

The importance of tourism: using Cabo Verde as an example



International tourist arrivals

1.18 m

115,000

2000

2024

GDP per capita



1,190 US\$



5,193 US\$

Life expectancy at birth



68.1 years



76.1 years

2000

today

A driver of prosperity and quality of life

POLICY AGENDA

March 2026 – EU edition

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New destinations

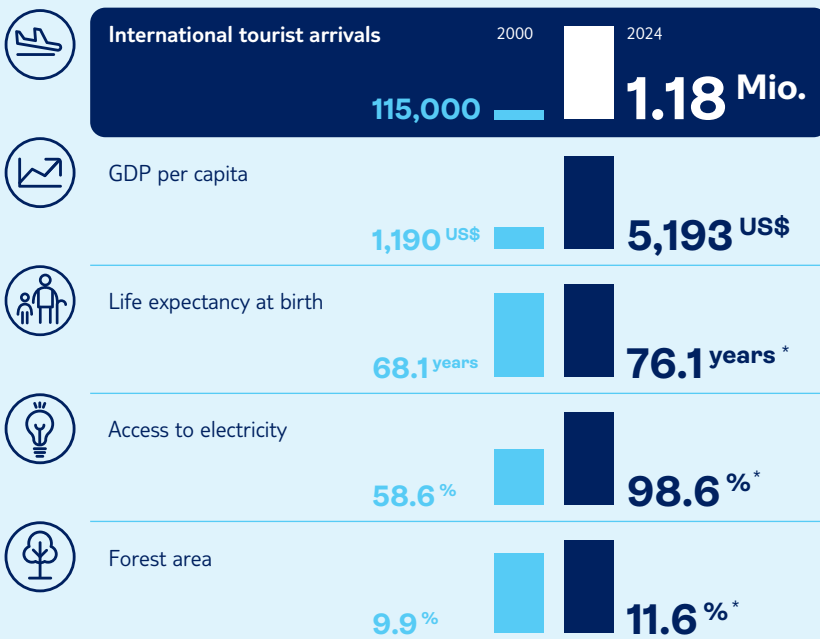
HOLISTIC DEVELOPMENT OF PARTNER REGIONS

Like no other company, TUI can develop new destinations from scratch and make them successful in a short period of time. This is possible thanks to the Group's unique integrated structure.

At the heart of the strategy: airlines and cruise lines, hotels and resorts, transfers, activities and experiences on site – TUI offers everything from a single source.

Cabo Verde in figures

Since the early 2000s, tourism has helped the island nation shed its status as one of the least developed countries (LDCs) and become a successful holiday destination. Tourism is a driver of social and economic development.



Source: World Bank, last available year; *2023

There are three key advantages of the TUI model. Firstly, TUI appeals to very different target groups through its various hotel brands and XXL portfolio of excursions and experiences. This strengthens the resilience of the destinations. Secondly, TUI can specifically drive demand through its powerful travel distribution network of over 1,200 travel agencies and leading online platforms. This increases capacity utilisation. Thirdly, TUI has viable concepts for cushioning seasonal fluctuations, which are one of the main challenges in tourism.

Example: Cabo Verde

Destinations with this special TUI presence are considered destination clusters. Take Cabo Verde, for example: TUI has been investing in hotels and flight connections in the island nation for many years, developing fascinating experiences for travellers and offering training and career opportunities in a structurally weak region. At the same time, this commitment means that public invest-

ment in general infrastructure is better utilised and easier to initiate. All of this enables emerging destinations in particular to optimally manage tourist arrivals.

Comprehensively understanding tourism value creation

Successful travel regions must offer the conditions necessary for the various aspects of tourism value creation – from mobility to hotels and restaurants to events – to complement each other optimally. If one component is missing, tourism does not flourish. A striking example: if a host country denies the necessary flight rights, hotels will lack guests. On the other hand, those who offer liberal aviation agreements can expect sustainable growth, investment and increasing prosperity.

Air transport

ENSURING EFFICIENT CLIMATE PROTECTION

Europe's transport sector is set to become more climate-friendly. Air transport plays a prominent role in this. Key instruments of EU policy include emissions trading and increasing quotas for sustainable aviation fuels (SAF). The targets are ambitious. In view of the difficult economic situation across Europe, it is more important than ever that regulation enables investment in efficiency and supports sufficient SAF production.

Climate efficiency in global comparison

In the climate efficiency ranking by the NGO atmosfair, three subsidiaries of TUI Airline occupy the top three places among the twelve charter airlines surveyed.



⋮
12.

Source: atmosfair Airline Index 2025

The International Civil Aviation Organization has set a target for CO₂ emissions from international air transport to be reduced to net zero by 2050. To reliably achieve this important goal, the TUI Group airline has set itself a concrete interim target: by 2030, CO₂ emissions per passenger kilometre are to be reduced by 24 per cent compared to 2019.

Efficiency is a key lever

Airlines make the most effective contribution to climate protection in aviation by renewing their fleets. New aircraft such as the Boeing 787 or 737 series are on average around 20 and 15 per cent more efficient than their predecessors, respectively. TUI is investing billions of euros in the latest aircraft: a total of 95 Boeing 737s of the newest generation – including the 737-8 and the larger 737-10 – are to be delivered over the next few years. Older and more fuel-intensive aircraft will be gradually taken out of service. TUI already has one of the most modern fleets in Europe.

Political support for SAF ramp-up

In addition to efficiency, the use of sustainable aviation fuels is an important component of the climate protection strategy. The EU blending quota – currently 2 per cent SAF and set to rise to 6 per cent SAF by 2030 – sets a clear ambition, but it faces a market with very limited supply. Synthetic aviation fuels in particular – for which a sub-quota of 1.2 per cent will apply in 2030 – are currently virtually unavailable on the market. Without targeted political support, there is a risk of penalties with no climate impact. What policy-makers should do now:

- **Enable SAF ramp-up:** revenue from emissions trading and aviation taxes should be used specifically to establish a functioning SAF market.
- **Establish eSAF production:** governments should actively support investment in electricity-based fuels, as eSAF is not yet available on the market.
- **Strengthen competitiveness:** EU airlines face fierce international competition. The EU must take this into account, strengthen the competitiveness of European companies and take urgent action to avert regulatory burdens – so that airlines can afford to invest in further emission reduction measures.

EU Council Presidency


ANCHORING TOURISM IN EUROPE

Cyprus took over the EU Council Presidency in January 2026. As a host to almost five million visitors per year, the Mediterranean island has a wealth of experience in sustainable tourism – and is therefore well placed to promote key tourism policy issues.

Tourism in the EU



 **1.9tn €**
contribution to GDP

 **10.5%**
of the EU economy

 **26m**
jobs

 **12%**
of all EU jobs

Source: World Travel & Tourism Council, 2025 forecast

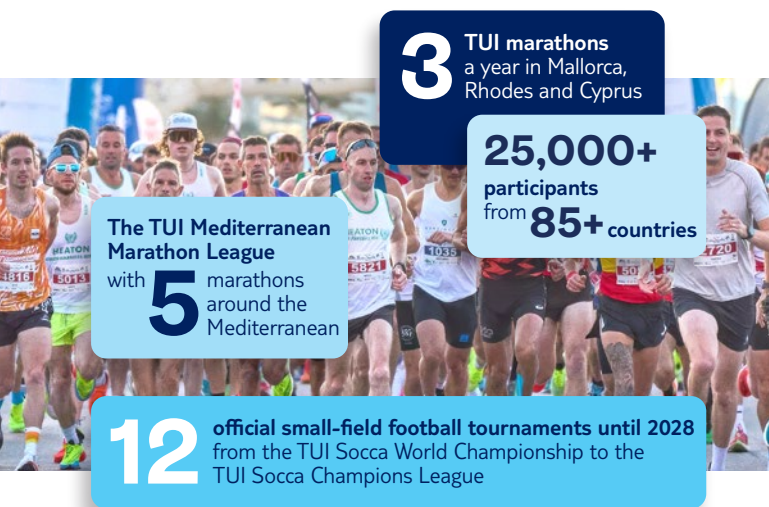
Although tourism is of paramount importance for Europe's labour markets and economic performance, there is currently no coherent and strategic EU tourism policy. The EU tourism strategy, which is expected in the first half of 2026, aims to remedy this situation. TUI encourages Cyprus to promote key measures to secure the EU's leading role in sustainable tourism.

- **Effectively financing the transformation:** sustainable transformation, innovation and skills development in tourism require appropriate financing instruments. Access to EU funding programmes should be simplified and equally accessible to all players in the tourism sector.
- **Strengthening skills and the labour market:** tourism is a key sector for labour market entry and skills improvement. EU programmes for education, training and upskilling should be more focused on tourism-related skills. Upskilling and reskilling protect and foster employment opportunities, retain skilled workers, and strengthen social participation in the regions.
- **Making decarbonisation competitive:** tourism depends on efficient air and sea connections. The EU should accelerate decarbonisation through effective incentives. Revenue from emissions trading should be earmarked for decarbonising the sector, and investing in sustainable fuels, low-emission propulsion systems and infrastructure in destinations.
- **Greater recognition for organised forms of travel:** organised travel enables transparent and controlled visitor flows and thus contributes to mitigating unbalanced tourism trends. Its positive role in destination management should be given much greater consideration, as it adds substantial value to the touristic ecosystem in destination, enhances acceptance of tourism flows at the local level and enables sustainable growth. Organised forms of travel are the solution to many challenges in destinations – not the problem.
- **Creating a level playing field:** commercial short-term rentals should be treated in the same way as organised tourism to ensure fair competition, relieve pressure on the housing market and secure acceptance of visitor flows in destinations. Living space must not be misused for tourist purposes. Clear regulations are needed here.
- **Integrating regenerative tourism more prominently at European level:** regenerative tourism strengthens the resilience of destinations and improves living conditions. The EU should create a common framework with clear definitions and establish closer links to climate, biodiversity and cohesion goals.

Sports tourism

CREATING NEW PERSPECTIVES FOR DESTINATIONS

Many holiday regions face the same challenges: high seasonality, fluctuating demand and economic risks. Sports tourism offers a strategic way to address these structural challenges – TUI is one of the pioneers in this field.

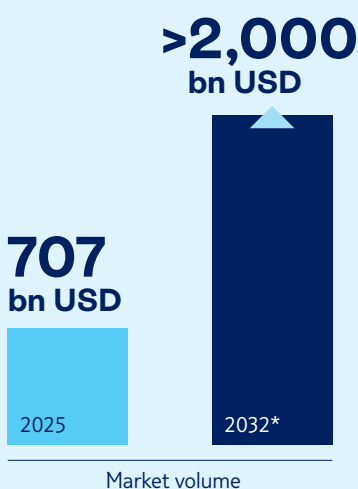


Sports tourism has become a significant segment of the travel market worldwide. Sports-related travel already accounts for around ten per cent of the global tourism market. This results in clear added value for destinations – in line with economic and social objectives.

- **Predictable demand outside the high season:** sports events create compelling reasons to travel in the off-season and shoulder seasons and help to distribute capacity utilisation and value creation more evenly throughout the year.
- **Stabilisation of employment and businesses:** recurring sports formats improve planning reliability for tourism companies and employees and reduce seasonal disruptions in the labour market.

Sports tourism as a growth driver

The market for sports tourism is expected to triple over the next seven years.



* Forecast, source: Fortune Business Insights

- **More efficient use of existing infrastructure:** accommodation, transport links and municipal facilities are better utilised without the need for additional investment.
- **Diversification of demand:** sports tourism appeals to new, predominantly international target groups and reduces dependence on a few traditional visitor flows.
- **New reasons to travel:** the majority of sports travellers travel in groups of friends or families – on average, one sports enthusiast brings 2.8 additional guests with them. TUI's data clearly shows that sporting events are a reason to spend many nights at a destination. Sports trips do not replace holidays; they take place in addition to them.

Systematic development of sports tourism

International tourism players play a central role in the systematic development of the segment. The TUI Group uses its international reach, operational experience and market access to strategically use sports formats to drive year-round utilisation of destinations. The travel group is the title sponsor of small-field football tournaments around the world, a marathon league and three TUI marathons around the Mediterranean. Sports enthusiasts from all over the world come together in the off-season, with the number of participants growing by up to 35 per cent per year. The TUI Palma Marathon Mallorca in October 2025 sold out in record time. Local conditions are critical to the success of sports tourism. TUI therefore welcomes the fact that Cyprus is putting sports tourism high on the agenda during its EU Council Presidency.

Nature Tourism

PROTECTING THE ENVIRONMENT AND WILDLIFE, EMPOWERING COMMUNITIES

Nature reserves now cover around 17 per cent of the world’s land area – a positive development. Yet many communities living in these regions face poverty, leading to consequences such as illegal logging, environmental pollution and poaching. Sustainable tourism can make a decisive difference here. It provides jobs and income for local people and helps protect flora and fauna.



Economic Impact

Volcanoes National Park attracts around 50,000 visitors per year. Guests pay 1,500 US dollars per person per day for gorilla trekking. Money that enables sustainable infrastructure and targeted protection measures for mountain gorillas. The example shows: tourism with sustainability in mind creates the conditions for effective nature and environmental protection.

Training of ...

100 local community members as wildlife monitors



200 young people from 10 schools as conservation ambassadors



20 experts from research and conservation institutions for environmental DNA analysis



The World Bank classifies tourism as an effective tool for development cooperation, particularly when it comes to preserving nature reserves. Globally, protected regions welcome about eight billion visits per year. Guests take part in guided walks and excursions, purchase local handicrafts, and stay and spend money in the area. The economic impact is enormous. Studies on nature reserves show that public investment in tourism infrastructure pays off sixfold.

Rwanda: Community Supports Conservation

An outstanding example is Volcanoes National Park in Rwanda, which offers endangered mountain gorillas a unique habitat. Thanks to enormous efforts, their population has grown from a few hundred to over 1,000 animals in recent years. However, this success brings new challenges: increasing animal density intensifies conflicts between gorillas and the local population, who often live in poverty with limited access to education and healthcare.

This is where the joint wildlife project of the TUI Care Foundation and the African Wildlife Foundation comes in. The approach is holistic: as part of the project, members of neighbouring communities are trained in combating poaching, managing human-wildlife conflicts, and monitoring the animals. This creates additional sources of income for local people and strengthens their sense of responsibility for the mountain gorillas. The project also enables pupils to visit the national park for guided gorilla treks and wildlife observation – unique experiences that spark a passion for conservation. Furthermore, young professionals from various institutions, including the University of Rwanda, are trained in recording and analysing eDNA data from mountain gorillas to better understand and protect the primates in the long term.



“ Conservation has brought real change to our community – electricity, clean water, better schools. We now understand that protecting our park means protecting our future, especially through the jobs and services that tourism provides.”

Beatrice Nyirabureteri
Community Eco-Guard

OECD Youthwise

INTEGRATING YOUNG PERSPECTIVES

The average age in the European Parliament? Just under 50. In the European Commission? Over 50. The picture is the same in international organisations such as the United Nations or the OECD. In short, young people's perspectives tend to be the exception when it comes to political decision-making. At the same time, they increasingly feel that their expectations are not being heard. With support from the TUI Care foundation, the OECD's Youthwise initiative creates a space for these voices to be heard in international political processes.

OECD at a glance

38 member states

around **60%** of global economic output

OECD recommendations **guide policy** far beyond the circle of members

Youthwise is an official youth advisory council established by the OECD that brings together around 20 young people from different countries and walks of life. Through face-to-face, virtual and hybrid consultations, events and workshops, the initiative offers participants a glimpse behind the scenes of international policy-making. More importantly, young people can contribute their experiences, ideas and work results directly to discussions with OECD experts and policy makers, thereby influencing important decision-making processes.

TUI Care Foundation as a partner

The first Youthwise cohort supported by the TUI Care Foundation addressed in 2023 and 2024 topics such as climate resilience and the path to net-zero emissions. Building on this success, the new youth advisory board will focus on digitalisation, education and inclusion as well as sustainable tourism until 2027. The project kick-off took place in September 2025 during a collaborative workshop at the OECD headquarters in Paris, where Youthwise members worked directly with experts from the OECD Directorates for Education and Entrepreneurship, SMEs, Regions and Cities.

OECD Youthwise programme

The TUI Care Foundation has been supporting the OECD Youthwise programme as a partner since 2023. The aim of this commitment is to give young people access to international policy debates and to enable them to contribute their perspectives where long-term decisions are made.

The Youthwise Program cohort with Mathias Cormann, Secretary-General of the OECD (center), and Alexander Panczuk, Managing Director of the TUI Care Foundation (right).



At a glance

TUI GROUP IN EUROPE

 Offices



 **Helsinki**
• TUI Suomi

 **Oslo**
• TUI Norge

 **Stockholm**
• TUI Sverige

 **Copenhagen**
• TUI Danmark

TUI Group – business figures

Unique  integrated business model

34.7 m  customers traveling to 180 regions

24.2 bn  turnover

1.46 bn  operating result

 **Dublin**
TUI Ireland •

 **Luton**
TUI UK •

 **Rijswijk**
TUI Nederland •

 **Hamburg**
• TUI Cruises

 **Warsaw**
TUI Polska •

 **Hanover**
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• TUI Deutschland

 **Ostend**
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 **Vienna**
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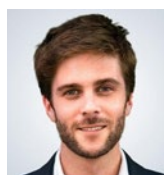
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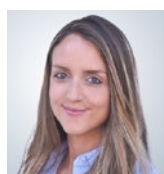
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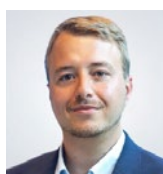
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