

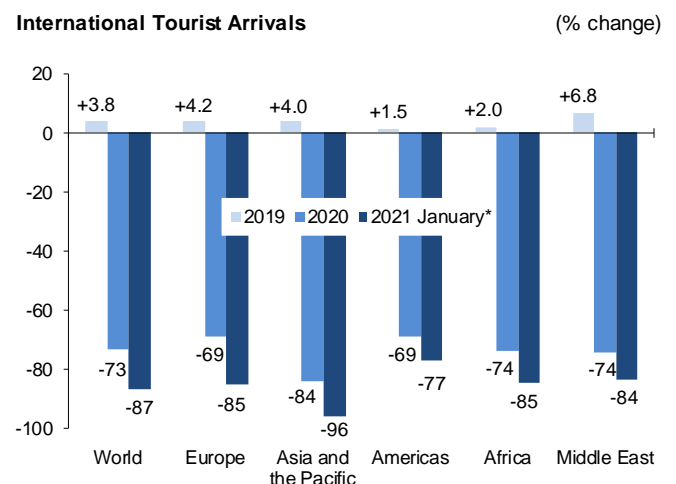


## International tourism further weakens in January 2021 with a drop of 87%

- After the unprecedented 73% drop in international tourism recorded in 2020 under the impact of the COVID-19 pandemic, demand for international travel remained very weak at the beginning of 2021.
- International tourist arrivals (overnight visitors) plunged by 87% in January 2021, amid new outbreaks and tighter travel restrictions. This follows a decline of 85% in the last quarter of 2020.
- By regions, Asia and the Pacific (-96%), the region which continues to have the highest level of travel restrictions in place, recorded the largest decrease in international arrivals in January. Europe and Africa both saw a decline of 85% in arrivals, while the Middle East recorded a drop of 84%. International arrivals in the Americas decreased by 77% in January, following somewhat better results in the last quarter of the year.
- Due to the worsening of the pandemic with a surge of cases and the emergence of new variants, many countries reintroduced stricter travel restrictions, including mandatory testing, quarantines and in some cases a complete closure of borders, on top of local lockdowns, all weighing on the resumption of international travel. In addition, the speed and distribution of the vaccination roll-out have been slower than expected and quite uneven across countries and regions.
- With 32% of destinations worldwide showing complete border closures in early February and another 34% with partial closure, UNWTO expects international tourist arrivals to be down about 85% in the first quarter of 2021 over the same period of 2019. This would represent a loss of some 260 million

international arrivals when compared to pre-pandemic levels.

- Looking ahead, UNWTO has outlined two scenarios for 2021. The first scenario points to a rebound in July, which would result in a 66% increase in international arrivals for the year 2021 compared to the historic lows of 2020. In this case, arrivals would still be 55% below the levels recorded in 2019. The second scenario considers a potential rebound in September, leading to a 22% increase in arrivals compared to last year. Still, this would be 67% below the levels of 2019.
- The scenarios consider a number of factors such as a gradual improvement of the epidemiological situation, a continued roll-out of the COVID-19 vaccine, a significant improvement in traveller confidence and a major lifting of travel restrictions, in particular in Europe and the Americas.



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



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### World Tourism Organization

C/ Poeta Joan Maragall 42, 28020 Madrid, Spain  
Tel (34) 91 567 81 00 / Fax (34) 91 131 17 02  
[info@unwto.org](mailto:info@unwto.org) - [www.unwto.org](http://www.unwto.org)

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### About the *UNWTO World Tourism Barometer*

The *UNWTO World Tourism Barometer* is a publication of the World Tourism Organization (UNWTO) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UNWTO Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UNWTO Secretariat wishes to express its gratitude to those who have contributed to the production of this *UNWTO World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UNWTO Panel of Tourism Experts for their valuable feedback and analysis.

This report was prepared by the **UNWTO Tourism Market Intelligence and Competitiveness Department**, under the supervision of Sandra Carvão, Chief of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian, and Javier Ruescas.

For more information including copies of previous issues, please visit: [www.e-unwto.org/loi/wtobarometereng](http://www.e-unwto.org/loi/wtobarometereng).

**We welcome your comments and suggestions at [barom@unwto.org](mailto:barom@unwto.org).**

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Data collection for this issue was closed at the end of March 2021.

The next issue of the *UNWTO World Tourism Barometer* with more comprehensive results is scheduled to be published in May 2021.

Pages 1-4 of this document constitute the Excerpt of the UNWTO World Tourism Barometer. The full document is available free of charge for UNWTO Members and subscribers from the UNWTO eLibrary at [www.e-unwto.org](http://www.e-unwto.org). This release is available in English, while the Statistical Annex is provided in English, French, Spanish and Russian.

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## Inbound tourism

### *International tourist arrivals plunged by 87% in January 2021*

- Demand for international travel remains very weak at the beginning of 2021, following the unprecedented 73% drop in international tourism recorded in 2020 under the impact of the COVID-19 pandemic.
- International tourist arrivals (overnight visitors) plunged by 87% in January 2021, amid new outbreaks and tighter travel restrictions. This follows a decline of 85% in the last quarter of 2020.
- The massive decline seen in January is the worst performance ever recorded for the first month of the year. January 2021 was the third consecutive month with a decrease over 85%.
- Due to the worsening of the pandemic with the surge in cases and the emergence of new variants, many countries reintroduced stricter travel restrictions, including mandatory testing, quarantines and in some cases a complete closure of borders, on top of local lockdowns, all weighing on the resumption of international travel. In addition, the speed and distribution of the vaccination roll-out have been slower than expected and quite uneven across countries and regions.
- At the beginning of February 2021, 69 destinations or 32% of all destinations worldwide representing 34% of all international tourist arrivals were completely closed for international tourism, an increase of 10 destinations compared to the 1<sup>st</sup> of November 2020. These 69 destinations represent 34% of all international tourist arrivals. Among these, the borders of top source markets such as China, Germany, Canada and the Russian Federation remain shut to international travel. A partial closure of borders is applied by 73 destinations (34% of all destinations) or 47% when considering their weight in international tourism, among which the United States and several major destinations in the European Union such as Croatia, Greece, Spain, Portugal, France and the Netherlands (see [UNWTO's ninth report on travel restrictions](#)).
- Against this backdrop, all world regions continued to suffer large decreases in international arrivals at the beginning of the year.
- Asia and the Pacific (-96%), the region which continues to have the highest level of travel restrictions in place, recorded the largest decrease in international arrivals in January. Europe and Africa both saw a decline of 85% in arrivals, while the Middle East recorded a drop of 84%. International arrivals in the Americas decreased by 79% in January, following somewhat better results in the last quarter of the year.
- Most world subregions saw drops of 80% to nearly 100% in arrivals in January, with the exception of Central and Eastern Europe, as well as North Africa, North America and the Caribbean, which recorded decreases below 80%.
- Only a small number of destinations saw declines below 70% in January, among which Mexico, Aruba, the Dominican Republic, Saint Maarten, US Virgin Islands, Maldives, Azerbaijan, Albania, Bulgaria, Montenegro and North Macedonia.
- Considering the decline recorded in January and the travel restrictions still in place, a similar decrease in international arrivals is estimated for February and March. UNWTO expects international tourist arrivals to be down about 85% in the first quarter of 2021 over the same period of 2019. This would represent a loss of some 260 million international arrivals when compared to pre-pandemic 2019 levels.

## International Tourist Arrivals by (Sub)region

	Monthly/quarterly data series														
	(million)			Share (%)	Change		% change over same period of the previous year								
					(%)	19/18	20*/19	2021*			2020*				
2018	2019	2020*	2020*	YTD				Jan.	Q1	Q2	Q3	Q4	Oct.	Nov.	Dec.
<b>World</b>	<b>1,413</b>	<b>1,466</b>	<b>394</b>	<b>100</b>	<b>3.8</b>	<b>-73.1</b>	<b>-86.7</b>	<b>-86.7</b>	<b>-28.0</b>	<b>-94.3</b>	<b>-77.6</b>	<b>-84.8</b>	<b>-82.5</b>	<b>-86.7</b>	<b>-85.7</b>
Advanced economies <sup>1</sup>	761	777	211	53.5	2.1	-72.9	-89.6	-89.6	-30.5	-93.9	-73.6	-87.4	-83.1	-90.2	-90.1
Emerging economies <sup>1</sup>	651	689	183	46.5	5.7	-73.4	-84.1	-84.1	-25.7	-94.9	-83.0	-82.3	-81.8	-83.4	-81.7
<i>By UNWTO regions:</i>															
<b>Europe</b>	<b>716.0</b>	<b>746.3</b>	<b>231.8</b>	<b>58.9</b>	<b>4.2</b>	<b>-68.9</b>	<b>-85.1</b>	<b>-85.1</b>	<b>-21.5</b>	<b>-92.8</b>	<b>-67.9</b>	<b>-82.0</b>	<b>-76.6</b>	<b>-85.5</b>	<b>-85.9</b>
Northern Europe	81.0	83.7	20.6	5.2	3.3	-75.4	-92.2	-92.2	-18.2	-95.1	-81.2	-89.2	-83.6	-91.2	-93.6
Western Europe	200.2	205.4	78.6	20.0	2.6	-61.7	-91.1	-91.1	-22.1	-89.6	-58.0	-86.1	-78.2	-89.9	-91.7
Central/Eastern Eur.	146.2	153.3	44.8	11.4	4.8	-70.8	-78.3	-78.3	-17.6	-94.3	-73.1	-81.1	-79.5	-81.9	-81.9
Southern/Medit. Eur.	288.6	303.9	87.9	22.3	5.3	-71.1	-81.5	-81.5	-24.7	-93.5	-68.7	-77.2	-72.7	-82.3	-80.3
- of which EU-27	523.8	540.7	176.2	44.7	3.2	-67.4	-86.0	-86.0	-23.1	-91.7	-64.1	-82.9	-77.2	-86.9	-87.1
<b>Asia and the Pacific</b>	<b>346.5</b>	<b>360.4</b>	<b>57.1</b>	<b>14.5</b>	<b>4.0</b>	<b>-84.2</b>	<b>-95.9</b>	<b>-95.9</b>	<b>-46.9</b>	<b>-98.7</b>	<b>-96.9</b>	<b>-95.4</b>	<b>-95.6</b>	<b>-95.4</b>	<b>-95.3</b>
North-East Asia	169.2	170.3	20.2	5.1	0.7	-88.1	-94.0	-94.0	-65.1	-98.9	-95.7	-92.9	-93.4	-92.5	-92.6
South-East Asia	128.6	138.6	25.5	6.5	7.8	-81.6	-98.1	-98.1	-34.0	-98.2	-98.1	-98.0	-98.0	-97.9	-98.0
Oceania	17.0	17.5	3.6	0.9	2.4	-79.4	-98.3	-98.3	-25.4	-99.2	-98.6	-98.5	-98.2	-98.5	-98.7
South Asia	31.7	34.0	7.8	2.0	7.5	-77.0	-93.0	-93.0	-22.2	-98.8	-96.8	-95.3	-95.2	-96.8	-94.1
<b>Americas</b>	<b>216.0</b>	<b>219.3</b>	<b>68.3</b>	<b>17.4</b>	<b>1.5</b>	<b>-68.8</b>	<b>-76.9</b>	<b>-76.9</b>	<b>-16.9</b>	<b>-92.7</b>	<b>-86.2</b>	<b>-76.5</b>	<b>-79.4</b>	<b>-76.6</b>	<b>-73.9</b>
North America	142.2	146.6	46.7	11.9	3.1	-68.1	-71.3	-71.3	-14.7	-90.3	-84.2	-72.9	-76.1	-72.3	-70.5
Caribbean	25.8	26.3	8.9	2.3	1.9	-66.0	-75.7	-75.7	-23.6	-96.6	-79.6	-72.1	-74.1	-76.0	-67.7
Central America	10.8	10.9	2.9	0.7	0.8	-73.1	-80.2	-80.2	-17.5	-98.2	-98.8	-86.8	-93.6	-85.7	-83.4
South America	37.2	35.4	9.7	2.5	-4.7	-72.5	-92.1	-92.1	-18.2	-98.9	-97.5	-90.9	-94.2	-92.1	-87.7
<b>Africa</b>	<b>68.7</b>	<b>70.0</b>	<b>18.4</b>	<b>4.7</b>	<b>2.0</b>	<b>-73.7</b>	<b>-84.8</b>	<b>-84.8</b>	<b>-13.1</b>	<b>-90.6</b>	<b>-86.6</b>	<b>-78.3</b>	<b>-80.9</b>	<b>-79.7</b>	<b>-74.7</b>
North Africa	24.1	25.6	5.5	1.4	6.4	-78.4	-79.7	-79.7	-20.4	-99.3	-91.8	-83.8	-86.6	-86.7	-78.7
Subsaharan Africa	44.6	44.4	12.9	3.3	-0.4	-71.1	-86.9	-86.9	-9.8	-85.3	-82.2	-75.4	-77.7	-76.4	-72.7
<b>Middle East</b>	<b>65.5</b>	<b>70.0</b>	<b>18.2</b>	<b>4.6</b>	<b>6.8</b>	<b>-74.0</b>	<b>-83.6</b>	<b>-83.6</b>	<b>-20.0</b>	<b>-98.9</b>	<b>-92.9</b>	<b>-85.7</b>	<b>-86.9</b>	<b>-85.7</b>	<b>-84.7</b>

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, March 2021)

\* Provisional data

<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2017, page 175, at [www.imf.org/external/ns/cs.aspx?id=29](http://www.imf.org/external/ns/cs.aspx?id=29).

See box in page 'Annex-1' for explanation of abbreviations and symbols used

## Industry indicators continued at low levels at the beginning of the year

- According to **IATA**, international passenger traffic measured in revenue passenger kilometers (RPKs) declined 86% year-on-year (y-o-y) in January 2021. This follows a decrease of 76% in international RPKs during 2020, in line with the drop in international tourist arrivals recorded in the same year. While traffic on international routes weakened slightly in January 2021, most of the deterioration this month was driven by domestic markets. Renewed virus outbreaks with the emergence of new variants and stricter travel restrictions weighed on January's overall weak results.
- Africa posted the lowest international RPK decline of all regions in January 2021 (-68% y-o-y) and also showed the most resilient outcome in 2020. International RPKs in North America decreased by 80% and in Latin America by 78% in January, while carriers in the Middle East were impacted by low traffic volumes on long-haul routes. International RPKs in Europe declined by 83% driven by lockdowns and a spike in virus cases. Asia and the Pacific continued to show the worst performance of all regions, with international RPKs down 95% in January.
- Domestic markets were the only relatively bright spot in 2020 but their performance deteriorated in January (-48% RPKs), according to IATA. The fall in domestic traffic was driven by Asian markets, and in particular China where domestic RPKs fell by 29% in January, due to stricter traffic controls ahead of the Chinese New Year amid several localized COVID outbreaks. Domestic RPKs also weakened in Australia (-82% RPKs) and Japan (-72%), while domestic traffic outcomes in January were more stable in the United States (-63%), India (-39%) and Brazil (-33%). By contrast, domestic RPKs of Russian airlines were up 1% y-o-y, driven by national holidays in the first week of the month.
- According to **ICAO**, air capacity fell by 58% in January 2021, down from -57% in December. Domestic air capacity (-33%) continued to perform comparatively better than international capacity (-75%) in January 2021 y-o-y. As demand decreased faster than supply, passenger load factors in international traffic deteriorated again in January and remained at record lows (45%).
- Data from **STR** indicates continued record low levels in the accommodation industry, with little change in

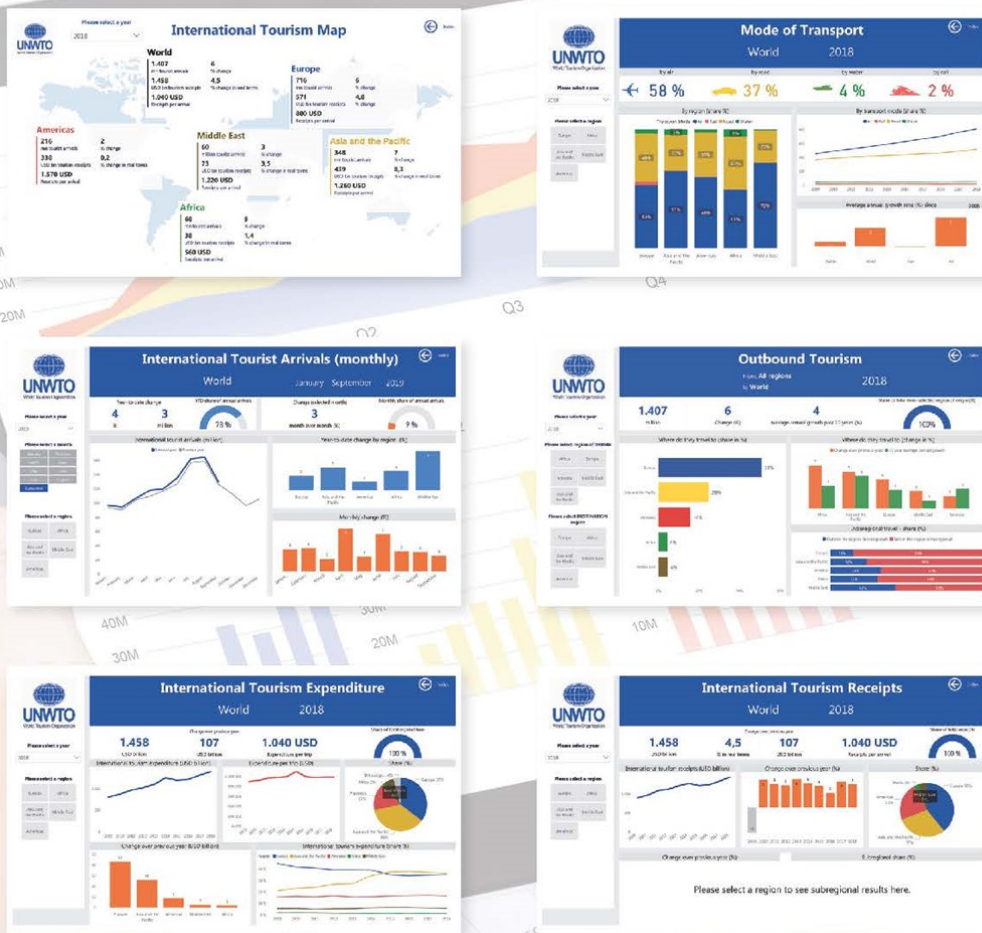
occupancy levels at the beginning of the year. Occupancy in February 2021 reached 24% in Europe, 28% in Africa, 37% in Asia and the Pacific, 42% in both the Americas and the Middle East (data by region are based on STR statistical regions).

## The outlook for 2021 remains uncertain

- After the collapse of international tourism in 2020, prospects for 2021 remain uncertain as they are largely dependent on the evolution of the pandemic as well as the vaccination process.
- In line with the 2021-2024 scenarios published by UNWTO in December 2020, two scenarios are envisaged for 2021, which indicate a possible rebound in international travel in the second half of the year.
- The first scenario points to a rebound in July, which would result in a 66% increase in international arrivals for the year 2021 compared to the historic lows of 2020. In this case, arrivals would still be 55% below the levels recorded in 2019. The second scenario considers a potential rebound in September, leading to a 22% increase in arrivals compared to last year. Still, this would be 67% below the levels of 2019.
- The scenarios consider a number of factors such as a gradual improvement of the epidemiological situation, a continued roll-out of the COVID-19 vaccine, a significant improvement in traveller confidence and a major lifting of travel restrictions, in particular in Europe and the Americas.
- However, the recovery outlook remains highly uncertain. New cases of COVID-19 continue to be reported worldwide, with more than 127 million confirmed cases as of 30 March 2021, according to the World Health Organization.
- Initiatives such as the Digital Green Certificate proposed by the European Commission to facilitate safe free movement within the European Union, as well as measures implemented by several countries to facilitate travel for vaccinated travellers, the extended use of testing or the establishment of Public Health Corridors (PHC), are expected to contribute to the gradual resumption of travel towards the summer season of the Northern Hemisphere.
- Effective collaboration among countries on health and travel protocols will continue to be key for a safe restart of tourism and to avoid another year of huge losses for the tourism sector.

# UNWTO Global Tourism Dashboard

The first truly global dashboard for tourism insights and data.



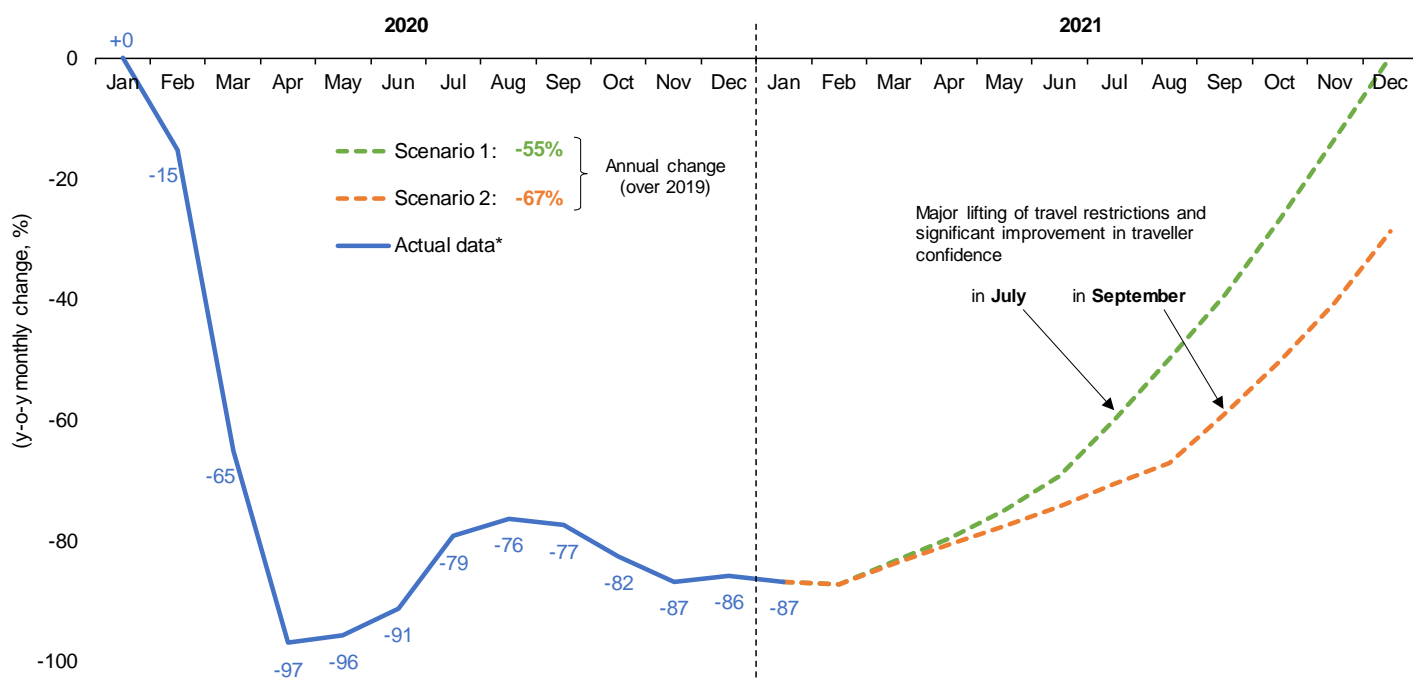
Consult the tourism dashboard at: [www.unwto.org/unwto-tourism-dashboard](http://www.unwto.org/unwto-tourism-dashboard)



## Outlook for 2021

- After a 73% plunge in international tourism in 2020 and a difficult start of 2021 due to the coronavirus pandemic, prospects for 2021 remain uncertain and highly dependent on the evolution of the health crisis.
- A rebound in international travel is expected in the second half of the year if major travel restrictions are lifted and traveler confidence improves, especially due to large pent-up demand. However, the improvement largely depends on the containment of the pandemic, which itself relies on the success of the vaccination programmes and the effective coordination of health and safety travel protocols, among other factors.
- Two forward-looking **scenarios** have been outlined by UNWTO for 2021, in line with the outlook for 2021-2024 published in the December 2020 UNWTO World Tourism Barometer. These scenarios assume a major re-opening of borders and improvement in traveler confidence in the months of July and September 2021 respectively, as well as no significant setbacks thereafter:
  - **Scenario 1** points to a rebound in July and would result in a 66% increase in international arrivals in 2021 compared to 2020, though a 55% decline versus the pre-pandemic levels of 2019.
  - **Scenario 2** considers a rebound in the month of September and a 22% increase in arrivals compared to 2020, though a 67% decrease over 2019.
- It is important to note that these scenarios are based on the premise that health conditions and traveler confidence do not deteriorate significantly after travel restrictions are lifted.
- Similar scenarios were outlined for 2020 about a year ago, and although arrivals followed closely one of the expected trend lines until August, the rise in infections and ensuing increase in travel restrictions, including the closure of borders in many destinations after the northern hemisphere summer led to a reversal in results from September onwards.

International tourist arrivals in 2020 and Scenarios for 2021 (y-o-y monthly change, %)



Source: UNWTO

\* Actual data is preliminary and based on estimates for destinations which have not yet reported monthly results.

(Data as of March 2021)

## World destinations tighten travel restrictions in early 2021

Global travel restrictions and low traveler confidence have severely impacted tourism since the outbreak of the pandemic in early 2020. International travel came to a nearly complete halt in April and May 2020 as more than 150 destinations worldwide closed their borders<sup>1</sup> representing over 80% of the world’s international arrivals. Between June and August, tourism edged up slightly as some countries slowly reopened, especially in Europe. By September, the number of closed destinations had fallen to 93, equivalent to 29% of global arrivals.

However, the resurgence of coronavirus cases at the end of the summer season in the Northern Hemisphere led to stricter restrictions and weaker tourism demand. International arrivals plunged 78% in September and 83% in October 2020. Still, the proportion of closed destinations declined to 18% by early November, as many countries changed their policy of full shutdown to partial restrictions such as compulsory quarantines or travel bans for certain markets.

Global tourism suffered another setback in the beginning of 2021 as countries tightened travel restrictions in response to the outbreak of new virus strains in different parts of the world.

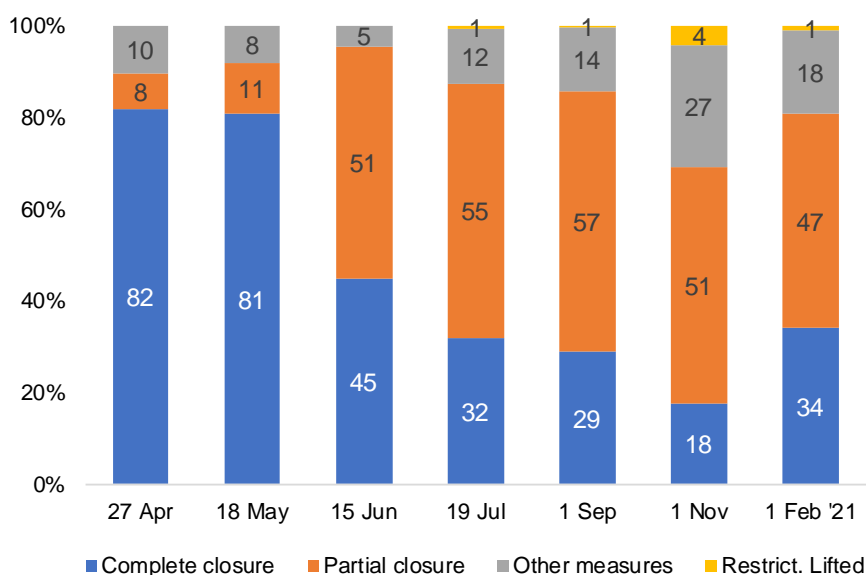
Mandatory testing, quarantines, and the complete closure of borders, have all deterred the expected resumption of international travel.

The number of closed destinations increased for the first time since the start of pandemic, from 18% last November, to 34% in February 2021. As a result, international tourist arrivals dropped 87% in January, with a similar decline estimated for February, according to the latest data and trends.

All world regions have seen an increase in border shutdowns in February 2021, except for Africa, where the share of closed destinations fell slightly from 11% to 9%, the lowest of all regions.

In Europe, the world’s most visited region, the share of closed destinations surged from 3% in November 2020, to 28% in February 2021. In the Middle East it grew from 8% to 27%. The share in Asia and the Pacific increased from 53% in November to 63% in February, the highest of all regions and well above the world average of 34%. In the Americas the share of closed destinations grew from 14% to 18%.

**World destinations by type of travel restriction, 2020 and Feb. 2021 (% share)**  
(% of world arrivals)\*



Note: "Other measures" category includes "PCR testing or quarantines" in Feb. 2021.

\*Shares calculated in terms of 2019 international arrivals

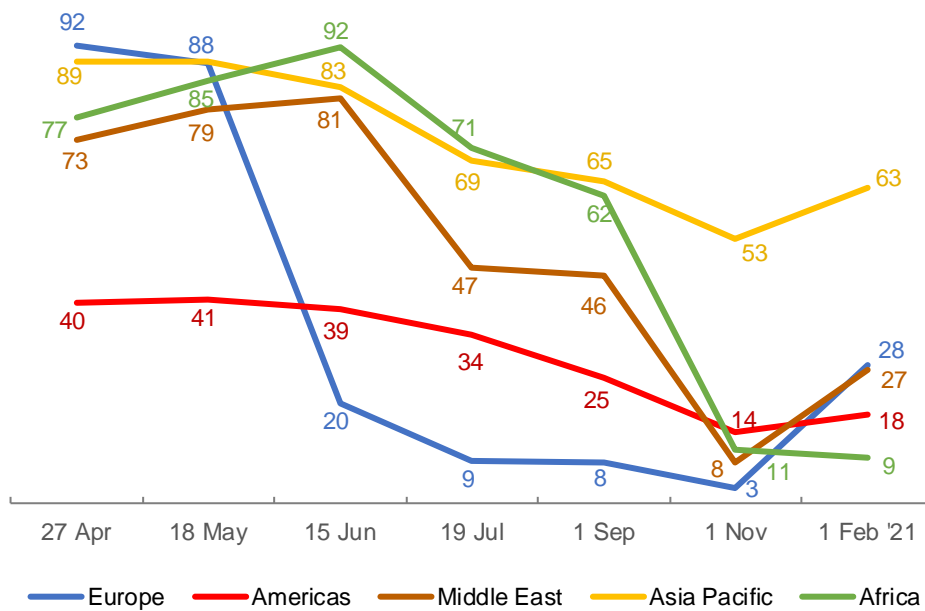
Source: UNWTO

<sup>1</sup> UNWTO, COVID-19-Related Travel Restrictions, A Global Review for Tourism, Ninth Report, 8 March 2021, available at:

<https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-03/210309-Travel-Restrictions.pdf>



**Share of destinations with complete closure of borders, by region, 2020 - Feb. 2021 (%)**  
 (% of region's arrivals)\*



\*Shares calculated in terms of 2019 international arrivals  
 Source: UNWTO  
 E.g. European destinations with complete closure on 1 Feb. represent 28% of region's arrivals.

# UNWTO / GTERC Asia Tourism Trends

## 2020 Edition

In light of the severe impacts that the COVID-19 pandemic has had on the tourism sector, the first chapter of the seventh volume in the series of *UNWTO/GTERC Asia Tourism Trends*, provides an analysis on the socioeconomic environment in Asia and the Pacific, supported by the latest international tourism trends for the region. The second chapter offers an overview of the recovery measures being taken in Asia and the Pacific to mitigate the effects of the pandemic and explore how the crisis may affect the achievement of the Sustainable Development Goals. The final chapter focusses on community development through tourism in rural settings. It offers a set of guidelines for policymakers and highlights the potential for the development of cultural routes across Asia and the Pacific.

This publication and its Executive Summary are available at:  
[www.e-unwto.org](http://www.e-unwto.org)

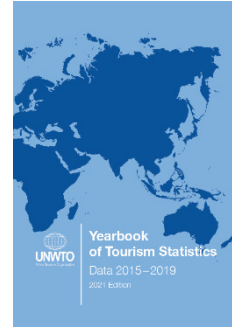




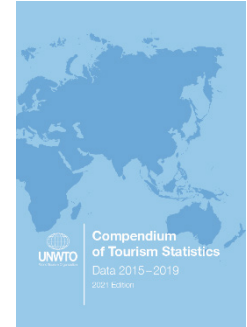
**UNWTO World Tourism Barometer**



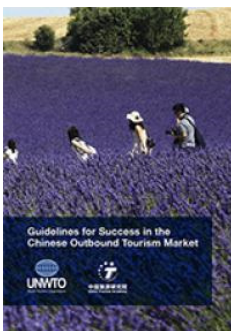
**International Tourism Highlights, 2020 Edition**



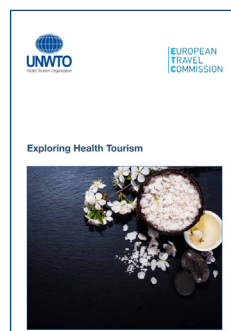
**Yearbook of Tourism Statistics (2015-2019)**



**Compendium of Tourism Statistics (2015-2019)**



**Guidelines for Success in the Chinese Outbound Tourism Market (2019)**



**Exploring Health Tourism (2018)**



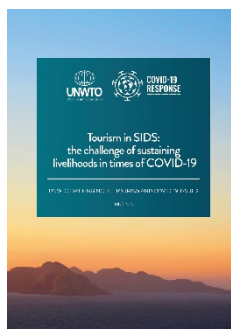
**The Gulf Cooperation Council (GCC) Outbound Travel Market (2018)**



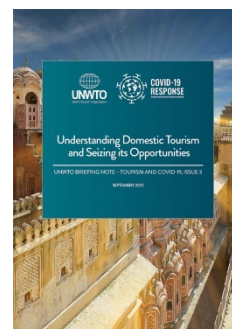
**European Union Tourism Trends (2018)**



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