



Euromonitor
International

New Frontier Markets - The Forefront of Tourism Recovery

April 2022

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Scope

Key findings

POST-PANDEMIC OUTLOOK

New frontier markets look to put the pandemic behind them

Faster recovery as upcoming destinations display resilience

Upgrade to the Middle East forecast performance

Precarious recovery for international travel

Domestic tourism to bounce back quicker than international demand

US and China critical source markets to recovery for many new frontier markets

Growing the domestic market drives social sustainability and economic development

Average daily room rate growth fuels new frontier hotels' recovery

Short-term rentals expand share of lodging as consumers seek variety and space

Activities benefit from easing border restrictions and pent-up demand

Airlines benefit from the uplift effect of rising prosperity...

...yet air dependency is a major stumbling block to the 1.5 ° C pathway to net-zero

Intermediaries on the long road to recovery

CLIMATE ACTION ON THE FRONT LINE

Euromonitor's Sustainable Travel Index - new frontier markets

Estonia - makes the largest strides at the top of the leader board

Striking the right balance for the triple bottom line in Asia Pacific

Iceland - economic sustainability boosted by transparency and certification

New frontier African countries lead the environmental sustainability pillar

Costa Rica - reaping the rewards of its long-term vision

Making headway in creating sustainable tourism demand in island nations

Jordan creates shared value for sustainable tourism demand

Eastern European new frontier markets lead in sustainable transport

Short-term rentals support sustainable lodging in the Americas

Mauritius - making strong progress in sustainable lodging

Six Senses Fiji - sustainably powered lodging

Qatar looks to World Cup to develop travel sector

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Challenges to overcome

Become tomorrow's next leader

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/new-frontier-markets-the-forefront-of-tourism-recovery/report.