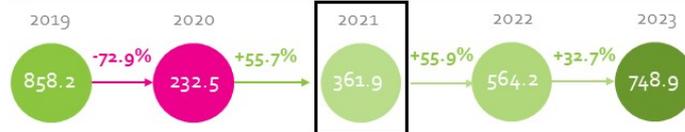


# ETRC subscribes to m1nd-set's B1S recovery monitor to provide data

## m1nd-set's b1s recovery monitor – Europe



International departures from Europe  
PAX in millions of passengers and Y.O.Y Growth



Top 10 direct destinations from Europe  
International PAX departures 2019

#1	AMS - Amsterdam, NL
#2	FRA - Frankfurt, DE
#3	CDG - Paris-De Gaulle, FR
#4	LHR - London-Heathrow, EN, GB
#5	LGW - London-Gatwick, EN, GB
#6	BCN - Barcelona, ES
#7	MUC - Munich, DE
#8	MAD - Madrid, ES
#9	DUB - Dublin, IE
#10	VIE - Vienna, AT



Top 10 nationalities departing from Europe  
Share of passengers per international departures 2021

United Kingdom	14.71%
Germany	10.88%
France	7.22%
Spain	6.51%
Italy	5.94%
United States	4.33%
Russian	4.33%
Switzerland	3.40%
Poland	2.87%
Netherlands	2.61%

Short term forecast based on historical data.

Top 10 airports in Europe  
International PAX departures 2021

#1	LHR - London-Heathrow, EN, GB
#2	CDG - Paris-De Gaulle, FR
#3	AMS - Amsterdam, NL
#4	FRA - Frankfurt, DE
#5	IST - Istanbul, TR
#6	MAD - Madrid, ES
#7	LGW - London-Gatwick, EN, GB
#8	BCN - Barcelona, ES
#9	MUC - Munich, DE
#10	ZRH - Zurich, CH

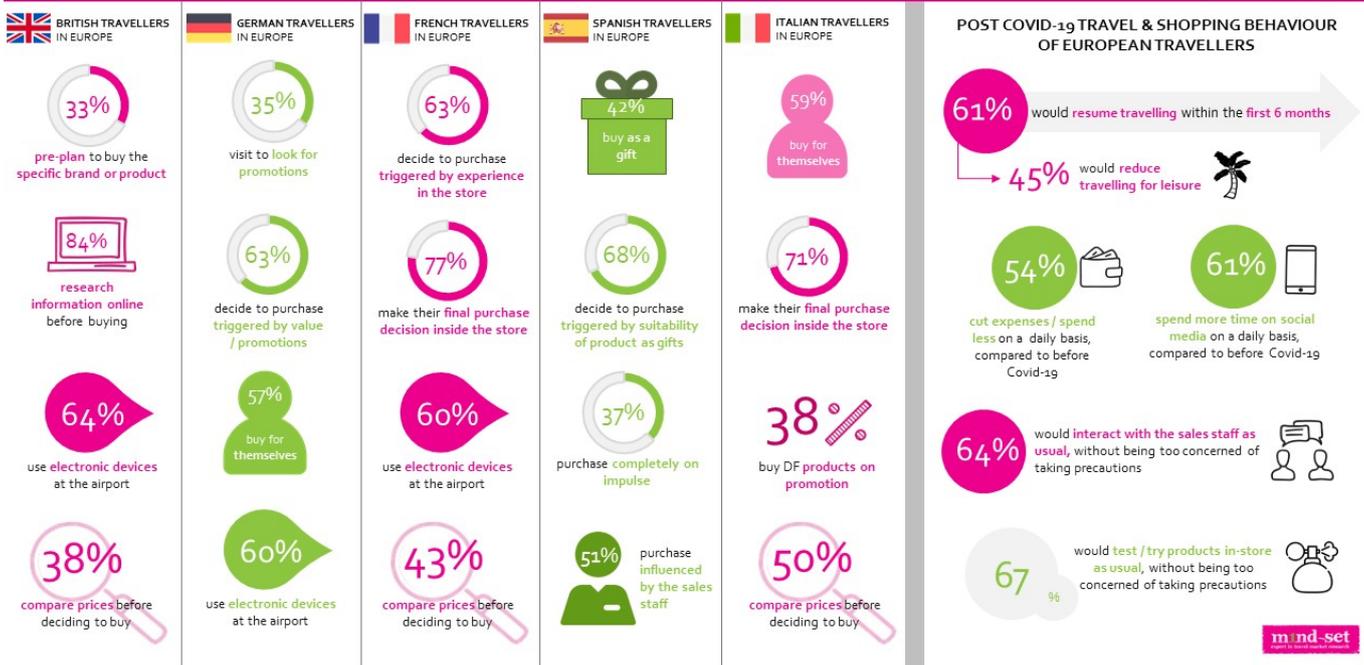
m1nd-set's B1S monitor reports that the top five traveling nationalities from Europe in 2021 will be the UK, Germany, France, Spain and Italy

m1nd-set's B1S COVID-19 recovery monitor initiative continues to draw major industry association support. Following the recent announcements of Americas associations ASUTIL and IAADFS joining forces with the swiss agency for the research partnership, the European Travel Retail Confederation (ETRC) has announced it is subscribing to the B1S recovery monitor to provide traffic and shopper insights data to its members

m1nd-set shares that the complimentary service, which comprises quarterly reports with key traffic trends and relevant shopper insights from its proprietary Business Intelligence Service (B1S) data tool, will be made available to all trade associations that wish to subscribe and provide the benefit to their respective members.

According to the first quarterly report for ETRC, international departures in Europe fell by more than 73% between 2019 and 2020, from 858 million passengers to 232.5 million. The recovery will be consistent over the next two years at circa 56% each year and 3% from 2022 -2023, to reach just less than 750 million in 2023 - still more than 100 million less than pre-COVID-19 levels.

m1nd-set's B1S reports that the top five traveling nationalities from Europe in 2021 will be the UK, Germany, France, Spain and Italy. Amsterdam Schiphol Airport leads the ranking in terms of the top ten direct destinations from European Airports among all international departures. This is followed by Frankfurt, Paris Charles De Gaulle, London Heathrow and London Gatwick. As for the top airports for international departures in 2021, London Heathrow is expected to remain on top, followed by Paris Charles De Gaulle, Amsterdam Schiphol, Frankfurt and Istanbul.



It's expected that following the lifting of restrictions, 61% of European travelers will resume travel within six months

Post-COVID-19 travel and shopping behavior in Europe reveals that 61% of European travelers state that they plan to travel again within the first six months after restrictions are lifted, while less than half (45%) say that they will reduce their leisure travel. Numbers to note:

Over 50% of shoppers will spend less on a daily basis post-COVID-19

Over 60% of shoppers will spend more time using social media

64% of shoppers will continue to engage with on-site sales staff members with minor concern about taking precautions and following protocols

67% of shoppers will continue to try, test and sample products without any concern about taking precautions and following protocols

"We are proud to partner with ETRC on this initiative and support its members through the recovery journey. The traffic forecast data is compiled with very robust forecasting tools based on IATA's data.

With the second, and in some cases, third waves of the pandemic crippling Europe's recovery, these scenarios might change over the coming months, so it will be interesting to see how the current forecast analysis compares to the situation in Q2 and Q3, especially with the vaccine roll-out rate occurring at different speeds across the region," says Anna Marchesini, Head of Business Development and Project Manager, m1nd-set.

"We have always endeavoured to provide our members with relevant and regular insights to give them tools to make business decisions. This service is even more important in the current context to help them understand how to navigate this rapidly changing environment.

ETRC values the support received from partners such as m1nd-set, providing complimentary and comprehensive data on the road to recovery of duty free and travel retail in Europe," adds Julie

Lassaigne, Secretary General, ERTC.