

Sustainable Holiday Travel: Awareness and Demand in Germany

Summary of the research report
based upon data from German Reiseanalyse 2019

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The complete report in German is available from the website of the Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (www.bmu.de) or at <https://doi.org/10.13140/RG.2.2.32704.48648>

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Introduction

Making holiday travel more sustainable has long been the subject of applied tourism research and political debate. At the same time, extensive efforts have been made in practice to encourage tourism providers to adopt more sustainable supply behaviours and to have these efforts certified. This study adds data about demand to the academic, political, and provider-oriented perspectives. It examines the focus on sustainability and the consumer behaviours of holiday-makers themselves. To this end, sustainability-oriented behavioural characteristics and attitudes with regard to holiday trips – broken down into trips of five days or longer and short breaks of two to four days – are documented on the basis of current surveys representative of the German population.

We use five indicators for each trip from one overnight stay:

1. Distance travelled (transport performance) in modal split
2. Number of days away by accommodation type
3. Use of carbon offset
4. Use of offers with eco-labels or sustainability labels
5. Relevance of sustainability considerations when making travel arrangements (hard and soft relevance)

The sixth indicator is the attitude towards sustainable travel among the population as a whole.

The data for these indicators were collected as part of the Reiseanalyse survey 2019 of the Research Association for Holiday and Travel: Holidays of five days or more in the face-to-face survey (January 2019) and short breaks in the online survey (November 2018 and May 2019). In addition, key data on business trips with overnight stays from the Business survey 2019 are referred to.

Results

Travel distance and number of days away

Differentiated developments can be observed in the central environmental performance data, namely distances travelled and number of days away: While distances have increased significantly in recent years, the number of days away has stagnated. For both indicators, long holiday trips account for around three quarters and short breaks for around one quarter of the total volume of trips.

The greater travel distances are mainly attributable to air travel, and in particular to travel to non-European destinations. As a result of this development (sharply rising travel distances with number of days away only moderately increasing), the number of travel kilometres required for a potentially value-adding day of travel at the destination is also increasing.

Whether and how this development will continue can only be determined through future repeat measurements (*monitoring*). It would make sense to continue to update the time series in order to systematically track the benchmark figures for sustainable holiday travel behaviours.

Conclusion and outlook

The data collected as part of the Reiseanalyse survey and presented in this report provide an up-to-date picture of the relevance of sustainability in holiday demand in Germany.

Sobering results

The results are somewhat sobering. The proportion of flight holidays for which consumers deliberately offset their carbon footprint is well below 10% (and in the case of longer holidays only 2%). Tourists deliberately select accommodations or tour operators marked as sustainable in only 6–8% of holidays and sustainability was a decisive factor in the selection of a holiday in 4–8% of trips.

Moreover, in recent years the distance travelled to a holiday destination has increased significantly – almost exclusively for air travel, and here predominantly for long-distance travel outside Europe (Mediterranean holidays have also increased, but by no means to the same extent). This is down to higher-income earners, while people on low incomes in fact cover fewer kilometres today than they did 10–15 years ago. At the same time, the total number of days away has hardly increased at all. However, it is precisely the time spent at the destination that is associated with opportunities for value creation. Significantly more mobility is produced today than in the past in order to generate this added value.

This means that while hard behavioural characteristics paint a rather unsustainable picture of holiday demand in Germany, the population's attitude towards sustainability in holiday travel is much more positive, showing a slight upward trend in recent years. Significantly more than half of people surveyed consider sustainability considerations important when it comes to holidays. There is currently quite a gap between attitude and behaviour. However, if a considerable number of consumers think that sustainability in holiday travel is a good thing (i.e. they have developed a positive attitude towards it) without this translating it to consumption, then this positive attitude should be interpreted as *acceptance of* rather than *preference for* sustainable travel.

Where does the gap come from?

It is by no means unusual for positive attitudes not to translate into attitudinal behaviour one-to-one. For holiday travel in particular, a number of possible explanatory models can be identified:

- As a rule, holidays are hedonistic leisure products that are exceptional in character, which can lead to people granting themselves an exemption, as it were, from their usual disciplined sustainability behaviour.
- Holidays are typically high-involvement products that focus on risk, fun, and symbolic value, rather than on arguments that appeal to reason. Generally speaking, people do not go on holiday *in order to* act in a sustainable and eco-friendly way, but rather *despite* wanting to act in a sustainable and eco-friendly way. This is diametrically opposed to the low or at best medium-level involvement with sustainability aspects.
- The immediate benefit that choosing the more sustainable alternative could bring (above and beyond a more favourable price) is either the social benefit (prestige), the enjoyment benefit (better quality of sustainable products), and self-affirmation through the feeling of having done the right thing – the consumer equivalent, one could say, of the *warm glow of giving* (Andreoni, 1990)(Andreoni, 1990) (Andreoni, 1990). This is up against a large number of possibly competing motives and the corresponding expected benefits. For example, for some the prestige benefit comes from sustainability, for others from exotic travel destinations, and for others still from buying expensive holidays.
- What is more, the expected benefit often goes hand in hand with higher costs. This may be higher prices, but also opportunity costs, such as making compromises (I would like to go to Sample Town, but there is no eco-certified accommodation there, so I will book a holiday in Sampleville) or more efforts when it comes to organisation (because it is difficult to find the right offers).

Overall, the net benefits derived from more sustainable behaviours do not seem sufficient today to close the above-mentioned gap between attitude and behaviour. The main argument in favour of the first and second hypotheses is that behavioural indicators are much less pronounced for long holidays than for short breaks or business trips. The higher the involvement and the exceptional nature of the consumption, the more likely it is that the positive sustainability attitude is overshadowed by other aspects: in such cases, consumers allow themselves something that runs counter to their attitude.

Increasing prices?

There seems to be a well-established stereotype that, in the case of holidays, sustainability means higher quality and higher prices. If respondents are shown eco-labels, prices are believed to be higher.

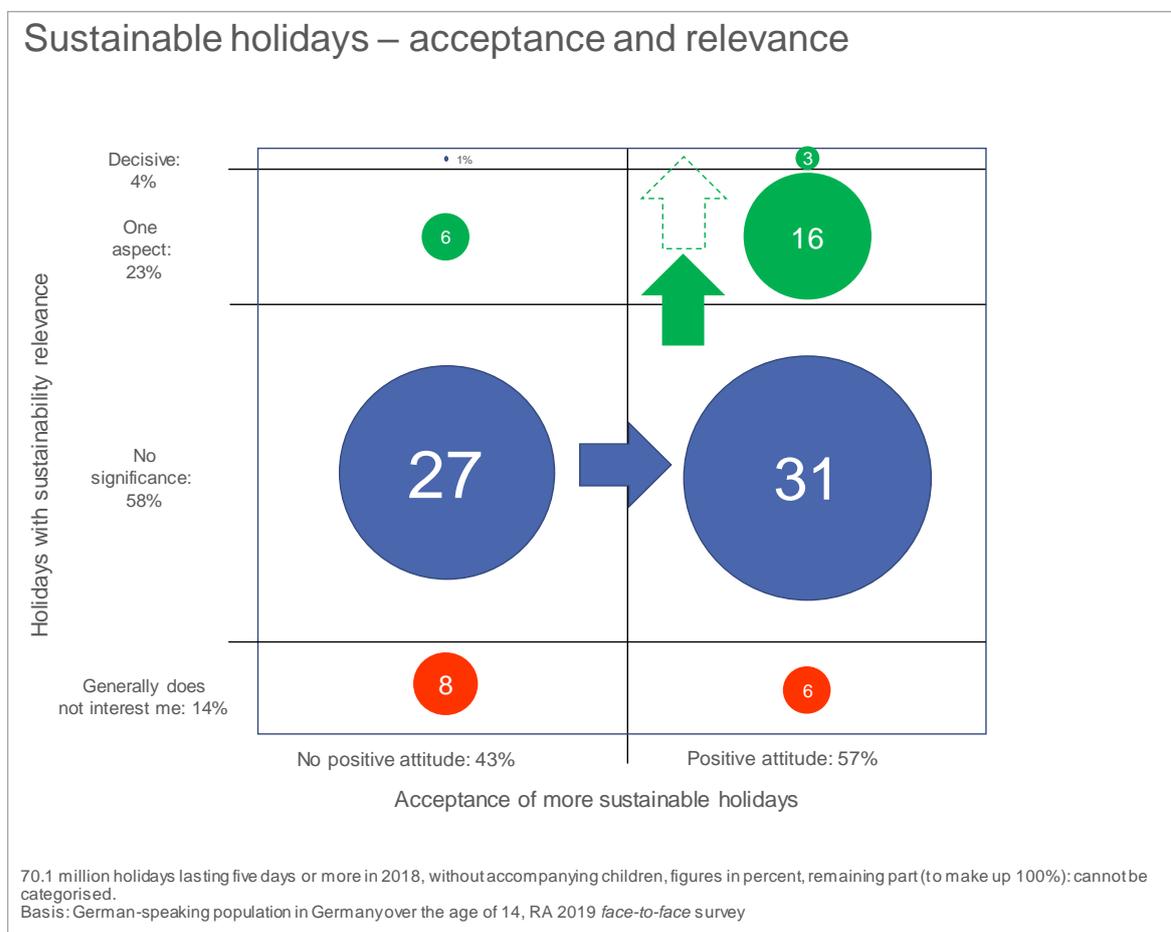
One way out of this dilemma would be not to view price and sustainability quality as trade-offs ('more sustainability means higher prices'); because with a low willingness to pay under low-involvement conditions, the idea that consumers can be asked to pay more for a less value-adding service does not seem like a constructive way forward.

It would mean either increasing the benefits of more sustainable alternatives relative to less sustainable alternatives or reducing their prices relatively speaking. The relative change can, of course, also take place via a worsening of less sustainable alternatives, for example by less sustainable (environmentally and socially harmful) holidays becoming more expensive due to incentive taxes. Such an effect can be expected in the transport sector, namely with sufficiently high carbon pricing.

Changing attitudes

If we consider holidays of five days more, there are a total of eight segments of different sizes (Figure 1).

Figure 1: Sustainable holiday – acceptance and relevance



On the horizontal axis, attitude as an indicator of acceptance of more sustainable holidays comes in two groups. The vertical axis represents the concrete sustainability relevance. The aim of a sustainability-oriented tourism policy would have to be to move as many trips as possible from the bottom to the top.

One can see quite clearly that the group with a positive attitude has a greater likelihood of considering sustainability for the concrete trip than the other group. This means that investing in attitude change can be worthwhile. The more people or their trips move from left to right (blue arrow), the greater the likelihood that they also move in an upward direction towards more sustainable travel arrangements (green arrow).

However, this change in attitude is not enough. You can see that there are many trips for which there is a positive attitude but where sustainability in specific cases does not (yet) play a role. At 31%, this is true for one third of holidays of five days or more. Possible reasons for this may include a lack of tourism offerings, not enough information about sustainable offerings, or a lack of incentives for or the insufficient utility of a sustainable offering.

Outlook: Is monitoring necessary?

The report presented here provides current data on the relevance of sustainability in holiday demand in Germany. Time series are available, at least of a few years, for some parameters (travel distances, number of days away, attitudes). First measurements are available for other parameters (carbon offsetting, use of award-winning offerings, sustainability relevance).

To be able to observe the development of demand over time, we now need methodical and substantive follow-up measurements. This is the only way to reliably gauge whether holiday demand is moving in a more or less sustainable direction.

Measurements alone do not change behaviour, of course. However, they do provide political and social decision-makers with a tool to test the aggregated effectiveness of measures designed to promote more sustainable travel on a population-wide scale. The authors believe that such a compass is crucial for being able to develop and test effective and efficient measures in a targeted way and in line with market requirements.