



**COVID-19  
RESPONSE**

# Understanding Domestic Tourism and Seizing its Opportunities

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UNWTO BRIEFING NOTE – TOURISM AND COVID-19, ISSUE 3

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# GLOBAL DOMESTIC TOURISM

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**9 billion**  
domestic tourist trips

**6x**

**times larger**  
than international tourism

**≥ 70%**

**share of domestic trips**  
(vs. international arrivals) in **33** out of **73** countries



**75%**  
**of total tourism expenditure**  
in OECD countries



# Methodological note

## Sources

The analysis of domestic tourism in this report uses World Tourism Organization (UNWTO) data on tourist trips (overnight visitors), number of guests and number of nights spent by visitors at hotels and similar establishments for 2018 or the most recent year. Data on domestic visitor trips (overnight and same-day visitors) is also shown for the world's major domestic tourism markets for sake of comparison. The report also lists domestic tourism expenditure data according to the Organisation for Economic Co-operation and Development (OECD) and Eurostat for a total of 36 countries. Data from OECD corresponds to 2018 or the latest year available. The reference year for Eurostat data was considered to be 2018 as no year is specified in the source. Eurostat data was converted from euros to US dollars applying an exchange rate of USD 1.181 per EUR (average exchange rate for 2018 according to the International Monetary Fund).

The source for inbound tourism indicators, including expenditure, is UNWTO. Inbound expenditure corresponds to international tourism receipts. All of the above refer to official data reported by countries or territories to UNWTO or other organizations. Data on air ticket sales in section 3 is according to ForwardKeys.

## Global domestic tourism

Global domestic tourist trips (overnight visitors) for 2018 was estimated based on actual data for 59 countries and modelled estimates for the rest, based on population and GDP per capita. Results are in line with the estimates for 2016 of the report

*Transport-related CO2 Emissions of the Tourism Sector*, by UNWTO and ITF.<sup>1</sup>

The table 'World's major domestic tourism markets' contains information for countries with 100 million domestic tourist trips or more, based on data for 2018 or estimates for markets not reporting this information. Some markets do not compile domestic tourist trips (overnight visitors), but only visitor trips (overnight and same-day visitors combined).

## Market coverage

Data on domestic tourism is still limited compared to inbound tourism. At the time of drafting, data on domestic tourist trips (overnight visitors) was available for 73 countries and territories (of a total of 220) for 2018 or earlier years, which roughly account for two-thirds of the world's domestic tourist trips. Data for 2018 only was available for 59 markets. On number of guests and nights at hotels and similar establishments there was information for 79 countries for 2018. Domestic tourism expenditure data is more limited, with information available for 36 countries combining OECD and Eurostat data. The table below shows the number of markets with available data on the different domestic tourism indicators:

In the future, increased efforts to collect and compile domestic tourism statistics would be desirable for a better understanding of the world's domestic tourism markets. The measurement of international tourism usually receives more attention and resources due to its capacity to generate export revenues and reduce trade deficits. However, domestic tourism represents a much larger market in many countries and a larger number of jobs, and therefore deserves greater attention by policymakers and researchers

Data coverage for various domestic tourism indicators

| Indicator                                 | Source                | Number of markets with available data for: |      |      |                 |
|---|-----------------------|--|------|------|-----------------|
|   |                       | 2016                                       | 2017 | 2018 | 2018 or earlier |
| Domestic tourist trips                    | UNWTO                 | 60   | 62   | 59   | 73              |
| Domestic guests at hotels                 | UNWTO                 | 80   | 80   | 79   | 88              |
| Nights of domestic visitors at hotels     | UNWTO                 | 85   | 85   | 79   | 92              |
| Domestic tourism expenditure <sup>1</sup> | OECD                  | ..   | ..   | ..   | 31              |
|   | Eurostat <sup>1</sup> | ..   | ..   | ..   | 26              |

Note: <sup>1</sup>) Domestic expenditure data from Eurostat is considered to be for 2018 (reference year not specified).

Source: Compiled by UNWTO based on available data as of July 2020.

<sup>1</sup> World Tourism Organization and International Transport Forum (2019), *Transport-related CO2 Emissions of the Tourism Sector – Modelling Results*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284416660>.

# Key findings

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## Domestic tourism is six times larger than international tourism

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- An estimated **9 billion domestic tourist trips** (overnight visitors) were recorded around the world in 2018, of which well **over 50% in Asia and the Pacific**.
- Worldwide, **domestic tourism is over six times bigger than international tourism** (1.4 billion international arrivals in 2018) measured in number of tourist trips.
- With travellers considering destinations closer to home in the early stages of travel normalization and with still important travel restrictions in place for international travel as a consequence of COVID-19, **countries with higher shares of domestic tourism are likely to recover earlier and faster**.
- According to available data, **the world's largest domestic tourism markets** in terms of tourist trips are **India, China** and the **United States of America**, mostly the result of their large populations and geographical size. Other large domestic tourism markets include **Japan, Brazil, France** and **Spain**.
- The highest ratio of tourist trips to population can be found in the **United States** with **5 domestic trips per capita** in 2018. Among the larger markets **Australia, Spain**, the **Republic of Korea** and **France** all recorded 3 to 4 domestic trips per capita.

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## Domestic tourism expenditure is higher than inbound spending in most large destinations

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- The largest domestic tourism markets in terms of expenditure among OECD countries are the **United States** (USD 1 trillion), **Germany** (USD 249 billion), **Japan** (USD 201 billion), the **United Kingdom** (USD 154 billion) and **Mexico** (USD 139 billion).
- **Tourists from the United States spent more than four times** the earnings generated by inbound travel to the United States and **Japanese tourists six times more**.
- In OECD countries, spending on domestic tourism is **three times** the amount generated from inbound tourism spending, in US dollar terms.
- **Relative to population, Iceland** and the **Netherlands** spend the most on domestic tourism in US dollar terms (both about USD 3,600 per capita), followed by **Australia** and **Germany** (above USD 3,000).

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## Country initiatives to promote the domestic tourism market

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- As travel restrictions begin to ease and the summer season takes place in the northern hemisphere, destinations worldwide are prioritizing domestic tourism, and thus preparing and adopting measures to promote travel within their countries.
- Two different types of initiatives stand out from the analysis and are the most adopted across countries – **1. financial incentives** and **2. marketing and promotion**. Incentives can take the form of vouchers, fiscal incentives or 'long weekends', whereas the launch of new communication campaigns and digital promotion efforts with a strong use of social media channels are popular strategies of marketing and promotion taken by most destinations.
- Some countries focus on **specific products**, mainly those related to nature and activities in open air, far from congested areas: wellness, natural protected areas, adventure and ecotourism, cultural and gastronomy tourism and rural tourism.

# Introduction

**As the world's tourism turns to domestic travel to boost the restart and recovery of the sector in times of the COVID-19 pandemic, this briefing note aims to analyse the global domestic tourism market and provide policy-makers and the tourism sector at large with examples of initiatives implemented around the world to promote domestic travel and restore confidence.**

With travellers considering shorter trips and destinations closer to home in the early stages of travel normalization and with still important travel restrictions in place for international travel,<sup>2</sup> countries with higher shares of domestic tourism are likely to recover earlier and faster.

Domestic tourism can be decisive in times of crisis, as it has proven its resilience in several adverse occasions. The current crisis offers an opportunity for countries to reevaluate their domestic tourism and implement policies that encourage domestic travel. Although international tourism often receives more attention due to its capacity to generate valuable export revenues, domestic tourism represents a much larger share of travellers and spending in many countries.

This report identifies the world's major domestic tourism markets (according to data available), analyses its main characteristics and shares the measures that are being implemented around the world to promote domestic tourism and restore confidence, as tourism restarts in the face of COVID-19.

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<sup>2</sup> According to the *UNWTO COVID-19 Related Travel Restrictions, A Global Review for Tourism – Sixth Report as of 30 July 2020*, 40% of all destinations worldwide have eased the restrictions they placed on international tourism in response to COVID-19. However, of the 87 destinations that have now eased travel restrictions, just four have completely lifted all restrictions, and 115 (53% of all destinations worldwide) continue to have their borders completely closed for tourism. <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-07/200730-travel-restrictions.pdf> (30-08-2020).



<https://www.e-univie.org/doi/book/10.18111/9789284422111> - Tuesday, September 15, 2020 3:11:31 AM - IP Address: 5.56.103.143

# PART 1

## Analysis of the global domestic tourism market



# 1. Global domestic tourism market – six times larger than the international market

An estimated **9 billion domestic tourist trips** (overnight visitors) were recorded around the world in 2018, of which well **over 50% in Asia and the Pacific**. Worldwide, **the domestic tourism market is over six times larger than the international tourism market** (1.4 billion international arrivals in 2018), measured in number of tourist trips (overnight visitors).

Domestic tourism comprises the activities of a resident visitor within the country of reference.<sup>3</sup> The size of domestic tourism markets is usually the result of several factors including demographics, income levels and transport and hospitality infrastructures.

According to available data,<sup>4</sup> **the world's largest domestic tourism markets** in terms of tourist trips are **India, China** and the **United States of America**, mostly the result of their large populations and geographical size.

**India** reported almost 1.9 billion domestic tourist trips (overnight trips) in 2018, the highest volume among countries reporting data on this indicator. The United States reported nearly 1.7 billion. Although such indicator is not available for **China**, this market recorded a staggering 5.5 billion domestic visitor trips in 2018, which includes both overnight and same-day visitors, respectively in 2018. The table below shows a list of major domestic tourism markets reporting 100 million or more trips in 2018. The order is only approximate and does not represent a ranking due to the lack of comparable data for several markets (see “Methodological note” for more information).

World's major domestic tourism markets, 2018\*

|                     | Tourist trips (arrivals) |           | Domestic visitor trips | Domestic visitors at hotels |           | Population | Domestic tourism trips per capita |
|---------------------|--------------------------|-----------|------------------------|-----------------------------|-----------|------------|-----------------------------------|
|                     | Domestic                 | Inbound   |                        | Guests                      | Nights    |            |                                   |
|                     | (million)                | (million) | (million)              | (million)                   | (million) | (million)  | (units)                           |
| India               | 1,855                    | 17.4      | ..                     | ..                          | ..        | 1,334      | 1.4                               |
| China               | ..                       | 62.9      | 5,539                  | ..                          | ..        | 1,395      | ..                                |
| United States       | 1,659                    | 79.7      | 2,291                  | ..                          | ..        | 327        | 5.1                               |
| Japan               | 291                      | 31.2      | 561.8                  | 317                         | 406       | 126        | 2.3                               |
| Brazil <sup>1</sup> | 191                      | 5.4       | ..                     | ..                          | ..        | 197        | 1.0                               |
| France              | 190                      | 89.4      | 268                    | 82                          | 135       | 65         | 2.9                               |
| Spain               | 170                      | 82.8      | 455                    | 51                          | 117       | 46         | 3.7                               |
| Russian Federation  | ..                       | 24.6      | ..                     | 48                          | 136       | 146        | ..                                |
| Republic of Korea   | 163                      | 15.3      | 311                    | 24                          | 26        | 52         | 3.2                               |
| Germany             | 159                      | 38.9      | ..                     | 114                         | 235       | 83         | 1.9                               |
| Indonesia           | ..                       | 13.4      | 303                    | 73                          | ..        | 264        | ..                                |
| Thailand            | 131                      | 38.2      | 228                    | 107                         | ..        | 68         | 1.9                               |
| United Kingdom      | 119                      | 36.3      | 1,822                  | 42                          | 91        | 66         | 1.8                               |
| Australia           | 106                      | 9.2       | 312                    | 37                          | 101       | 25         | 4.2                               |
| Malaysia            | 102                      | 25.8      | 302                    | 52                          | ..        | 32         | 3.1                               |
| Mexico              | 100                      | 41.3      | ..                     | 62                          | 109       | 125        | 0.8                               |

Notes: Table contains markets with 100 million or more domestic tourist trips, actual or estimated.

\*) Data corresponds to 2018 or latest year available.

1) Tourist trips, population and trips per capita for Brazil correspond to 2011.

Source: UNWTO (tourism) and IMF (population). Domestic tourist trips for the United States of America and Mexico according to OECD.

3 Full statistical definition and characteristics in: United Nations (2010), *International Recommendations for Tourism Statistics 2008*, United Nations, New York (online), available at: <https://www.e-unwto.org/doi/book/10.18111/9789211615210> (30-08-2020).

4 Data on domestic tourism is more limited than on inbound tourism. There are still important gaps in its statistical measurement and country coverage. For example, data on domestic tourist trips (overnight visitors) is currently available for only 73 countries (of a total of 220) for 2018 or earlier years. Please see “Methodological note” for more information.

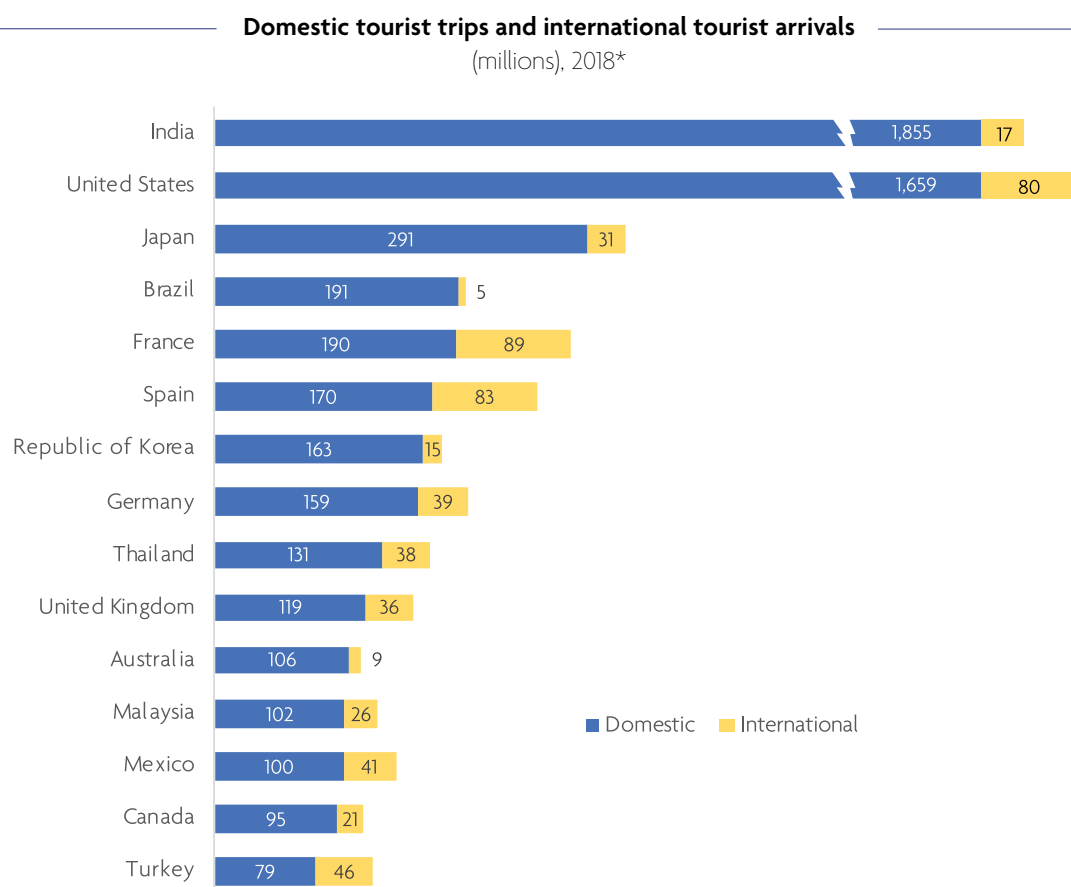


Other large domestic tourism markets include **Japan**, **Brazil**, **France** and **Spain**. Japan reported 291 million domestic tourist trips in 2018, almost ten times as many as international tourist arrivals.

The **Republic of Korea** and **Germany** also have important domestic tourism markets, reporting 163 and 159 million domestic trips respectively in 2018. The **Russian Federation** is also a large market, though no data is available on domestic trips. In Asia and the Pacific, **Thailand**, **Australia** and **Malaysia** have significant domestic markets as well, with over 100 million trips each. **Indonesia** is also worth mentioning, though no data is available on tourist trips, only visitor trips (303 million). Other important markets include **Mexico** (100 million domestic tourist trips), **Canada** (95 million) and **Turkey** (79 million).

Among these major markets, the **highest ratio of tourist trips to population** can be found in the **United States** with **5 domestic trips per capita**. In **Australia** and **Spain**, the ratio is about 4 trips per capita and in the **Republic of Korea**, **Malaysia** and **France** it is about 3 domestic trips per capita.

The following subsections look at the proportions of domestic and international travel in more detail, based on tourist trips (overnight visitors), guests and nights at hotels and similar establishments. As data is not available for all markets, it is important to note that the lists of countries presented below are not world rankings.



Notes: \*) Data for the 15 largest domestic tourism markets for which there is tourist trip data for 2018 or earlier.

Data for Brazil corresponds to 2011. Domestic tourist trip data is not available for China or the Russian Federation.

Source: World Tourism Organization (2020).

## 1.1 Domestic tourist trips vs. international tourist arrivals

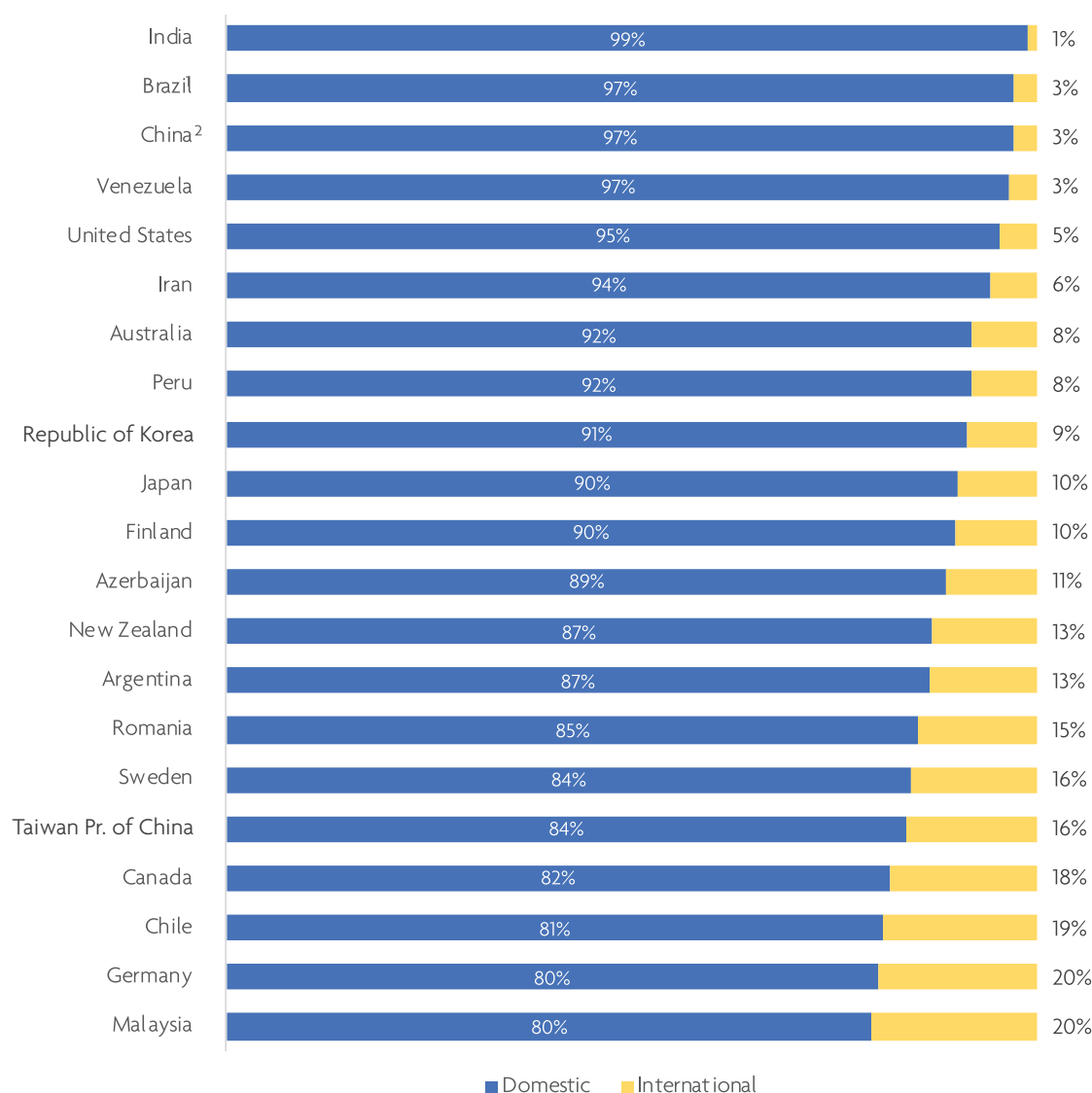
Considering all markets for which there is data on domestic tourist trips (overnight visitors), plus China (using data on visitor trips), the countries with the highest proportion of domestic trips versus international arrivals are **India, Brazil, China, and Venezuela**, all reporting **97%** or higher domestic tourist trips versus international tourist arrivals. In the **United States**, domestic trips account for **95%** of all trips.

In **Iran, Australia, Peru, the Republic of Korea, Japan and Finland** the proportion of domestic trips is **90%** or higher.

In **21** out of 73 countries reporting domestic tourist trip data (for 2018 or earlier), domestic trips represented **80%** or more of all arrivals, attesting to the importance of domestic tourism globally.

Share of domestic trips and international tourist arrivals

(%), 2018\*



Notes: \*) Markets with 80% or higher share of domestic trips for which there is tourist trip data for 2018 or earlier.

1) Data for Brazil corresponds to 2011.

2) Data for China is domestic visitor trips (overnight and same-day).

Source: World Tourism Organization (2020).



## 1.2 Domestic vs. international guests at hotels

Data on domestic guests at hotels confirms the importance of domestic tourism. In 2018 the **largest number of domestic guests at hotels and similar establishments** (based on countries with available data) were reported by **Japan** (317 million), **Germany** (114 million) and **Thailand** (107 million). (Data is not available for China, India or the United States.)

The highest percentage of domestic guests (versus international guests) were recorded in **Australia**,

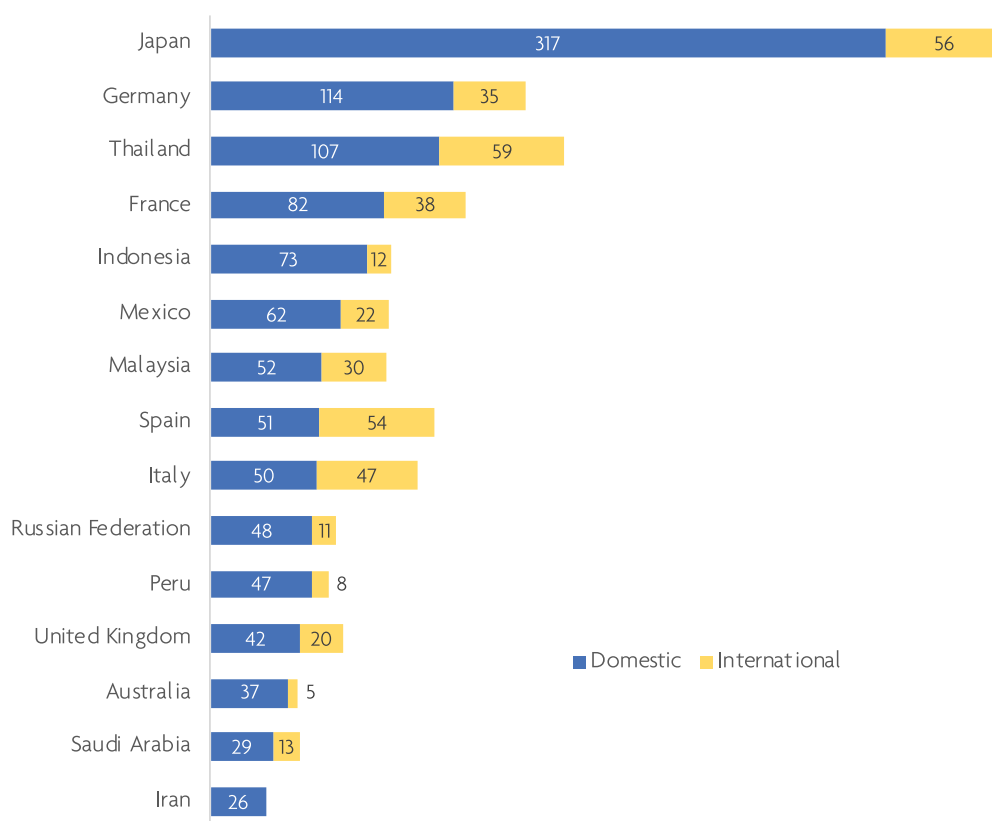
**Indonesia, Peru** and **Japan** (ranging from 85% to 89%), followed by **Ukraine** (84%) and the **Russian Federation** (81%). Of the 15 largest markets reporting numbers of domestic guests, only Spain recorded fewer domestic guests (49% of total guests) than international (51%). In Italy, the proportion of domestic guests is also about half of the total (52%).

In **33** out of 73 countries reporting domestic tourist trip data (for 2018 or earlier), domestic trips represented **70%** or more of all arrivals, attesting to the importance of domestic tourism globally.

In **21** out of those same 73 countries, the share of domestic trips represents **80%** or more of all arrivals.

### Domestic and international guests at hotels and similar establishments

(millions), 2018\*

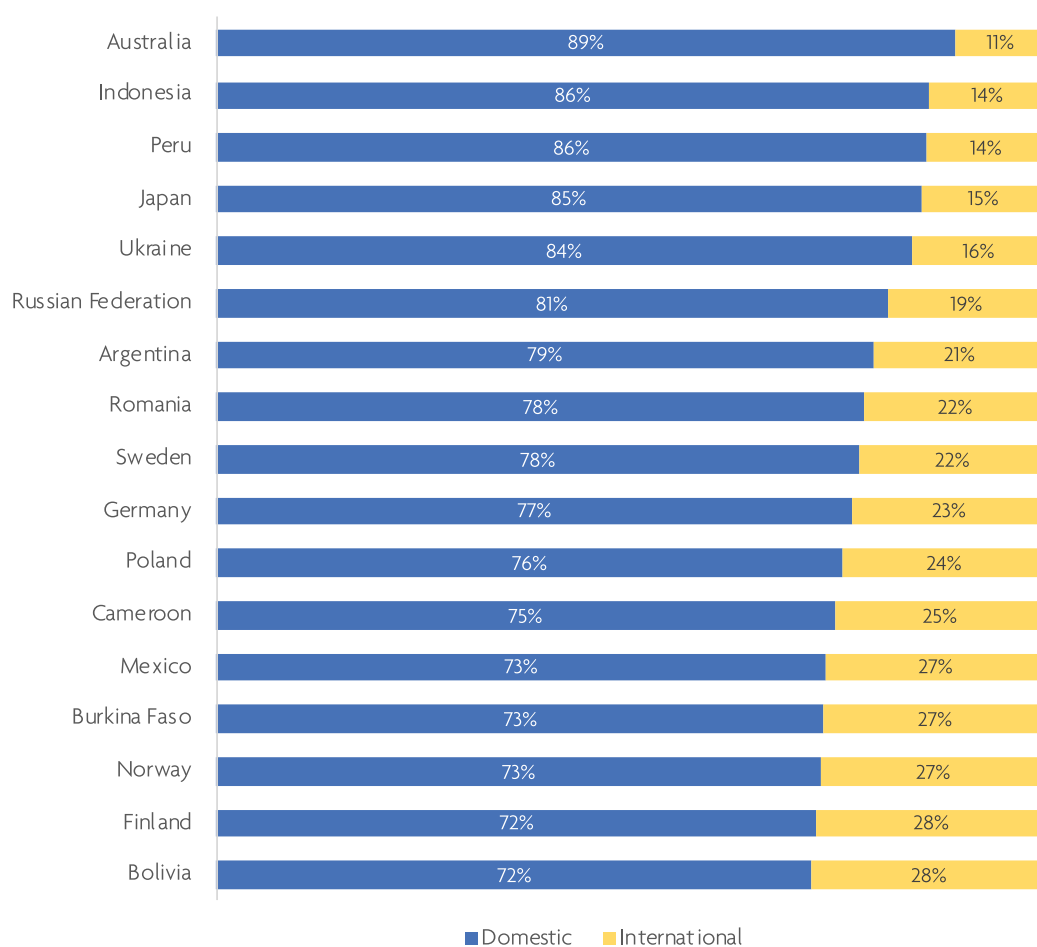


Note: \*) Data for the 15 largest domestic tourism markets for which there is domestic guest data for 2018 or 2017.

Source: World Tourism Organization (2020).

## Share of domestic and international guests at hotels and similar establishments

(%), 2018\*



Notes: \*) Markets with 80% or higher share of domestic trips for which there is tourist trip data for 2018 or earlier.

1) Data to Brazil corresponds to 2011.

2) Data for China is domestic visitor trips (overnight and same-day).

Source: World Tourism Organization (2020).



### 1.3 Domestic vs. international guests by nights spent at hotels

Among markets with available data, those reporting the highest number of nights spent by domestic tourists at hotels and similar establishments in 2018 (or earlier years) were **Japan, Germany, Saudi Arabia** and **Italy**. Japan recorded the largest number by far, with over 400 million, followed by Germany with 235 million, Saudi Arabia and Italy, both with 140 million nights.

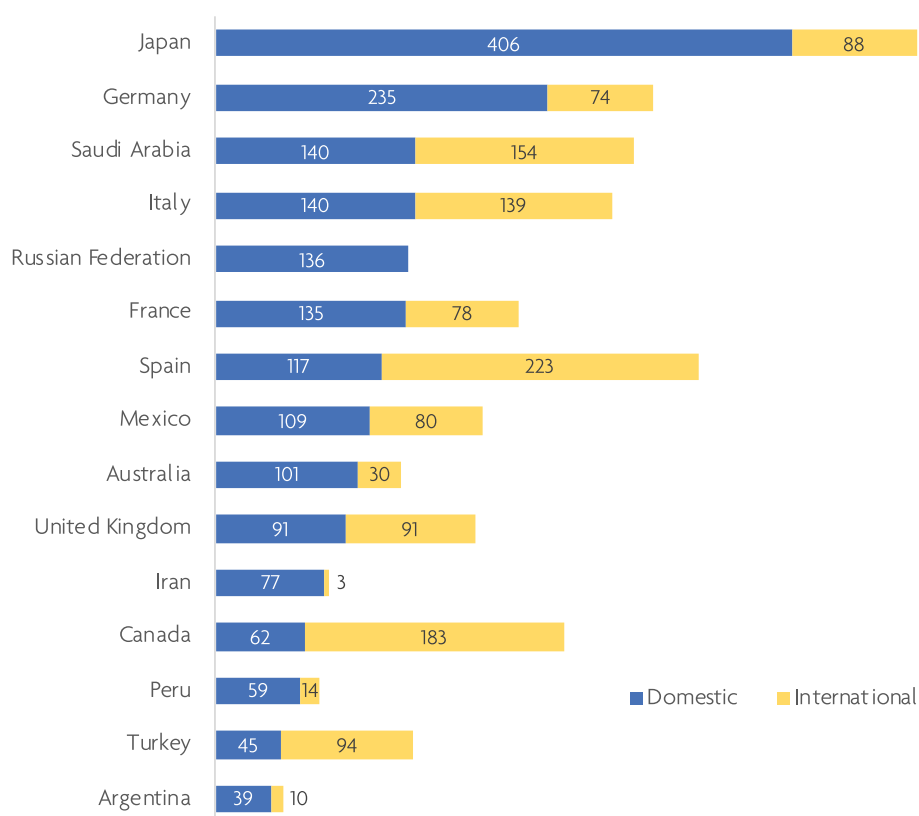
The markets with the highest share of nights spent by domestic tourists (compared to international guests) were **Iran** (96% in 2011), **Eritrea** (91%), **Kazakhstan**, **Ukraine**, **Algeria** and **Japan** (all between 82% and 84%).

As in number of guests, **Spain** also recorded more nights spent by international visitors (66%) than domestic visitors (34%) in 2018. This is also the case in **Saudi Arabia, Canada** and **Turkey**. In Canada the proportion of domestic nights is particularly low (25%).

In **15** out of **77** countries which reported number of nights at hotels and similar establishments (for 2018 or earlier) the share of domestic visitor nights is greater than **70%**.

#### Nights spent by domestic and international visitors at hotels and similar establishments

(millions), 2018\*



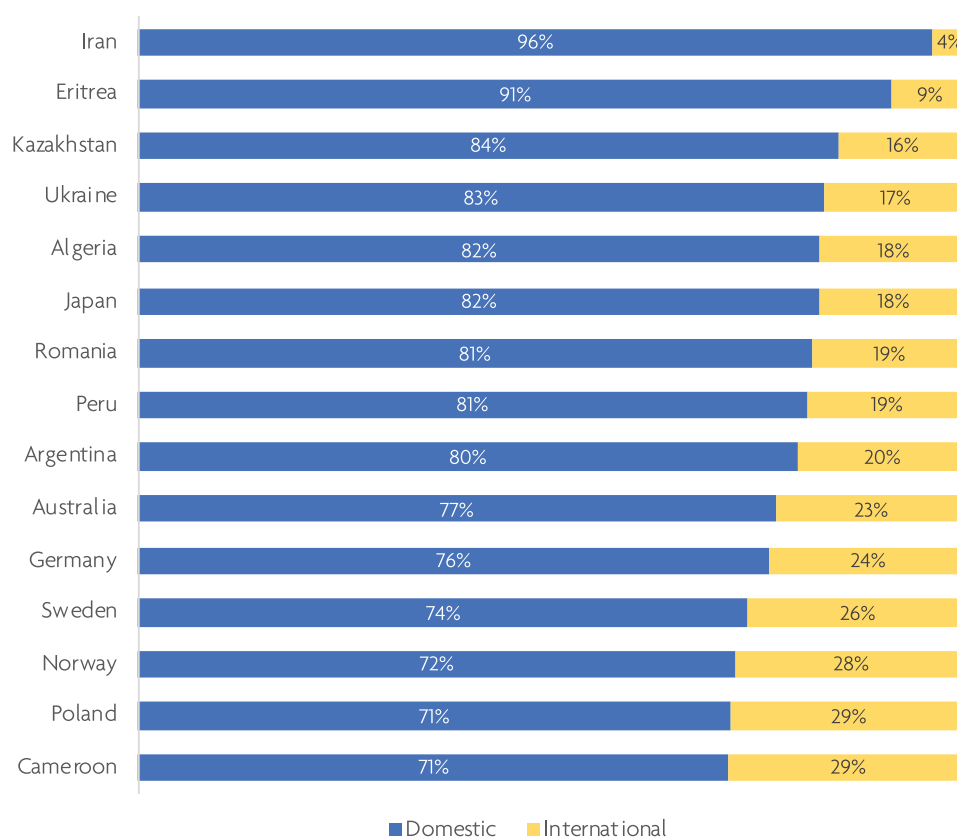
Note: \*) Data for the 15 largest markets for which there is data for 2018 or latest available year.

Data for Iran corresponds to 2011.

Source: World Tourism Organization (2020).

## Share of nights spent by domestic and international visitors at hotels and similar establishments

(%), 2018\*



Note: \*) Markets with 70% or higher share of nights spent by domestic visitors at hotels in 2018 or earlier years.

Data for Iran corresponds to 2011.

Source: World Tourism Organization (2020).



## 2. Domestic tourism expenditure higher than inbound spending in most large destinations

*Domestic tourism expenditure* is the tourism expenditure of a resident visitor within the economy of reference.<sup>5</sup> In many countries with large domestic markets, spending on domestic tourism can be much higher than the earnings generated by inbound travel. This section looks at domestic tourism expenditure based on data from the Organisation for Economic Co-operation and Development (OECD) and from Eurostat for a total of 36 countries.<sup>6</sup> This is also compared with inbound tourism expenditure in those markets.

In **20** out of 36 countries with available data, domestic tourism expenditure is higher than inbound spending (in US dollar terms). Among these 36 countries, those with the highest expenditure on domestic tourism are the **United States of America, Germany, Japan, the United Kingdom and Mexico.**

**Tourists from the United States spent almost USD 1 trillion on domestic travel in 2018**, by far the highest among countries reporting this data and **more than four times the earnings generated by**

**inbound travel to the United States** (USD 215 billion). In **Germany**, nearly **USD 250 billion** were spent on domestic travel, **almost seven times as much as inbound tourists spent** visiting the country. **Japanese** tourists spent **USD 201 billion** travelling within their country in 2017, **almost six times the receipts earned from inbound tourism** (USD 34 billion).

Overall, **spending on domestic tourism for the OECD countries is three times the amount generated from inbound tourism spending.**<sup>7</sup> In 9 of these countries, domestic spending accounts for 70% or more of total tourism spending.

Ten of the fifteen largest OECD markets by domestic tourism expenditure belong to the European Union, which shows the importance of domestic tourism in Europe. **Domestic tourism expenditure is 1.8 times higher than inbound tourism expenditure in the EU-28.**<sup>8</sup>

**Relative to population, Iceland and Netherlands spend the most on domestic tourism** in US dollar terms (both about USD 3,600 per capita), followed by **Australia** and **Germany** (above USD 3,000). This is well above inbound tourism earnings per capita in the Netherlands (USD 1,030), Australia (USD 1,680) and Germany (USD 450), though quite lower in the case of Iceland (USD 8,900 per capita earned from inbound tourism).

<sup>5</sup> United Nations (2010).

<sup>6</sup> Data for 31 OECD countries reported in: Organisation for Economic Co-operation and Development (2020), *OECD Tourism Trends and Policies, 2020*, DOI: <https://doi.org/10.1787/20767773>; and 5 EU countries reported in: *Eurostat Tourism Satellite Accounts in Europe – 2019 edition*, European Union, Luxembourg, DOI: 10.2785/78529.

<sup>7</sup> Ibid.

<sup>8</sup> *Eurostat Tourism Satellite Accounts in Europe – 2019 edition*, European Union, Luxembourg, DOI: 10.2785/78529. Note that Eurostat points out that domestic tourism expenditure makes a significant contribution to the economy and is therefore a key component of the Tourism Satellite Accounts. It comprises expenditure by residents travelling within their own country and expenditure linked to outbound trips but incurred in the country of residence, e.g. fares for a trip abroad but paid to a carrier in the country of origin or purchase of a new suitcase before the trip.

## Domestic and inbound tourism expenditure

|                       | year | Tourism Expenditure |               | Population | Per capita spending |         | GDP per capita |
|-----------------------|------|---------------------|---------------|------------|---------------------|---------|----------------|
|                       |      | Domestic            | Inbound       |            | Domestic            | Inbound |                |
|                       |      | (USD billion)       | (USD billion) | (million)  | (USD)               | (USD)   | (USD)          |
| United States         | 2018 | 956                 | 215           | 327.4      | 2,920               | 660     | 62,870         |
| Germany               | 2015 | 249                 | 37            | 81.7       | 3,050               | 450     | 41,160         |
| Japan                 | 2017 | 201                 | 34            | 126.7      | 1,580               | 270     | 38,340         |
| United Kingdom        | 2017 | 154                 | 48            | 66.0       | 2,330               | 720     | 39,980         |
| Mexico                | 2018 | 139                 | 23            | 124.7      | 1,110               | 180     | 9,800          |
| France                | 2018 | 97                  | 66            | 64.7       | 1,500               | 1,020   | 42,950         |
| Australia             | 2017 | 81                  | 42            | 24.8       | 3,280               | 1,680   | 55,970         |
| Spain                 | 2015 | 74                  | 62            | 46.4       | 1,590               | 1,350   | 25,850         |
| Italy                 | 2015 | 71                  | 39            | 60.8       | 1,170               | 650     | 30,150         |
| Canada                | 2018 | 62                  | 26            | 37.0       | 1,670               | 710     | 46,290         |
| Netherlands           | 2018 | 61                  | 18            | 17.2       | 3,560               | 1,030   | 53,230         |
| Sweden                | 2018 | 22                  | 15            | 10.2       | 2,170               | 1,460   | 54,360         |
| Austria               | 2017 | 21                  | 20            | 8.8        | 2,330               | 2,320   | 47,390         |
| Switzerland           | 2014 | 15                  | 18            | 8.1        | 1,880               | 2,190   | 87,160         |
| Norway                | 2017 | 15                  | 5             | 5.3        | 2,830               | 1,000   | 75,310         |
| New Zealand           | 2018 | 14                  | 11            | 4.9        | 2,940               | 2,210   | 41,200         |
| Belgium               | 2016 | 13                  | 8             | 11.3       | 1,110               | 680     | 41,540         |
| Denmark               | 2017 | 11                  | 8             | 5.7        | 1,930               | 1,480   | 57,380         |
| Portugal              | 2017 | 9                   | 18            | 10.3       | 880                 | 1,710   | 21,480         |
| Romania <sup>1</sup>  | 2018 | 9                   | 3             | 19.5       | 450                 | 170     | 12,270         |
| Finland               | 2016 | 9                   | 3             | 5.5        | 1,590               | 480     | 43,570         |
| Israel                | 2018 | 8                   | 7             | 8.9        | 950                 | 810     | 41,730         |
| Chile                 | 2018 | 6                   | 3             | 18.8       | 320                 | 150     | 15,900         |
| Poland                | 2015 | 6                   | 10            | 38.0       | 150                 | 280     | 12,570         |
| Czech Republic        | 2017 | 5                   | 7             | 10.6       | 480                 | 650     | 20,410         |
| Ireland               | 2007 | 4                   | 6             | 4.4        | 970                 | 1,360   | 60,810         |
| Hungary               | 2017 | 2                   | 6             | 9.8        | 230                 | 630     | 14,270         |
| Slovakia              | 2016 | 2                   | 3             | 5.4        | 380                 | 510     | 16,560         |
| Croatia <sup>1</sup>  | 2018 | 2                   | 11            | 4.2        | 400                 | 2,680   | 14,870         |
| Slovenia              | 2017 | 1                   | 3             | 2.1        | 670                 | 1,370   | 23,500         |
| Iceland               | 2017 | 1                   | 3             | 0.3        | 3,620               | 8,910   | 72,280         |
| Lithuania             | 2017 | 1                   | 1             | 2.8        | 340                 | 460     | 16,850         |
| Bulgaria <sup>1</sup> | 2018 | 1                   | 5             | 7.0        | 120                 | 640     | 9,310          |
| Latvia <sup>1</sup>   | 2018 | 0.4                 | 1             | 1.9        | 230                 | 550     | 18,030         |
| Estonia               | 2014 | 0.3                 | 2             | 1.3        | 200                 | 1,410   | 20,390         |
| Malta <sup>1</sup>    | 2018 | 0.1                 | 2             | 0.5        | 280                 | 3,900   | 30,610         |

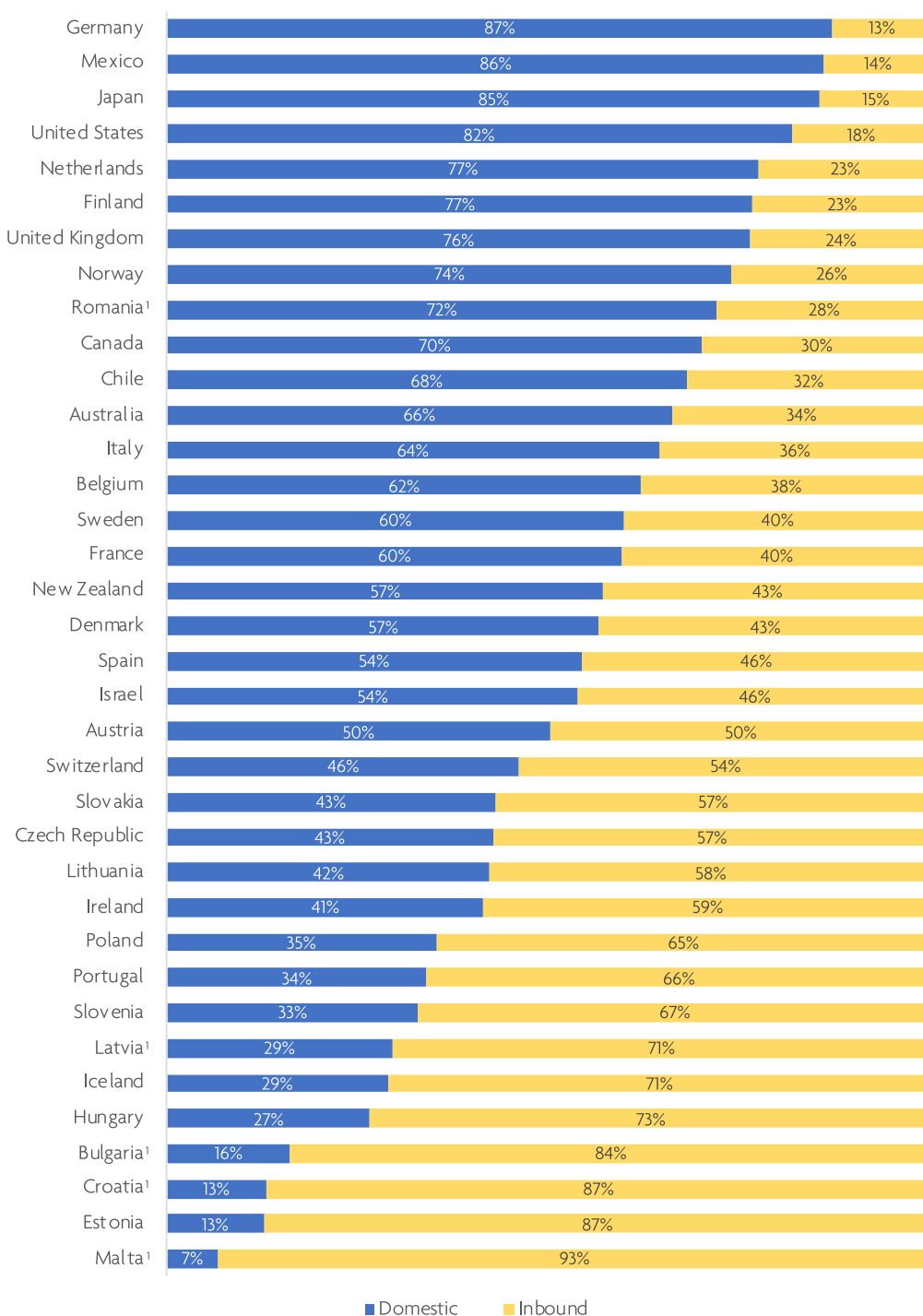
Notes: List based on available domestic expenditure data for 36 markets: 31 according to OECD and 5 according to Eurostat.

<sup>1</sup>) Domestic expenditure according to Eurostat. Reference year considered to be 2018 (not specified by source).

Source: OECD and Eurostat (domestic expenditure), UNWTO (inbound expenditure) and IMF (population, GDP).

## Share of domestic and inbound tourism expenditure

(%), 2018\*



Notes: \*) Domestic expenditure data for 31 countries according to OECD corresponds to 2018 or latest year available.

1) Data on domestic expenditure for 5 countries according to Eurostat. Reference year considered to be 2018.

Source: Compiled by UNWTO based on OECD, Eurostat (domestic) and UNWTO (inbound).



### 3. Domestic tourism recovering faster from COVID-19 crisis in selected markets

This section looks at recent domestic and international travel demand in the **United States of America, France** and **China**, three of the world's largest tourism markets, based on air ticket sales data from **ForwardKeys** for the period 6 January to 16 August 2020, measured in number of arrivals.

Air ticket data for international travel to, and domestic travel within the three markets show that domestic travel is recovering faster from the COVID-19 crisis than international travel. The data indicates smaller year-on-year drops in domestic ticket sales than international tickets in all three markets.

The largest difference can be found in the United States, where domestic ticket sales dropped 49% compared to a 66% decline in international tickets

for travel to the United States. In France, domestic air travel dropped 54%, compared to 63% in international travel to that destination. Of the three countries analysed, the decline was strongest in China, though domestic air travel fell less (-75%) than international air travel to China (-90%).

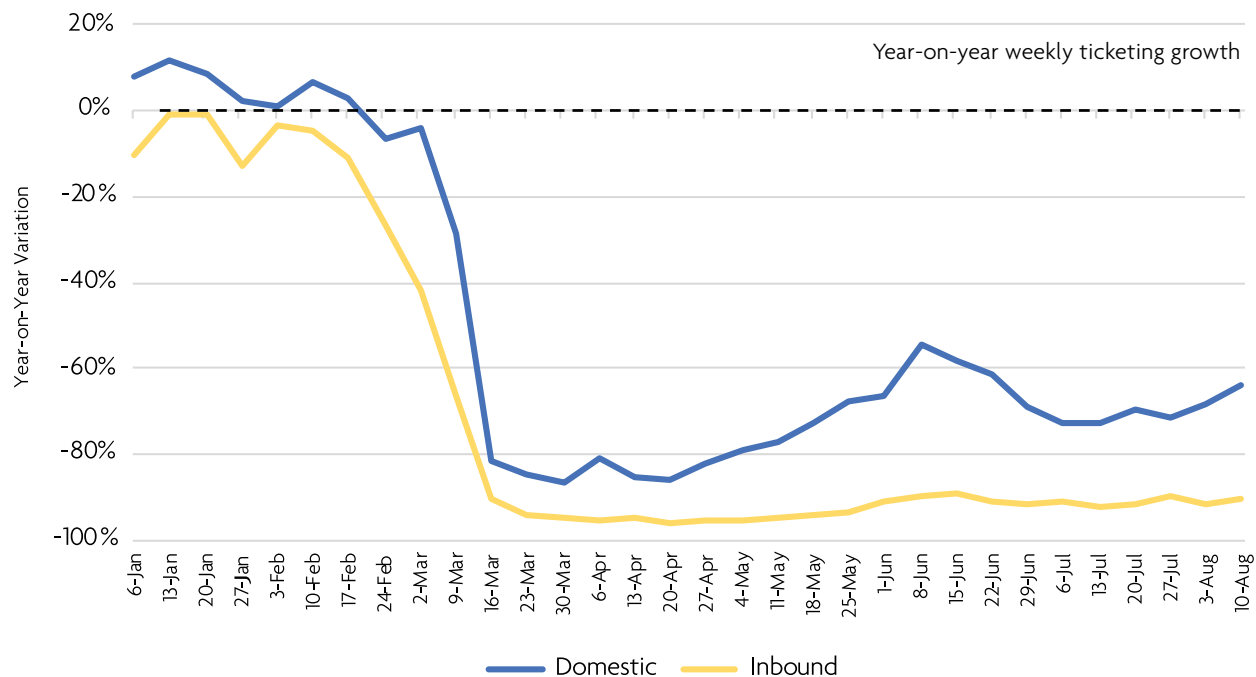
In the United States, domestic travel demand continuously exceeded international demand for that destination during the entire period. In China and France however, domestic demand started to surpass international demand in April and May respectively, according to air ticket sales.

**New air tickets issued year-to-date in 2020**  
(year-on-year % change in arrivals)

| Market        | Domestic arrivals | International arrivals |
|---------------|-------------------|------------------------|
| United States | -49.0%            | -66.5%                 |
| France        | -53.7%            | -64.0%                 |
| China         | -75.9%            | -90.1%                 |

Notes: Tickets issued from 6 Jan to 16 August 2020.  
Source: ForwardKeys Air Ticket year-to-date data.

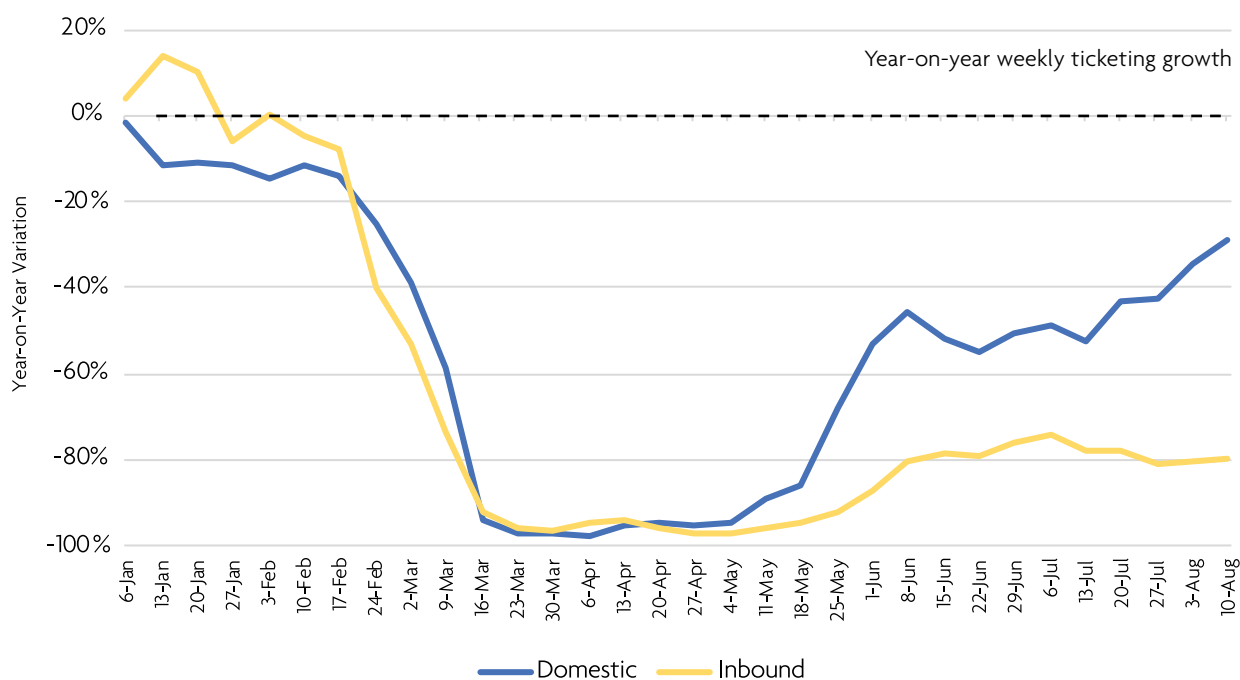
**Weekly air tickets issued for future international travel to the US, and domestic travel within the US**  
(% change in arrivals), 2020



Note: Tickets issued from 6 January to 16 August 2020 for any future travel vs same period in 2019. Only pax staying more than 1 night at destinations.  
Source: ForwardKeys Air Ticket data.

### Weekly air tickets issued for future international travel to France, and domestic travel within France

(% change in arrivals), 2020

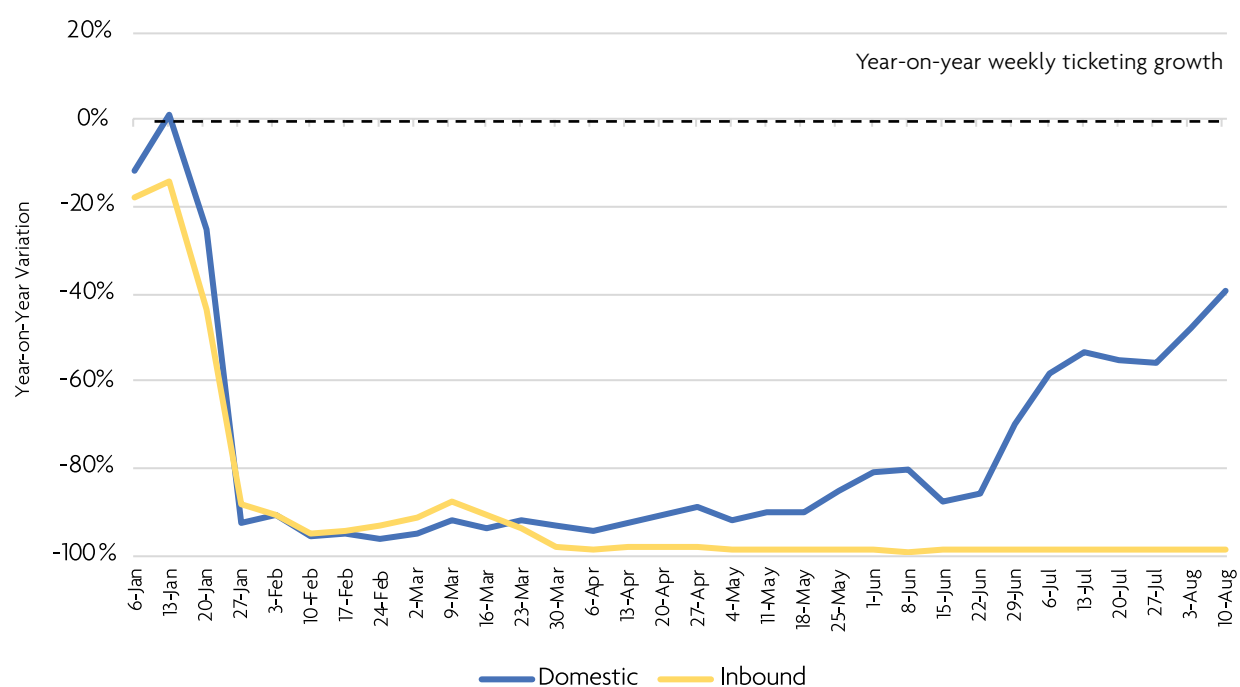


Note: Tickets issued from 6 Jan to 16 August 2020 for any future travel vs same period in 2019. Only pax staying more than 1 night at destinations.

Source: ForwardKeys Air Ticket data.

### Weekly air tickets issued for future international travel to China, and domestic travel within China

(% change in arrivals), 2020



Note: Tickets issued from 6 January to 16 August 2020 for any future travel vs same period in 2019. Only pax staying more than 1 night at destinations.

Source: ForwardKeys Air Ticket data.



## PART 2

# Initiatives and incentives to promote domestic tourism



An aerial photograph of a beach scene. In the foreground, there's a sandy beach with several white lounge chairs and colorful beach umbrellas. People are scattered across the beach, some sitting on chairs, others walking. In the background, the ocean is visible with people swimming and surfing. The overall scene is vibrant and captures a typical summer beach atmosphere.

# Key findings

- As travel restrictions begin to ease and the summer season takes place in the northern hemisphere, destinations worldwide are prioritizing domestic tourism and thus preparing and adopting measures to promote travel within their countries. The main objective of such initiatives is to boost domestic travel and restore confidence in the tourism sector.
- The promotion of domestic tourism is, in many cases, the first step to restart tourism; and in most of the countries this is expected to be followed by initiatives intended to attract international tourists, at a first stage, from the same region.
- Two different types of initiatives stand out from the analysis and are the most adopted across countries – **1. financial incentives** and **2. marketing and promotion**. Incentives can take the form of vouchers, fiscal incentives or long weekends, whereas the launch of new communication campaigns and digital promotion efforts with a strong use of social media channels are popular strategies of marketing and promotion taken by most destinations.
- Other common type of initiatives implemented by countries are public-public partnerships at different levels, as well as public-private collaboration in marketing and promotion efforts such as communication campaigns, online platforms, tourism fairs and discounts.
- Examples of product development, market intelligence efforts, as well as capacity building and training measures are also being carried out in some countries.

## 4. Initiatives to promote domestic tourism

In the past months, travel restrictions in many countries are being partially or completely lifted and the responsible and safe restart of tourism is gradually taking place.<sup>9</sup> With domestic tourism as an immediate priority, many governments around the world are developing and implementing several initiatives targeted at promoting domestic travel and restoring confidence in the tourism sector. The present section offers a detailed overview of such initiatives, and some local and private sector initiatives. Despite the wide variety of initiatives, these can be mostly grouped into the following categories:

1. Financial incentives;
2. Marketing and promotion;
3. Product development;
4. Partnerships;
5. Market intelligence; and
6. Capacity building and training.

All the case studies included in this section have been provided by government authorities, complemented with desk research and are available and regularly updated online on the UNWTO interactive dashboard [COVID-19: Measures to Support Travel and Tourism](https://www.unwto.org/covid-19-measures-to-support-travel-tourism).<sup>10</sup>

## 4.1 Analysis of main national measures

### 4.1.1 Financial incentives

**Incentives** are among the most common measures adopted by countries to stimulate domestic tourism. Although the specific mechanisms vary from country to country, the economic aid component of incentives is a common denominator to most of the measures reported in this area.

Incentives can be designed addressing both the **demand** and the supply side. Initiatives on the demand side can include **vouchers** (holiday bonus and similar) for residents in the country to spend in domestic tourism establishments (mainly accommodation but not only), **fiscal incentives** (i.e., reduction of VAT on domestic flights and other tourism services) and other measures such as **'long weekends'** (a measure consisting of moving bank national holidays close to the weekend to incentivize residents to travel within the country). From the **supply** side, incentives are mainly aimed at providing **financial support** to the domestic tourism industry, usually by allocating specific funds to tourism providers and to destination management/marketing organizations (DMOs), mainly for promotion and marketing campaigns.

Overall, these schemes aim to boost domestic tourism, stimulate the liquidity of tourism businesses – specially micro-, small and medium-sized enterprises (MSMEs) – strengthening employment and support local economies, while at the same time in many cases extending the tourism season and, in some others, allowing lower-income households access to holidays this year.

The extent and depth of these measures vary among regions: vouchers and fiscal incentives are more common in Europe and in Asia and the Pacific while 'long weekends' have been adopted in the Americas. Examples of financial aid can be found in Europe, the Americas, Asia and the Pacific and the Middle East.

<sup>9</sup> For more information please consult the latest *UNWTO Report COVID-19-Related Travel Restrictions – A Global Review for Tourism. Sixth Report* as of 30 July 2020 (online), available at: <https://web.unwto.org/s3fs-public/2020-07/200730-travel-restrictions.pdf> (30-08-2020).

<sup>10</sup> Please consult the UNWTO Dashboard: [www.unwto.org/covid-19-measures-to-support-travel-tourism](https://www.unwto.org/covid-19-measures-to-support-travel-tourism) (30-08-2020).

### 4.1.2 Marketing and promotion

Across the world, countries are implementing marketing and promotional strategies seeking to boost domestic travel and restore confidence. In many countries, domestic campaigns are the first step to restart tourism and reactivate the tourism economy, which will later be followed by marketing and promotion efforts to attract foreign travellers.

While the majority of countries is launching **new domestic tourism campaigns**, a few are strengthening existing domestic travel campaigns. In general, these campaigns are being promoted primarily through **digital platforms and social media**, television and radio advertisements; with some governments taking on a more creative and innovative approach by **using big data, promoting contests or creating new platforms** offering tourism experiences and assisting local businesses.

Using different slogans, tourism authorities are focussing on either promoting less-known destinations, rural and natural areas, or highlighting their most iconic attractions and popular destinations. Regardless of the focus, the message conveyed is fundamentally the same: to stimulate domestic demand and recover the confidence in tourism.

In order to promote domestic tourism, some authorities have also been using online tools to provide information on travel restrictions and safety measures for the territory.

### 4.1.3 Product development

Some countries focus their endeavours to develop or strengthen specific products to boost their domestic tourism, mainly those related to nature and activities in open air, far from congested areas. These include **wellness, natural protected areas, adventure and ecotourism, cultural and gastronomy tourism and rural tourism**. Additionally, some countries have also worked to encourage tourism in their capital cities (urban tourism).

Another focus of product development includes the promotion of **road trips and national routes** connecting different destinations.

### 4.1.4 Partnerships

Joint tourism initiatives with participation of public stakeholders at different levels (national and local) and involvement of the private sector are widely seen in the measures in place to boost domestic tourism.

In many countries, **tourism authorities have partnered with other concerned national authorities** (Ministry of Transport, Ministry of Finance, Ministry of Culture, etc.) to, for example, offer holiday vouchers and other incentives. National tourism administrations and national tourism organizations (NTAs/NTOs) have also partnered **with municipalities and DMOs** to:

1. Develop new tourism products at destination level;
2. Enhance and adapt the product offers at local level;
3. Improve infrastructure in certain destinations; and
4. Promote domestic marketing and initiatives.

In some cases, municipalities have been considered as key partners for national tourism authorities since their specific experience and knowledge of destinations is providing relevant insights when it comes to the design of domestic tourism strategies at national level.

Similarly, in the current context the **importance of public-private partnerships** is reinforced such as:

1. Marketing and promotion campaigns in collaboration with tourism businesses (i.e., accommodation establishments, restaurants, transport providers, travel agencies, etc.), institutional partners and destinations;
2. Marketing initiatives to provide visibility and market access for tourism businesses through fairs or special online platforms; and
3. Strategic alliances with the private sector to promote special offers.



### 4.1.5 Market intelligence

To better define their marketing strategies, some countries have also been assessing the potential share of domestic tourism through **forecasting and market insights on the behaviour and preferences of the domestic traveller** and on how can domestic tourism be better developed and promoted. Surveys on domestic tourism have been generally carried out with confinement measures still in place to guide the tourism industry as soon as restrictions are eased and at the same time to understand in advance what are the most appropriate and effective strategies to employ in restarting tourism, especially in terms of promotion and product development. A more holistic approach includes the establishment of an Observatory to monitor and measure domestic tourism in Argentina.

### 4.1.6 Capacity building and training

Most countries have widely adopted measures to **enhance capacity building and training initiatives addressed** to tourism stakeholders at large. In regard to domestic tourism, relevant and creative efforts are being made, especially in the Americas.

Among these initiatives, **online training platforms** provided by NTAs and NTOs offer a wide range of **webinars and other online training tools** on different topics, i.e., enhancement of professional skills development of frontline workers in direct contact with domestic tourists, creation and development of new tourism products aimed at the domestic market, strengthening the marketing chain with national travel agencies by deepening their knowledge of the national destinations and helping them sell domestic tourism experiences and destinations.

In other cases, the training initiatives are jointly organized with DMOs and municipalities in an effort to strengthen the co-governance of tourism and help municipal tourism coordinators better understand the singularities of the domestic traveller, in addition to showcasing the different products and experiences available and developing new tourism products and tailor-made marketing campaigns to promote domestic tourism.

## 4.2 National initiatives case studies

### 4.2.1 Examples of incentives

#### Holiday vouchers, bonus and similar schemes

- The **Greek** Government is allocating EUR 30 million (approximately USD 36 million) to subsidize holidays for citizens through the social tourism programme Tourism for All, addressed to low-income groups. Eligible parties are those with EUR 16,000 (USD 19,000) of annual individual income and EUR 28,000 (USD 33,400) for family income. The programme has a duration of six months, from 15 July to 31 December, with the possibility of an extension. The programme subsidizes half of a 4-night-stay in a hotel that is enrolled in the programme and is expected to provide some 1 million overnight stays with 250,000 social tourism coupons being distributed to Greek citizens. Greece will also stimulate domestic tourism through a corporate or business holiday travel vouchers programme worth EUR 300 (USD 360) which will be made available for private sector employees in order to encourage employees to travel.
- **Italy** approved a Holiday Bonus (**Bonus Vacanze**)<sup>11</sup> for families under certain conditions that would allow them to travel within the country and reactivate demand. The holiday bonus offers a contribution of up to EUR 500 (USD 600) for stays in hotels, campsites, holiday villages, farmhouses and bed & breakfasts in Italy. The beneficiaries are families with income of up to EUR 40,000 (USD 47,800) and the bonus amount depends on the number of family members (from EUR 150 to 500; USD 180 to 600). The holiday bonus will be valid from 1 July to 31 December and will be downloaded and spendable in digital form only. The bonus will be usable to the extent of 80% in the form of an immediate discount for the payment of the services provided by the hotelier while the remaining 20% may be discharged as a tax deduction when filing the tax return by the member of the family to whom the stay is invoiced (with electronic invoice or commercial document). The discount applied to the guest in possession of the Holiday Bonus will be refunded to the establishment in the form of a tax credit that can be used in compensation without limit of amount, through a specific form. Alternatively,

<sup>11</sup> Please consult: <https://www.bonus-vacanze.org/home>.

it can be transferred to third parties, including credit institutions and financial intermediaries.

- **Icelandic** residents aged over 18 years will collectively receive ISK 1.5 billion (USD 11.1 million) worth of travel vouchers (*Ferðagjöf*,<sup>12</sup> which can be translated as *Travel Gift*) from the Government to spend domestically. Individuals can receive a ISK 5,000 (approximately USD 37) Travel Gift as part of the tourism support package by the Icelandic Government in collaboration with the Icelandic Travel Industry Association. The gift needs to be fetched at [Island.is](https://island.is) (an official website by the Icelandic Government) with a personal electronic certificate. Travel Gifts can be used at tourism companies that have signed up for the Travel Gift scheme and expire on 31 December 2020.
- In order to support tourism businesses hardly hit by the COVID-19 crisis, the **Romanian** Government has decided to maintain the *Tourist Pass Holiday*<sup>13</sup> initiative (holiday vouchers for public employees similar to 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 and December 2019 has been extended by law until 31 May 2021. These vouchers can be granted and managed only to licensed operators, authorized by the Tourism Ministry.
- **Serbia** has set aside RSD 2.8 billion (USD 33 million) for 560,000 tourist vouchers worth RSD 5,000 (USD 50) intended for citizens of Serbia who wish to spend their vacation in the country. Vouchers can be used only in hospitality facilities in Serbia.
- **Slovenia** has also approved a tourism voucher scheme by which every adult will receive a EUR 200 voucher (USD 240), while children under 18 will receive EUR 50 (USD 60). The vouchers will be reimbursed by the Slovenia's Financial Administration (FURS). Valid since the first day of school summer vacation (25 June) until the end of 2020, the voucher can be used at any accommodation businesses registered under the following categories: hotels and other similar accommodation, holiday homes and resorts, tourist farms with rooms, renting private rooms to guests, [mountain lodges](#)<sup>14</sup> and youth hostels, and other short-term accommodation and camping activities. The vouchers will be entered as a credit of a permanent resident into the IT system of the Financial Administration (FURS) and every resident eligible for it will receive an e-mail about it. Voucher holders will not be able to get cash for the voucher.
- **Poland** has adopted a similar initiative with free vouchers for families with children. Each family with a child under 18 years old or a child with a disability can claim a voucher of PLN 500 (USD 130). The amount can be spent on hotel services or tourist events carried out by an entrepreneur or public organization throughout the country.
- In **Denmark** the Government launched a scheme making 53 ferry journeys free in July as part of a wider package to promote domestic tourism.
- Under the economic stimulus package, the **Malaysian** Government has introduced several incentives for domestic tourism implemented as of 10 June. Among them an allocation of MYR 500 million (USD 113 million) of travel discount vouchers to encourage domestic tourism in the country, complemented with a personal tax relief of up to MYR 1,000 (USD 227) for expenditure related to domestic tourism for all Malaysians. A matching grant known as *Galakan Melancong Malaysia (Gamelan)*<sup>15</sup> will also be extended primarily for domestic promotion and marketing activities in order to assist local tourism players.
- The Government of **Thailand** will subsidize 5 million nights of hotel accommodation at 40% of normal room rates, with the subsidy limited to THB 3,000 per night (USD 98) for up to five nights. Tourists will be responsible for the other 60%. Under the name *We Travel Together*<sup>16</sup> this stimulus scheme will also apply to other tourism services, such as food and domestic air tickets with up to a 40% of the actual expenses subsidized by the Government (in the case of air

12 Please consult: <https://ferdagjof.island.is/en>.

13 Please consult: <https://www.sodexo.ro/en/holiday-vouchers/tourist-pass-vacation-vouchers/>.

14 Please consult: <https://www.pzs.si/novice.php?pid=14382>.

15 Please consult: <https://www.tourism.gov.my/industry/view/gamelan-2019>.

16 Please consult: <https://www.เราเที่ยวด้วยกัน.com>.

tickets there is a ceiling), while the tourist pays the rest. Participants must be Thai nationals with a valid ID card, be aged 18 or above and must choose to travel, eat and stay in a province other than the province on one's house registration. Applicants must download an application (similar to a wallet) and register. Once registration is validated, the subsidy will be transferred into the app accounts after registrants check into the registered hotel accommodations. Registration is open from 15 July to 31 October 2020 and until the quota for each category is met. Under this stimulus package, the Thai Government will also fund the holiday travel expenses of approximately 1.2 million health workers and volunteers at hospitals, as a sign of gratitude for their service in helping to address the pandemic.

- **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 MOP 560 (USD 70) to join two tours – with MOP 280 (USD 35) per tour – scheduled between 22 June and 30 September organized by participating travel agencies. At present, the project covers a total of 15 itineraries in two categories, namely Community-based Tours (six itineraries) and Leisure Tours (nine itineraries). The project is tailored to provide residents with affordable plans and opportunities to get familiarized with the latest development of the local communities and tourism products.
- The Government of the **Republic of Korea** will issue 1 million discount coupons of KRW 30,000 or 40,000 (USD 25–35) that can be used in accommodations across the country. The coupons will be issued from 14 August to 31 October on a first-come-first-served basis. The country's Government expects that this [initiative](#)<sup>17</sup> will stimulate tourist consumption of KRW 567 billion (USD 480 million).

### Fiscal incentives (VAT tax reduction, etc.)

- In **Hungary**, the in-kind benefits system which employers may give employees in addition to their salaries (SZÉP Card) will allow for larger benefits: the *SZÉP Card* is issued by commercial banks, it works almost like a bank card, but can only be used for the services eligible (accommodation, catering and leisure-time). It has always been taxed at a preferential rate, but now the yearly amount which can be provided at this preferential tax rate is maximized with the ceiling almost doubled. In addition, payments to these accounts are treated even more preferentially between 22 April and 31 December 2020, as no social contributions have to be paid after them, only the income tax of 15%.
- In **Turkey** VAT rate on domestic flights is reduced to 1% from 18% for three months.

### 'Long weekends'

- Acknowledging the importance of domestic tourism for the Mexican economy, which represents 82% of the total tourist consumption, with an expenditure of USD 142.000 million, **Mexico** has decided to continue with the established long weekends to encourage domestic tourism.
- **Costa Rica** approved a law to move all holidays of 2020 and 2021 to Mondays, in order for Costa Ricans to enjoy long weekends to travel domestically and to extend their stays in tourist destinations throughout the country, contributing to the reactivation of the sector.
- **New Zealand** is also promoting long weekends or extra holidays as a measure to boost domestic tourism.

<sup>17</sup> Please consult: [https://korean.visitkorea.or.kr/notice/news\\_detail.do?nwsid=c48afaf3-c1e8-4ef7-997f-f81047ebcc46](https://korean.visitkorea.or.kr/notice/news_detail.do?nwsid=c48afaf3-c1e8-4ef7-997f-f81047ebcc46).



#### 4.2.2 Examples of marketing and promotion initiatives

- **Argentina, Canada, China, Costa Rica, Denmark, Fiji, Finland, France, Georgia, Hungary, Iceland, Jordan, Malaysia, Mexico, Morocco, New Zealand, Portugal, Republic of Korea, Serbia, Slovenia, Spain and Uruguay** have all kicked-off domestic tourism marketing and promotional campaigns at the national level as an effort to stimulate domestic demand and restart tourism within their countries.
- **Costa Rica** announced the launching of an unprecedented national advertising campaign aimed at reducing prices for national tourists.
- The **French** Government has launched the campaign *#CetÉtéJeVisiteLaFrance*<sup>18</sup> (*This Summer, I visit France*) highlighting the diversity of destinations across the country and encouraging its citizens to rediscover their own culture, heritage and gastronomy.
- For the first time ever, **Spain** has launched a domestic tourism campaign with the *#DescubreLoIncreible*<sup>19</sup> (*Discover the Unbelievable*) being promoted in social media.
- In **Argentina**, the Government announced a contest *Promociona tu Destino*<sup>20</sup> (*Promote Your Destination*) addressed to tourism students and recent graduates with the goal of generating new and innovative ideas on how to promote the countries' destinations.
- **Mexico** is pursuing an ambitious digital strategy based on big data and social listening to boost domestic tourism. The campaign<sup>21</sup> includes the participation of the 32 States and different municipalities to help build a narrative and strategic line of communication that ensures the content reaches the right audience. Furthermore, the Secretary of Tourism of Mexico (SECTUR) has
- also confirmed that the Tourist Tianguis (the main tourism fair in the country) has been postponed to March 2021, but with the novelty of being preceded by the first Digital Tourist Tianguis, in September 2020, where all States and – mainly – tourism service providers will be able to offer their products and tourist packages, consolidating it as a driving force for internal tourism and the reactivation of the tourist value chain.
- In June, a domestic tourism campaign *#TuPodes*<sup>22</sup> (*#YouCan*) by Turismo de **Portugal** was announced inspiring the Portuguese travellers to visit the places that have made Portugal the world's best destination three years in a row. The campaign will be carried out in three phases. The first phase consisted in the launch of the new video *#TuPodes*<sup>23</sup> with the second phase focussed on the testimonies of tourism workers and the third phase on a digital platform,<sup>24</sup> which will support the national campaign, but also the regional campaigns, compiling countless tourist experiences across the country. The visibility that will be given to the services of these companies will also boost the business fabric of the regions and support the marketing effort of these companies through offers specifically aimed at the national tourist who is not their usual customer.
- In **Hungary**, the Hungarian Tourism Agency has launched a communication campaign<sup>25</sup> advocating for nationals to spend this year's holiday rediscovering the territory and exploring the rural landscapes, while simultaneously releasing a communication campaign promoting urban tourism in Budapest for the summer season.
- In **New Zealand**, citizens are encouraged to experience something new (*Do Something New, New Zealand*)<sup>26</sup> and the Government has allocated NZD 1 million (USD 660,000) for a domestic tourism campaign focussing on those regions that had been most impacted by the restrictions on the China visitor market.

18 Please consult: [https://www.france.fr/fr/campagne/cetetejevisitelafance?utm\\_source=redirection&utm\\_medium=referral&utm\\_campaign=cetetejevisitelafance](https://www.france.fr/fr/campagne/cetetejevisitelafance?utm_source=redirection&utm_medium=referral&utm_campaign=cetetejevisitelafance).

19 Please consult: <https://www.spain.info/es/descubreloincreible>.

20 Please consult: <https://www.argentina.gob.ar/turismoydeportes/promociona-tu-destino>.

21 Please consult: <https://www.gob.mx/sectur/prensa/presenta-miguel-torruco-la-estrategia-digital-para-la-contencion-de-crisis-del-sector-turistico>.

22 Please consult: <https://www.portugal2020.pt/content/nova-campanha-tu-podes-visita-portugal>.

23 Please consult: <https://www.youtube.com/watch?v=Y7j3cvtWnOE&feature=youtu.be>.

24 Please consult: <https://tupodes.visitaportugal.com>.

25 Please consult: <https://utazazitthon.csodasmagyarorszag.hu>.

26 Please consult: <https://www.tourismnewzealand.com/news/do-something-new-new-zealand/>.

- In **Denmark**, the Danish Coastal and Rural Tourism (Dansk Storbyturisme) and Visit Denmark (the national tourism board) are encouraging the Danes to use [#baredenmark](#)<sup>27</sup> (Just Denmark) and showcase the interesting things they are doing by being on a vacation in Denmark. They have also launched a campaign to encourage Danes to post on Instagram and win DKK 200.000 (USD 32 ,000).
- The Government of **Georgia** launched a new programme *Travel for Georgia* with the aim of promoting domestic tourism in the country. The Government is encouraging all stakeholders to take part in the programme and revive domestic tourism.
- In **Fiji**, an initiative of Tourism Fiji and the Ministry of Commerce, Trade and Tourism, the *Love our Locals*<sup>28</sup> campaign, intends to build consumer confidence and ignite economic activity in the tourism sector by launching a call to action and asking Fijians to rally behind local restaurants, tour operators and hotels, support Fijian Made products and enjoy holidays in the country.
- Tourism **Malaysia** has reinforced its *Cuti-Cuti Malaysia*<sup>29</sup> domestic tourism campaign. The campaign seeks to encourage citizens to travel to nearby places in the country for their weekend getaways and thus revive the country's tourism industry.
- The **Korea** Tourism Organization (KTO) has launched this year's edition of *Travel Week*<sup>30</sup> aimed at boosting off-season holidays and dispersing holidays of Korean citizens, which are usually concentrated in the summer, as well as promoting domestic tourism.
- **Finland** has allocated additional financing of EUR 500,000 (USD 590,000) to support domestic travel and tourism as part of the recovery measures related to the COVID-19 crisis. The financial effort will be mainly used to implement a national domestic tourism campaign in connection with the ongoing *100 Reasons to Travel in Finland* campaign<sup>31</sup> by the Finnish Association of Tourism Organisations, Suomen Matkailu.

#### 4.2.3 Examples of product development initiatives

- **Costa Rica** seeks to reinforce its very well-known wellness segment among international tourism markets within its own population with specific Wellness Pura Vida free courses and a Training Week, offered by international wellness tourism experts in the digital *ICT Capacita platform*<sup>32</sup> of the Costa Rican Tourism Institute (ICT). ICT aims to strengthen this segment within its nationals and to position Costa Rica as a comprehensive destination that allows locals to reconnect with nature by mixing wellness and adventure with unique experiences to recharge batteries. The objective is to generate new business ideas, improve current ones and give advice and recommendations to entrepreneurs interested in this segment of the tourism market.
- **Paraguay** has taken advantage of the series of webinars *Tourist Destinations of Paraguay* to showcase the different products and experiences that Paraguay offers in its 17 departments, mainly highlighting natural (birdwatching and fishing) and (eco)adventure tourism, rural tourism, cultural and gastronomy tourism (such as the *Yerba Mate* circuit), and a virtual trip through 22 national routes detailing each of them and their historical, cultural, natural and gastronomic offers.
- Within its marketing and promotion efforts to strengthen domestic tourism, **Mexico** will continue to promote the 121 *Magical Towns (Pueblos Mágicos)* in the first Digital Tourism Tianguis (September 2020), consolidating it as a driving force for internal tourism. Its strategy will also focus on the boosting of road trips and the promotion of regional routes, such as the development of the long-term project the *Maya Train*, which would include the integration of tourism circuits that cover beaches, archaeological areas, museums, Magical Towns and cities declared World Heritage Sites.

27 Please consult: <https://www.megetmereendbare.dk>.

28 Please consult: <https://www.fijitimes.com/love-our-locals-campaign/>.

29 Please consult: <http://cuticuti-malaysia.com>.

30 Please consult: <https://korean.visitkorea.or.kr/other/otherService.do?otdid=46a412aa-0b3b-11ea-869b-020027310001>.

31 Please consult: <https://100sytya.fi>.

32 Please consult: <https://ictcapacita.go.cr/>.

- **Peru** is placing its focus on cultural tourism and protected natural areas, including among these the archaeological park of Machu Picchu and the network of Inca Roads, by encouraging free of charge access to some groups of nationals.
- A similar focus is given by **Jordan** and the Royal Society for the Conservation of Nature (RSCN) that encourages sustainable ecological tourism through its campaign *Travel Inside your Country*, offering special prices and discounts at most reserves and RSCN facilities.
- **Argentina** is taking advantage of its *Promote Your Destination*<sup>33</sup> contest to place the focus on rural tourism and local areas and give visibility to lesser known destinations to diversify its domestic tourism offer.
- **Hungary** and **Paraguay** put efforts to encourage urban tourism in their capital cities, either by a communication campaign (Budapest) or by revitalizing the infrastructure of the city center (Asunción).

#### 4.2.4 Examples of partnerships

##### Public-public (NTAs/NTOs and municipalities, DMOs and/or other ministries, etc.)

- In **Peru**, the Ministry of Foreign Trade and Tourism (MINCETUR) joined efforts with the Ministry of Culture and the National Service of Protected Natural Areas (SERNAP) to launch a series of incentives for public servants, children, adolescent and older adults, who will have free-of-charge access to archaeological sites, museums, historical places and natural areas of the country from 1 July to 31 December 2020. A total of 55 cultural sites and 22 protected natural areas, including among these the archaeological park of Machu Picchu and the network of Inca Roads will benefit from this measure of reactivation and economic promotion of tourism within the country.
- Boosting coordination between national and regional levels, **Atout France** is organizing in partnership with the Regional Tourism Committees a strong digital campaign that involves influencers' visits to France throughout the summer.
- **Destination Canada** announced a new partnership with the provinces and territories to deliver locally-led marketing programmes encouraging Canadians to discover their own back yard.
- Similarly, the **Costa Rican** Tourism Institute (ICT) aims to integrate the Regional Tourist Chambers in the process of improving and adapting the product offer at local level, which, in turn, would strengthen them.
- In **Hungary**, the Hungarian Tourism Agency (HTA) partnered with several public transport companies (i.e., railways, long distance buses and petrol station network) for a joint campaign to promote safe domestic travel to rediscover the wonders of Hungary.
- In **Chile**, there has been strong coordination between national and local authorities. The Undersecretariat of Tourism jointly with the National Tourism Service (SERNATUR) organized the virtual event National Meeting of Municipal Tourism Coordinators in order to strengthen the associativity among municipalities and prepare

33 Please consult: : <https://www.argentina.gob.ar/turismoydeportes/promociona-tu-destino>.

together the gradual reactivation of local tourism. Tourism coordinators in charge of tourism planning and management at each municipality are crucial due to their experience and better knowledge of their territories. With the participation of more than 400 professionals from all over the country, SERNATUR will be able to execute strategies in order to reactivate domestic tourism more efficiently.

- **Paraguay** is an example of joint public-public collaboration at destination level. In its efforts to revitalize the historic city centre of its capital city Asuncion for attracting tourists from other parts of the country, SENATUR leads this revitalization project and coordinates actions with other public institutions, such as the Ministry of Public Works and Communications; the Ministry of Interior; the Ministry of Urban Planning, Housing and Habitat; the National Secretariat of Culture; the Municipality of Asunción; and the National Administration of Electricity, among others. Infrastructure improvements include transforming some of the main streets into pedestrian ones, enabling means of transport to facilitate tours, improving the squares, placing illuminated water sources and enhancing the tree planting of the sidewalks.

#### Public-private (NTAs/NTOs and/or DMOs and private sector)

- **Atout France** has launched the campaign *#CetÉtéJeVisiteLaFrance*<sup>34</sup> (*This Summer, I visit France*) in collaboration with a number of tourism businesses and stakeholders as part of its strategy to boost domestic tourism demand. Sixty destinations, tourism companies and institutional partners have adhered to this campaign that aims to encourage citizens to meet their families and friends while supporting the local economy by highlighting the diversity of French destinations which will allow travellers to rediscover their own culture, gastronomy and heritage.

- **Finland's** campaign *100 Reasons to Travel in Finland*<sup>35</sup> implemented by the Finnish Association of Tourism Organizations Suoma ry and supported by the Ministry of Employment and the Economy (MEE), has led tourism operators around the country to join forces. Part of the Government's financing to domestic tourism will be allocated to increasing the visibility of tourism companies and their products and services in a special platform, with the objective of expanding the campaign to cover a larger number of small and medium-sized tourism companies from all parts of Finland. To this end, all tourism companies serving the domestic travel and tourism sector will be able to participate in the extended campaign for a special participation fee of EUR 300 (USD 360) plus VAT.
- In the case of **Macao (China)**, the Macao Government Tourism Office (MGTO) has coordinated the local tour project *Macao Ready Go! Local Tours* with a task force formed by the Macau Travel Agency Association, the Association of Macao Tourist Agents and the Travel Industry Council of Macau offering special rates for residents to participate in local tours.
- In **Costa Rica**, the Costa Rican Tourism Institute (ICT) will establish strategic alliances with the private sector to promote special offers and easier payment conditions in order to stimulate domestic tourism.
- Similarly, the **Republic of Korea** collaborates with local governments and the private sector for its domestic tourism campaign *Travel Week* for which the Korea Tourism Organization (KTO) recommends tourist sites; and national travellers can benefit from discounts on attractions, transportations and accommodations that are part of the campaign.

34 Please consult: [https://www.france.fr/fr/campagne/cetetejevisitelafance?utm\\_source=redirection&utm\\_medium=referral&utm\\_campaign=cetetejevisitelafance](https://www.france.fr/fr/campagne/cetetejevisitelafance?utm_source=redirection&utm_medium=referral&utm_campaign=cetetejevisitelafance).

35 Please consult : <https://100sytya.fi>



#### 4.2.5 Examples of marketing intelligence initiatives

- In order to assess the domestic travel demand and to ensure the survival of the industry in the aftermath of the pandemic, Tourism **Malaysia**, the national tourism organization of Malaysia, conducted an online survey<sup>36</sup> from 7 to 13 April 2020. Succinctly, the survey intended to assess domestic travellers following the end of the travel restrictions with regard to: i) their willingness to travel for leisure; ii) their travel preferences; and iii) their perception on leisure travel. The findings of the survey intend to enable industry players and other related stakeholders to envision the demand of domestic travellers and identify suitable and effective strategies to revive their businesses and travel industry as a whole.
- In the **Philippines**, the department of Tourism conducted an online survey<sup>37</sup> on the effects of the pandemic on domestic and international tourism and on Filipinos' travel behaviour in the new normal. The results of the survey were released to various tourism stakeholders in a webinar in the end of June. The survey, which had over 12,000 respondents across the country, showed the Filipinos' sentiments and concerns regarding domestic travel and provided insights to tourism businesses to better prepare and respond to national tourists. According to the Government, the survey represents the data-driven efforts of the tourism authorities and tourism stakeholders to restart the local tourism industry.
- In May 2020, the National Secretariat of Tourism (SENATUR) in **Paraguay** carried out a survey<sup>38</sup> to gather information and better prepare the tourism sector for the aftermath of the outbreak. In this survey, 61.5% of Paraguayans expressed their desire to make trips within the country, once travel restrictions were lifted. The results of the survey triggered SENATUR to focus all its efforts in better prepare the sector for domestic tourism.
- In response to the situation and the travel restrictions imposed on international tourism, the Government of **China** conducted a market intelligence exercise to forecast the proportion of domestic tourism in the overall tourism demand.
- The Minister of Tourism and Sports of **Argentina** announced the creation of an Observatory for Domestic Tourism. The objective is to have a tool that provides knowledge and understanding of the profile of the Argentine tourists, their preferences, interests, habits, needs and predisposition to travel. The Observatory would serve both to measure the impact of the current situation, as well as to favour a more comprehensive understanding of the structure of the Argentine tourist, in coordination with the private sector.
- Tourism Australia has developed a new online map<sup>39</sup> to help **Australians** navigate domestic travel as restrictions continue to ease across the territory. The interactive map provides an overview of Australia's national picture, with click-through links to each state and territory for further advice, including the status of state borders, latest travel information and other helpful industry resources. It aims to be a useful and updated tool for Australians who wish to travel within the country.

36 Please consult: <http://mytourismdata.tourism.gov.my/wp-content/uploads/2020/05/Domestic-Traveler-Survey-after-MCO-4.pdf>

37 Please consult: <https://guidetothephilippines.ph/ph-travel-survey>.

38 Please consult: <https://singerman-makon.com/consumo-y-turismo-post-coronavirus-2/>.

39 Please consult: <https://www.australia.com/en/travel-alerts/australian-travel-status-map.html>.

#### 4.2.6 Examples of capacity building and training initiatives

- At the end of May, the **Costa Rican** Tourism Institute (ICT) launched its digital *ICT Capacita platform*,<sup>40</sup> a training platform aimed at contributing to the personal and professional skill development of those people who work in the care of national and international tourists. Among the courses programmed, this platform offers training on wellness tourism as part of the tourism strategy to attract domestic tourism in this segment.
- In **Chile**, SERNATUR organized a series of training activities under the theme *Chile, tu mejor apuesta* (*Chile, your best bet*) that seeks to strengthen the marketing chain with national travel agencies by deepening their knowledge of the national destinations that will be promoted in a first stage of reactivation of tourism. The Undersecretary of Tourism has supported this initiative and jointly with SERNATUR the Government is also organizing regional roundtables with all tour operators throughout the country to explain these changes in trend and the importance of working with marketing channels to promote national tourism.
- Tourism Australia has launched a free online training initiative for frontline travel sellers in **Australia** designed to equip agents with relevant up-to-date information and showcase new regions, destinations and experiences within Australia. The programme offers interactive training modules, itinerary suggestions, fact sheets, latest industry news and monthly e-mail updates covering what's new in Australian tourism. The main goal is to help agents sell Australian tourism experiences and introduce domestic travellers to destinations and experiences they might be less familiar with.
- **Paraguay** has organized a series of webinars called *Tourist Destinations of Paraguay*, aimed to showcase the different products and experiences that Paraguay has to offer in its 17 departments. Some of the presented segments included: nature (birdwatching and fishing) and (eco) adventure tourism, rural tourism, cultural and gastronomy tourism (for example, the *Yerba Mate Circuit*), and a virtual trip through 22 national routes, detailing each national route and what people can find around the cities: historical, cultural, social, gastronomic sites, traditional festivals, emblematic buildings, diversity in nature, protected wild areas.

40 Please consult: <https://ictcapacita.go.cr/?lang=en>.

## 4.2.7 Summary of case studies

| POLICIES  | COUNTRIES  |
|---|--|
| <b>1. Incentives</b>  |  |
| <b>Holidays vouchers and bonus</b>  | Greece, Denmark, Iceland, Italy, Macao (China), Malaysia, Poland, Republic of Korea, Romania, Slovenia, Serbia, Thailand   |
| <b>Fiscal incentives (VAT tax reductions, etc.)</b>   | Hungary, Turkey  |
| <b>Long weekends</b>  | Costa Rica, Mexico, New Zealand  |
| <b>2. Marketing and promotion</b>   |  |
| <b>Marketing campaigns and promotional efforts</b>  | Argentina, Canada, China, Costa Rica, Denmark, Fiji, Finland, France, Georgia, Hungary, Iceland, Jordan, Malaysia, Mexico, Morocco, New Zealand, Portugal, Republic of Korea, Serbia, Slovenia, Spain, Uruguay |
| <b>3. Product development</b>   |  |
| <b>Development of tourism products (i.e., rural tourism, ecotourism, wellness, gastronomy, etc.)</b>  | Argentina, Costa Rica, Jordan, Hungary, Mexico, Paraguay, Peru   |
| <b>4. Partnerships</b>  |  |
| <b>Public-public partnerships (NTAs/NTOs and municipalities, DMOs and/or other Ministries, etc.)</b>  | Canada, Chile, Costa Rica, France, Hungary, Paraguay, Peru   |
| <b>Public-private partnerships (NTAs/NTOs and/or DMOs and private sector, i.e. accommodation establishments, travel industry, restaurants, transport service providers, domestic travel agencies)</b> | Costa Rica, Finland, France, Macao (China), Republic of Korea  |
| <b>5. Market intelligence</b>   |  |
| <b>Creation of observatories Studies, surveys, forecasting</b>  | Argentina, Australia, China, Malaysia, Paraguay and Philippines  |
| <b>6. Capacity building and training</b>  |  |
| <b>Webinars</b>   | Australia, Chile, Costa Rica, Paraguay   |
| <b>Online Training initiatives and tools</b>  |  |

## 4.3 Local and private sector initiatives

As presented in the above section, national governments have led the implementation of a variety of measures through their NTAs/NTOs to coordinate the restart of tourism in their territories.

However, many innovative measures have arisen from destinations at local level (cities) and different private entities, such as the accommodation and airlines sector. These usually were conceived through partnerships and collective efforts for a common aim.

The initiatives below serve as mere examples of collaborations between destinations and the private sector or between different private entities, mainly for common promotional campaigns or for the creation of competitive offers to make their businesses more attractive to national tourists.

### Sevilla and Bilbao, two destinations in Spain partnering with an airline to reactivate national travel

Under the slogan *Están para comérselas* (They are to eat them), the Seville and Bilbao City Councils and Vueling have launched a promotional campaign focussed on gastronomy with the aim of reinforcing their respective flows of travellers through the air route that directly links both cities.

This initiative is part of the municipal strategies for the recovery of the national market, as well as to support the hotel and catering industry through the local gastronomy.

Source: <https://www.sevilla.org/actualidad/noticias/los-ayuntamientos-de-sevilla-y-bilbao-y-la-aerolinea-vueling-lanzan-una-campana-de-promocion-turistica-basada-en-la-gastronomia-tradicional-de-ambos-destinos>.

### Domestic tourism campaign – All In NYC

NYC & Company, the official destination marketing organization and convention and visitors bureau, and its Coalition for NYC Hospitality and Tourism Recovery (a group of entrepreneurs, organizations and cultural institutions that advise the Mayor's Office) revealed a [tourism recovery roadmap](#) which includes a series of initiatives that aim to help residents to

reconnect with the city they live in. Based on three stages – Rise, Renew, Recover –, the initiatives envisioned aim is the revitalization of New York City's tourism and hospitality industries. Across these three stages, messaging and tourism-friendly programmes will target first hyperlocals to metropolitan residents then, as conditions allow, will expand to regional, domestic and, ultimately, international travellers.

The first component of the *All In NYC* campaign, the *Stay Well NYC Pledge*, aims to create transparency around Standard Operating Procedures to restore confidence and ensure that locals and visitors know that the hospitality, tourism, arts, culture and entertainment sectors are aligned on best-in-class cleaning standards.

The second component of *All In NYC* will inspire New Yorkers to explore neighbourhoods throughout the five boroughs and support local businesses. NYC & Company will be creating a series of video profiles along with a platform that allows residents to share their love for their neighbourhoods, elevating a diverse range of voices across channels to both celebrate the locals who make the city so engaging and to help visitors enjoy a deeper, authentic experience in New York City's many enclaves.

Another way to inspire people to see all five boroughs of New York City (NYC) is through *Art on the Grid*, a multi-platform exhibition of new work by a group of 50 NYC-based emerging artists. A partnership between NYC & Company, the Public Art Fund and JCDecaux, this large outdoor art exhibition will feature works of art on NYC bus shelters and LinkNYC screens around the city.

Additional pieces of the campaign include supporting industry segments such as restaurants, with content featuring New York City chefs, promoting staycations in NYC, leveraging well-known New Yorkers to become influencers for their city, engaging external audiences, and expanding the campaigns reach geographically.

Source: <https://business.nycgo.com/press-and-media/press-releases/articles/post/the-coalition-for-nyc-hospitality-tourism-recovery-unveils-roadmap-to-help-sectors-rally/>.

Consult also the tourism recovery roadmap: [https://coalition.nycgo.com/wp-content/uploads/2020/07/NYCCompany\\_Roadmap\\_for\\_Tourism\\_Reimagining\\_and\\_Recovery.pdf](https://coalition.nycgo.com/wp-content/uploads/2020/07/NYCCompany_Roadmap_for_Tourism_Reimagining_and_Recovery.pdf).



## Alliances in the Spanish accommodation sector

Seven independent Spanish hotels from different parts of Spain joined efforts and came together to create the *SíVamoss* (*YesWeGo*) travel platform that aims to reactivate national tourism by offering domestic travellers the possibility to acquire a national tourist passport for a single reduced price (EUR 289) that allows them to book up to four hotel nights in these hotels to travel until October 2021.

Benefits of the passport include accommodation with breakfast for two guests, 3 or 4 hotel nights in the chosen establishments, in addition to VIP treatment with special courtesies.

Source: <https://sivamoss.com/>.

## Agoda's GoLocal campaign

Agoda, an online hotel booking platform specialized in Asia, has launched its biggest integrated campaign *GoLocal* aimed at stimulating domestic tourism across its Asia and the Pacific and global markets, and has signed up thousands of hotel partners to share great deals with people who want to start travelling again. The campaign aims to stimulate domestic travel demand across Asia and the Pacific and beyond, by using creative content and messaging to inspire as many travellers as possible to explore their own countries, reconnect with local culture and discover hidden gems.

Partners signing up to *GoLocal* are offering special domestic deals. In return, participating partners will be featured across various Agoda product and marketing touchpoints, strategically identified to maximize the impact of the campaign. These include the campaign's landing site, *GoLocal* badges to highlight participating properties on Agoda, and exciting brand and performance marketing activities. Strategic partnerships with key verticals will highlight and promote partner hotels and properties, further extending the reach of the campaign.

Source: <https://www.agoda.com/press/go-local?cid=1844104>

# ANNEX

## Domestic tourism markets, 2018

|                        | year | Tourist trips (arrivals) |           | Domestic visitor trips | Domestic visitors at hotels: |           | Population | Domestic tour. trips per capita |
|------------------------|------|--------------------------|-----------|------------------------|------------------------------|-----------|------------|---------------------------------|
|                        |      | Domestic                 | Inbound   |                        | Guests                       | Nights    |            |                                 |
|                        |      | (million)                | (million) | (million)              | (million)                    | (million) | (million)  | (units)                         |
| Angola                 | ..   | ..                       | ..        | ..                     | 0.3                          | 0.7       | 29.3       | ..                              |
| Argentina              | 2018 | 45.5                     | 6.9       | 89.9                   | 16.3                         | 38.6      | 44.6       | 1.0                             |
| Armenia                | 2018 | 1.1                      | 1.7       | ..                     | ..                           | ..        | 3.0        | 0.4                             |
| Australia              | 2018 | 105.6                    | 9.2       | 311.7                  | 36.8                         | 100.6     | 25.2       | 4.2                             |
| Austria                | 2018 | 12.5                     | 30.8      | ..                     | 10.9                         | 25.6      | 8.9        | 1.4                             |
| Azerbaijan             | 2018 | 21.0                     | 2.6       | 22.5                   | 0.5                          | 1.0       | 9.9        | 2.1                             |
| Bahrain                | 2018 | 0.1                      | 4.4       | 3.8                    | 0.1                          | 0.1       | 1.5        | 0.1                             |
| Belarus                | 2018 | 2.6                      | 2.1       | 3.6                    | 1.0                          | 2.1       | 9.5        | 0.3                             |
| Belgium                | 2018 | 8.4                      | 9.1       | ..                     | 4.8                          | 7.9       | 11.4       | 0.7                             |
| Botswana               | 2016 | 3.1                      | ..        | 4.8                    | 0.5                          | ..        | 2.3        | 1.4                             |
| Brazil                 | 2011 | 190.9                    | 6.6       | ..                     | ..                           | ..        | 196.6      | 1.0                             |
| Bulgaria               | 2018 | 4.2                      | 9.3       | 6.5                    | 3.3                          | 7.4       | 7.0        | 0.6                             |
| Burkina Faso           | ..   | ..                       | ..        | ..                     | 0.4                          | 0.6       | 19.8       | ..                              |
| Cambodia               | ..   | ..                       | 6.2       | 11.1                   | ..                           | ..        | 16.2       | ..                              |
| Cameroon               | ..   | ..                       | ..        | ..                     | 1.6                          | 2.9       | 24.9       | ..                              |
| Canada                 | 2018 | 95.4                     | 21.1      | 278.1                  | ..                           | 62.4      | 37.0       | 2.6                             |
| Chad                   | ..   | ..                       | ..        | ..                     | 0.0                          | 0.0       | 12.5       | ..                              |
| Chile                  | 2018 | 24.5                     | 5.7       | 45.9                   | 6.0                          | 15.8      | 18.8       | 1.3                             |
| China                  | ..   | ..                       | 62.9      | 5,539.0                | ..                           | ..        | 1,395.4    | ..                              |
| Colombia               | ..   | ..                       | 4.0       | 108.4                  | ..                           | ..        | 49.8       | ..                              |
| Côte d'Ivoire          | ..   | ..                       | ..        | 2.0                    | ..                           | ..        | 25.6       | ..                              |
| Croatia                | 2018 | 3.2                      | 16.6      | 8.2                    | 1.1                          | 2.5       | 4.2        | 0.8                             |
| Cuba                   | ..   | ..                       | 4.7       | ..                     | ..                           | 3.6       | 11.3       | ..                              |
| Cyprus                 | 2018 | 1.6                      | 3.9       | ..                     | 0.5                          | 0.9       | 0.9        | 1.8                             |
| Czech Republic         | 2018 | 27.2                     | 14.3      | ..                     | 7.5                          | 17.0      | 10.7       | 2.5                             |
| Dem. Rep. of the Congo | 2015 | 0.5                      | ..        | ..                     | ..                           | ..        | 87.0       | 0.0                             |
| Denmark                | 2018 | 11.9                     | 12.7      | ..                     | 4.6                          | 9.5       | 5.8        | 2.1                             |
| Ecuador                | 2018 | 8.5                      | 2.5       | 12.7                   | 1.9                          | 4.5       | 17.0       | 0.5                             |
| Egypt                  | 2015 | 10.2                     | 11.3      | ..                     | ..                           | ..        | 89.0       | 0.1                             |
| Estonia                | 2018 | 4.4                      | 3.2       | ..                     | 1.1                          | 1.7       | 1.3        | 3.3                             |
| Finland                | 2018 | 29.1                     | 3.2       | ..                     | 7.5                          | 12.2      | 5.5        | 5.3                             |
| France                 | 2018 | 189.8                    | 89.4      | 268.2                  | 81.9                         | 134.7     | 64.7       | 2.9                             |
| Georgia                | 2018 | 5.8                      | 4.8       | 13.1                   | 0.9                          | 2.0       | 4.0        | 1.4                             |
| Germany                | 2018 | 159.3                    | 38.9      | ..                     | 113.8                        | 234.6     | 82.9       | 1.9                             |
| Greece                 | 2018 | 5.7                      | 30.1      | 26.3                   | 5.9                          | 13.4      | 10.7       | 0.5                             |
| Hungary                | 2018 | 14.4                     | 17.2      | ..                     | 5.4                          | 12.3      | 9.8        | 1.5                             |
| India                  | 2018 | 1,854.9                  | 17.4      | ..                     | ..                           | ..        | 1,334.2    | 1.4                             |
| Indonesia              | ..   | ..                       | 13.4      | 303.4                  | 73.1                         | ..        | 264.2      | ..                              |
| Iran                   | 2011 | 57.1                     | 7.3       | ..                     | 25.7                         | 77.1      | 75.2       | 0.8                             |
| Ireland                | 2018 | 10.9                     | 10.9      | ..                     | 4.7                          | 8.8       | 4.9        | 2.2                             |
| Israel                 | 2010 | 7.7                      | 4.1       | ..                     | 6.4                          | 13.6      | 7.6        | 1.0                             |
| Italy                  | 2018 | 62.9                     | 61.6      | ..                     | 49.9                         | 140.2     | 60.5       | 1.0                             |
| Japan                  | 2018 | 291.1                    | 31.2      | 561.8                  | 317.0                        | 406.2     | 126.5      | 2.3                             |
| Kazakhstan             | 2018 | 8.7                      | ..        | 10.0                   | ..                           | 4.4       | 18.3       | 0.5                             |
| Kenya                  | ..   | ..                       | 1.9       | ..                     | ..                           | 3.6       | 48.0       | ..                              |
| Korea, Republic of     | 2018 | 163.2                    | 15.3      | 311.2                  | 23.8                         | 26.5      | 51.6       | 3.2                             |
| Latvia                 | 2018 | 2.6                      | 1.9       | 10.9                   | 0.6                          | 1.0       | 1.9        | 1.3                             |

Note: Domestic and inbound tourist trips, population and tourist trips per capita correspond to the year indicated under column "Year".

Table lists 93 markets with available data on at least one domestic tourism indicator (trips, guests or nights) for 2018 or earlier.

Source: UNWTO (tourism) and IMF (population). Domestic tourist trips for the United States of America and Mexico according to OECD.

## Domestic tourism markets, 2018 (cont.)

|                     | year | Tourist trips (arrivals) |                      | Domestic visitor trips<br>(million) | Domestic visitors at hotels: |                     | Population<br>(million) | Domestic tour. trips per capita<br>(units) |
|---------------------|------|--------------------------|----------------------|-------------------------------------|------------------------------|---------------------|-------------------------|--|
|                     |      | Domestic<br>(million)    | Inbound<br>(million) |                                     | Guests<br>(million)          | Nights<br>(million) |                         |  |
| Lithuania           | 2018 | 2.6                      | 2.8                  | 14.7                                | 14.7                         | 1.7                 | 2.8                     | 0.9  |
| Luxembourg          | 2018 | 0.1                      | 1.0                  | ..                                  | ..                           | 0.2                 | 0.6                     | 0.2  |
| Malaysia            | 2018 | 101.5                    | 25.8                 | 302.4                               | 302.4                        | ..                  | 32.4                    | 3.1  |
| Mali                | 2018 | 0.0                      | ..                   | ..                                  | ..                           | 0.0                 | 18.5                    | 0.0  |
| Malta               | 2018 | 0.2                      | 2.6                  | ..                                  | ..                           | 0.4                 | 0.5                     | 0.5  |
| Mexico              | 2018 | 100.4                    | 41.3                 | ..                                  | ..                           | 108.6               | 124.7                   | 0.8  |
| Morocco             | 2014 | 23.6                     | ..                   | ..                                  | ..                           | 7.2                 | 33.8                    | 0.7  |
| Mozambique          | ..   | ..                       | ..                   | ..                                  | ..                           | 0.4                 | 30.3                    | ..   |
| Namibia             | 2015 | 3.7                      | ..                   | ..                                  | ..                           | ..                  | 2.3                     | 1.6  |
| Netherlands         | 2018 | 23.7                     | 18.8                 | ..                                  | ..                           | 23.7                | 17.2                    | 1.4  |
| New Zealand         | 2012 | 16.6                     | 3.7                  | ..                                  | ..                           | 17.3                | 4.4                     | 3.7  |
| Nigeria             | 2016 | 6.3                      | ..                   | 14.8                                | 14.8                         | ..                  | 186.0                   | 0.0  |
| Norway              | 2018 | 19.0                     | 5.7                  | ..                                  | ..                           | 17.1                | 5.3                     | 3.6  |
| Palestine           | ..   | ..                       | 0.6                  | ..                                  | ..                           | 0.1                 | 4.9                     | ..   |
| Peru                | 2013 | 36.1                     | 4.4                  | ..                                  | ..                           | 59.5                | 30.5                    | 1.2  |
| Philippines         | ..   | ..                       | 7.2                  | 111.4                               | 111.4                        | ..                  | 106.6                   | ..   |
| Poland              | 2018 | 47.7                     | 19.6                 | ..                                  | ..                           | 36.0                | 38.0                    | 1.3  |
| Portugal            | 2018 | 19.6                     | 22.8                 | ..                                  | ..                           | 16.0                | 10.3                    | 1.9  |
| Puerto Rico         | ..   | ..                       | 3.1                  | ..                                  | ..                           | ..                  | 3.2                     | ..   |
| Rep. Moldova        | 2018 | 0.0                      | 0.2                  | 0.0                                 | 0.0                          | 0.2                 | 4.1                     | 0.0  |
| Romania             | 2018 | 16.5                     | 2.8                  | 52.1                                | 52.1                         | 22.8                | 19.5                    | 0.8  |
| Russian Federation  | ..   | ..                       | 24.6                 | ..                                  | ..                           | 135.9               | 145.7                   | ..   |
| Saudi Arabia        | 2018 | 43.3                     | 15.3                 | 46.5                                | 46.5                         | 140.5               | 33.4                    | 1.3  |
| Senegal             | 2017 | 0.5                      | ..                   | ..                                  | ..                           | 1.1                 | 15.9                    | 0.0  |
| Slovakia            | ..   | ..                       | ..                   | 7.1                                 | 7.1                          | 6.1                 | 5.5                     | ..   |
| Slovenia            | 2018 | 2.0                      | 4.4                  | 10.9                                | 10.9                         | 2.2                 | 2.1                     | 1.0  |
| South Africa        | 2018 | 17.6                     | ..                   | 132.6                               | 132.6                        | 15.0                | 57.9                    | 0.3  |
| Spain               | 2018 | 169.8                    | 82.8                 | 455.3                               | 455.3                        | 116.5               | 46.4                    | 3.7  |
| Sri Lanka           | ..   | ..                       | 2.3                  | ..                                  | ..                           | 2.7                 | 21.7                    | ..   |
| Swaziland           | 2018 | 0.1                      | ..                   | 0.2                                 | 0.2                          | ..                  | 1.1                     | 0.1  |
| Sweden              | 2017 | 38.4                     | 7.4                  | 55.9                                | 55.9                         | 27.9                | 10.1                    | 3.8  |
| Switzerland         | 2018 | 6.7                      | 11.7                 | 69.5                                | 69.5                         | 17.4                | 8.5                     | 0.8  |
| Taiwan Pr. of China | 2017 | 56.0                     | 11.1                 | 183.4                               | 183.4                        | ..                  | 23.6                    | 2.4  |
| Tajikistan          | 2018 | 0.2                      | 1.3                  | 0.3                                 | 0.3                          | ..                  | 9.1                     | 0.0  |
| Thailand            | 2018 | 130.9                    | 38.2                 | 227.8                               | 227.8                        | ..                  | 67.8                    | 1.9  |
| Trinidad and Tobago | 2013 | 0.6                      | ..                   | 1.3                                 | 1.3                          | ..                  | 1.3                     | 0.5  |
| Turkey              | 2018 | 78.5                     | 45.8                 | 126.5                               | 126.5                        | 45.3                | 82.0                    | 1.0  |
| Ukraine             | ..   | ..                       | 14.2                 | ..                                  | ..                           | 8.3                 | 44.2                    | ..   |
| United Kingdom      | 2018 | 118.6                    | 36.3                 | 1,822.0                             | 1,822.0                      | 91.1                | 66.4                    | 1.8  |
| United States       | 2018 | 1,659.0                  | 79.7                 | 2,291.1                             | 2,291.1                      | ..                  | 327.4                   | 5.1  |
| Uruguay             | 2018 | 5.2                      | 3.5                  | 6.1                                 | 6.1                          | ..                  | 3.5                     | 1.5  |
| Utd Arab Emirates   | 2018 | 4.3                      | ..                   | ..                                  | ..                           | 11.0                | 10.4                    | 0.4  |
| Uzbekistan          | ..   | ..                       | 5.3                  | 119.1                               | 119.1                        | 1.6                 | 32.5                    | ..   |
| Venezuela           | 2017 | 12.6                     | ..                   | 17.6                                | 17.6                         | ..                  | 30.3                    | 0.4  |
| Vietnam             | 2018 | 41.4                     | 15.5                 | 80.0                                | ..                           | ..                  | 94.6                    | 0.4  |
| Zimbabwe            | 2018 | 0.7                      | ..                   | 1.2                                 | 0.5                          | 1.5                 | 14.6                    | 0.1  |

Note: Domestic and inbound tourist trips, population and tourist trips per capita correspond to the year indicated under column "Year".

Table lists 93 markets with available data on at least one domestic tourism indicator (trips, guests or nights) for 2018 or earlier.

Source: UNWTO (tourism) and IMF (population). Domestic tourist trips for the United States of America and Mexico according to OECD.

## Domestic and inbound tourism expenditure

|                       | year | Tourism Expenditure       |                          |                 |                | Population<br>(million) | Per capita spending: |                  | GDP per capita<br>(USD) |
|-----------------------|------|---------------------------|--------------------------|-----------------|----------------|-------------------------|----------------------|------------------|-------------------------|
|                       |      | Domestic<br>(USD billion) | Inbound<br>(USD billion) | Domestic<br>(%) | Inbound<br>(%) |                         | Domestic<br>(USD)    | Inbound<br>(USD) |                         |
| United States         | 2018 | 956                       | 215                      | 82              | 18             | 327.4                   | 2,920                | 660              | 62,870                  |
| Germany               | 2015 | 249                       | 37                       | 87              | 13             | 81.7                    | 3,050                | 450              | 41,160                  |
| Japan                 | 2017 | 201                       | 34                       | 85              | 15             | 126.7                   | 1,580                | 270              | 38,340                  |
| United Kingdom        | 2017 | 154                       | 48                       | 76              | 24             | 66.0                    | 2,330                | 720              | 39,980                  |
| Mexico                | 2018 | 139                       | 23                       | 86              | 14             | 124.7                   | 1,110                | 180              | 9,800                   |
| France                | 2018 | 97                        | 66                       | 60              | 40             | 64.7                    | 1,500                | 1,020            | 42,950                  |
| Australia             | 2017 | 81                        | 42                       | 66              | 34             | 24.8                    | 3,280                | 1,680            | 55,970                  |
| Spain                 | 2015 | 74                        | 62                       | 54              | 46             | 46.4                    | 1,590                | 1,350            | 25,850                  |
| Italy                 | 2015 | 71                        | 39                       | 64              | 36             | 60.8                    | 1,170                | 650              | 30,150                  |
| Canada                | 2018 | 62                        | 26                       | 70              | 30             | 37.0                    | 1,670                | 710              | 46,290                  |
| Netherlands           | 2018 | 61                        | 18                       | 77              | 23             | 17.2                    | 3,560                | 1,030            | 53,230                  |
| Sweden                | 2018 | 22                        | 15                       | 60              | 40             | 10.2                    | 2,170                | 1,460            | 54,360                  |
| Austria               | 2017 | 21                        | 20                       | 50              | 50             | 8.8                     | 2,330                | 2,320            | 47,390                  |
| Switzerland           | 2014 | 15                        | 18                       | 46              | 54             | 8.1                     | 1,880                | 2,190            | 87,160                  |
| Norway                | 2017 | 15                        | 5                        | 74              | 26             | 5.3                     | 2,830                | 1,000            | 75,310                  |
| New Zealand           | 2018 | 14                        | 11                       | 57              | 43             | 4.9                     | 2,940                | 2,210            | 41,200                  |
| Belgium               | 2016 | 13                        | 8                        | 62              | 38             | 11.3                    | 1,110                | 680              | 41,540                  |
| Denmark               | 2017 | 11                        | 8                        | 57              | 43             | 5.7                     | 1,930                | 1,480            | 57,380                  |
| Portugal              | 2017 | 9                         | 18                       | 34              | 66             | 10.3                    | 880                  | 1,710            | 21,480                  |
| Romania <sup>1</sup>  | 2018 | 9                         | 3                        | 72              | 28             | 19.5                    | 450                  | 170              | 12,270                  |
| Finland               | 2016 | 9                         | 3                        | 77              | 23             | 5.5                     | 1,590                | 480              | 43,570                  |
| Israel                | 2018 | 8                         | 7                        | 54              | 46             | 8.9                     | 950                  | 810              | 41,730                  |
| Chile                 | 2018 | 6                         | 3                        | 68              | 32             | 18.8                    | 320                  | 150              | 15,900                  |
| Poland                | 2015 | 6                         | 10                       | 35              | 65             | 38.0                    | 150                  | 280              | 12,570                  |
| Czech Republic        | 2017 | 5                         | 7                        | 43              | 57             | 10.6                    | 480                  | 650              | 20,410                  |
| Ireland               | 2007 | 4                         | 6                        | 41              | 59             | 4.4                     | 970                  | 1,360            | 60,810                  |
| Hungary               | 2017 | 2                         | 6                        | 27              | 73             | 9.8                     | 230                  | 630              | 14,270                  |
| Slovakia              | 2016 | 2                         | 3                        | 43              | 57             | 5.4                     | 380                  | 510              | 16,560                  |
| Croatia <sup>1</sup>  | 2018 | 2                         | 11                       | 13              | 87             | 4.2                     | 400                  | 2,680            | 14,870                  |
| Slovenia              | 2017 | 1                         | 3                        | 33              | 67             | 2.1                     | 670                  | 1,370            | 23,500                  |
| Iceland               | 2017 | 1                         | 3                        | 29              | 71             | 0.3                     | 3,620                | 8,910            | 72,280                  |
| Lithuania             | 2017 | 1                         | 1                        | 42              | 58             | 2.8                     | 340                  | 460              | 16,850                  |
| Bulgaria <sup>1</sup> | 2018 | 1                         | 5                        | 16              | 84             | 7.0                     | 120                  | 640              | 9,310                   |
| Latvia <sup>1</sup>   | 2018 | 0.4                       | 1                        | 29              | 71             | 1.9                     | 230                  | 550              | 18,030                  |
| Estonia               | 2014 | 0.3                       | 2                        | 13              | 87             | 1.3                     | 200                  | 1,410            | 20,390                  |
| Malta <sup>1</sup>    | 2018 | 0.1                       | 2                        | 7               | 93             | 0.5                     | 280                  | 3,900            | 30,610                  |

Notes: List based on available domestic expenditure data for 36 markets: 31 according to OECD and 5 according to Eurostat.

<sup>1)</sup> Domestic expenditure according to Eurostat. Reference year considered to be 2018 (not specified by source).

Source: OECD and Eurostat (domestic expenditure), UNWTO (inbound expenditure) and IMF (population, GDP).





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**COVID-19  
RESPONSE**