

SUSTAINABILITY IN TRAVEL – GERMANY – 2023

Consumers need help to become sustainable travellers. To up participation in sustainable travel activities, brands need to educate on holistic sustainable travel with transparent criteria and simple booking tools, for example.



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Sustainability In Travel - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on the holiday market, including changing attitudes towards sustainability in travel
- Past and future holiday destinations and holiday types with a focus on cyclists as sustainable travellers
- Interest and participation in sustainable holiday activities and sustainability issues travel brands should prioritise
- Consumers' behaviour towards sustainability in travel and how brands can bridge the 'say-do gap'

Overview

While Germans strive to go green, only **42%** have a good understanding of how to travel sustainably and **60%** think it requires more effort to book a sustainable holiday than a conventional one. This likely contributes to **Germans not acting on their sustainability intentions**.

Germans face higher prices for holidays and **sustainability is taking a back seat** in the current economic situation. **72% of travellers** say that the cost of a holiday has the biggest impact on their travel planning. While **eco-friendly technologies** to reduce emissions **require significant investments** from travel brands, domestic holiday brands can position themselves as **cheaper and more eco-friendly** alternative to international brands.



Consumers need help to become sustainable travellers. To up participation in sustainable travel activities, brands need to educate on holistic sustainable travel with transparent criteria and simple booking tools, for example.

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62% of Germans think travel companies are **guilty of greenwashing**, indicating that a **lack of transparency** is threatening the market. Brands need to be honest about the climate footprints of their travel offers and make emissions measurable **to gain consumers' trust**.

Despite their negative aspects, holidays can also have a positive impact on social sustainability, such as boosting local economies. Brands can leverage this to increase participation in sustainable holiday activities with greater visibility of holistically sustainable travel offers across the environmental, social and economic pillars, through **simplified booking processes**, for instance. This will help **educate Germans**, shrinking the 'say-do gap', and transforming the market in the long term.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for sustainability in travel

Market context

- Mintel's holistic approach to defining sustainability in travel
- In times of high inflation, costs remain more important than sustainability
- Germans' travel behaviour reflects the 'say-do gap'

Mintel predicts

- Market size & forecast
- High prices for holidays will contribute to rapid market recovery in value in the short-term
- Germans' focus on their main holiday causes market volume to lag behind market recovery

Opportunities

- Help Germans bridge the 'say-do gap'
- Create visibility for holistically sustainable travel offers
- Gain consumers' trust and counteract greenwashing
- Target luxury travellers who focus less on cost

MARKET DRIVERS

The German economy

- Stagnation follows a technical recession
 - Graph 1: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure

The impact of the economy on sustainability in travel

- Germans face higher prices for holidays...
- ...but sustainability can go hand in hand with cheaper holidays...
- ...and sustainability is here to stay

Sustainability in the travel industry

- Sustainable development as the basis for sustainable tourism
- Mintel's approach to defining sustainability in travel
- Tourism brands need to act...
- ...and leverage the positive effects on sustainability
- Climate change is threatening the tourism industry
- The National Tourism Strategy encourages brands to join forces to become eco-friendly

Germans' behaviours towards sustainability

- Germans are keen to contribute to sustainable development in their everyday life
- Help Germans to bridge the say-do gap on holidays
 - Graph 2: "I prefer to book my holidays with travel companies that look to protect the environment than with those that don't", 2021 vs 2022

WHAT CONSUMERS WANT AND WHY

Past and future holiday destinations

- Domestic destinations have been highly popular in recent years...
- ...and can leverage environmental sustainability to keep up with the competition from abroad
 - Graph 3: future holiday destinations in the next three years, 2023
- ...and can leverage environmental sustainability to keep up with the competition from abroad
- Support consumers to make long-distance holidays more sustainable

Past and future holiday types

- Unsustainable cruise holidays show great growth potential
 - Graph 4: taken and planned holiday types, 2023
- Make cruise holidays more sustainable
- Target cyclists who have a good knowledge of holidaying sustainably...
- ...to capitalise on cyclists' participation in sustainable holiday activities
- Luxury holiday brands: lead the way towards sustainable tourism

Sustainable travel activities

- Room to engage Germans more strongly with various types of sustainable holiday activities
- Promote sustainable travel activities in line with the three sustainability pillars
 - Graph 5: sustainable activities before/while on holiday, 2023
- Promote sustainable travel activities in line with the three sustainability pillars
- Create visibility for sustainable booking platforms...
- ...and ease the booking process for sustainable holidays
- Guide travellers to book more sustainable flights

Sustainability in Travel – Germany – 2023

- Help Germans to support local populations...
 - Graph 6: participation in sustainable travel activities, by generation, 2023
- ...with a focus on slow tourism and lesser-known destinations

Ethical travel priorities

- Brands need to prioritise saving resources
 - Graph 7: sustainability issues travel brands should prioritise, 2023
- Promote eco-friendly accommodations to Germans
- Leverage Gen Z's focus on reducing emissions...
- ...and encourage other generations to travel by train
- Help Gen Z to be holistically sustainable on holidays

Behaviours towards sustainability in travel

- The say-do gap is fuelled by various factors
 - Graph 8: behaviours towards sustainability in travel, 2023
- Educate travellers to counteract the say-do gap...
- ...and gain credibility to prevent greenwashing
- Find alternatives to skiing holidays to cope with less snow
- Focus on main holidays abroad and domestic short trips

LAUNCH ACTIVITY AND INNOVATION

- The 49-Euro Ticket can help domestic destinations to entice visitors
- The cruise market is investing heavily in sustainable solutions
- Aircraft emissions need to be reduced at the source
- The travel industry seeks to make emissions measurable
- Sustainable initiatives in the traditional travel sector

Advertising and marketing activity

- Google supports consumers to choose more eco-friendly alternatives
- Switzerland promotes travelling through Switzerland via train
- ÖBB promotes nightjets
- MSC Cruises puts sustainability at the heart of its campaign

MARKET SHARE

- Germany is still the number one travel destination for Germans
 - Graph 9: volume market share of domestic and international trips taken by Germans*, 2019-22

MARKET SIZE, SEGMENTATION AND FORECAST

- Sustainability contributes to the growing market value
- Travellers focus on international main holidays and short domestic trips
- Strong growth in market value...
- ...driven by volume growth of international trips
- High prices for holidays will contribute to rapid market recovery in value in the short-term
- Germans' focus on their main holiday causes market volume to lag behind market recovery
- Price increases are driving value growth in 2023
- Help Germans to make holidays abroad more sustainable in the short term
- Sustainability will gain momentum in the mid term
- Brands will be forced to offer sustainable holidays in the long term

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market size – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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