

The Ethical Traveller - UK - February 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“More travellers are likely to adopt the ‘flexitarian’ approach to flying that we are seeing in dietary habits – choosing to take lower carbon forms of transport or stay in the UK for some, but not all, of their holidays. Travellers want to feel their holidays are helping local people and places, and are responsive to brands who model these values.”

– John Worthington, Senior Analyst

This report looks at the following areas:

- Local cultural experiences and use of public transport are among the most effective ways to promote ethical travel in destinations
- Travellers are willing to ‘put something back’ through local clean-ups and other activities
- Flexi foodies
- Kicking the bucket-list

Global issues, such as the growing climate emergency and overtourism, are forcing ethical considerations into the mainstream. The travel industry has been slow to react but is starting to face up to its challenges and responsibilities. Consumers are adopting greener habits at home and expect brands to help them do so when on holiday. Clearer, more widely recognised product labelling would help to drive ethical and environmentally-friendly choices. Younger generations have particularly strong environmental values and will help to reshape the future travel landscape.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

The Ethical Traveller - UK - February 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this Report

Executive Summary

The market

UK ethical consumer spend surpassed £41 billion in 2018

Figure 1: UK ethical consumer spending, 2010-18

Record travel growth poses difficult questions

Figure 2: Number of domestic and overseas holidays taken by UK residents, 2014-19

Travel lags behind other sectors when it comes to consumer consideration of ethical factors

Figure 3: Ethical consideration taken into account, by retail sector, January 2019

Companies and brands

The consumer

28% of holidaymakers are estimated to be 'soft ethical'...

...and 7% are estimated to be 'hard ethical'

Carbon reduction and recycling are the leading priorities for travellers

Figure 4: Ethical travel priorities, November 2019

Almost half of holidaymakers have experienced guilt about flying

Figure 5: Impact of environmental concerns on flying, November 2019

Figure 6: Intentions to fly on holiday over the next five years amongst recent fliers, November 2019

Support for frequent flier levy

Figure 7: Attitudes towards the cost of flying, November 2019

Most travellers think companies should pay to make holidays more sustainable, but 39% are prepared to pay more

Half of holidaymakers think 'Fairtrade'-style labelling would nudge them into more ethical decisions

A good ethical reputation can boost viral marketing

Figure 8: Attitudes towards ethical travel, November 2019

What we think

Issues and Insights

Local cultural experiences and use of public transport are among the most effective ways to promote ethical travel in destinations

The facts

The implications

Travellers are willing to 'put something back' through local clean-ups and other activities

The facts

The implications

Flexi foodies

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

The Ethical Traveller - UK - February 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications
Kicking the bucket-list
The facts
The implications

The Market – What You Need to Know

UK ethical spend rose by 89% between 2010 and 2018
Soft ethical travellers...
...and hard ethical travellers
Holidays are at record levels
The limits of growth
Offsetting proves controversial
Green Speed rail project mooted

Market Drivers – Ethical Consumerism

UK ethical consumer spend is over £40 billion a year
Labelling has made food and drink the biggest ethical spend category
Figure 9: UK ethical consumer spending, 2010-18
Half of consumers are prepared to boycott unethical companies
Figure 10: Attitudes towards ethical/unethical companies, November 2019
Travel lags behind other consumer sectors when it comes to ethical choices
Figure 11: Ethical consideration taken into account, by retail sector, January 2019
Environmental policy is a low booking priority for holidaymakers
Figure 12: Main reasons for choosing travel company, package vs independent, February 2019
'Soft ethical' and 'hard ethical' travellers

Market Drivers – The Travel Market

2019 looks like another record year for holidays...
Figure 13: Trends in the number and value of domestic holidays taken by UK residents, 2014-18
Figure 14: Trends in the number and value of overseas holidays taken by UK residents, 2014-18
...but record growth brings new problems
Dealing with overtourism
Tourism taxes
The climate emergency
UK commits to net zero by 2050
Aviation emissions – global
Low fares and over-capacity have fuelled rise in air travel
Figure 15: Volume of overseas holidays taken by UK residents, by main mode of travel, 2014-18
Aviation emissions – UK
Carbon offsetting continues to be controversial
Cruise/ferry operators are launching cleaner vessels

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

The Ethical Traveller - UK - February 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Green Speed rail could open up aviation alternatives
 Certification is improving but is still a barrier to ethical travel choices
 TUI's greener, fairer pledge

Companies and Brands – What You Need to Know

Cities of the future
 Wild at heart
 Green challenge
 The war on plastic
 Meat-free tours
 Slow train coming

Launch Activity and Product Trends

Green city breaks
 Eco challenge
 Rewilding nature, rewilding people
 Plastic-free travel
 Plant-based travel
 Taking the slow lane

The Consumer – What You Need to Know

Reducing emissions and recycling are seen as the leading priorities
 Reducing poverty is a key priority for long-haul travellers
 Flight guilt takes off
 UK breaks and foreign train travel will acquire social kudos
 Six in 10 think companies should pay for sustainability, but four in 10 are willing to pay extra
 Consumers would respond to clearer ethical travel labelling
 35% of travellers have recommended a travel company because of its ethical reputation

Consumer Priorities for Ethical Travel

Decarbonisation and recycling are seen as the biggest ethical travel priorities overall
 Poverty reduction is a leading priority for long-haul travellers
 Figure 16: Ethical travel priorities, November 2019
 Travellers are positive about sustainable hotel practices but often forget to recycle
 Green holidays can be a catalyst for lifestyle changes

Attitudes Towards Flying

Six in 10 holidaymakers travel by air
 Figure 17: Transport modes used for holiday, November 2019
 22% of air travellers are 'frequent holiday fliers'
 Figure 18: Frequency of holiday flying, November 2019
 Almost half of holidaymakers have experienced flight guilt
 Figure 19: Impact of environmental concerns on flying, November 2019

**BUY THIS
 REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

The Ethical Traveller - UK - February 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

18% of recent holiday fliers expect to reduce/stop flying in the next five years

Figure 20: Intentions to fly on holiday over the next five years, November 2019

Figure 21: Intentions to fly on holiday over the next five years amongst recent fliers, November 2019

Environmental and financial concerns are the main reasons people will consider flying less

Figure 22: Reasons for flying less/not flying over the next five years, November 2019

Train brag

Figure 23: Likely effect of travel behaviour on concerns about flying, November 2019

Conflicted travellers

37% of travellers under 40 agree the cost of flying should increase

38% of holidaymakers support a frequent flier levy

Figure 24: Attitudes towards the cost of flying, November 2019

Attitudes Towards Ethical Travel

39% of travellers say they'd be willing to pay extra for an ethical holiday

Better labelling has the potential to unlock ethical travel purchases

Figure 25: Attitudes towards ethical travel, November 2019

A strong ethical reputation leads to customer referrals

Figure 26: Attitudes towards ethical reputation and policy of travel companies, November 2019

Ethical Travel in the Local Destination

Over-45s are the most likely to say my money should benefit the local people

Rising demand for local experiences can help promote ethical tourism

Travel companies can do more to promote local public transport

Half of holidaymakers are willing to take part in an environmental activity

Travel brands need to adapt to flexitarian trend

Figure 27: Attitudes towards ethical travel in the local destination, November 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Definitions

Abbreviations

Consumer research methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com