



Preverisk  
Group

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Vaccination and the recovery of tourism:  
Will they go hand in hand?

# What is a vaccine and what types are there?

A vaccine is a preparation intended to generate immunity against a disease by stimulating the production of antibodies

Type	Virus	Viral vector vaccines (Adenovirus)	Genetics mRNA or mDNA	Proteins
Process	<p>Inactivated or weakened virus vaccines</p> <p>use a form of the virus that has been inactivated or weakened</p> <p>it doesn't cause disease, but still generates an immune response</p>	<p>Takes a harmless virus</p> <p>uses to deliver pathogenic viral genes</p> <p>to build immunity</p>	<p>Cutting-edge approach,</p> <p>uses genetically engineered RNA or DNA to generate a protein,</p> <p>that itself safely prompts an immune response</p>	<p>Use harmless fragments of proteins or protein shells</p> <p>that mimic the SARS-CoV-2 virus</p> <p>to safely generate an immune response.</p>
Other vaccines	Chickenpox, Polio	Ebola	No previous experience	Pertussis, Hepatits B, VPH
COVID19 vaccines	Wuhan, Sinopharm, Sinovac	Oxford-AstraZenec, Janssen	Pfizer-BioNTech , Moderna	Novavax, Sanofi

# Which COVID-19 vaccines are there?



	Sinopharm	Oxford-Astrazeneca	Moderna	Pfizer	Gamaleya (Sputnik V)	Jansen (J&J)
<b>Type</b>	Inactivated virus	Vector (Adenovirus)	Genetic (ARN-m)	Genetic (ARN-m)	Vector (Adenovirus)	Vector (Adenovirus)
<b>Effectiveness</b>	79,34%	66%	94,1%	95%	91,6%	Pending publication.
<b>Approval/Authorisation</b>	China, United Arab Emirates, Egypt and Jordan	UK, EU, Argentina, India & Mexico	USA, Canada, Israel, EU, Switzerland	USA, Canada, Israel, EU, Switzerland, Saudi Arabia, Jordan, Costa Rica, Ecuador, Panama, Mexico, Singapore, Kuwait, Chile, Argentina	Russia, Belarus, Argentina, Algeria, Bolivia, Palestine & Serbia	Phase 3 in development
<b>Preservation</b>	Cold 2-8°	Cold 2-8°	-20°	-70°	-20°	2-8°
<b>Dosage</b>	2 doses: 3 weeks	2 doses: 4 weeks	2 doses: 28 days	2 doses: 21 days	2 doses: 3 weeks	1 o 2 doses



# What are the stages of the development?

## (1) Exploratory work

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- Determine the virus genetic sequence
- Identify the structure of the virus proteins
- Goal: Develop a vaccine which mimic an infection without making you sick
- Determine possible antigens (toxins that trigger your immune system)

## (2) Pre-clinical development

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- Tested in laboratories and animals
- Objective evaluate that is safe to produce and generates an immune response

## (3) Clinical development

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### Phase 1:

- 20-100 healthy adult volunteers
- Objective : SAFETY
- Dose, immune response
- Randomized controlled trials

### Phase 2:

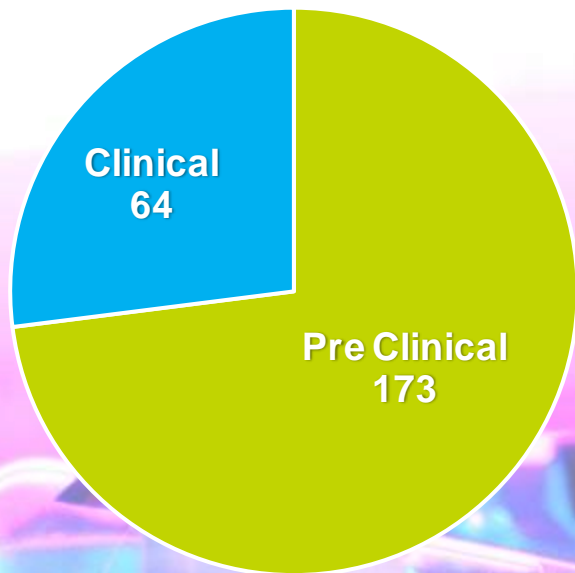
- 100-1000 volunteers
- Different demographics: variables in immune response (age, region, ethnic, )
- Optimal dose and schedule
- Randomized controlled trials

### Phase 3:

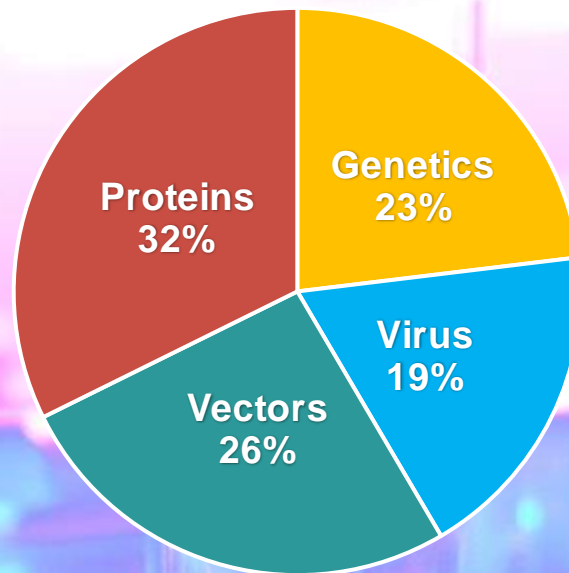
- 1000's volunteers
- Vs placebo / another vaccine
- Primary endpoint: Efficacy disease incidence reduction / immunological correlates of protection (high level of antibodies or T-cells)

# How many COVID-19 vaccines are being developed?

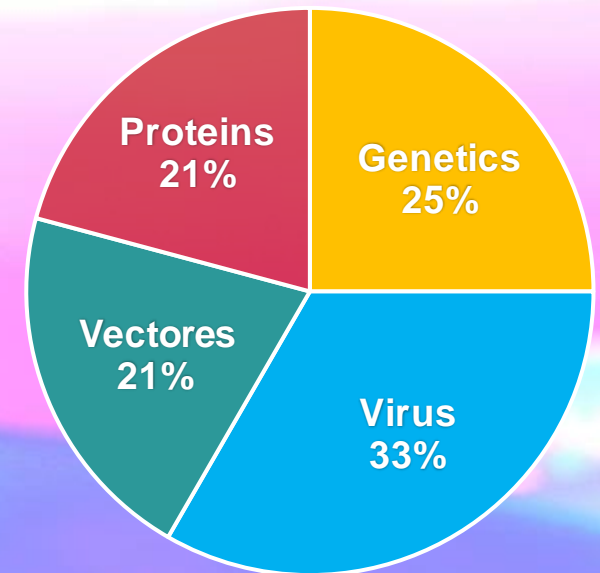
Vaccines in Development  
(237)



Clinical phase (64)






Phase 2/3 (24)



# How is herd immunity achieved?

## PERFECT Vaccination

-  Reduces the severity of the disease and mortality
-  Prevents transmission and spread
-  Long term immunity

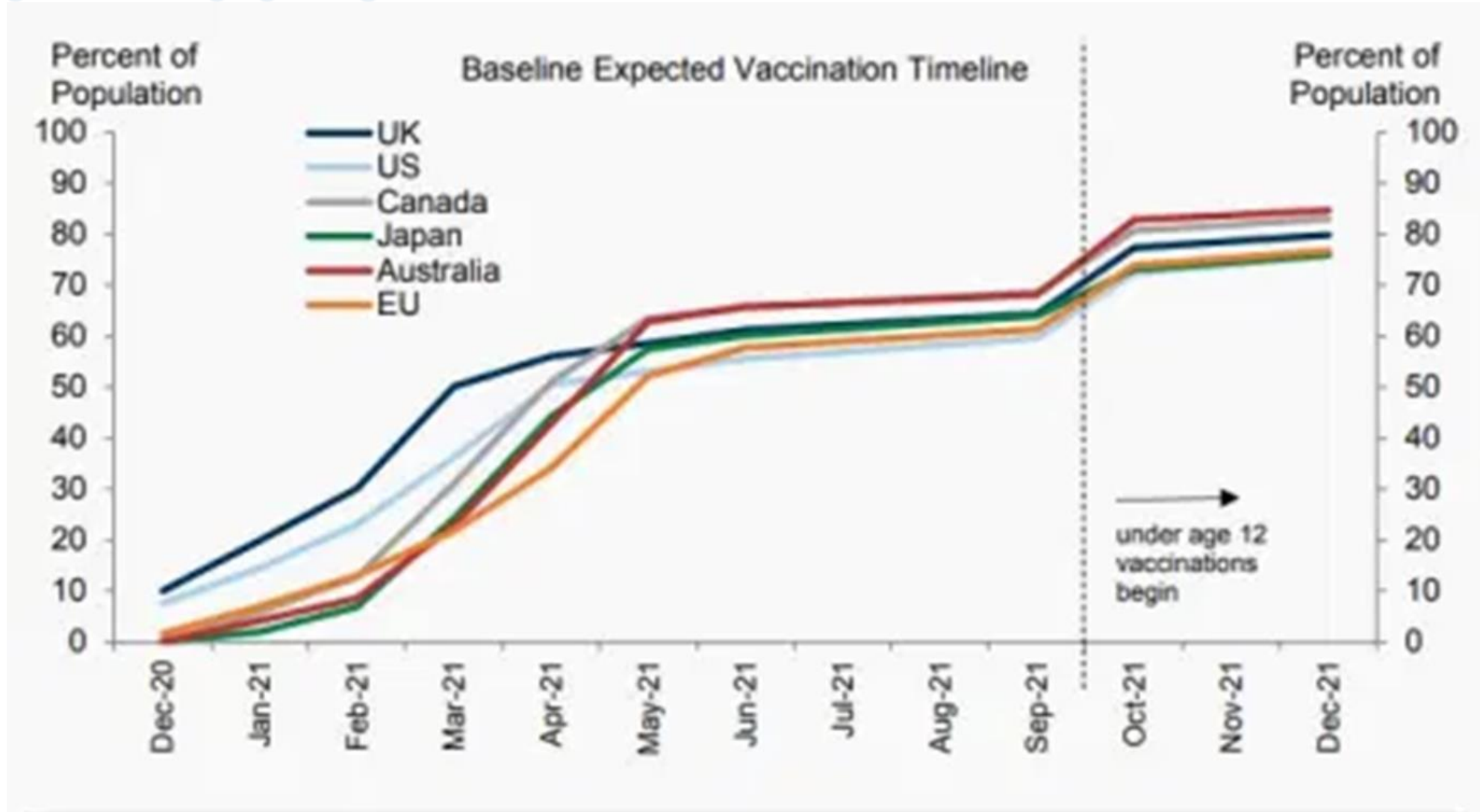


**If this happens...**

**Immunity depends on transmission.  $R=3 \rightarrow 60-70\%$**



# What is the estimated vaccination forecast?

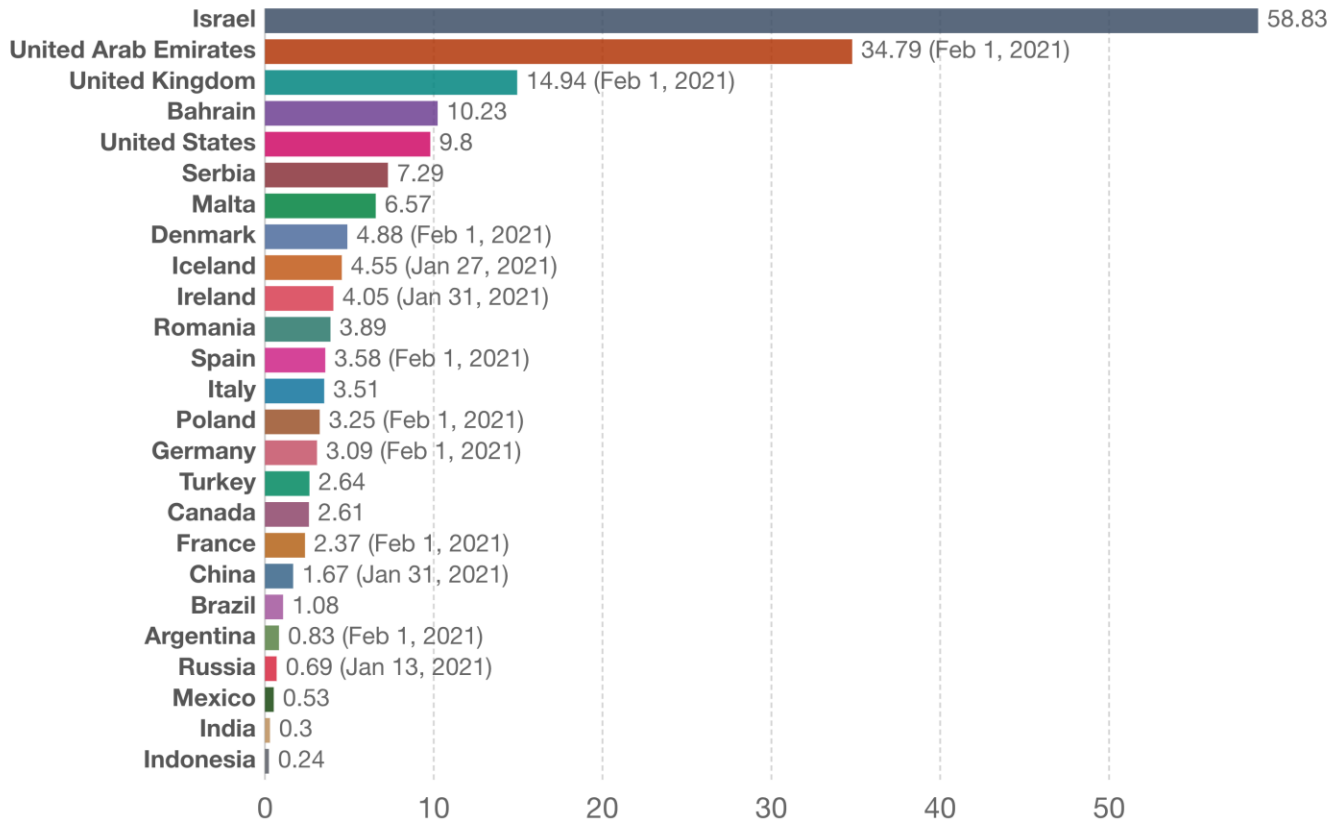


# Will we all be immunised at once?

## COVID-19 vaccine doses administered per 100 people, Feb 2, 2021

Total number of vaccination doses administered per 100 people in the total population. This is counted as a single dose, and may not equal the total number of people vaccinated, depending on the specific dose regime (e.g. people receive multiple doses).

Our World  
in Data



Different rates due to the following:

- ❖ Type of vaccination purchased
- ❖ Supply capacity and complexity of distribution
- ❖ Vaccination programmes
- ❖ **Vaccine price**



# Will tourism return thanks to vaccination?

Market research led by the ETC (European Travel commission);  
**Monitoring the intra-European and National intention to travel.**

Total respondents: 5,855

Countries of origin:

Germany, UK, France, Spain,  
Italy, Switzerland, Belgium,  
Netherlands, Poland & Austria.

5 published reports. Up to 6  
survey of reports will be carried  
out.

Date of survey completion: Feb  
2021



MONITORING SENTIMENT FOR DOMESTIC  
AND INTRA-EUROPEAN TRAVEL

WAVE 5 | 02/21

Co-funded by  
the European Union



EUROPEAN  
TRAVEL  
COMMISSION

# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

The importance of health and safety considerations further increases, while sustainability appears for the first time as a popular travel quality

Dec '20 – Jan '21 survey



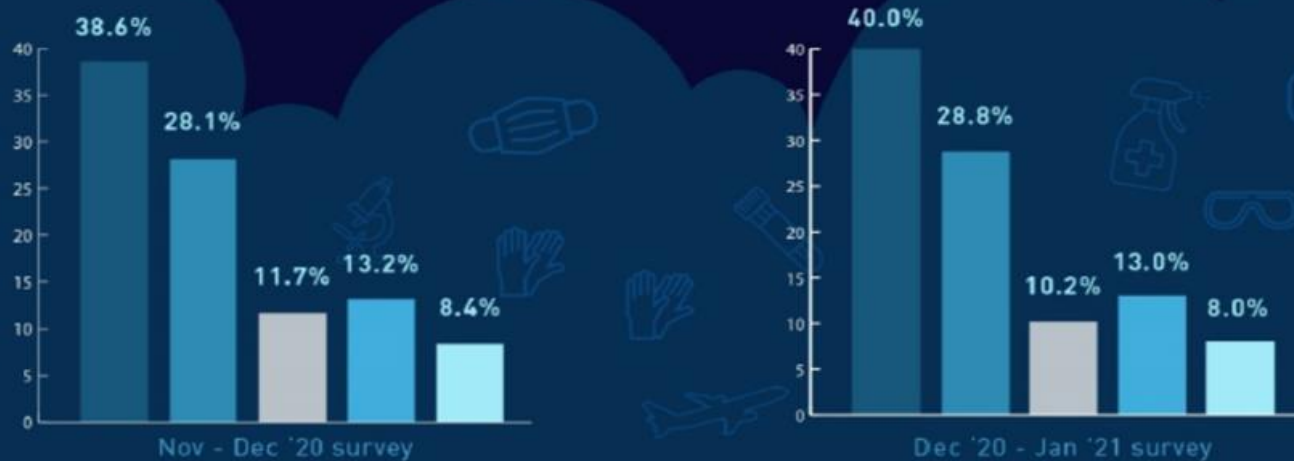
\* No significant changes between waves were recorded for this question



# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## STRICT PROTOCOLS BRING THE PEACE OF MIND TO PROPERLY ENJOY A TRIP:

Strict health and safety protocols in the destination are welcomed by over two-thirds of "early bird" travellers



I feel much safer, knowing that my health is a top concern for the destination



I feel more relaxed to enjoy my stay



It does not make any difference to me



I feel I cannot enjoy everything that a place has to offer



I feel that strict protocols can damage the joy of travelling

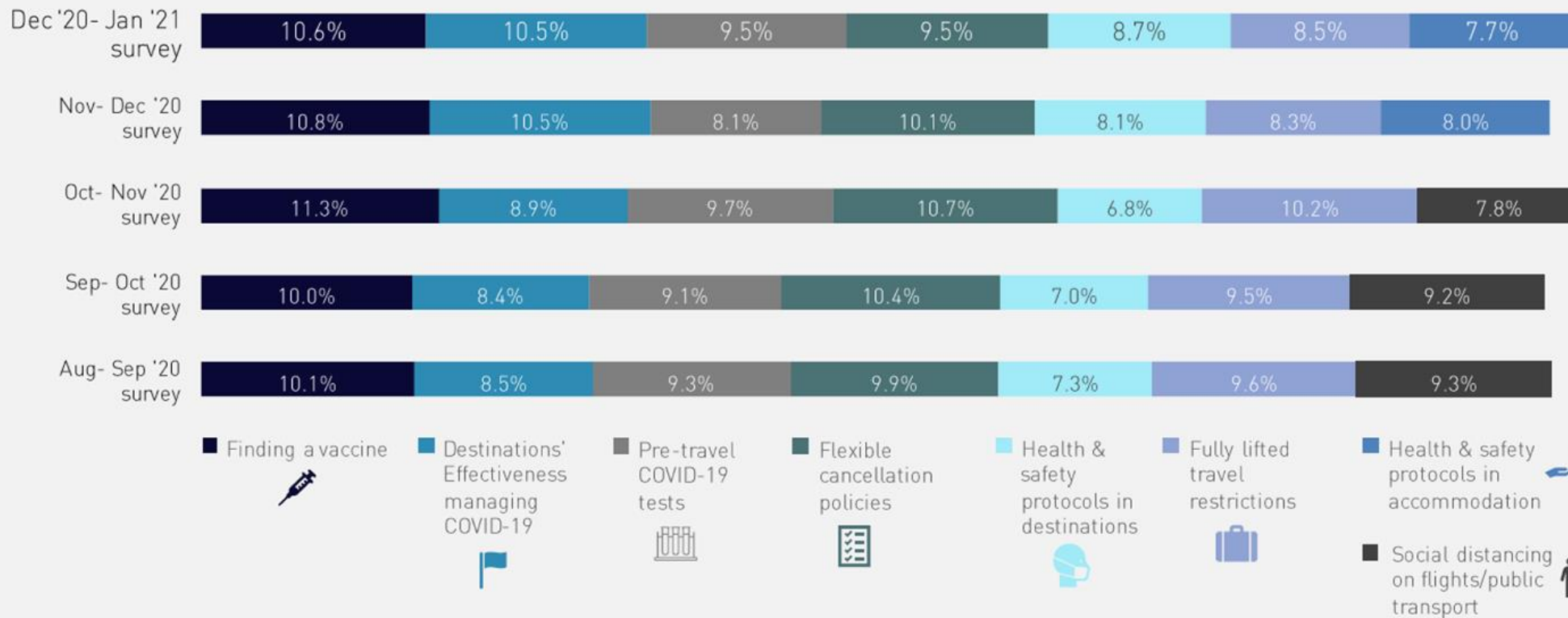
71% of those planning a domestic trip view strict health and safety protocols in a positive light, vs. 65% of those planning to travel outside of Europe.

Notes: • Q18. Please select a response which describes you the most:  
 "When I travel to places with strict health and safety protocols..."  
 • Refers to survey respondents that are most likely to travel by the end of July 2021, n= 3,181  
 • Data was collected between 18/12/2020 - 7/1/2021

# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

COVID-19 vaccines remain the top driver for resuming travel, bringing hope that a mass rollout will contribute towards tourism recovery

Most important factors to travel within Europe



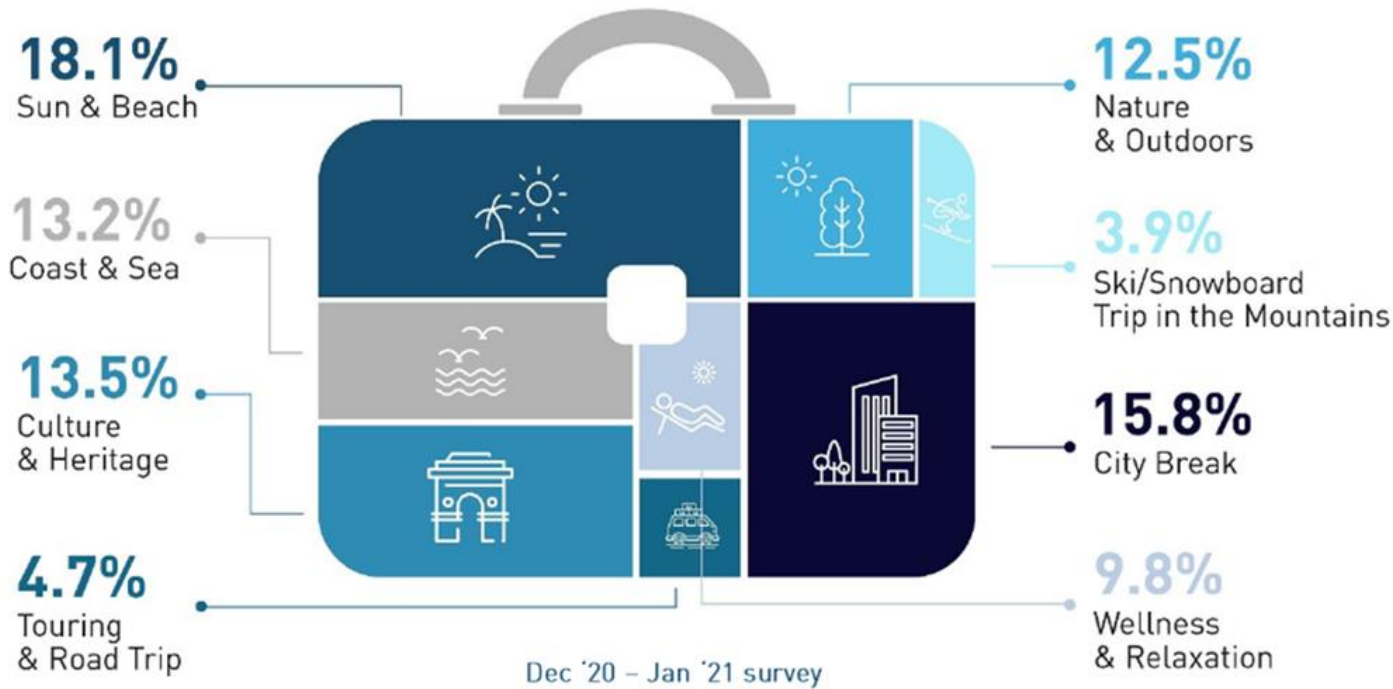
\* No significant changes between waves were recorded for this question.

Q3. Which factors are currently most important to you to travel within Europe?

# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## Sun and beach experiences gain interest with many Europeans planning to resume travel in early summer

Preferred type of leisure trip for respondents most likely to travel in the next 6 months



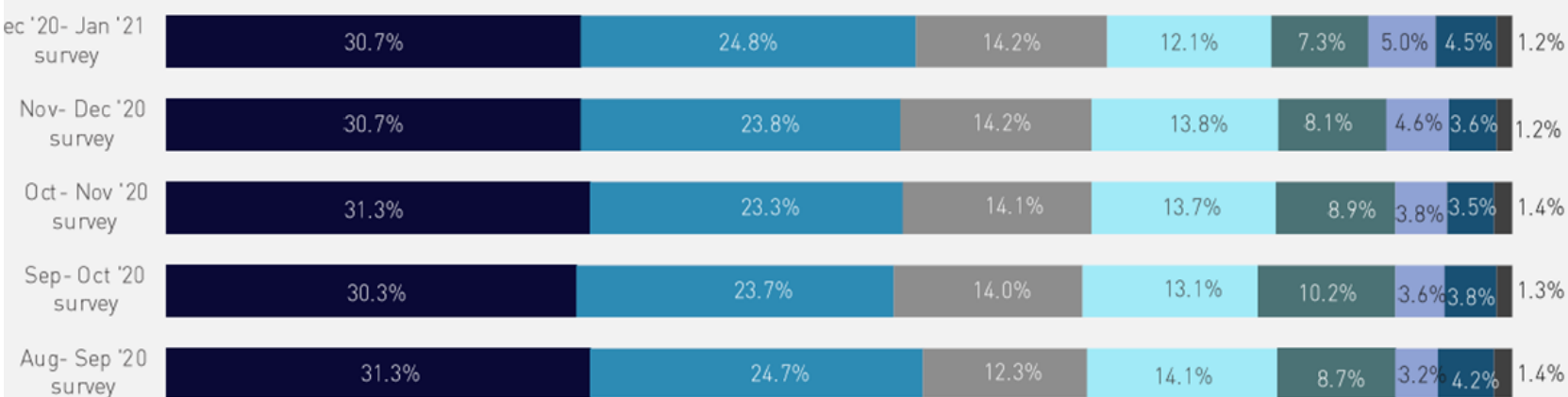
Culture and Heritage trips as well as wellness and relaxation show the lowest seasonality among all types of leisure trips

\* No significant changes between waves were recorded for this question  
Q17. What type of leisure trip within Europe are you most likely to undertake next?

# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY




## Over half of respondents still indicate a hotel or resort to be their preferred accommodation choice

Preferred type of accommodation for respondents most likely to travel in the next 6 months



The preference for hotels/ resorts increases with age: 28% of the 18-24 age group stay in hotels vs. 51% in the 55+ age group

-  Hotel chain or resort
-  Independent hotel/resort
-  Friends and/or family

-  Short-term rental via online platform
-  Other paid serviced accommodation (bed and breakfast, etc.)
-  Hostel/motel

-  Camping/caravan
-  Other

For the younger audience (18-24) the short-term rentals are in 3<sup>rd</sup> place

\* No significant changes between waves were recorded for this question



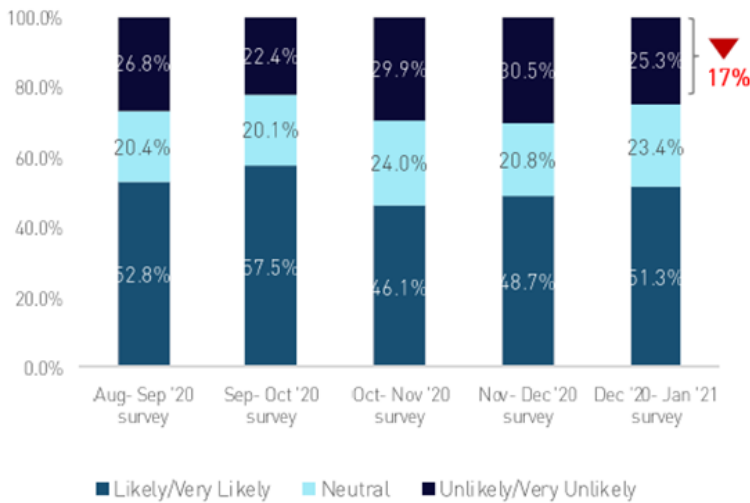
# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## GERMANY

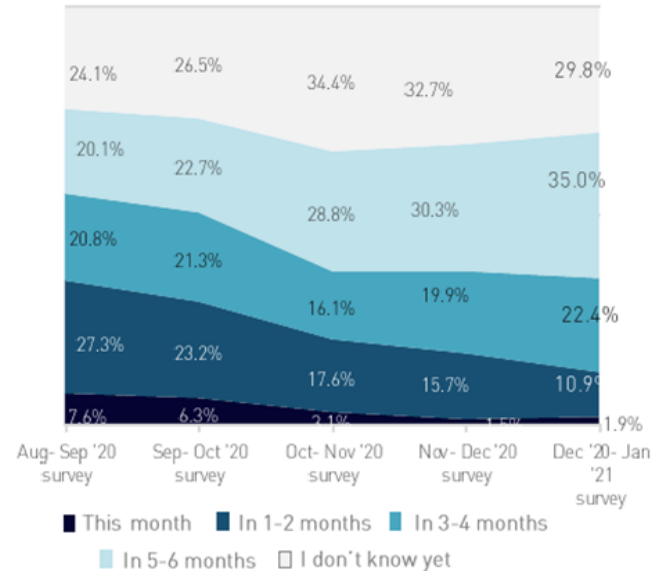
More than half of the surveyed Germans intend to travel in the next 6 months, with the May – July 2021 period being the top choice



Willingness to travel in the next 6 months

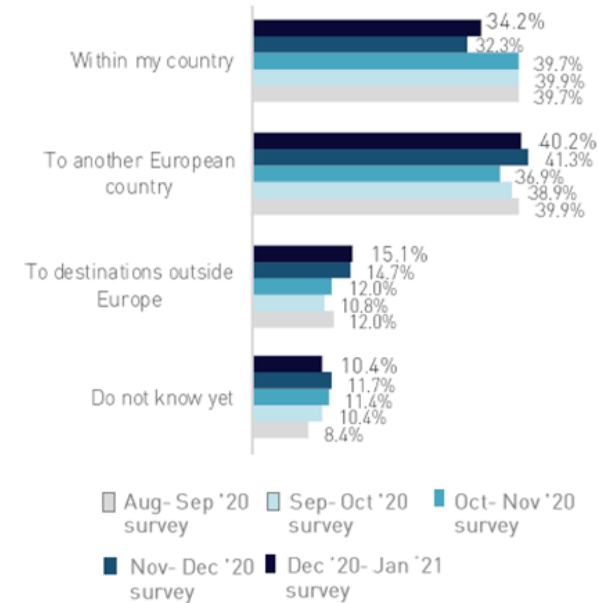


When will Germans travel?



For specific dates please refer to [slide 10](#)

Where will Germans travel within the next 6 months?



Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q9.When are you most likely to go on your next trip either in your country or within Europe?

Q10.Where do you plan to travel in the next 6 months?

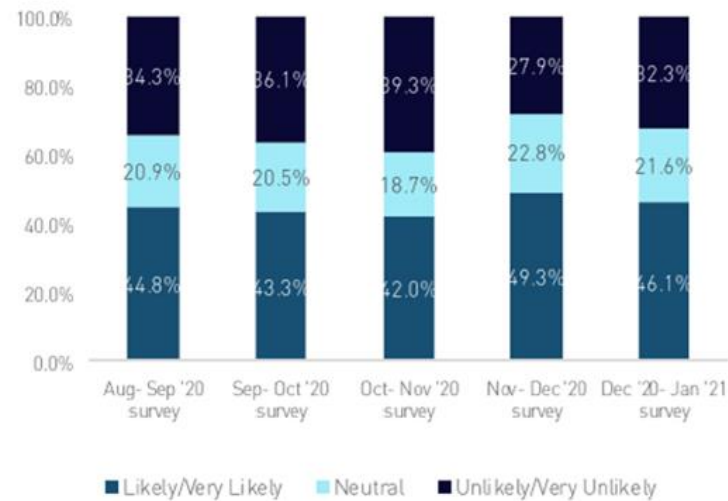
# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## UNITED KINGDOM

Britons are largely uncertain about the time of their next trip, but still view spring – summer 2021 quite positively



Willingness to travel in the next 6 months

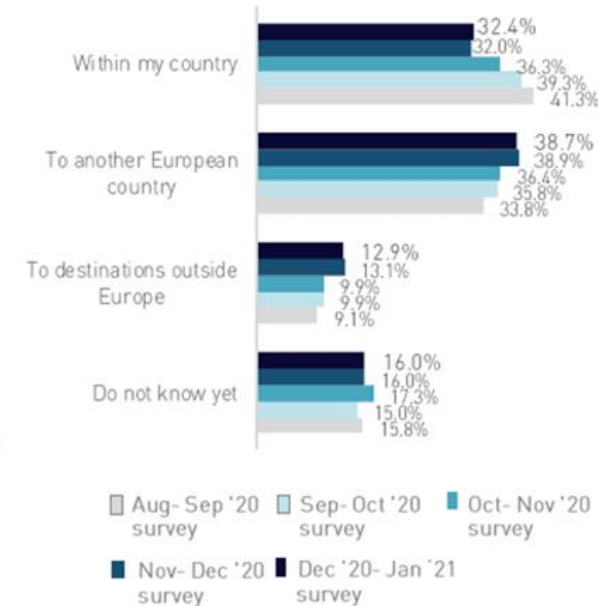


When will Britons travel?



For specific dates please refer to [slide 16](#)

Where will Britons travel within the next 6 months?



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q9. When are you most likely to go on your next trip either in your country or within Europe?

Q10. Where do you plan to travel in the next 6 months?

# Covid-19 vaccination in UK

## Government roadmap has gone 'beyond expectations' for travel restart

by Ian Taylor Feb 24th 2021, 8:22   

The **government roadmap for restarting travel** has gone “beyond expectations” say industry sources at the heart of engagement with ministers.



The prime minister insisted there is “time to make plans for the summer” as he unveiled the four-step roadmap on Monday.

It will begin with schools reopening on March 8. Non-essential retail could reopen from April 12 and travel resume from May 17, with each step a minimum five weeks' apart.

Boris Johnson also announced a **successor to the Global Travel Taskforce** to review

- Travel resume from May 17, also announced a successor to the Global Travel Taskforce to review the reopening of travel and report by April 12.
- EasyJet 337% increase in flight bookings in the U.K. and a 630% rise in holiday bookings following the government announcement. Also, 19 million seats sold the next day of the announcement.
- Tui also said bookings jumped 500% overnight.

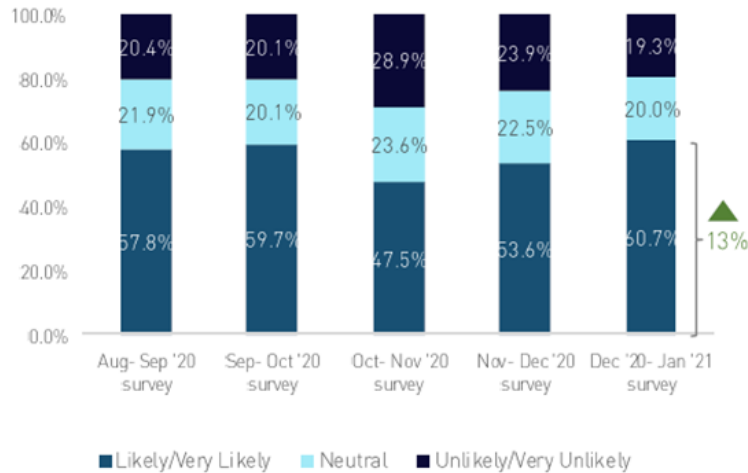
# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## ITALY

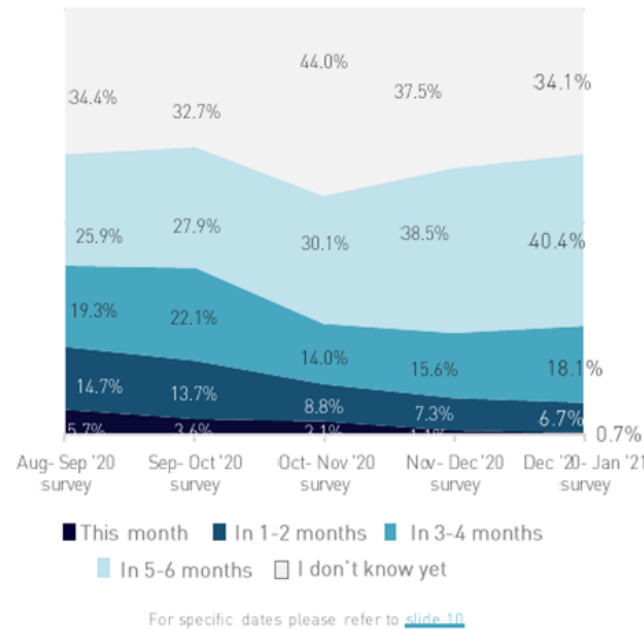
While positive travel sentiment gathers momentum, 50% of Italians are still reluctant to venture abroad



Willingness to travel in the next 6 months

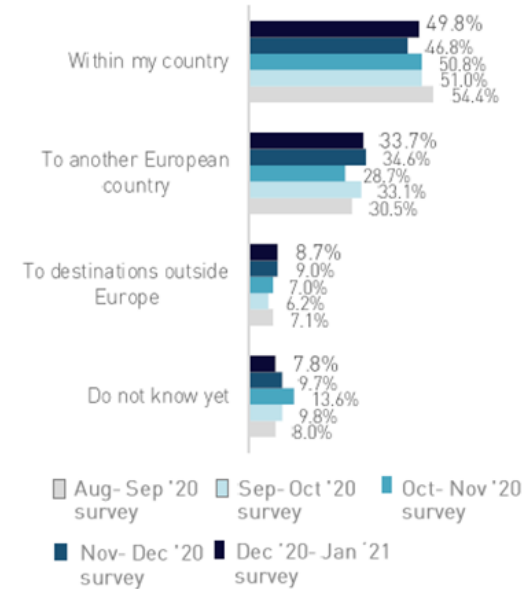


When will Italians travel?



For specific dates please refer to [slide 10](#)

Where will Italians travel within the next 6 months?



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q9. When are you most likely to go on your next trip either in your country or within Europe?

Q10. Where do you plan to travel in the next 6 months?

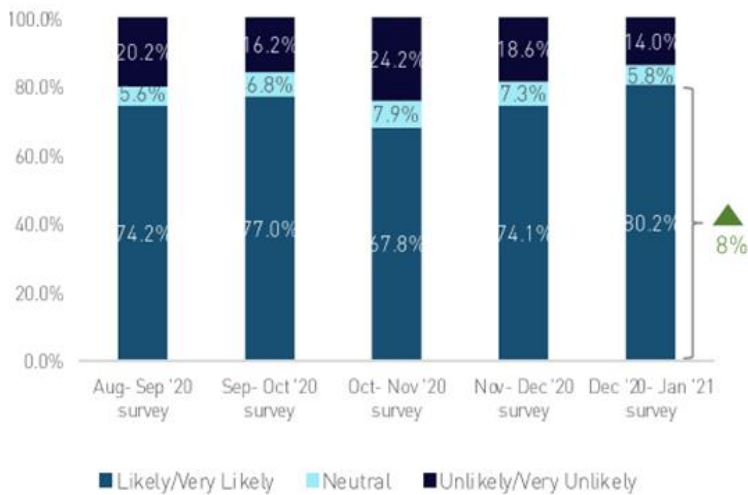
# SAFETY AND HYGIENE REMAIN THE MOST IMPORTANT INDICATOR OF TRAVEL QUALITY

## POLAND

With a share of 80%, Poles are still the most enthusiastic of all surveyed markets when it comes to travel up to July 2021



Willingness to travel in the next 6 months

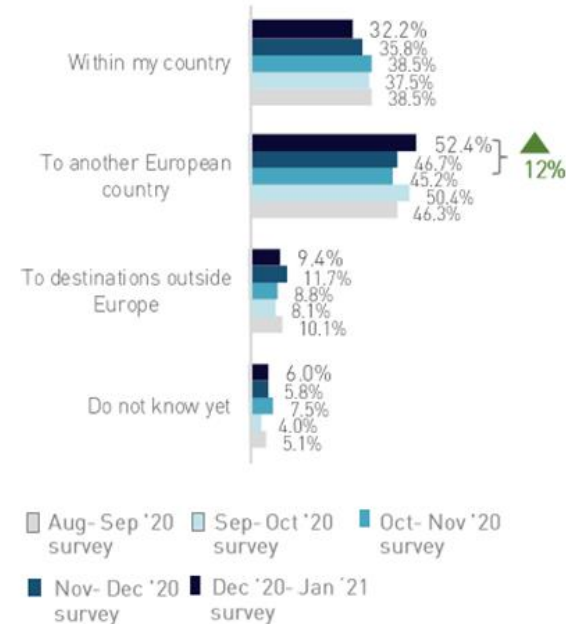


When will Poles travel?



For specific dates please refer to [slide 10](#)

Where will Poles travel within the next 6 months?



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q9. When are you most likely to go on your next trip either in your country or within Europe?

Q10. Where do you plan to travel in the next 6 months?



# When will tourism return?



## Positive data!

Efficacy data FAR better than expected

We know more about the virus...

Preventative measures & Public Health

Diagnosis & test: Each time easier,  
more accessible & reliable

New treatments for Covid-19

People are keen to travel again:

- ❖ Skyscanner reports + 48% reservations in UK for 2021
- ❖ 62% of respondents say they will travel again once vaccinated

## Limitations...



Vaccination capacity

Problem with supply & quality

Peoples reluctance

- ❖ 46% in Spain don't want to be vaccinated (INE- Nov 2020)

Equity between countries

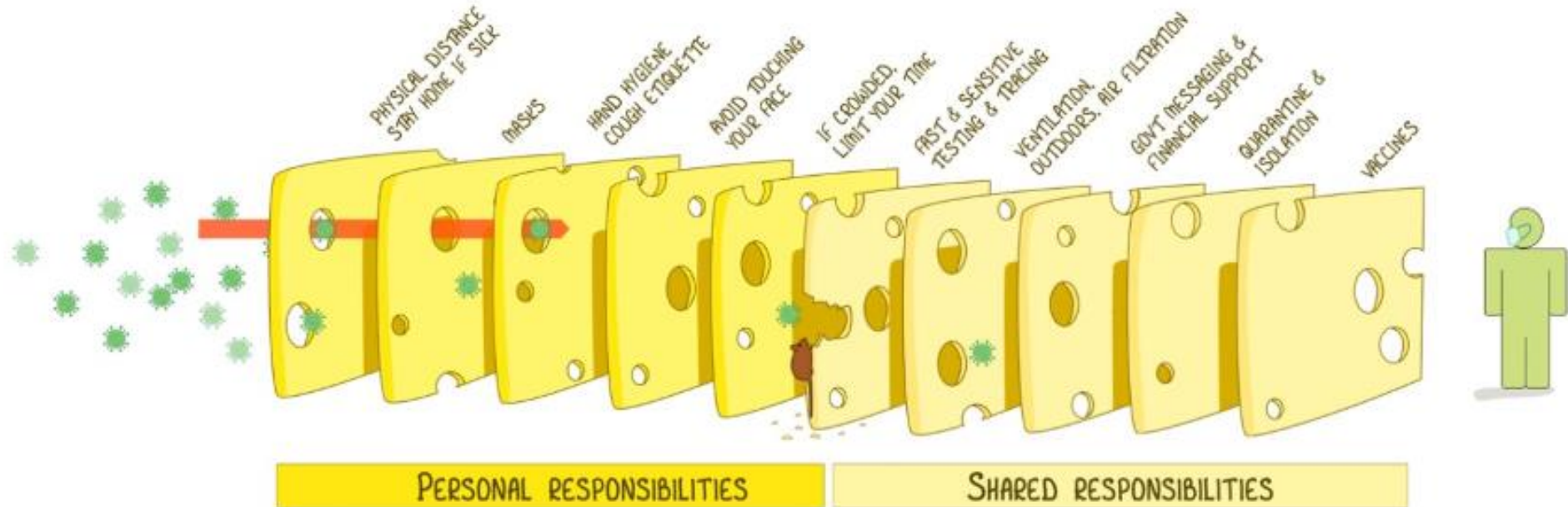
Short term immunity



# How is protection against the virus

## THE SWISS CHEESE RESPIRATORY VIRUS PANDEMIC DEFENCE

RECOGNISING THAT NO SINGLE INTERVENTION IS PERFECT AT PREVENTING SPREAD



EACH INTERVENTION (LAYER) HAS IMPERFECTIONS (HOLES).  
MULTIPLE LAYERS IMPROVE SUCCESS.

# Our conclusions

## ❖ Vaccine is not the same as vaccination...

1. Speed up the commercialisation of new vaccines.
2. Ensure mass production & even distribution. “No body is safe until every body is safe”.
3. Speed up vaccination programmes.

## ❖ Your customer needs after Covid ..

1. We have seen with the business indicators the new measures of the quality of the customer being on top of them the hygiene level in final destination.
2. We believe business wise, it is important to invest with hygiene requirements including seeking the expertise support from well branded hygiene companies.
3. No contradiction between vaccination and ensurance of vigilant hygiene. At least until 70% of the world wide population is immunized, we really need to prove to our customers extraordinary hygiene level on place.





### Seal of safety

Monitoring programme, follow up, constant & continuous work for 1 year.



### Auditing

In person & remotely.  
(combined plan)



### Software

App4Check.  
Autovalidation.



### Training

COVID-19 manager.  
Operating protocols for COVID-19.  
Food hygiene / Allergens



### Consulting

Review & update of operational protocols.  
Assistance with crisis management.





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