

Sustainability in Travel - UK - 2023

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- Impact of the cost-of-living crisis on the UK holiday market
- Holidaying intentions and likely behavioural changes for 2023 and beyond
- Participation and interest in sustainable travel activities
- Sustainability projects that consumers would like to see travel brands prioritise
- Behaviours towards sustainability in travel

Two thirds of consumers think that many travel companies are guilty of greenwashing. With consumers having become more sceptical and conscientious, the necessity for transparency with regard to sustainability credentials has never been higher. Furthermore, brands should focus on helping more consumers understand how to travel more sustainably, which can also help reinforce their sustainability goals and credentials.

78% of UK adults say that the cost of a holiday has the biggest impact on their travel planning, which rises to 89% of those who describe their financial situation as struggling and declines to 64% of those in a healthy financial situation. Cost remains more important than sustainability for most consumers, particularly within the current economic climate.

With flying still being the norm for many consumers, the responsibility falls on airlines and airports to strive to be as sustainable as possible. As a result, one possible strategy could be to focus on 'opting out' of carbon offsetting rather than the opt-in scheme which is currently used.

While eating in an independent restaurant or staying in an independent hotel are already popular activities, the highest growth potential lies with eco-friendly accommodation and holidays by rail. However, the cost of this offering will play a big role in how much the industry can benefit from this growth potential.



“Consumers increasingly expect to see sustainable tourism practices, along with complete transparency from travel brands on their sustainability credentials. They must be guided in their choices by travel experts and companies – particularly as other factors such as cost and quality remain at the forefront of consumers’ minds.”

– Jennie Bryans, Travel and Leisure Analyst, April 2023

Buy this report now

Visit store.mintel.com

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



Report Price: £2195 | \$2995 | €2600

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for the UK travel market**
Figure 1: Category outlook, 2023-27
- **The market**
- **The income squeeze is expected to continue throughout 2023**
Figure 2: The Financial Confidence Index, 2009-23
- **Global warming presents challenges to the travel industry**
- **The journey to net zero**
- **Companies and brands**
- **Lufthansa introducing 'green fares' on short-haul flights**
- **MSC Cruises launch a new sustainability campaign**
- **WTTC launches Hotel Sustainability Basics**
- **The Italian tourism board utilised the impact of the pandemic to promote sustainable tourism practices**
- **The consumer**
- **Overseas holidays back on the cards for Brits**
Figure 3: Past and future holiday destinations, 2023
- **Summer beach holidays have greatest growth potential**
Figure 4: Types of holidays taken and future intentions, 2023
- **Eco-friendly accommodation and holidays by rail show highest growth potential**
Figure 5: Participation and future interest in holiday activities, 2023
- **Young travellers more interested in adopting a hands-on approach to sustainable activities**
Figure 6: Responses to 'have done in the last three years', by age, 2023
- **Consumers are eager to see support for a range of sustainability projects**
Figure 7: Ranking of sustainability projects for travel companies, 2023
- **Cost and quality remain essential factors when travel planning**
Figure 8: Behaviours towards sustainable travel, 2023
- **Travellers eager to explore lesser-known destinations**
Figure 9: Behaviours towards sustainable travel

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

- **Lack of trust amongst travel companies' sustainability claims**

Figure 10: Behaviours towards sustainable travel, 2023

ISSUES AND INSIGHTS

- **Cost remains overarching factor for holidaymakers**
- **Local community in the sustainability spotlight**
- **Younger consumers eager for a hands-on approach to sustainable tourism**

MARKET DRIVERS

- **The income squeeze is expected to continue throughout 2023**
Figure 11: The Financial Confidence Index, 2009–23
- **Booking activity heats up in the first few months of 2023**
Figure 12: Expected time of booking main holiday in 2023
Figure 13: Participation and main holidaying intentions by destination, 2019–23
- **The journey to net zero**
- **Global warming presents challenges to the travel industry**
Figure 14: UK mean temperature in °C, by quarter, 2013–22
- **Extreme weather events accelerate climate change priorities**
Figure 15: Biggest environmental concerns amongst global consumers, 2021–22
- **Protecting local communities and cultures is paramount**

LAUNCH ACTIVITY AND INNOVATION

- **Transport operators focusing on sustainable targets**
- **Gatwick aims to be net zero by 2030**
- **Lufthansa introducing 'green fares' on short-haul flights**
- **Delta Airlines launches a roadmap to achieve net zero by 2050**
- **All aboard! European governments launch national public transport discounts**
- **Cruises campaigning for a sustainable future**
- **MSC Cruises launch a new sustainability campaign**
- **First river cruise using battery power launches**
- **Sustainable accommodation options increasingly in the spotlight**
- **EasyJet Holidays launches eco-certified hotel collection**
- **WTTC launches Hotel Sustainability Basics**
- **Destinations are marketing themselves as eco and sustainable through campaigns**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £2195 | \$2995 | €2600

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

- **Albania turning away from mass 'sun and sea model'**
- **Byway launches 'Swisstainable' rail holidays**
- **Greece focuses on promoting lesser-known destinations and extending the season**
- **Nepal implements a ban on independent trekking**
- **The Italian tourism board utilised the impact of the pandemic to promote sustainable tourism practices**

HOLIDAY DESTINATIONS

- **Overseas holidays back on the cards for Brits**
Figure 16: Past and future holiday destinations, 2023

HOLIDAY TYPES

- **Summer beach holidays have greatest growth potential**
- **Sustainable methods to be used by travel brands targeting beach holidays**
- **City breaks and sightseeing breaks remain popular**
Figure 17: Types of holidays taken and future intentions, 2023
Figure 18: Communal beach cleaning facilities in Porthtowan Beach, Cornwall, 2023
- **Nearly a quarter of families with young children plan to embrace the great outdoors**

SUSTAINABLE TRAVEL ACTIVITIES

- **Eco-friendly accommodation and holidays by rail show highest growth potential**
Figure 19: Participation and future interest in holiday activities, 2023
- **Local businesses trailblazing sustainable travel activities**
Figure 20: Responses to 'have done in the last three years', by household income, 2023
- **Young travellers more interested in adopting a hands-on approach to sustainable activities**
Figure 21: Responses to 'have done in the last three years', by age, 2023
- **Opportunity to promote the convenience of train travel to families**

IMPORTANCE OF SUSTAINABILITY PROJECTS

- **Consumers are eager to see support for a range of sustainability projects**
Figure 22: Ranking of sustainability projects for travel companies, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **Opportunity to promote community-based tourism within tours**

BEHAVIOURS TOWARDS SUSTAINABILITY IN TRAVEL

- **Cost and quality remain essential factors when travel planning**

Figure 23: Behaviours towards sustainable travel, 2023

- **Brands should ensure they are providing affordable and sustainable transport options to meet demand**

- **Responsibility falls on travel companies to implement carbon offsetting**

- **Travellers eager to explore lesser-known destinations**

Figure 24: Behaviours towards sustainable travel

- **Lack of trust amongst travel companies' sustainability claims**

- **Influencers can play a key role in promoting sustainable travel to Gen Zs**

Figure 25: Behaviours towards sustainable travel, 2023

Figure 26: TikTok '4 things to bring to be a more sustainable traveller', 2023

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.