

SUSTAINABLE TRAVEL IN AN ERA OF DISRUPTION

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ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

EUROPEAN TRAVEL COMMISSION



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OUR MISSION

Strengthen the sustainable development of Europe as a tourist destination and increase competitiveness, through knowledge gathering and sharing amongst members and lobbying as well as by establishing a professional marketing platform for the successful promotion of member countries.

OUR MANDATE

Non-profit organisation responsible for the promotion of Europe as a travel destination.

OUR MEMBERS

34 National Tourism Organisations (NTOs) in Europe 11 private organisations (Associates)



SUSTAINABLE TRAVEL IN AN ERA OF DISRUPTION:
IMPACT OF COVID-19 ON SUSTAINABLE TOURISM ATTITUDES
NEW REPORT PUBLISHED JANUARY 2022

EUROPEAN TRAVEL COMMISSION

New ETC Market Study

Our **objectives** were to shed light on the way COVID-19 has influenced:

- Consumer's understanding and appreciation of sustainability
- The extent to which this understanding has influenced their attitude towards sustainable travel choices
- The extent to which this change is represented in their projected travel behaviour
- The conditions that may foster a more sustainable travel behaviour

This research was co-financed by the Centre of Expertise Leisure, Tourism and Hospitality, Breda University of Applied Sciences and the European Tourism Futures Institute



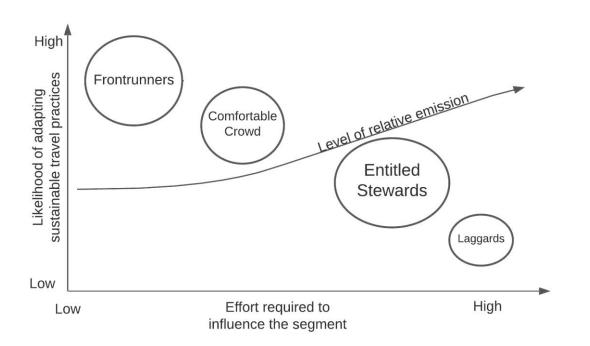


Key findings

- Pre-pandemic, current and projected travel behaviour of the respondents do align, indicating a very limited impact of the pandemic on the likelihood of adopting more sustainable travel behaviour in the future
- Overall, travellers are most likely to adopt sustainable practices in the behavioural category of interacting with the local community and immersing in local life, learning about the local traditions and trades, buying local products and choosing locally owned restaurants while in the destination
- Constraints found to have a significant impact on the likelihood of adopting more sustainable travel practices in the future are money and time



Key findings – behavioural clusters



Market segmentation based on value orientations and behavioural patterns



Creating awareness

Frontrunners

- Recognise this group's potential to become accelerators for developing the market for sustainable tourism products
- Build a community of Frontrunners and inspire other travellers to join the "club"
- Develop campaigns to showcase how local communities and the ecosystem benefit from the actions of conscious travellers
- Showcase the successes and best practices of businesses that flourish by offering sustainable travel products to inspire other businesses to follow in their footsteps
- Create awareness of reputable eco-certification programmes to strengthen the efforts to eliminate greenwashing
- This group may be consulted in destination level decision-making processes and initiatives to improve the offer of sustainable options and their uptake

Product development and adaptation of sustainability principles

- The MICE sector has the potential to lead the way by using opt-out strategies to foster adoption of sustainable practices
- Participate in eco-certification programmes and work with eco-certified suppliers
- Build packages around sustainable forms of mobility
- Foster partnerships with local service providers



Comfortable crowd

Creating awareness

- Increase the feeling of moral obligation amongst travellers in this segment by showcasing how communities and the ecosystem benefits from the actions of the Frontrunners. Urge the Comfortable Crowd to act as the Frontrunners.
- Focus promotional efforts on alternative destinations in the proximity of one's home, emphasise convenience and (travel) time efficiency
- Promote off-season deals and last-minute offers as this segment is likely to opt for these holidays, emphasise flexibility and the price-quality ratio
- Increase awareness of the economic impacts of mindful travel choices, such as booking with independent or local businesses
- Promote regional products and the possibility to engage with the local community (e.g., tastings, workshops, cooking classes, etc.)
- Create awareness of alternative travel modes focusing on comfort, convenience and efficiency – and benchmark with other travel modes, such as car and aeroplanes



Product development and adaptation of sustainability principles

Comfortable crowd

- Tourism suppliers should not follow the market, but lead and shape demand
- Provide sustainable, regional and domestic offers (e.g. package tours) to turn awareness into action
- Avoid labelling your offers as 'sustainable', instead focus on comfort, convenience and fun
- Travellers may be independent but want to book part of their trips through specialists, therefore sustainable modular options can be appealing to this target group
- Use financial instruments/incentives to stimulate behavioural change (e.g. coupons/vouchers/credit system)
- International chains can play a key role in increasing awareness and ascription of responsibility among this cluster and therefore should increase their efforts to adapt sustainable practices
- Make the first-time experience exceptional so that sustainable options become the norm



Entitled Stewards

Creating awareness

- Increase the feeling of moral obligation amongst travellers in this segment by showcasing how communities and the ecosystem benefit from the actions of the Frontrunners. Urge the Entitled Stewards to act as the Frontrunners
- Increase awareness of the economic impacts of mindful travel choices, such as booking with independent or local businesses
- Create awareness of alternative travel modes focusing on comfort, convenience and efficiency – and benchmark with other travel modes, such as car and aeroplanes
- Raise awareness of alternatives to CO₂ compensation schemes, such as packing lighter to reduce fuel consumption, choosing alternative modes of transportation, ways to reduce the use of plastic, etc. to foster behavioural change
- Foster accountability and transparency when it comes to CO₂ compensation schemes and work with partners that meet certification standards
- Raise awareness of the pressure placed on destinations when travelling during peak seasons, (e.g. overcrowding, pressure on destination resources, etc.)
- Increase the visibility of sustainable offers at the destination (e.g. sending follow up emails, pop up messages, etc. once the travellers are in the destination)

Product development and adaptation of sustainability principles

- Suppliers should not follow the market, but lead and shape demand
- Offer sustainable modular options for in-destination services and experiences
- While compensation and eco-certification schemes may help, real change should be fostered by offering products that allow travellers to adopt more sustainable travel behaviours, instead of compensating their carbon and overall eco-footprint



Laggards

Creating awareness

- Use the tactic of de-marketing to discourage demand for traditional offers, for example by reducing focus on this specific segment in promotional campaigns
- Promote traditional values (e.g. responsibility for one's family and direct social circle, courtesy and respect for others, respect for privacy, honour and integrity, etc.) that align with the principles of sustainability to capture this segment
- Collaborate with stakeholders that operate according to the principles of sustainability to phase out businesses that refuse to change their business model

Product development and adaptation of sustainability principles

- Reduce demand from this segment by adjusting the product portfolio and increase demand from other clusters
- Make sustainable options the default offer, instead of a choice
- As an alternative, develop and offer traditional products with a twist (choose traditional products and services with the least impact, adapt the offering by integrating sustainable elements)
- Avoid labelling offers as 'sustainable', instead focus on comfort, convenience and fun
- Use dynamic pricing and flexible packaging to encourage the consideration of alternative offers (e.g. in the off-season)
- Use financial instruments/incentives to stimulate behavioural change (e.g. coupon/vouchers/credit or point system)



Other recommendations to DMOs, NTOs and tourism business

- Monitor the lifestyle choices and interests of your travellers to develop fitting sustainable offers
- Collaborate with data agencies to gather information about consumer lifestyles (e.g. data about daily tasks, leisure and recreation, tourism, communication, social participation, etc.) – you may buy relevant data or may sponsor questions in future Surveys
- Do customer satisfaction surveys to enhance understanding of traveller's choices
- Collect best practices/tips/tricks of environmentally-conscious travellers to influence the choices of other travellers (e.g. via review websites, social media, etc).



Strategic actions for policymakers and third sector members

 Infrastructure development to enable the use of alternative transport modes

Examples:

- 1. Continue investing in E-infrastructure (e.g. availability of charging infrastructure, hydrogen points)
- 2. Reduce the number of car parking lots at popular destinations and increase options for and the quality of mass transport
- 3. Encourage the use of park and ride systems for large cities to achieve multi-modal transportation
- 4. Use zoning to create CO2 neutral/pedestrian zones
- Financial incentives/measures to foster the provision and choice of sustainable alternatives







MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL



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TRAVEL CONCERNS



Despite the ongoing war in Ukraine, Europeans' travel sentiment climbs to new heights: over 3 in 4 Europeans plan to travel by September 2022 (+16%)





PREFERRED COUNTRIES FOR EUROPEANS' NEXT INTERNATIONAL TRIP



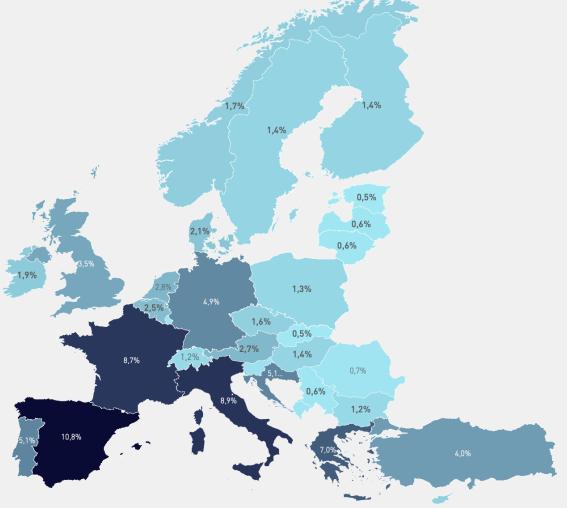
With the approaching summer period, Europeans' interest in Mediterranean destinations peaks

TOP 10 COUNTRIES

10.8%	4 %*
8.9%	3 %*
8.7%	
7.0%	3 %*
5.1%	
5.1%	
4.9%	
4.0%	
3.5%	
2.8%	
	8.9% 8.7% 7.0% 5.1% 5.1% 4.9% 4.0% 3.5%

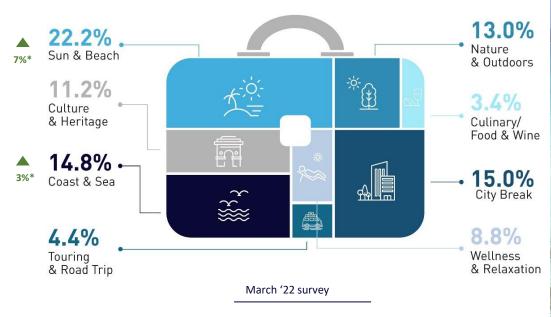
^{*}Please use this map as a reference only

No. of respondents: 4,401



Sun & Beach holidays (+7%) are Europeans' leading choice for the summer

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



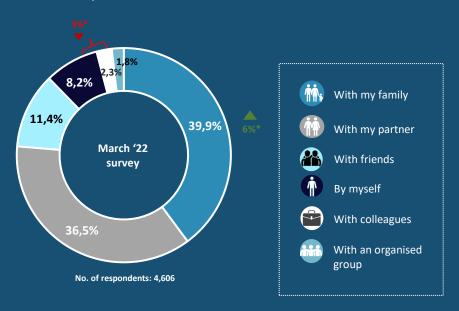
[&]quot;Coast & Sea" and "Sun & Beach" holidays are separated in this survey because some destinations like the Netherlands, Denmark, the Baltic countries, etc., offer coast & sea experiences and sports (e.g. sailing) but they are not necessarily associated with sun & beach vacations and experiences like Spain, Italy, Greece, etc.





As summer approaches, family travel is once again Europeans' leading choice (40%). Plans for solo travel and business trips drop

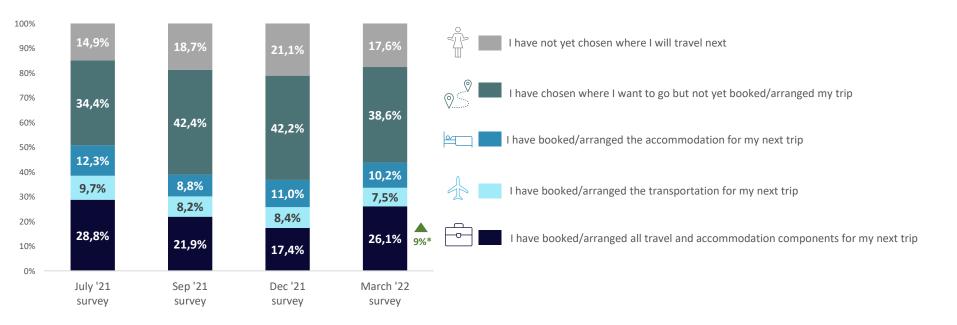
Preferred travel companion for respondents who are most likely to travel in the next 6 months





Despite the surge in travel sentiment, only 1 in 4 Europeans have fully booked their next trip, indicating a limited level of consumer commitment and some potential impact of the war in Ukraine

Status of planning for the next trip





As Europeans are already vaccinated to a great extent, COVID-19 vaccination is no longer the top travel confidence booster; flexible cancellation policies and lifted travel restrictions have taken the lead, while the importance of bargains and attractive deals also increased, potentially leading to more last-minute bookings



March '22 survey

^{*} Statistically significant difference vs previous survey period

'TRAVEL-READY' EUROPEANS' CONCERNS

Quarantine measures remain Europeans' most critical concern while the economic situation is still of relatively low concern



March '22 survey



Thank you very much for your attention!

