecast to see the greatest decline in visitor arrivals in 2020 at 9.8mn. The UK remains the hardest-hit European nation in terms of travel. Some confusion continues to surround the UK's quarantine measures while the drop in business travel has further damaged travel to the capital city. Rome and Paris continue to endure significant losses, with visitor arrivals set to decline 5.6mn and 5.4mn in 2020 as tourists avoid densely populated areas.

Recovery of city travel

Most European governments have taken a proactive approach in encouraging tourism, easing international travel restrictions and encouraging domestic travel. However, the coronavirus continues to engulf the region, with travel restrictions changing continuously and, often, with little notice. This fluctuation dampens tourist sentiment and endangers the travel recovery. International visitor arrivals to European cities will not exceed 2019 levels again until 2024, while domestic visitor arrivals will reach 2019 levels by 2023.

European city international vs domestic visitor arrivals



Source: Tourism Economics

European cities international visitor arrivals will not reach pre-crisis levels again until 2024.