REPUBLIC OF NAMIBIA
MINISTRY OF ENVIRONMENT, FORESTRY AND TOURISM

VACCINATION IN TOURISM

COMPILATION OF STATISTICS AND DATA FROM EUROPEAN TRAVEL COMMISSION (ETC) UN WORLD TOURISM ORGANIZATION 2021/2022

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EUROPEANS' TRAVEL SENTIMENT SKYROCKETS IN VIEW OF VACCINE ROLLOUTS & THE INTRODUCTION OF THE EU DIGITAL COVID CERTIFICATE

Intention to travel in the next 6 months

70% likely/ very likely

15% neutral

15% unlikely/ very unlikely

Travel intention after COVID-19 vaccination

54% likely/very likely

19% unlikely/very unlikely

Sentiment towards EU Digital Covid Certificate

57% positive

18% negative

When will Europeans travel next?

31% during June/July 2021

41% during August/September 2021

16% during October/November 2021

Travellers' booking status

42% have chosen the destination and have already made all or some bookings for their next trip

40% have chosen the destination but have not made any bookings

19% have not yet decided where they want to travel next

Where will Europeans travel next?

51% to another European country

36% to their own country

Data in this box represents the preferences of Europeans who are most likely to travel within the next 6 months - "Early-bird" travellers

Source: European Travel Commission, Monitoring Sentiment for Domestic & Intra-European Travel, wave 7
Sample size: 5,921 (total sample) & 4,160 ("early-bird" travellers)
Data collection: 19-29/5/2021

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

MINDHAUS

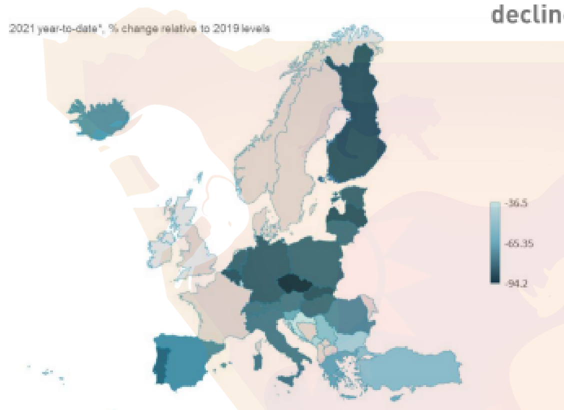
European Travel Commission (ETC) Trends & Prospects Quarterly Report 3/2021

EUROPEAN DESTINATIONS' EFFORTS TO FUEL A MUCH-NEEDED TRAVEL REBOUND MATERIALISED OVER THE PEAK SUMMER SEASON

International tourist arrivals to Europe were down 77% half-way through the year relative to 2019[1]. A few European destinations enjoyed a better-than-expected summer season attributed to improving vaccination coverage, the EU Digital COVID Certificate and relaxed restrictions for fully vaccinated foreign travellers. Destinations with draconian restrictions in place, those strongly dependent on long-haul markets have struggled to reopen.

[1] UN World Tourism Organization (UNWTO)

Despite a moderate rebound over summer, more than half of reporting destinations saw tourist arrivals decline over 74%



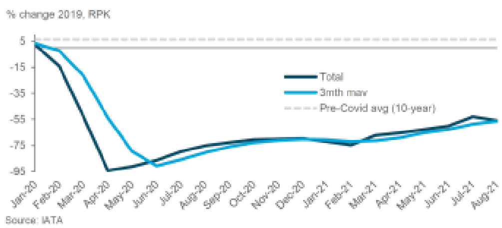
- Czech Republic -94%
- Slovakia -87%
- Latvia -87%
- Finland -86%
- Belgium -86%

Source: TourMIS *date varies (Jan-Sep) by destination

Industry Performance

- Global Revenue Passenger Kilometres (RPKs) remain well below normal (-56% lower than 2019 levels) over the August to August period.
- Improvement since April has been largely due to domestic travel.

Global Air Passenger Traffic Growth

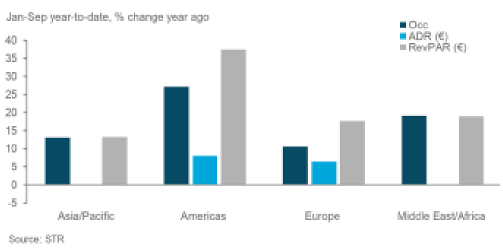


Source: IATA

- Airlines in Europe continued to recover in August as progress in vaccination rates permitted the loosening of restrictions, but with international RPKs still down 56% compared to 2019.
- In August, European RPKs were 49% lower than they had been in August 2019, compared to a 57% decline in the two-year period to July 2021.

- Europe enjoyed some growth in occupancy rates, albeit less than the other regions (10.5%). European hotels also managed to grow ADR (6.5%), despite a subdued demand back-drop.

Global Hotel Performance



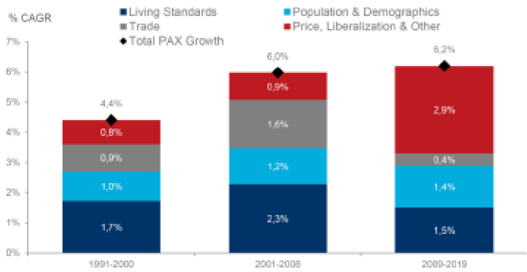
Source: STR

- European short term rental reservations have recovered to -33% of 2019 levels throughout 2021, and now sit just behind North America making it second in terms of world region recovery.

Special Focus: The End of Low Cost Travel?

- The cost of travel has fallen over the past two decades, with global average spending per international trip across all destinations down 17% in 2019 from its 2000 level in real prices.
- Airlines that were not bailed-out by governments have had to borrow heavily; those repayments will be made more challenging by declining credit ratings and higher financing costs. Meanwhile, the increased share accounted for by short-haul leisure — at the expense of business and premium class — will eat into profits and leave airlines little choice but to raise prices.

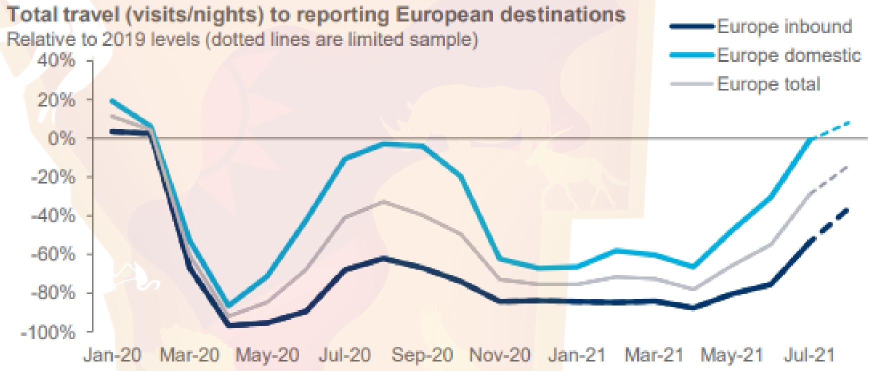
Passenger growth decomposition by growth cycle



- Some discounting will be likely in the short-term in an effort to regain market share and stimulate demand, while additional capacity is likely to come from all airlines in the coming months ahead of next summer.
- Recent weeks have seen steep increases in the price of jet fuel IATA / S&P's jet fuel monitor indicates that jet fuel prices in Europe as of 8th October are 18.5% higher than one month earlier and a dramatic 117.5% higher than one year ago.
- Wider concerns about environmental sustainability are also a consideration. New taxes, regulations and consumer preferences for more responsible travel could put upward pressure on prices, as could new requirements around cleaner fuels and operating activities.
- Pent-up demand could be put off purchasing travel if fares rise too steeply, particularly in an environment in which other cost of living increases appear to be accelerating.

A promising summer season for most

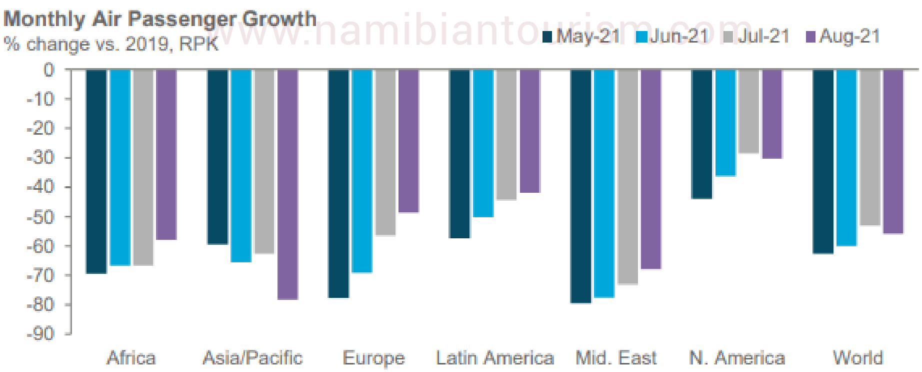
- Many European markets achieved a stronger than expected summer season following a depressing start to the year, and data points to a stronger summer than in 2020. The creation of the EU Digital Covid-19 Certificate was fundamental to ensuring safe travel across the region and helped to simplify the process of cross-border travel.
- Europe currently possesses the highest vaccination rate among the world regions, which will enable the release of significant pent-up demand, with pre-pandemic levels set to be surpassed by 2024.
- A slower vaccine rollout across Eastern Europe, and in some large long-haul source markets, may potentially delay the recovery, presenting a lingering downside risk.



Source: Tourism Economics

Rapid improvement in European air passenger demand

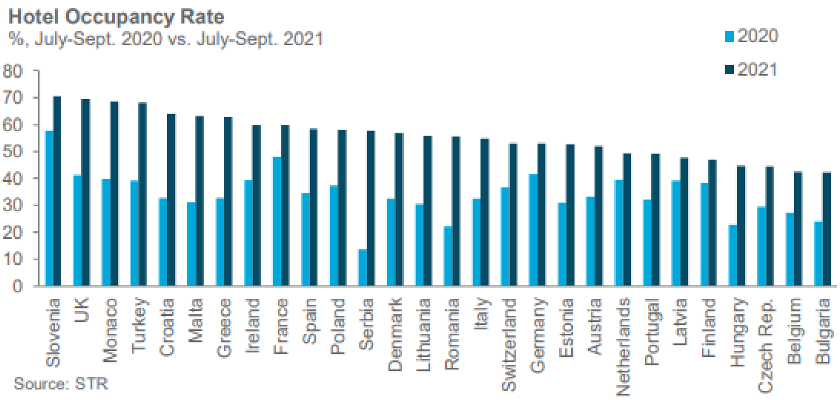
- Airlines in Europe also continued to recover in August as progress in vaccination rates permitted the loosening of restrictions, but with international RPKs still down 56% compared to 2019.
- Data from Eurocontrol currently only goes up to the end of August as well but confirms the overall picture of tentative recovery. The number of flights were down around 32% in August 2021 compared to August 2019 but marking a significant improvement in performance earlier in the year. Flights continue to be down by a lower percentage than air passenger numbers indicating some lower than usual load factors, but also suggesting continued new capacity to enable further growth in recovery.



Source: IATA

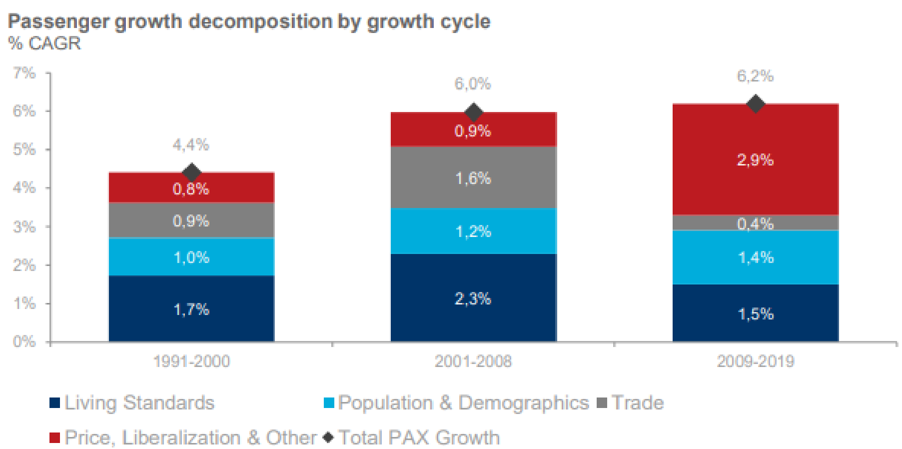
Hotel performance this summer outperformed last

- All reporting European destinations enjoyed higher levels of hotel occupancy this summer compared to last, based on data for July-September. A number of destinations reported occupancy rates close to 70%, including Slovenia, the UK, Monaco, and Turkey.
- However, it is not clear within the data how many hotels have closed because of the pandemic and have yet to reopen; this reduction in supply will only support higher levels of occupancy temporarily, until room supply returns to pre-pandemic levels.
- European short term rental reservations have recovered to -33% of 2019 levels throughout 2021 so far, and now sit just behind North America making it second in terms of world region recovery.

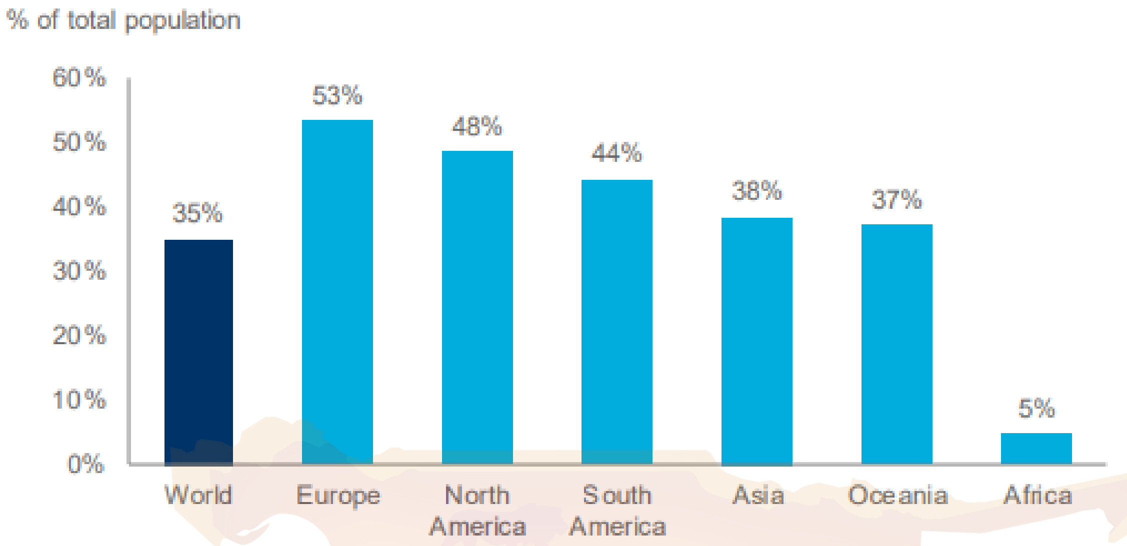


The end of low-cost travel era could be drawing near…

- Covid-19 hit passenger demand in an unprecedented fashion. Larger airlines tended to receive state intervention, while some smaller operators will have had to borrow. But in many cases even flag carriers will have to repay state loans. This is seen by some as a sign that air fares must increase as operators seek to recoup losses in order to repay loans. The airline industry is also facing challenges from increasing jet fuel costs.
- The costs of travel have been falling for decades and lower air fares have played a critical part in this. This, alongside market liberalisation, played an increasingly important role in passenger growth in the most recent growth cycle. Raising fares risks dampening the recovery in demand for air travel. However, while there are plenty of reasons why travel prices may increase, evidence of this is not yet definitive.



Share of population fully vaccinated by region



Source: Tourism Economics, Our World In Data Last updated: 11/10/2021

Europe's travel recovery attained a significant boost during the summer months, with improving vaccination rates and an easing of travel restrictions boosting traveller confidence and enabling greater activity. The creation of the EU Digital COVID-19 Certificate was key to the further opening-up of Europe during the summer, providing a unified approach to the restart of travel across the region. The certificate offered an important gateway to more normal travel behaviour, reducing the burden of testing and quarantine measures on tourists and easing concerns related to welcoming tourists back. Intra-regional travel as a result experienced an uplift and is set to account for 85% of European international arrivals in 2021, up from 77% in 2019, according to Tourism Economics' latest baseline. Portugal, Malta, and Iceland have managed to vaccinate over 80% of their populations, with Portugal possessing the highest vaccination rate in Europe at 86%. However, there is a divergence in vaccination rates across Europe, with Eastern Europe trailing behind. Bulgaria, Belarus, Bosnia & Herzegovina and Ukraine are at the bottom end of the scale, with less than 20% of their populations fully vaccinated. This slower vaccine rollout across Eastern Europe may potentially impact the pace of recovery. However, they are still well ahead of the global trend. Nearly all Eastern European markets are set to vaccinate 70% of their populations by 2022, with Bulgaria and the Czech Republic reaching this benchmark by 2023. Based on current rates, Slovakia will vaccinate 70% of its population by 2024, the slowest pace across Europe. Though an acceleration in distribution rates would push these timelines forward. The vaccine administered has also become a matter of contention across Europe. The EU has approved the use of AstraZeneca, Pfizer, Moderna, and Janssen vaccines, but the Sputnik V vaccine – the main vaccine used in Russia – still awaits approval from the European Medicines Agency (EMA) and the World Health Organisation (WHO) and is not recognised as valid by certain destinations. This has emerged as a greater concern for Western Europe, where Russian arrivals are expected to remain below 2019 levels until 2024 compared to 2023 for Eastern Europe.

2. GLOBAL TOURISM FORECAST SUMMARY

Tourism Economics' global travel forecasts are shown on an inbound and outbound basis in the following table. These are the results of the Global Travel Service (GTS) model, which is updated in detail three times per year. Forecasts are consistent with Oxford Economics' macroeconomic outlook according to estimated relationships between tourism and the wider economy. Full origin-destination country detail is available online to subscribers.

GTS Visitor Growth Forecasts, % change year ago

	Inbound*					Outbound**				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
data/estimate/forecast	e	f	f	f	f	e	f	f	f	f
World	**-72.8%**	**15.4%**	**119.6%**	**28.6%**	**15.5%**	**-72.5%**	**13.1%**	**120.9%**	**28.2%**	**15.2%**
Americas	**-68.5%**	**13.9%**	**93.1%**	**27.6%**	**14.5%**	**-71.3%**	**11.5%**	**103.8%**	**26.9%**	**14.7%**
North America	-68.2%	17.9%	90.4%	27.8%	13.4%	-71.3%	10.4%	109.0%	27.6%	14.4%
Caribbean	-68.4%	21.1%	82.7%	25.5%	14.7%	-67.7%	32.3%	53.8%	19.0%	14.7%
Central & South America	-69.3%	-3.2%	111.2%	28.4%	18.0%	-71.5%	13.6%	90.1%	25.0%	16.0%
Europe	**-68.1%**	**26.2%**	**107.1%**	**16.4%**	**9.7%**	**-67.3%**	**23.5%**	**105.3%**	**17.6%**	**10.0%**
ETC+3	-67.2%	20.9%	112.8%	15.1%	9.2%	-66.3%	17.6%	110.5%	17.0%	9.6%
EU	-66.6%	15.5%	117.9%	15.4%	8.6%	-66.3%	17.4%	110.4%	17.3%	9.7%
Non-EU	-73.7%	76.6%	73.8%	20.2%	13.8%	-71.1%	52.6%	87.1%	18.8%	11.5%
Northern	-69.5%	-17.8%	182.3%	28.7%	13.3%	-72.4%	22.0%	136.9%	19.4%	11.1%
Western	-57.8%	-2.1%	112.8%	10.6%	7.3%	-61.8%	9.3%	106.2%	16.2%	9.3%
Southern/Mediterranean	-71.5%	59.5%	95.8%	13.2%	8.2%	-68.0%	28.5%	103.1%	16.9%	8.8%
Central/Eastern	-73.3%	44.7%	95.8%	23.7%	13.8%	-70.3%	48.7%	82.6%	18.9%	11.1%
- Central & Baltic	-72.2%	18.5%	128.9%	22.4%	13.3%	-66.7%	31.8%	87.3%	15.2%	8.8%
Asia & the Pacific	**-84.2%**	**-38.1%**	**330.6%**	**74.1%**	**29.4%**	**-83.8%**	**-33.2%**	**314.0%**	**64.9%**	**27.8%**
North East	-88.0%	-8.3%	328.8%	67.2%	26.1%	-85.4%	-19.7%	298.8%	65.9%	26.9%
South East	-81.4%	-64.1%	410.9%	92.1%	36.3%	-82.6%	-61.6%	515.8%	65.1%	30.1%
South	-76.3%	-45.3%	246.6%	60.3%	23.3%	-74.0%	-28.0%	143.5%	46.0%	23.5%
Oceania	-76.3%	-31.6%	176.5%	66.1%	27.4%	-82.4%	-46.2%	344.1%	78.3%	33.7%
Africa	**-74.6%**	**29.6%**	**67.4%**	**43.6%**	**21.7%**	**-72.5%**	**22.6%**	**60.5%**	**40.7%**	**19.2%**
Middle East	**-73.2%**	**32.1%**	**104.9%**	**27.9%**	**17.8%**	**-70.3%**	**33.8%**	**78.2%**	**32.6%**	**18.6%**

* Inbound is based on the sum of the country overnight tourist arrivals and includes intra-regional flows

** Outbound is based on the sum of visits to all destinations

Northern Europe is Denmark, Finland, Iceland, Ireland, Norway, Sweden, and the UK;

Western Europe is Austria, Belgium, France, Germany, Luxembourg, Netherlands, and Switzerland;

Southern/Mediterranean Europe is Albania, Bosnia-Herzegovina, Croatia, Cyprus, Greece, Italy, Malta, Montenegro, North Macedonia, Portugal, Serbia, Slovenia, Spain, and Turkey;

Central/Eastern Europe is Armenia, Azerbaijan, Bulgaria, Czech Republic, Estonia, Hungary, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Poland, Romania, Russian Federation, Slovakia, and Ukraine;

- Central & Baltic Europe is Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, and Slovakia;

ETC+3 is all ETC members plus Austria, Sweden, and the United Kingdom

Source: Tourism Economics based on GTS as of 11.10.2021

EUROPEAN TRAVEL COMMISSION (ETC)

MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL - SEPT 2021

KEY FINDINGS

THIS REPORT MONITORS SENTIMENT AND SHORT-TERM INTENTIONS FOR DOMESTIC AND INTRA-REGIONAL TRAVEL WITHIN EUROPE AND IS THE 8TH WAVE OF MARKET RESEARCH[1] INITIATED IN SEPTEMBER 2020. RESPONSES ARE COLLECTED FROM EUROPEANS IN 10 HIGH-VOLUME SOURCE MARKETS, IN LIGHT OF THE COVID-19 CRISIS.

• TRAVEL SENTIMENT REMAINS HIGH, WITH 68% OF EUROPEANS PLANNING TO TRAVEL BETWEEN JULY 2021 AND JANUARY 2022.
• THE COVID-19 VACCINE IS KEY TO TOURISM RECOVERY: HALF (50%) OF EUROPEANS PLAN TO BOOK A TRIP ONCE VACCINATED AND OVER HALF (54%) CONFIRM THAT THE VACCINE MADE THEM MORE OPTIMISTIC AND CONFIDENT REGARDING TRAVEL.
• 57% OF RESPONDENTS STRONGLY AGREE/AGREE THAT THE INTRODUCTION OF THE EU DIGITAL COVID19 CERTIFICATE WILL FACILITATE TRAVEL PLANNING
• WHEN PLANNING A TRIP, EUROPEANS PRIMARILY DESIRE ENJOYING LIFE IN A RELAXING ENVIRONMENT (17%), ESCAPING FROM ROUTINE (16%) AND SPENDING QUALITY TIME WITH FAMILY OR FRIENDS (14%).

EUROPEANS' DESIRE FOR LEISURE TRAVEL REACHED ITS HIGHEST SHARE OF ALL RESEARCH WAVES OVER THE SUMMER MONTHS (72% OF 'EARLY-BIRD' TRAVELLERS).
• 53% OF EUROPEANS PLANNING TO TRAVEL IN THE NEXT 6 MONTHS AIM TO VISIT ANOTHER EUROPEAN COUNTRY – THE HIGHEST LEVEL SINCE SEPTEMBER 2020. 56% OF 'EARLY-BIRD' TRAVELLERS FOCUSED ON JULY-SEPTEMBER, WHILE 37% PLAN TO TRAVEL BETWEEN OCTOBER 2021 AND JANUARY 2022.
• EUROPEANS WITH SHORT-TERM TRAVEL PLANS SHARED PREFERENCES FOR SPENDING THEIR NEXT HOLIDAY OUT IN THE FRESH AIR, WHETHER ON SUN & BEACH (23%), COAST & SEA (15%) OR NATURE & OUTDOORS TRIPS (13%).
• AT THE SAME TIME, AN INCREASING NUMBER OF RESPONDENTS FAVOUR TRAVELLING BY CAR (40%), WHILE THEIR PREFERENCE FOR AIR TRAVEL DROPPED TO ITS LOWEST POINT (46%) SINCE SEPTEMBER 2020, PARTIALLY DUE TO THE STRONG INTEREST IN DOMESTIC TRAVEL (35%) AND VISITING NEIGHBOURING COUNTRIES (30%).
• 1 IN 3 OF 'TRAVEL-READY' EUROPEANS ARE PLANNING A 4–6-NIGHT TRIP, AND HALF WILL INVEST 500-1,500 EUROS ON THEIR NEXT HOLIDAY. A THIRD (34%) OF THEM HAVE CHOSEN A DESTINATION, BUT NOT YET BOOKED, AND 29% HAVE FULLY BOOKED THEIR NEXT TRIP.

• SLOWLY ADJUSTING TO LIVING ALONGSIDE COVID-19, THE SHARE OF RESPONDENTS WHO REFRAINED FROM PLANNING A TRIP DROPPED TO ITS LOWEST POINT (16%).
• THE TOP 3 FACTORS BOOSTING TRAVELLERS' CONFIDENCE IN PLANNING A TRIP BETWEEN OCTOBER-NOVEMBER ARE GETTING VACCINATED (37%), PRE-TRAVEL COVID-19 TESTS (20%) AND DESTINATIONS' EFFECTIVENESS IN MANAGING COVID-19 (20%).
• THE MOST WORRISOME PARTS OF A JOURNEY IN RELATION TO PERSONAL HEALTH AND SAFETY REMAIN THE AIR TRAVEL (17%), IN-DESTINATION TRANSPORT (15%) AND FOOD & BEVERAGE (13%).

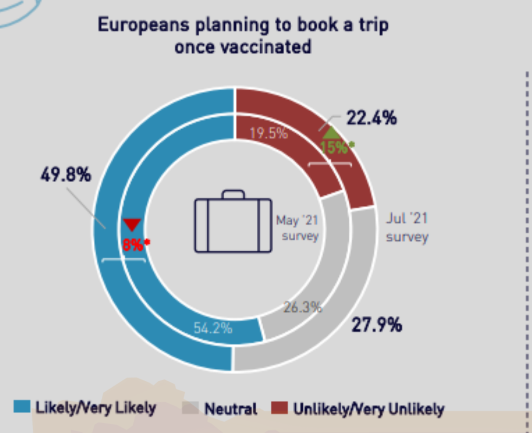
RECOMMENDATIONS FOR DESTINATIONS

• THE STRONG LINK BETWEEN VACCINATION AND TRAVEL CONFIDENCE ENDURES. DESTINATIONS SHOULD MAINTAIN THEIR FOCUS ON COUNTRIES THAT TOP THE VACCINATION UPTAKE LIST AND ON AGE GROUPS WITH A HIGH SHARE OF FULLY VACCINATED CONSUMERS*.
• DESTINATIONS SHOULD FURTHER ENHANCE STRICT HEALTH & SAFETY PROTOCOLS AND HIGHLIGHT THEIR POSITIVE PERFORMANCE IN LIMITING THE SPREAD OF COVID-19 IN RESPONSE TO TRAVELLERS' ACUTE CONCERNS ABOUT DESTINATIONS' COVID-19 CASE LEVELS AND EFFECTIVE MANAGEMENT OF THE PANDEMIC.
• WITH INCREASING INTEREST IN ROAD TRIPS AND IN OUTDOOR HOLIDAYS, DESTINATIONS COULD CO-CREATE THEMED INTRA-REGIONAL CAR ROUTES BASED ON VISITORS' INTERESTS TO HELP DISPERSE VISITOR FLOWS AND BUILD INTER-REGIONAL TOURISM PARTNERSHIPS.
• RESPONDING TO EUROPEANS' TASTE FOR 4-6-NIGHT CITY BREAKS, URBAN DESTINATIONS CAN PROMOTE INDEPTH EXPERIENCES, SUCH AS LOCAL CULTURAL EVENTS, MULTI-DAY WORKSHOPS AND DAY TRIPS TO NEARBY PLACES TO ATTRACT LONGER STAYS THAT RESULT IN GREATER ECONOMIC CONTRIBUTIONS.

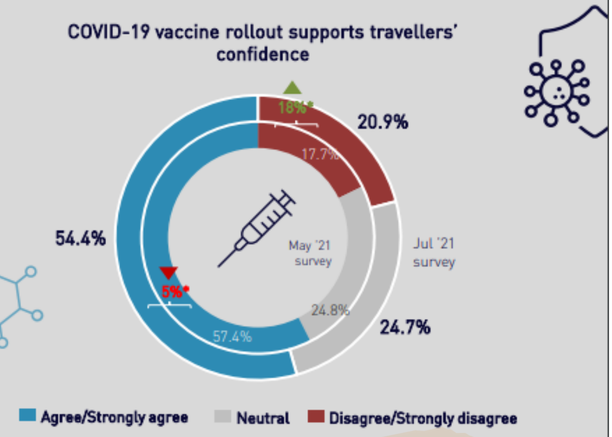
RECOMMENDATIONS FOR BUSINESSES

• TAKING ADVANTAGE OF EUROPEANS' POSITIVE TRAVEL SENTIMENT, BUSINESSES COULD OFFER EARLY-BIRD DEALS FOR Q4 2021 THAT FOCUS ON DRIVING-DISTANCE AUDIENCES AND THAT HAVE FLEXIBLE BOOKING TERMS.
• BUSINESSES CATERING FOR FAMILIES SHOULD HIGHLIGHT THEIR OFFER AS A WAY TO SPEND QUALITY TIME TOGETHER AND RE-CONNECT, WHILE BUSINESSES FOCUSING ON COUPLES SHOULD SPOTLIGHT ROMANTIC LEISURE TIME AND ENJOYING LIFE IN A RELAXING ENVIRONMENT.
• HOTELS SHOULD FOCUS ON SHORT BOOKING WINDOWS, AS 44% OF 'EARLY-BIRD' TRAVELLERS HAVE CHOSEN WHERE THEY WANT TO GO BUT HAVE NOT YET BOOKED THEIR ACCOMMODATION. • UTILISING UNSOLD ROOM INVENTORY THROUGH NEGOTIATING WITH CAREFULLY SELECTED CONTENT CREATORS COULD BE A WAY FOR INDEPENDENT HOTELS AND RESORTS TO FURTHER COMMUNICATE THEIR BRAND, PROVIDE ENGAGING CONTENT AND DRIVE DIRECT SALES.
• IN RESPONSE TO EUROPEANS' CONCERNS AND DECLINING INTEREST IN AIR TRAVEL, AVIATION STAKEHOLDERS SHOULD PROMOTE LAST-MINUTE DEALS, FLEXIBLE CANCELLATION POLICIES AND THE STRICT IMPLEMENTATION OF HEALTH & SAFETY PROTOCOLS AT AIRPORTS AND IN-FLIGHT.

The COVID-19 vaccine is still key to travellers' confidence and booking behaviour, yet it no longer has a great assurance effect



Q7. To what extent do you agree/ disagree with the following statement: "Once I'll get vaccinated for COVID-19, I would soon book a trip".



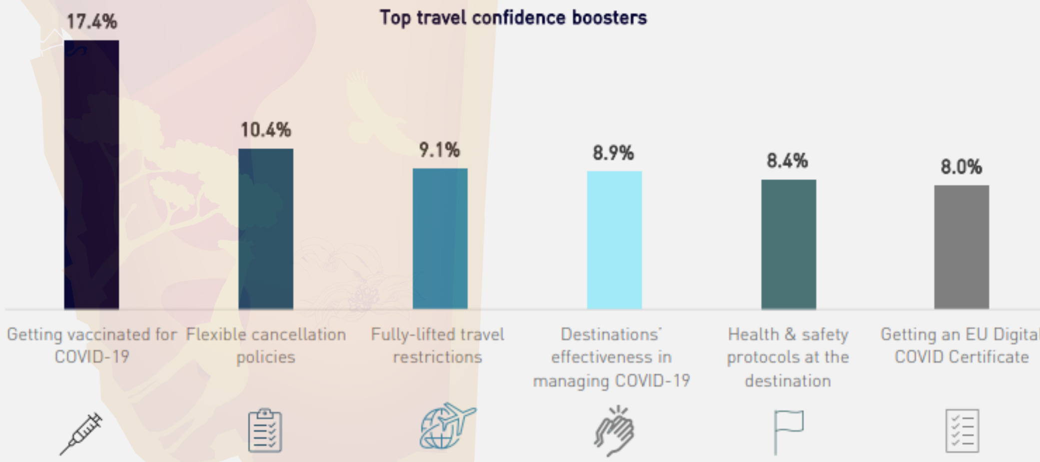
Q8. To what extent do you agree/ disagree with the following statement: "Now that a vaccine for COVID-19 has been rolled out, I feel much more optimistic and confident about planning trips in the next six months".

* % change vs previous survey period

No. of respondents: 5,778

Vaccine rollout, flexible cancellation policies and fully-lifted travel restrictions are the factors enhancing Europeans' travel confidence the most

For travellers planning a trip between October-November, **pre-travel COVID-19 tests** are the 2nd most important factor (while ranked 8th among the total sample) and should be made highly accessible by destinations and businesses.



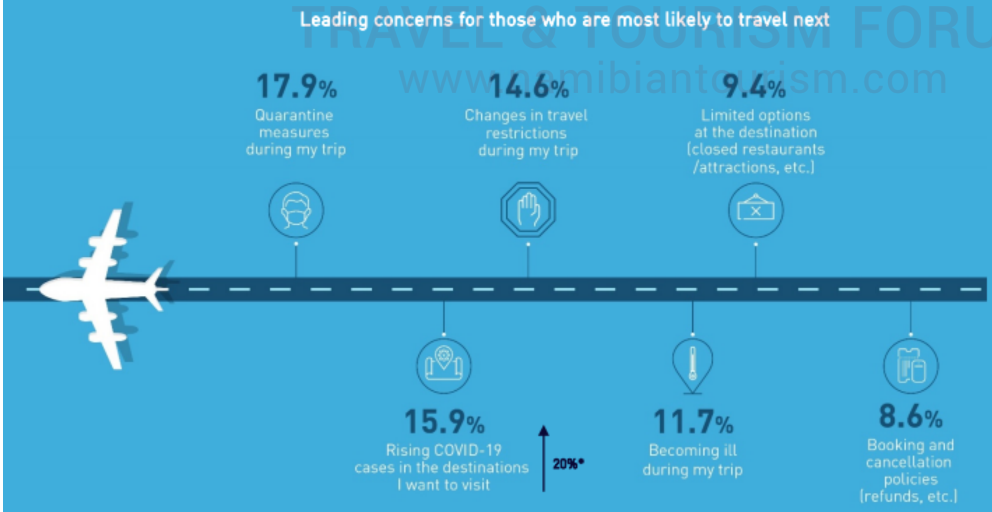
* No significant changes between waves were recorded for this question

Q3. Which factors will make you feel more confident to start planning a trip in the next months within Europe?

No. of respondents: 5,778

'TRAVEL-READY' EUROPEANS' CONCERNS

Quarantine measures remain travellers' greatest worry, while anxiety about rising COVID-19 cases at the destination has surged by 20%



Travellers aged 54+ tend to show higher levels of concern about **getting ill at the destination** (30% compared to 18% among 18-24-year-olds) and regarding **possible changes in travel restrictions** (29% compared to 18% among travellers aged 18-24)**

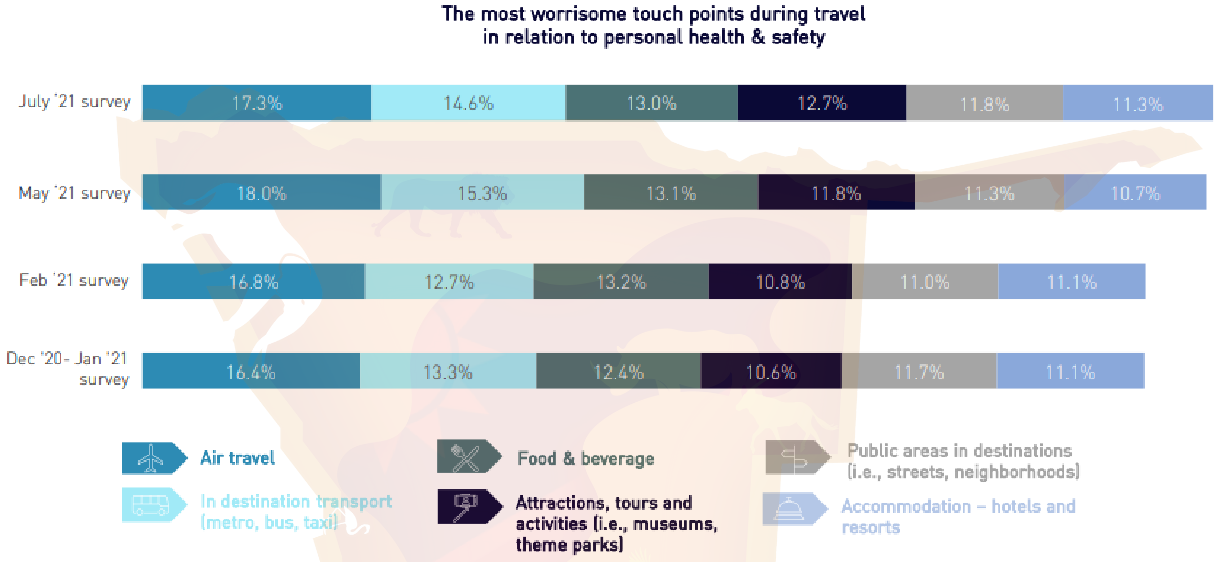
**This refers to the total sample

Q4. What currently concerns you the most about travelling within Europe?

No. of respondents: 3,923

* % change vs previous survey period

Healthwise, Europeans perceive using public transportation (air or ground) to be the riskiest part of their travel journey, and they are now more concerned about attractions, tours and activities

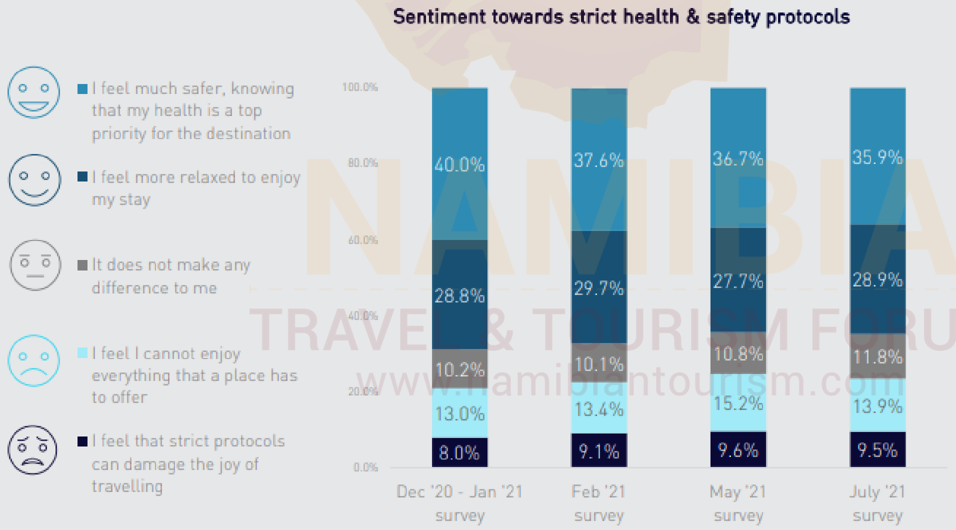


* No significant changes between waves were recorded for this question

Q5. In relation to your personal health and safety, which parts of your journey will concern you the most?

No. of respondents: 5,778

Destinations' strict health and safety protocols make people with travel plans feel safer and more relaxed



66% of travellers planning to travel by air have a favourable sentiment towards strict health and safety protocols, compared to 60% among those planning to travel by car

Q6. Please select a response which describes you the most:
"When I travel to places with strict health and safety protocols..."

* No significant changes between waves were recorded for this question

No. of respondents: 3,923

EUROPEAN TRAVEL COMMISSION (ETC)

EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES
JUNE | 2021

EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES
RESEARCH HIGHLIGHTS

Concluding six waves of market research[1] into European travel sentiment from September 2020 to February 2021, this report spotlights consumers' attitudes towards responsible travel.

- **The COVID-19 crisis had created an opportunity for European tourism to restart better with a refocusing of priorities:** promoting responsible travel and working with a consolidated and consistent approach towards **natural, social and economic sustainability**.
- In addition to the positive sentiment for travelling, **Europeans are also demonstrating an enthusiasm for hosting travellers**, with 40% of respondents wanting to have more tourists visiting their community or country.
- In the context of the pandemic, excessive numbers of tourists at one destination means an undesirable level of overcrowding. Mindful of this, **44% of respondents say they will consider off-season travel** and **32% are willing to spend more in order to visit less crowded destinations.**

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- Sustainable tourism aims to better manage the relations between the visitors, the tourism industry, the community and the environment. In line with this, **over 1 in 3 respondents are willing to spend more, benefiting local communities in both social and economic terms.**
- On a less positive note, the COVID-19 threat and personal health concerns **have led 50% of respondents to favour single-use packaging** for food and personal care products - representing a setback for the plastic-free travel lobby. Collective actions at a regional and country level will be necessary to ensure this trend will be reversed in the aftermath of the pandemic.

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- **3 in 5 respondents are now willing to take fewer trips and spend more time in one destination** - a critical factor considering that 75% of tourism CO_2 emissions result from transportation[1].
- In addition, 30% of Europeans are willing to spend more for green premium travel, acknowledging the need **to reduce their own carbon footprint.**

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RECOMMENDATIONS FOR DESTINATIONS

- The positive sentiment of residents for accepting more tourists can be leveraged **to re-establish the relations between tourists and the host community** and **for implementing collaborative initiatives on a local level** that will guide responsible tourism development.
- As more Europeans are willing to consider off-the-beaten-track destinations, **NTBs[1] should promote lesser-known destinations** and **highlight the pristine beauty of crowd-free travel.**
- Looking to better manage tourism seasonality, the growing interest in off-season travel should encourage **DMOs[1] to develop a 365 strategy, with recommended products and experiences for every season.**
- In view of the increasing desire to spend more time at a single destination, **DMOs[1] should further develop and promote immersive experiences for the visitor planning an extended stay.** These could include skills workshops conducted by local craftspeople, taking part in local events and activities and even volunteering on environmental projects and community enhancement schemes.

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RECOMMENDATIONS FOR BUSINESSES

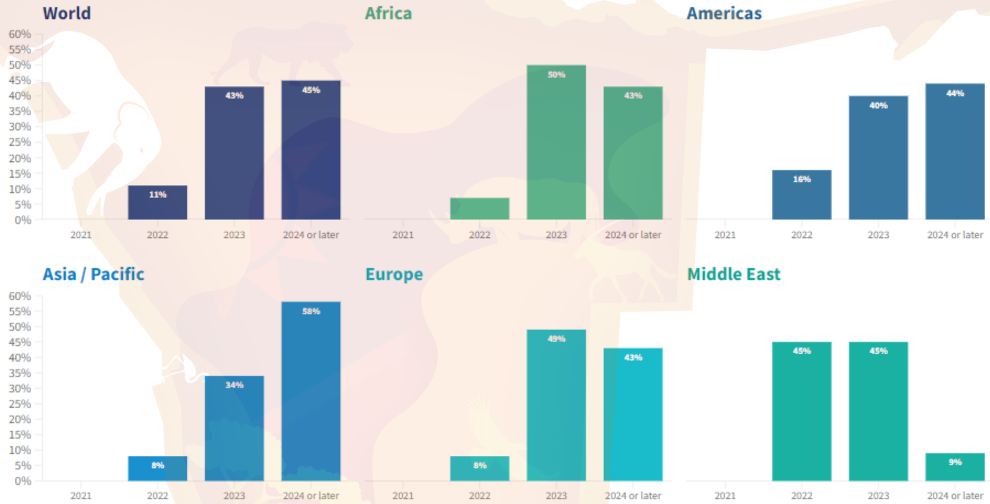
- Resulting from tourists' interest in supporting the host community, local entrepreneurs **should offer social tourism products and community tourism experiences**, creating localised and highly immersive tours that will benefit both the tourists and the residents.
- For tourists who wish to pay more for a less crowded visit, tourism **sights can offer VIP experiences for those purchasing tickets at less busy times of the day.**
- To address the willingness of tourists to invest in a green premium travel, **businesses can offer green upgrades, carbon offsetting schemes and opportunities to take part in environmental projects**, as part of their value proposition.
- To counter the readoption of single-use packaging for food and personal care products, tourism businesses should ensure optimum health and hygiene protocols are in place and reward guests that refrain from using plastic. Furthermore, **governments should reward accommodation establishments and restaurants that adopt plastic-free policies.**

VACCINES AND REOPEN BORDERS DRIVING TOURISM'S RECOVERY 4 OCT 21

World Tourism Organization

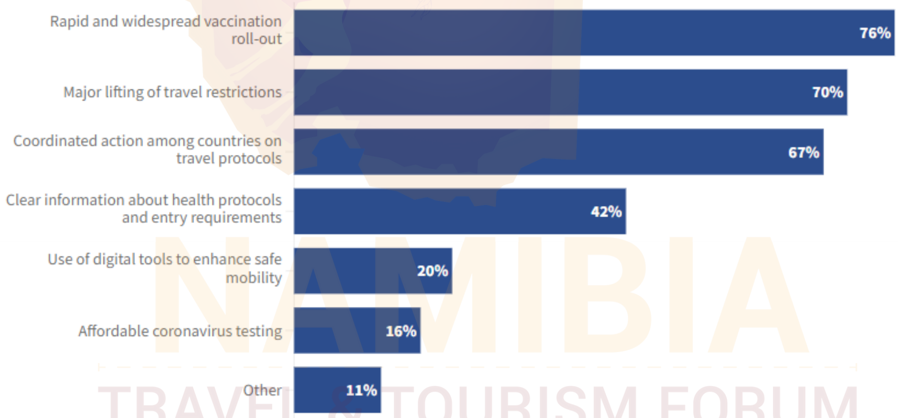
INTERNATIONAL TOURISM ENJOYED SIGNS OF REBOUND IN JUNE AND JULY 2021 AS SOME DESTINATIONS EASED TRAVEL RESTRICTIONS AND THE GLOBAL VACCINATION ROLLOUT ADVANCED IN MANY PARTS OF THE WORLD.

When do you expect international tourism to return to pre-pandemic 2019 levels in your country?



UNWTO conducted a global survey among its UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery.
Data as collected by UNWTO, September 2021. Published: 04/10/2021

"What are the main factors which could contribute to an effective recovery of international tourism?"



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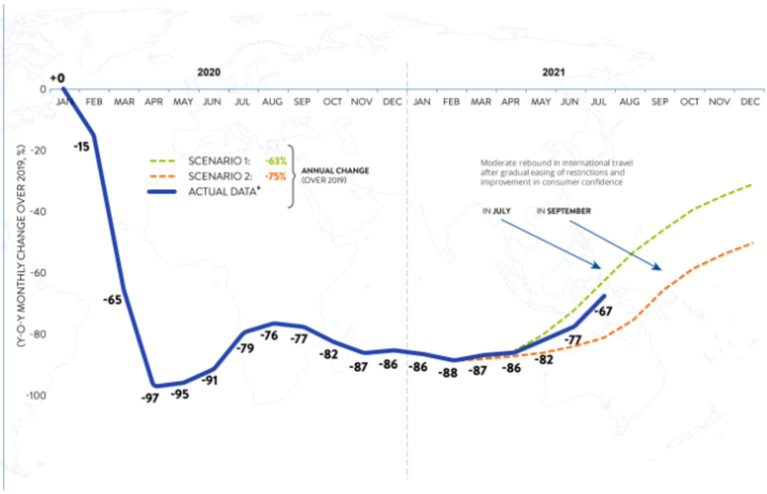
INTERNATIONAL TOURIST ARRIVALS: SCENARIOS FOR 2021

(Y-O-Y MONTHLY CHANGE OVER 2019, %)



* Actual data for 2021 is preliminary and based on estimates for destinations which have not yet reported monthly results.

UNWTO

SOURCE: UNWTO (DATA AS OF SEPT 2021)

Sources

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