

Demand-side Indicators for Sustainable Holiday Travel: What consumers can tell us

Measuring Sustainability in Tourism –
Opportunities and Limitations

Day 2, Workshop 5

Berlin, 3 April 2019

Dirk Schmücker

**We live in interesting times
and are aware that we need to change our mindsets ...**

**„We are heading for
environmental disaster unless we
change our habits quickly“**

Indonesia 93%

Peru 86%

Germany 85%

Spain 79%

USA 70%

Japan 55%

We live in interesting times
and are aware that we need to change our mindsets ...



... because people in Europe care about sustainability:

59% think you should measure progress of a country based equally on social and environmental criteria and on economic criteria.

75% have a positive attitude towards environmentally friendly products even if they cost a bit more

Source: European Commission 2014, Special Eurobarometer 416, ATTITUDES OF EUROPEAN CITIZENS TOWARDS THE ENVIRONMENT

Basis: Population (ages 15+) in the resp. countries 2014



Holiday trips, inbound, outbound, domestic
but not business, VFR and other tourism

Demand-side Indicators for Sustainable **Holiday** Travel: What **consumers** can tell us

Consumer decisions and choice,
but not locals (e.g. acceptance), businesses and other people

Measuring Sustainability in Tourism –
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Day 2, Workshop 5

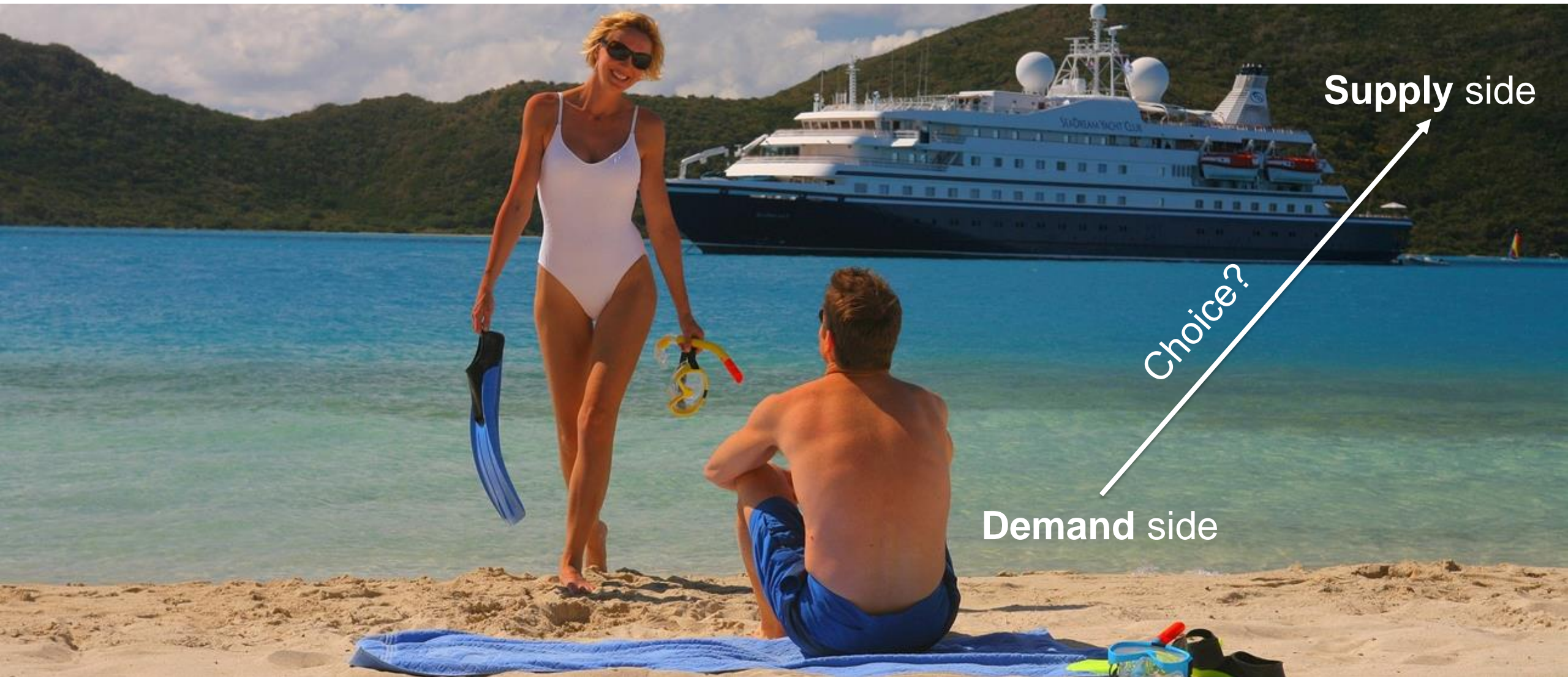
Berlin, 3 April 2019

Dirk Schmücker

Agenda

- **What can we expect from demand-side research?**
- Selected first results from a recent German study
- Implications and discussion

Supply side – demand side perspectives



Describe and explain

EXPLAIN

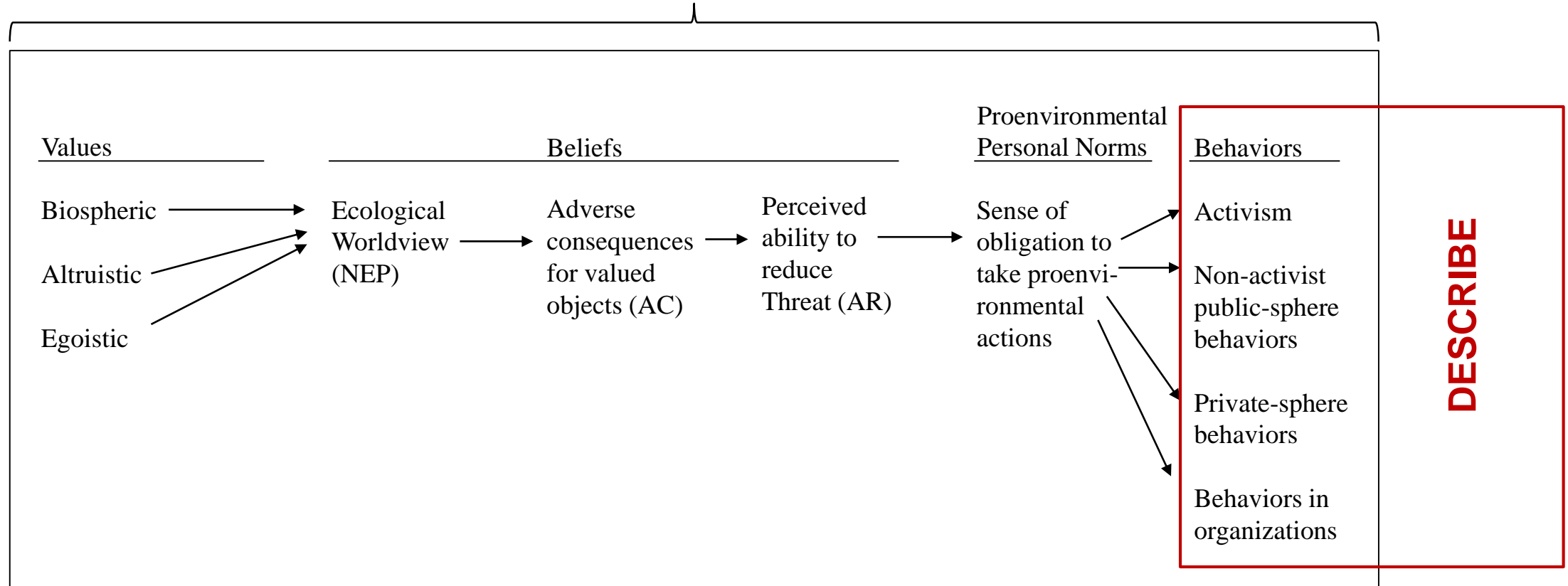


Figure from: Stern, Paul C. 2000. „New Environmental Theories: Toward a Coherent Theory of Environmentally Significant Behavior“. *Journal of Social Issues* 56 (3): 407–24. <https://doi.org/10.1111/0022-4537.00175>.

Gather information about consumers

Observe



- Observe **people**
- Observe their **traces** (i.e. electronic signals)

Ask Questions



- In **personal** interviews, by phone or **online**
- Respondents must be **willing** and **able** to respond

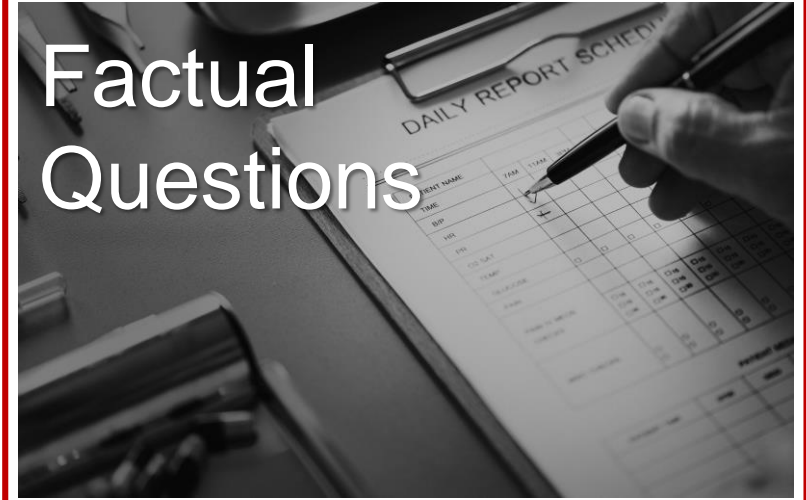
Basic question types

Attitudinal Questions



- Questions try to gather information about **attitudes**, **emotions** and their **feelings**, **opinions**, **ratings** and preferences etc.
- Answers cannot be checked by some objective third – not even in principle

Factual Questions



- Try to gather information about **facts**, e.g. travel **behaviour**
- Answers could be checked by some objective third – in principle

Potential flaws when asking people



- Questions try to gather information about attitudes, emotions and their feelings, opinions, ratings and preferences etc.
- Facts cannot be checked by some objective third – not even in principle



Statistical sampling errors

Flawed sampling
(systematic biases)

Flawed Q&A
(people misunderstand,
don't know, lie, or don't
care)

- Try to gather information about facts
- Facts could be checked by some objective third – in principle

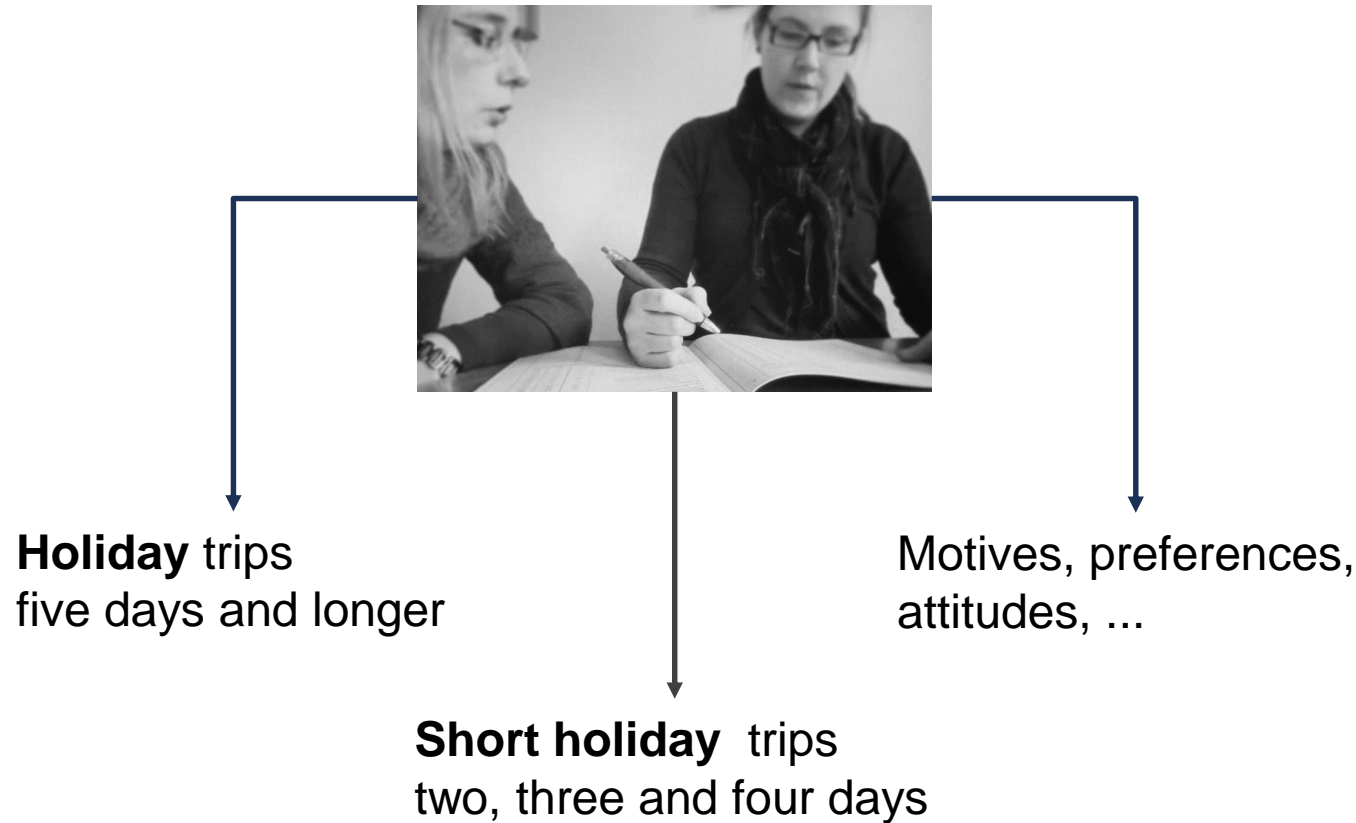
- “It is **not known how many** tourists display environmentally sustainable behaviour.”
- “Estimates in this empirical study vary from 0% to 44%.”
- “Responses are affected by **how tourists are asked** about their behaviour.”
- “And by whether **the definition** of such behaviour includes intent.”
- “More observational studies are urgently needed.”

Juvan, Emil, and Sara Dolnicar. 2016. „Measuring environmentally sustainable tourist behaviour“. *Annals of Tourism Research* 59 (July): 30–44.
<https://doi.org/10.1016/j.annals.2016.03.006>.

Agenda

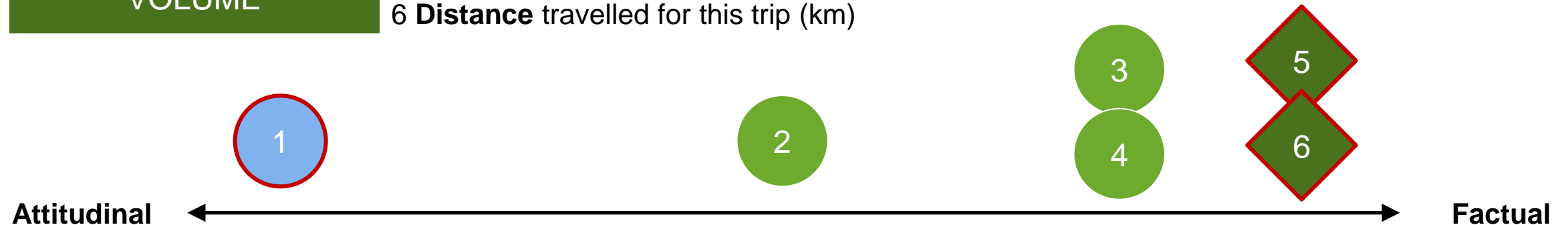
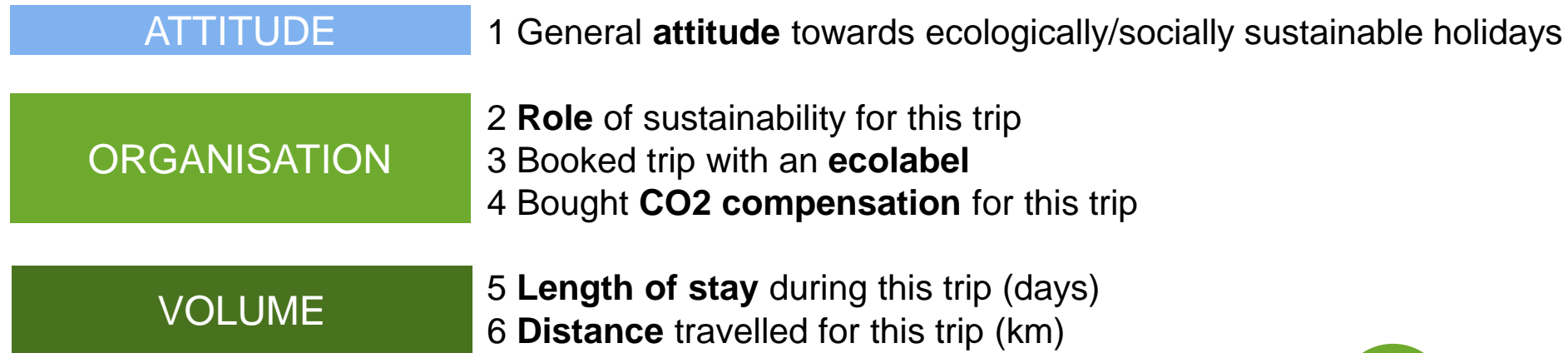
- What can we expect from demand-side research?
- **Selected first results from a recent German study**
- Implications and discussion

Data source: Reiseanalyse

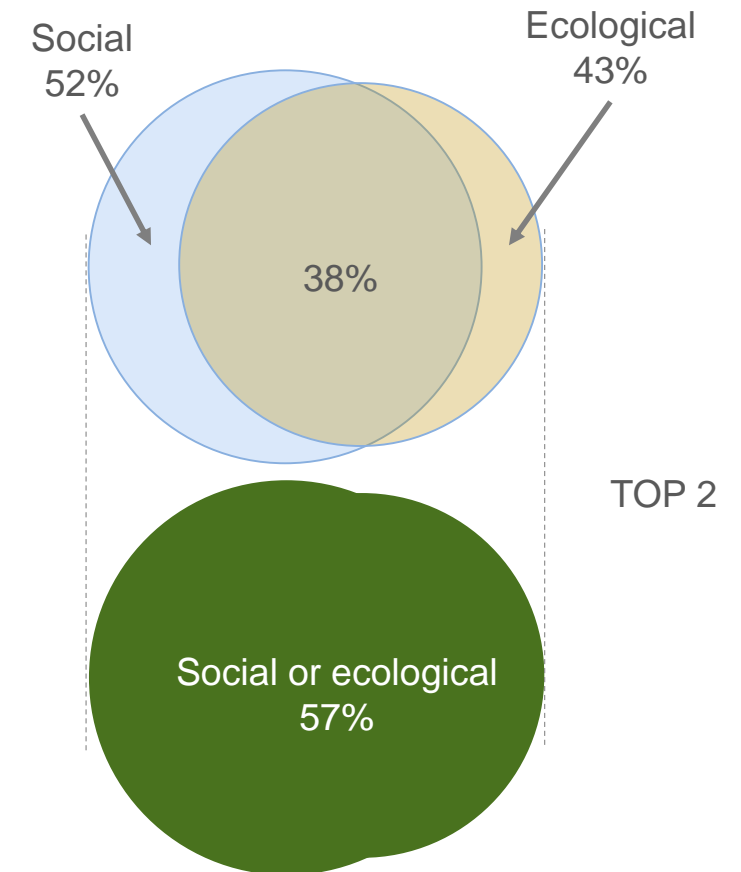
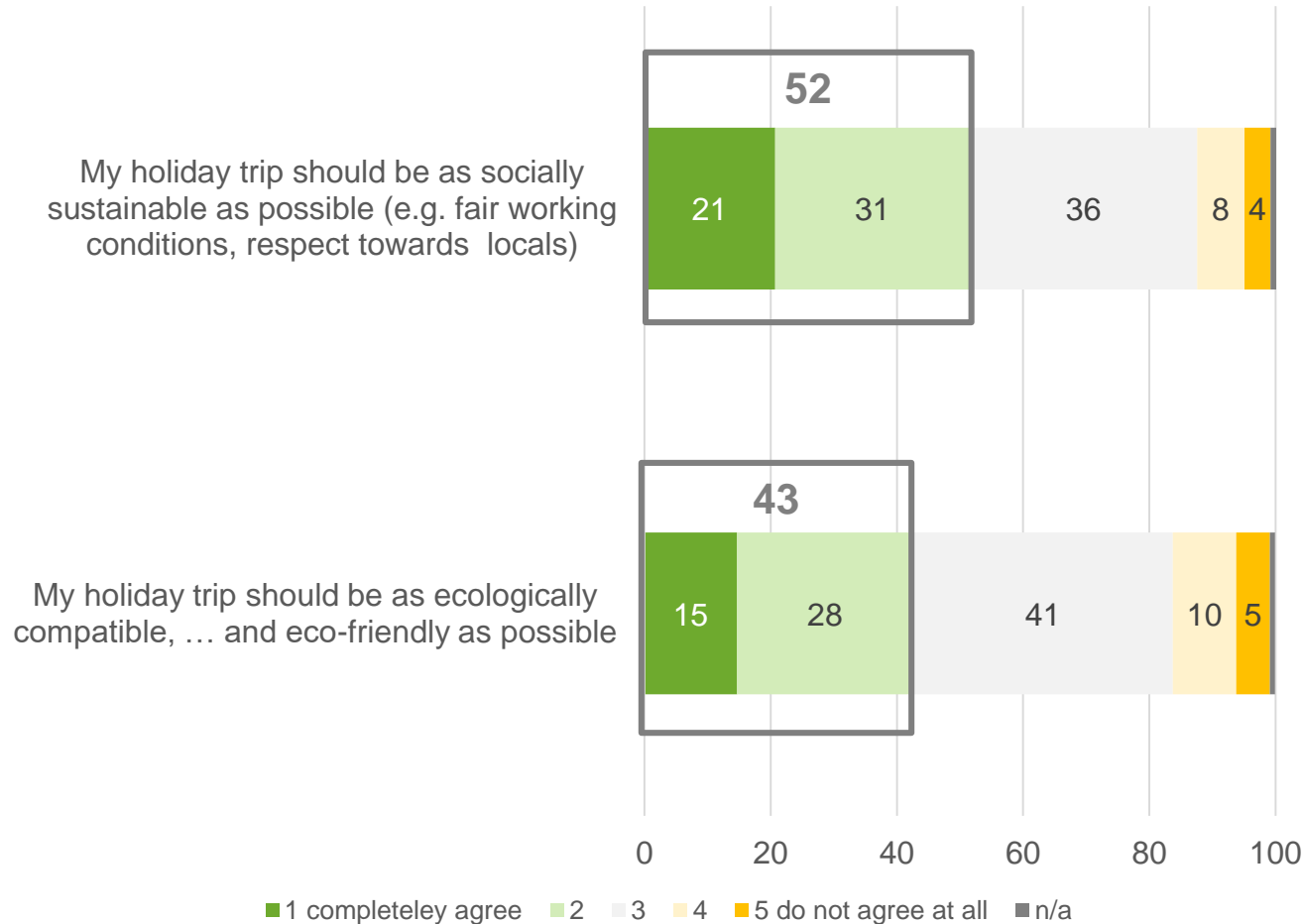


- ~ **8,000 face-to-face** in-home interviews in January, representing German-speaking population in Germany, 14 years and older (70.5 m)
- **2 x 2,500 online** interviews in May and November, representing German-speaking (online) population in Germany, 14-75 years (64.5 m)
- **Started in 1970** (old FRG), extended to reunified Germany in 1991, extended to cover non-Germans in 2010
- Owner: FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.)

Six demand side indicators for sustainable holiday travel



Attitude towards sustainability in holiday travel, 2019



„If you think of holiday trips in general, regardless of a specific destination. How do you prefer to spend your holiday trips?“/„Wenn Sie einmal ganz allgemein an Urlaubsreisen denken – unabhängig von einem konkreten Reiseziel: Auf welche Weise gestalten Sie am liebsten Ihre Urlaubsreisen?“ 2 from 7 items.

Base: Holidaymakers, German-speaking population in Germany 14 years and older., RA 2019 *face-to-face*, Figures are given as percentage

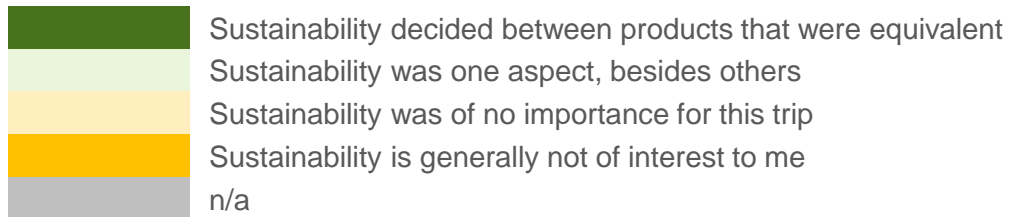
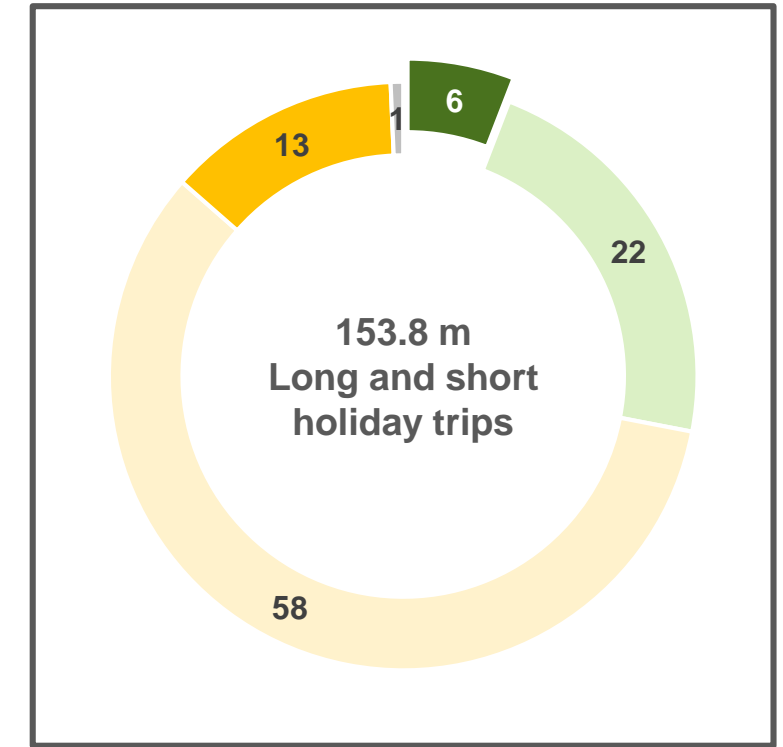
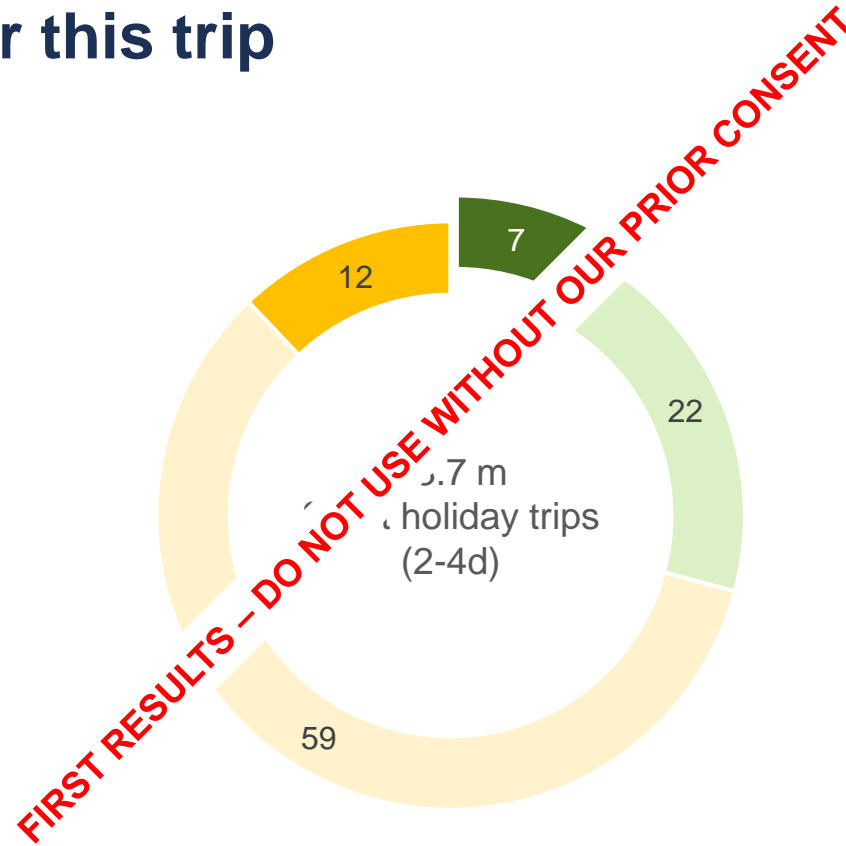
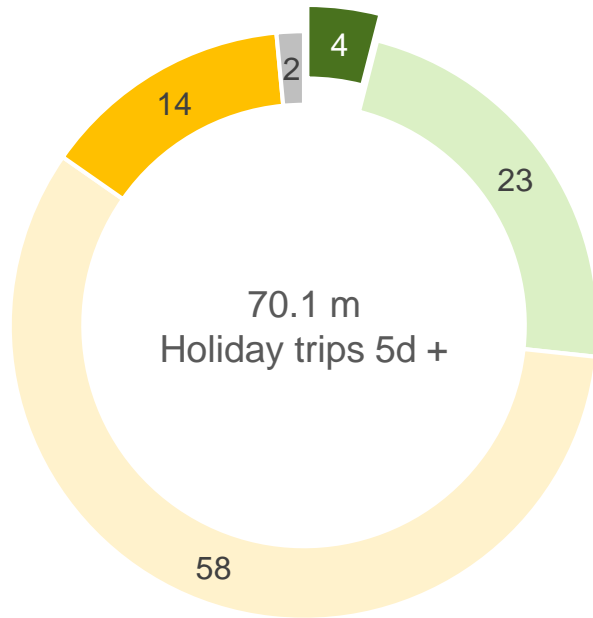
Positive attitude growing, 2013-2019



„If you think of holiday trips in general, regardless of a specific destination. How do you prefer to spend your holiday trips?“/„Wenn Sie einmal ganz allgemein an Urlaubsreisen denken – unabhängig von einem konkreten Reiseziel: Auf welche Weise gestalten Sie am liebsten Ihre Urlaubsreisen?“, TOP 2 social or ecological sustainable

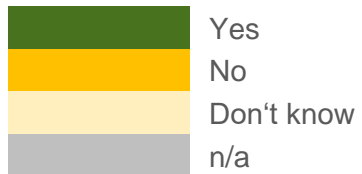
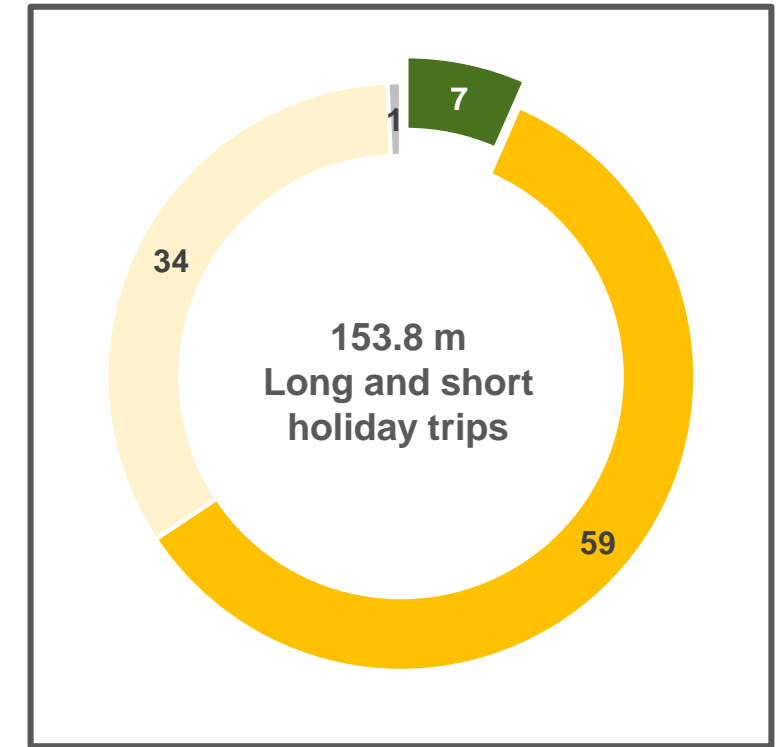
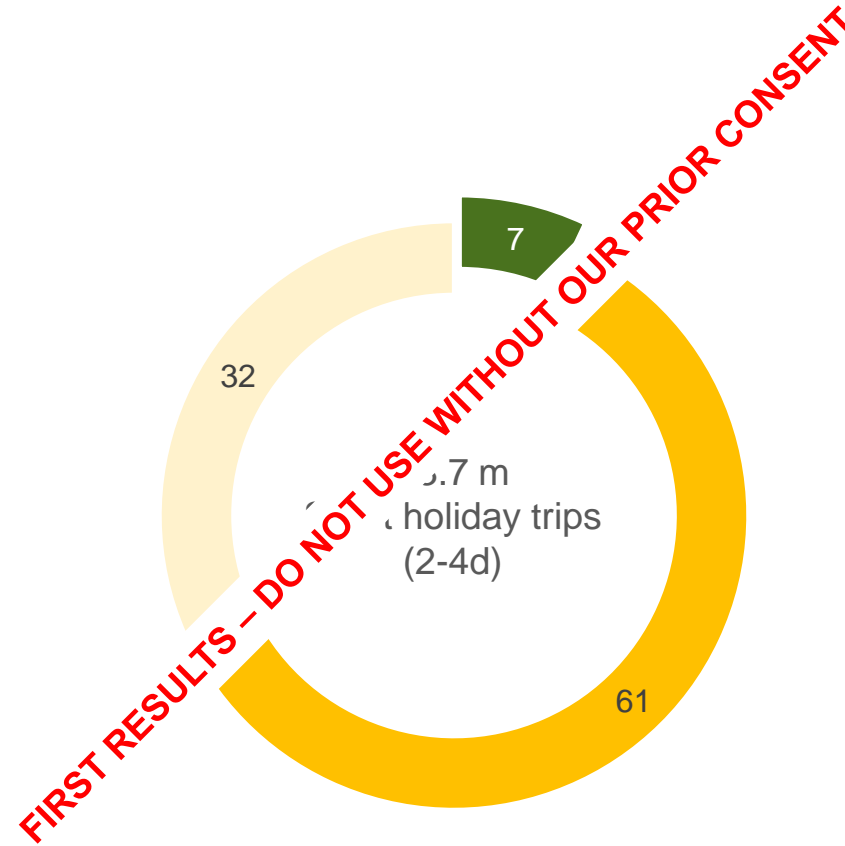
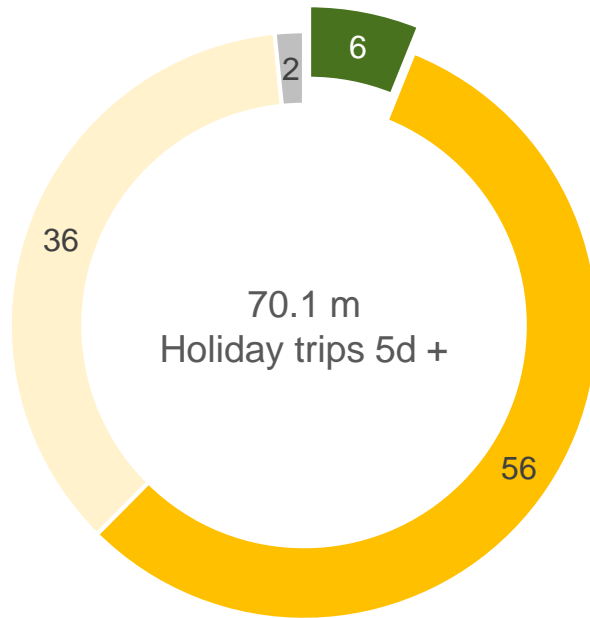
Base: Holidaymakers, German-speaking population in Germany 14 years and older, n=6,37, 58.6 Mio., RA 2019 *face-to-face*, Figures are given as percentage

Role of sustainability for this trip



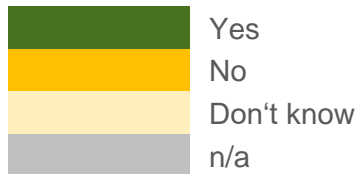
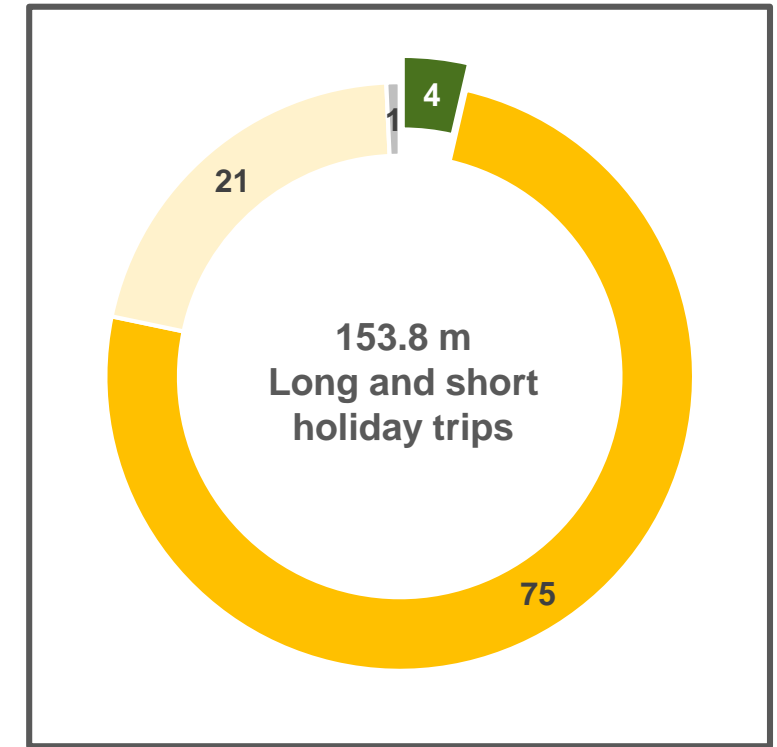
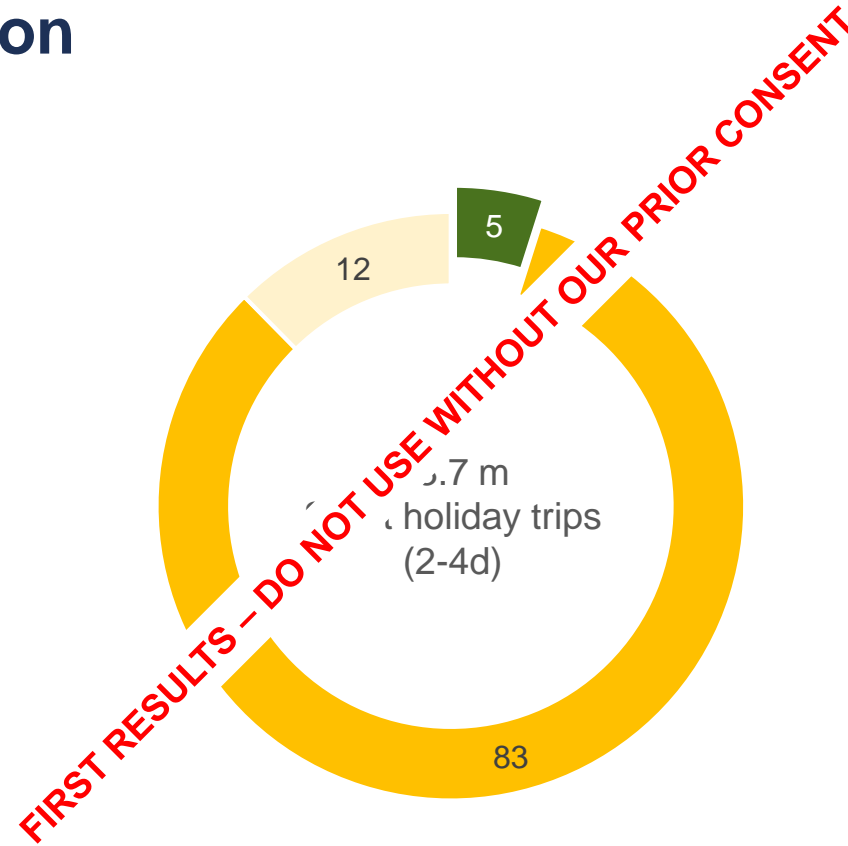
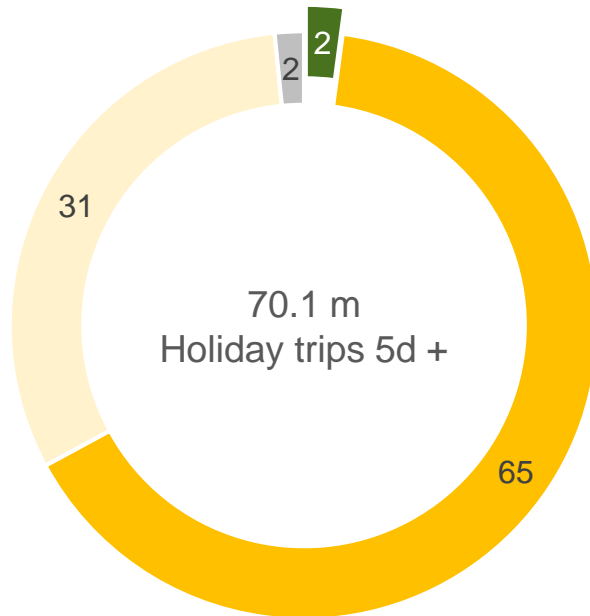
„Thinking back to your last holiday trip: Which of the following statemens applies?“/„Wenn Sie einmal an diese Urlaubsreise nach zurückdenken: Welche der folgenden Aussagen trifft zu?; Holiday trips 5d+, without trips of accompanying children, Base: Holidaymakers, German-speaking population in Germany 14 years and older, RA 2019 *face-to-face*; Short holiday trips 2-4d (1st, 2nd and 3rd trip in a half-year), without trips of accompanying children, Base: German-speaking population in Germany 14-75 years, RA 11/2018 *online*, Figures are given as percentage

Use of ecolabels



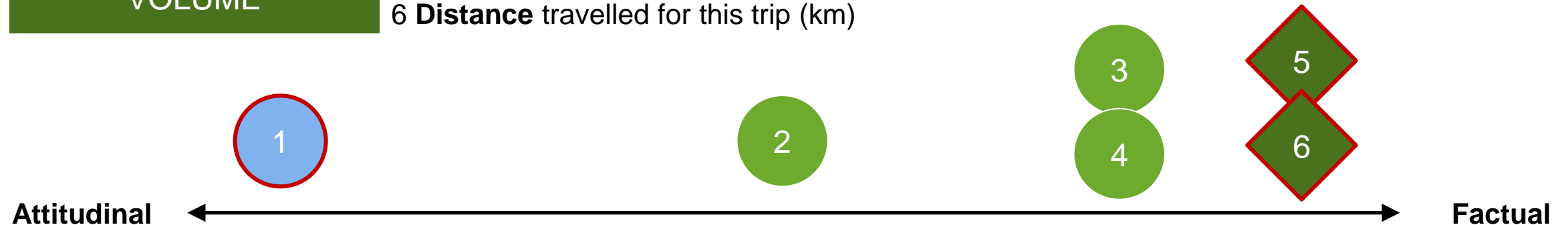
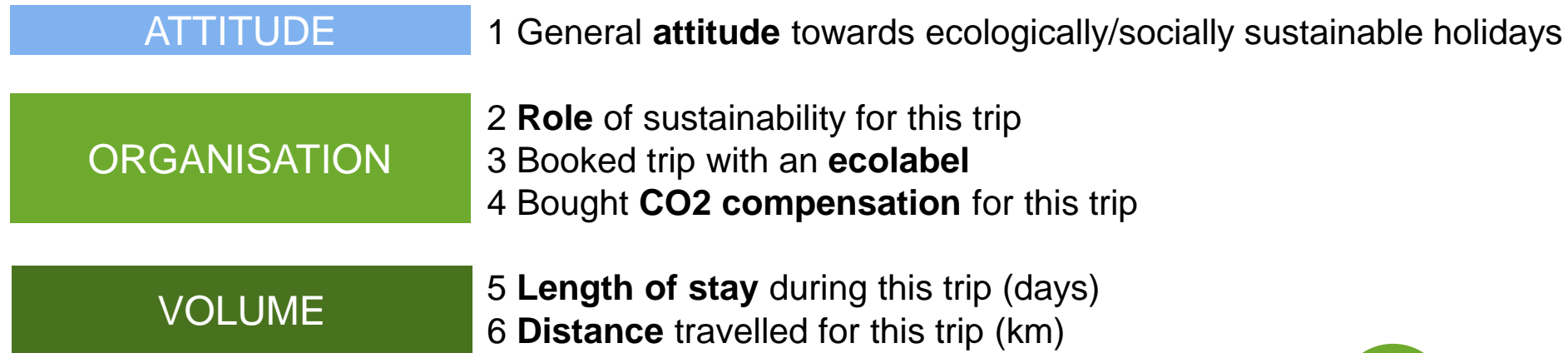
„Did the accommodation or the tour operator have an ecolabel or some specific sustainability mark?“, „Hatten die Unterkunft oder der Reiseveranstalter bei dieser Urlaubsreise ein besonderes Umweltzeichen (Ökolabel, etc.) oder eine besondere Nachhaltigkeitskennzeichnung?“, Holiday trips 5d+, without trips of accompanying children, Base: Holidaymakers, German-speaking population in Germany 14 years and older, RA 2019 *face-to-face*; Short holiday trips 2-4d (1st, 2nd and 3rd trip in a half-year), without trips of accompanying children, Base: German-speaking population in Germany 14-75 years, RA 11/2018 *online*, Figures are given as percentage

Use of CO2 compensation

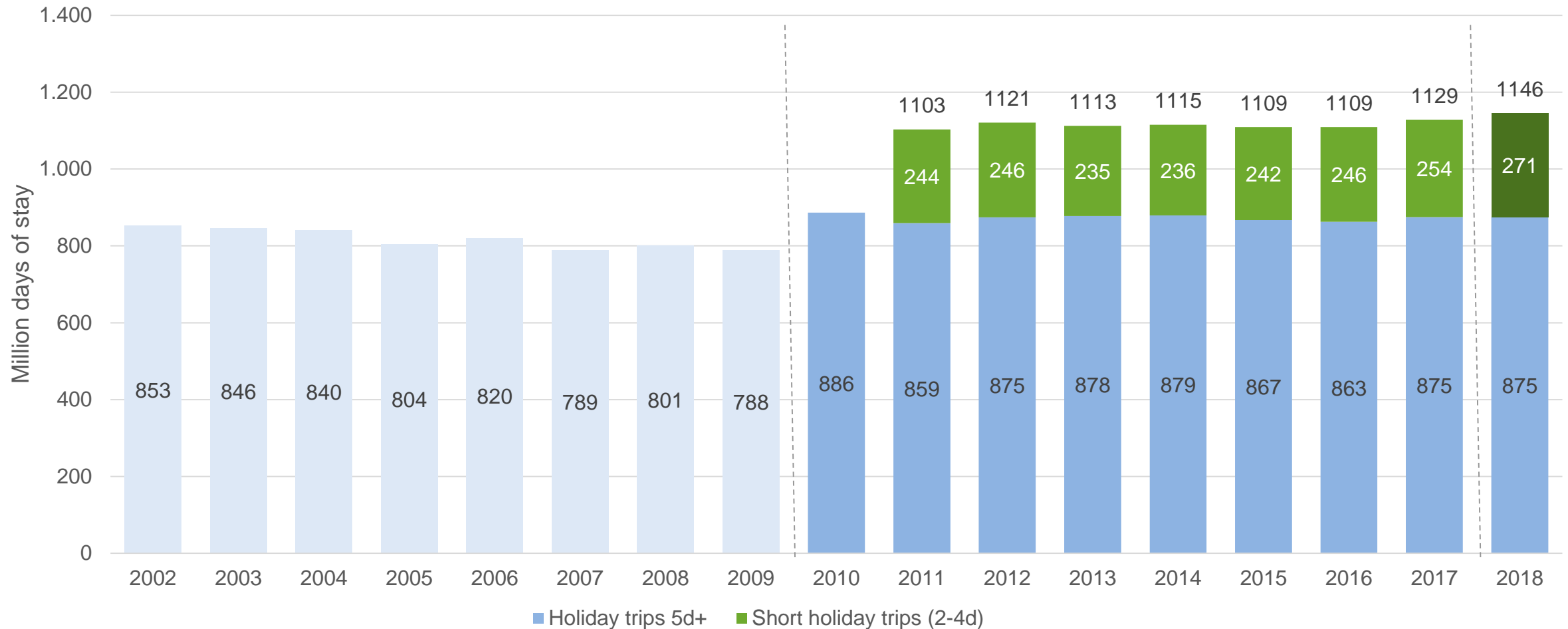


„Did you buy a CO2 compensation for transport or sojourn during this trip (e.g. Atmosfair, myClimate)?“/„Haben Sie bei dieser Urlaubsreise eine CO2-Kompensation für An- und Abreise oder Aufenthalt getätigt (z. B. bei Atmosfair, MyClimate)?“; Holiday trips 5d+, without trips of accompanying children, Base: Holidaymakers, German-speaking population in Germany 14 years and older, RA 2019 *face-to-face*; Short holiday trips 2-4d (1st, 2nd and 3rd trip in a half-year), without trips of accompanying children, Base: German-speaking population in Germany 14-75 years, RA 11/2018 *online*, Figures are given as percentage

Six demand side indicators for sustainable holiday travel

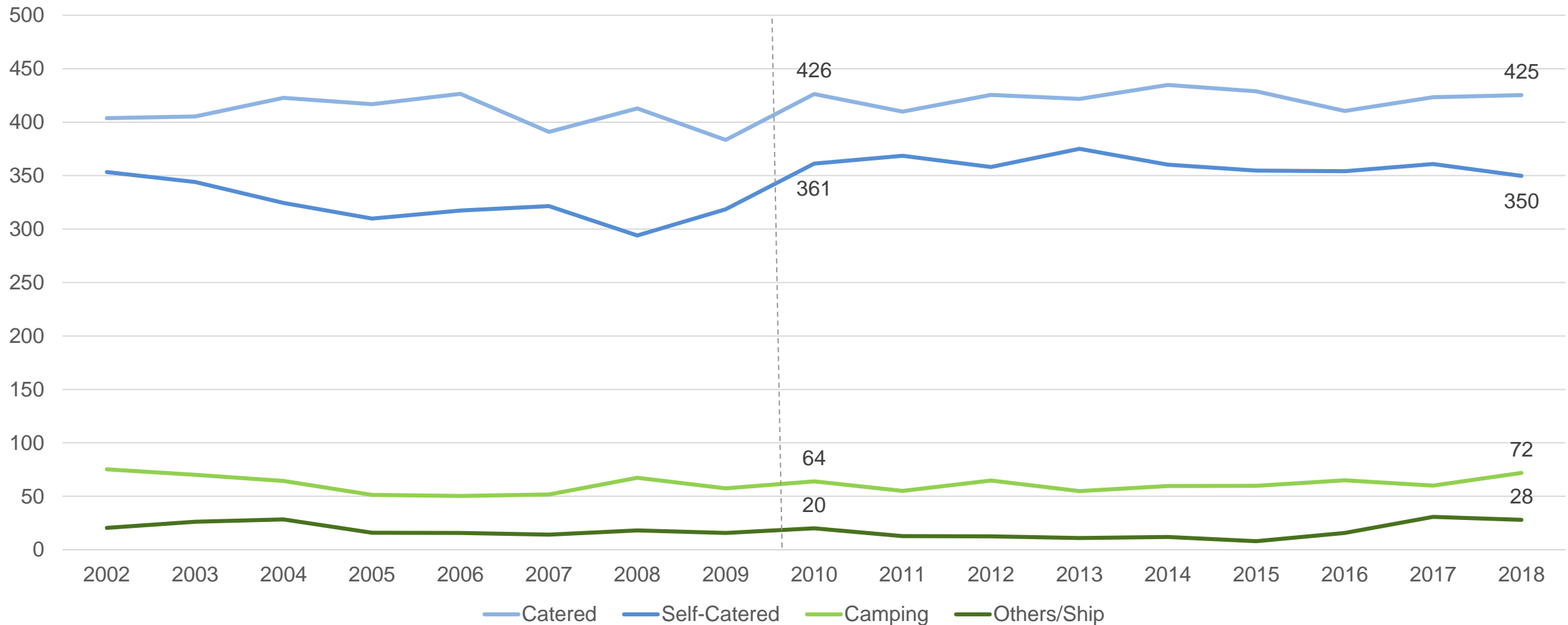


Million days of stay on holiday trips, 2002/2011 up until 2018



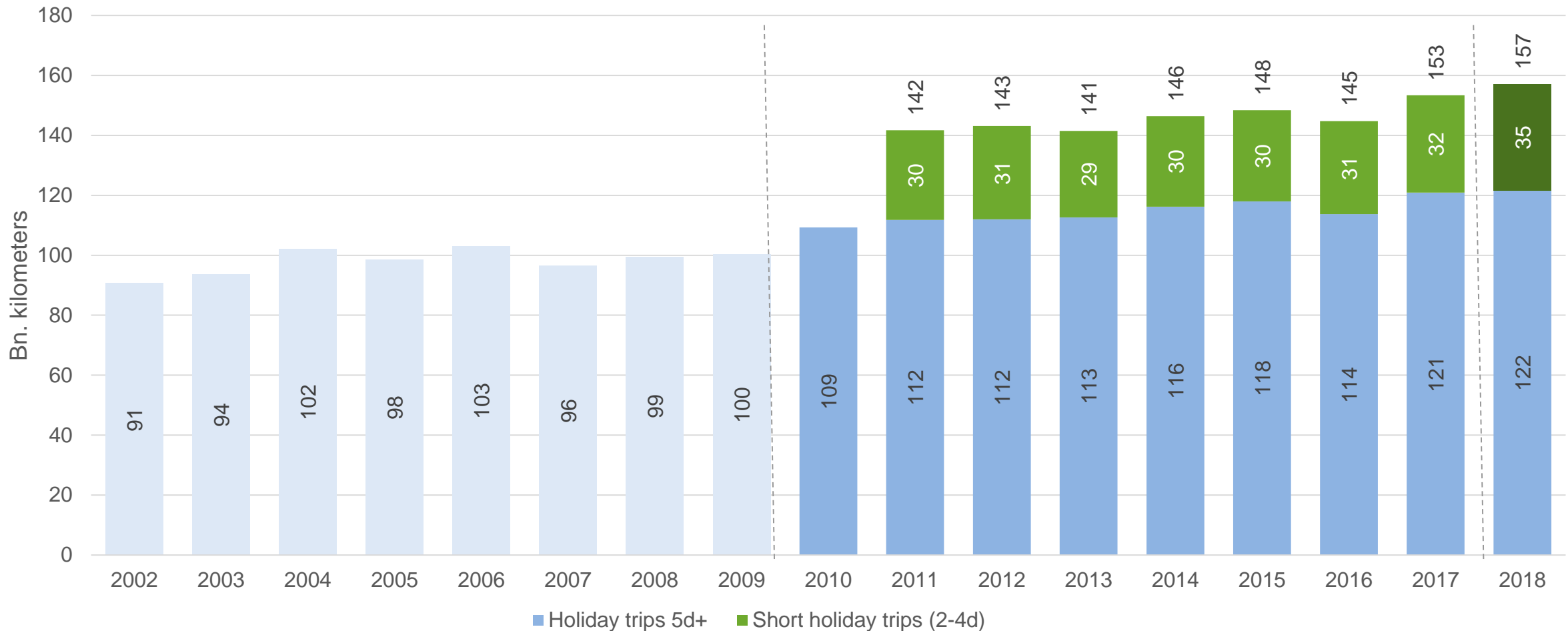
Holiday trips 5d+, without trip of accompanying children, Base: German-speaking population in Germany, 14 years and older, up to 2010: Germans only, RA 2003-2019 *face-to-face*
 Short holiday trips 2-4d (1st, 2nd and 3rd trip in the half-year), without trips of accompanying children. Base: German-speaking population in Germany, 14-75 years, up to 2017: 14-70 years, RA 2012-2019 *online*

Million days of stay, by type of accommodation (holiday trips 5d+ only)



Holiday trips 5d+, without trip of accompanying children, Base: German-speaking population in Germany, 14 years and older, up to 2010: Germans only, RA 2003-2019 *face-to-face*

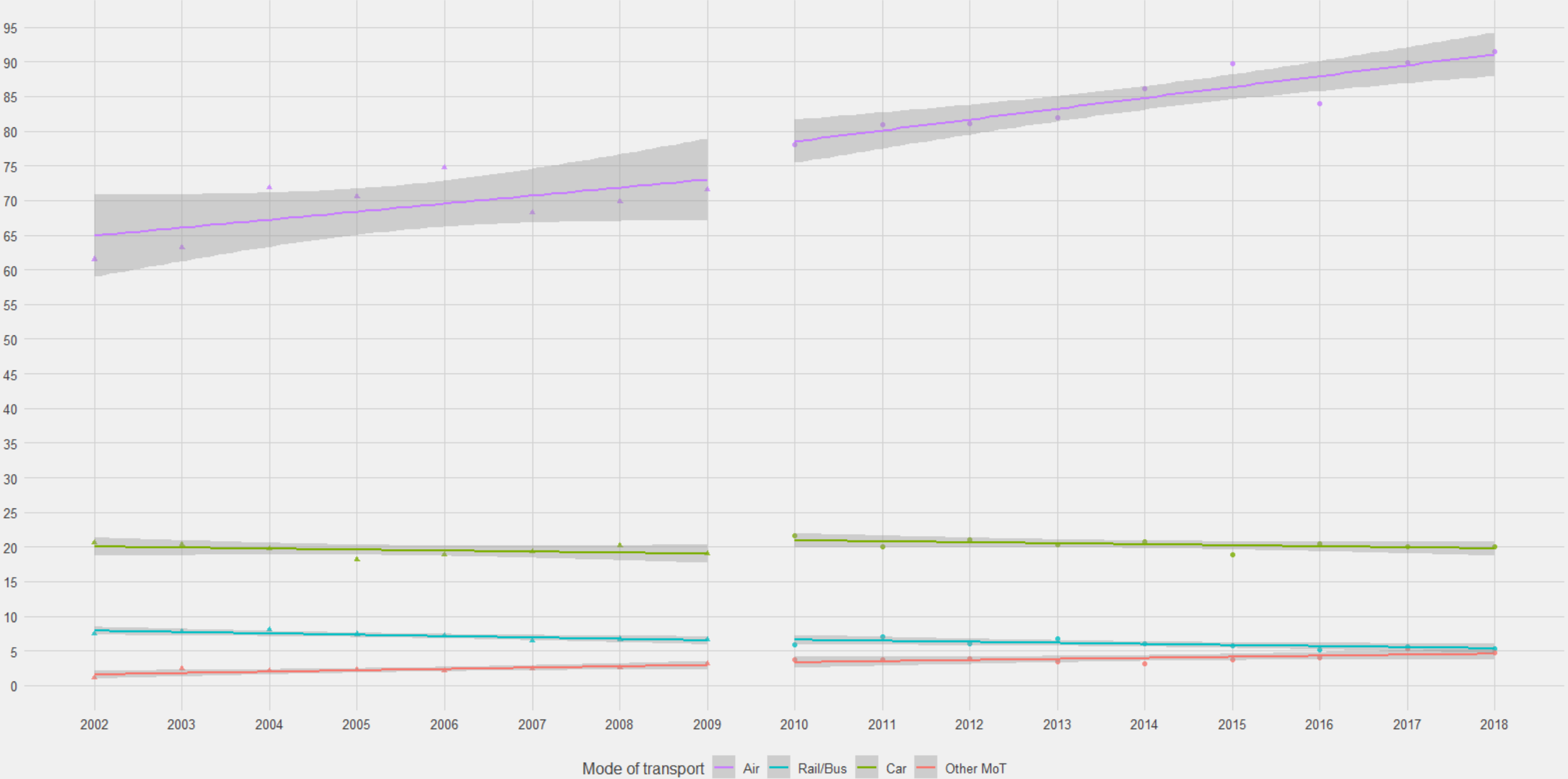
Distance travelled (bn. Km, one-way), 2002/2011 up to 2018



Holiday trips 5d+, without trip of accompanying children, Base: German-speaking population in Germany, 14 years and older, up to 2010: Germans only, RA 2003-2019 *face-to-face*
 Short holiday trips 2-4d (1st, 2nd and 3rd trip in the half-year), without trips of accompanying children. Base: German-speaking population in Germany, 14-75 years, up to 2017: 14-70 years, RA 2012-2019 *online*

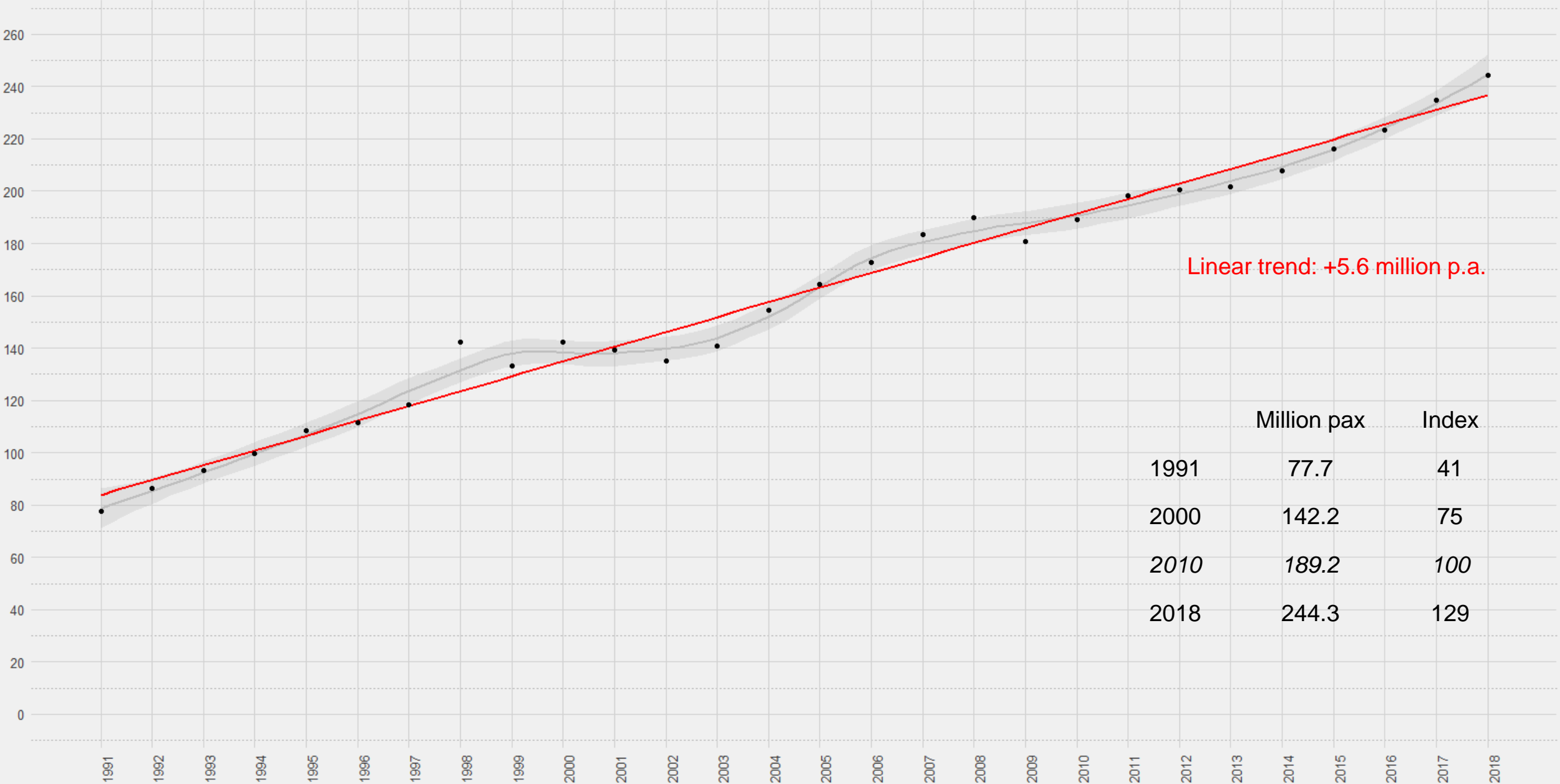
Distances travelled (bn km)

Holiday trips 5 days+, Germany, 2002-2018



Air passengers from German airports, 1999-2018

Million pax, local traffic (departures and arrivals), without transit



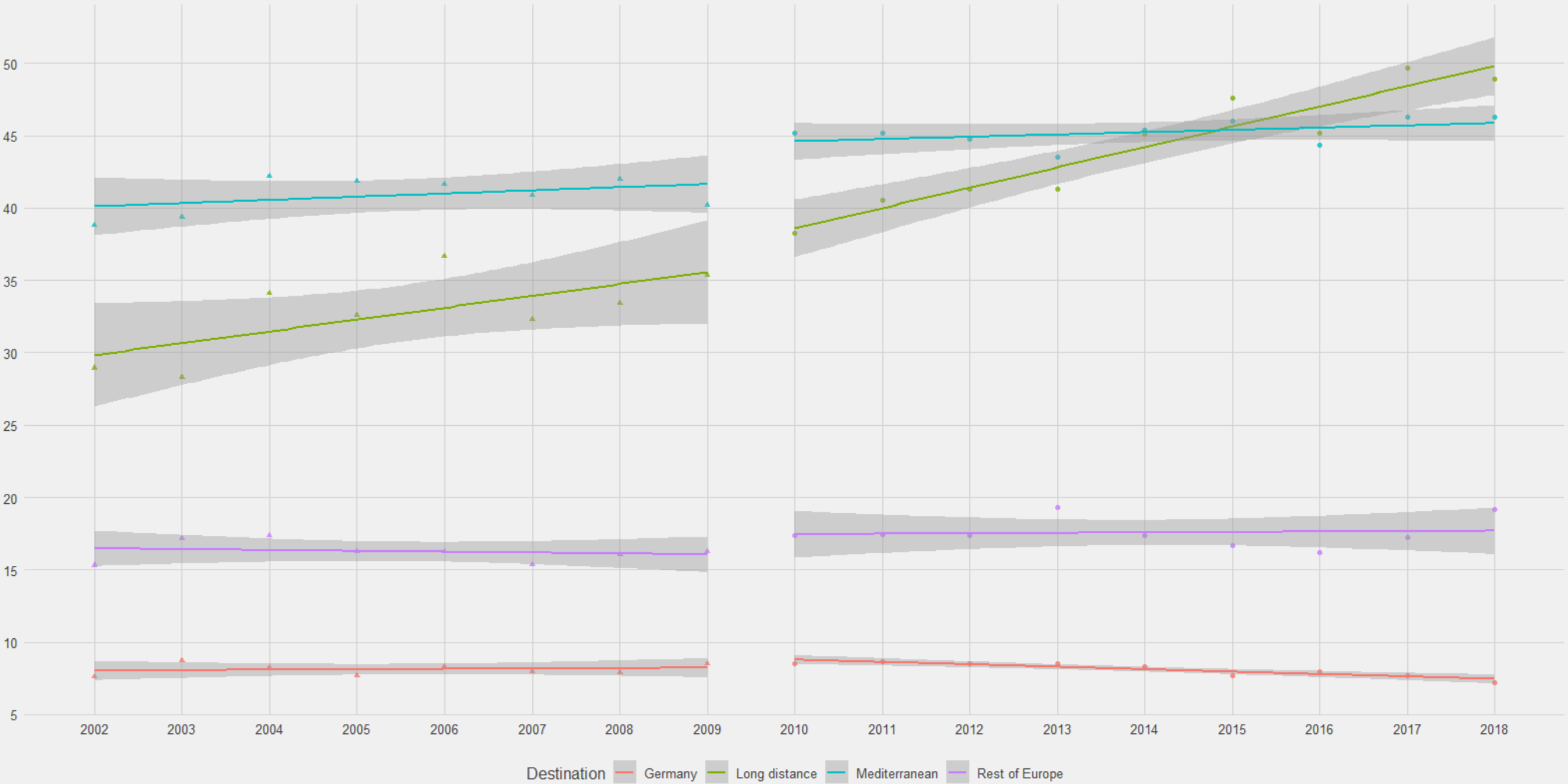
Linear trend: +5.6 million p.a.

Million pax Index

1991	77.7	41
2000	142.2	75
2010	189.2	100
2018	244.3	129

Distances travelled (bn km)

Holiday trips 5 days+, Germany, 2002-2018



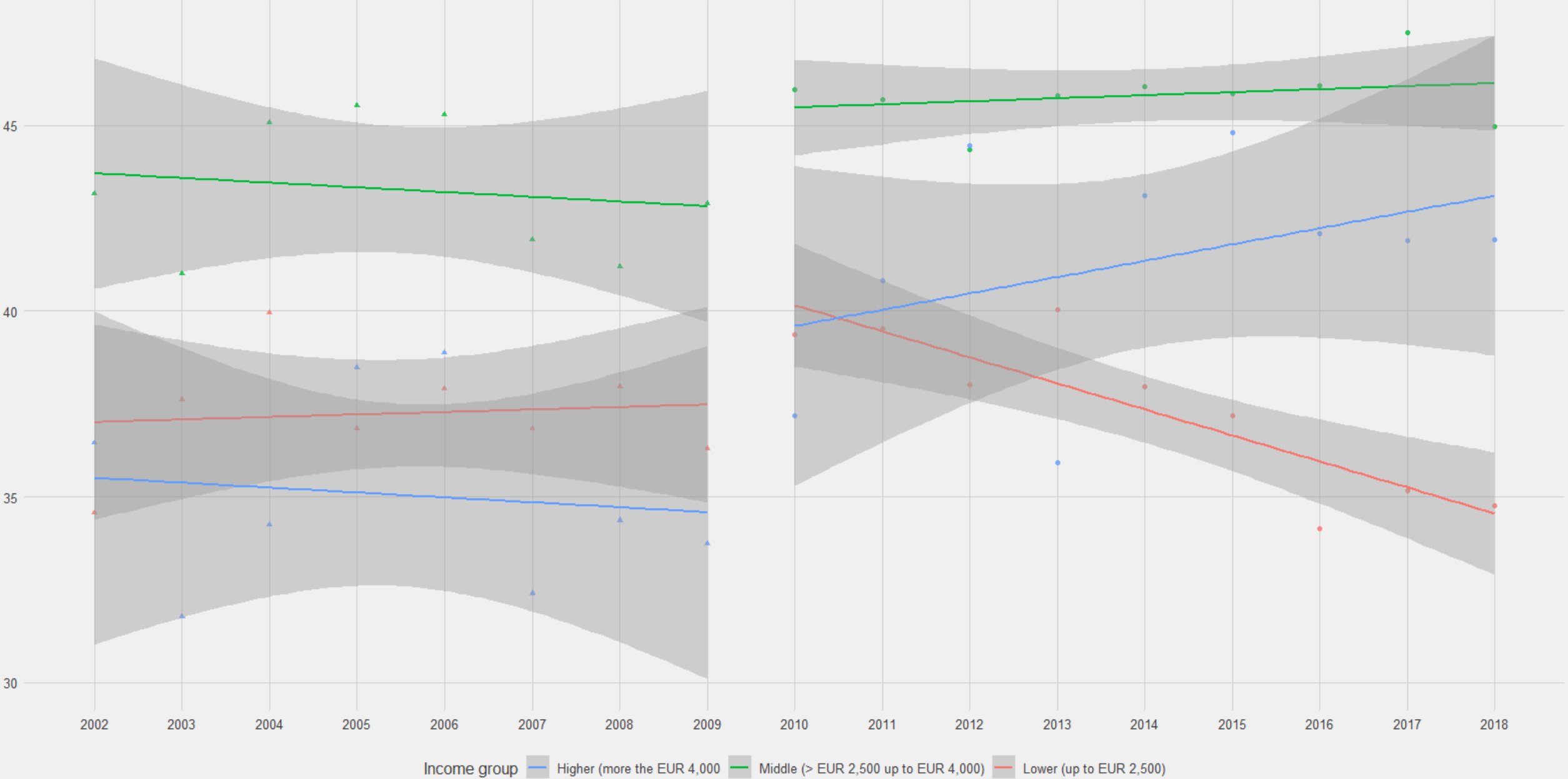
Distances travelled (bn km)

Holiday trips 5 days+, Germany, 2002-2018



Distances travelled (bn km)

Holiday trips 5 days+, Germany, 2002-2018 (controlled for varying group sizes)



All indicators by income groups

	Income group	Lower (up to EUR 2,500)	Middle (EUR 2,500 – 4,000)	Higher (more than EUR 4,000)	Total
BASE	Million persons	32.5	24.2	13.7	70.5
	Share (%)	46%	34%	20%	100%
VOLUME	Million holiday trips 5d+	25.5	26.6	18.3	70.1
	Million short holiday trips 2-4d	57.1	30.4	26.6	83.7
	Total: Million holiday trips	81.9	57.0	44.9	153.8
	Share (%)	34%	37%	29%	100%
	Million days of stay	388.0	437.6	320.8	1,146.4
	Share (%)	34%	38%	28%	100%
	Distance travelled, one-way, bn. km	46.1	56.9	54.1	157.1
	Share (%)	29%	36%	34%	100%
	By airplane	27.5	36.1	36.7	91.5
	Share (%)	27%	36%	37%	100%
ORGANISATION	Share of trips with CO2 compensation reported	4%	3%	3%	4%
	Share of trips with ecolabel reported	6%	7%	7%	7%
	Sustainability was decisive for this trip	7%	5%	5%	6%
ATTITUDE	Positive general attitude towards sustainability in holiday travel	55%	58%	56%	57%

FIRST RESULTS – DO NOT USE WITHOUT OUR PRIOR CONSENT

A new perspective on THE GAP



Conflict

Wanting two or more things that do not go together

Constraint

Financial, temporal, social, physical or other barriers prevent realisation



All indicators by attitude groups (Holiday trips 5d+ only)



	Income group	Positive attitude	No positive attitude	Total
BASE	Million persons	39,2	31,3	70.5
	Share (%)	56%	44%	100%
VOLUME	Million holiday trips 5d+	40,2	29,9	70.1
	Share (%)	57%	43%	100%
	Million days of stay	497,4	377,7	875
	Share (%)	57%	43%	100%
	Distance travelled, one-way, km	68,7	52,9	121.6
	Share (%)	56%	44%	100%
	By airplane	51,9	39,6	91.5
	Share (%)	57%	43%	100%
ORGANISATION	Share of trips with CO2 compensation reported	3%	1%	2%
	Share of trips with ecolabel reported	9%	2%	6%
	Sustainability was decisive for this trip	6%	2%	4%
	Sustainability was one aspect besides others	29%	15%	23%

Holiday trips 5d+ (without trips of accompanying children). Base: German-speaking population 14 years and older in Germany, RA 2019 *face-to-face*

Agenda

- What can we expect from demand-side research?
- Selected first results from a recent German study
- **Implications and discussion**

Demand side indicators and SDG



eurostat Sustainable development in the European Union 11

Marine conservation

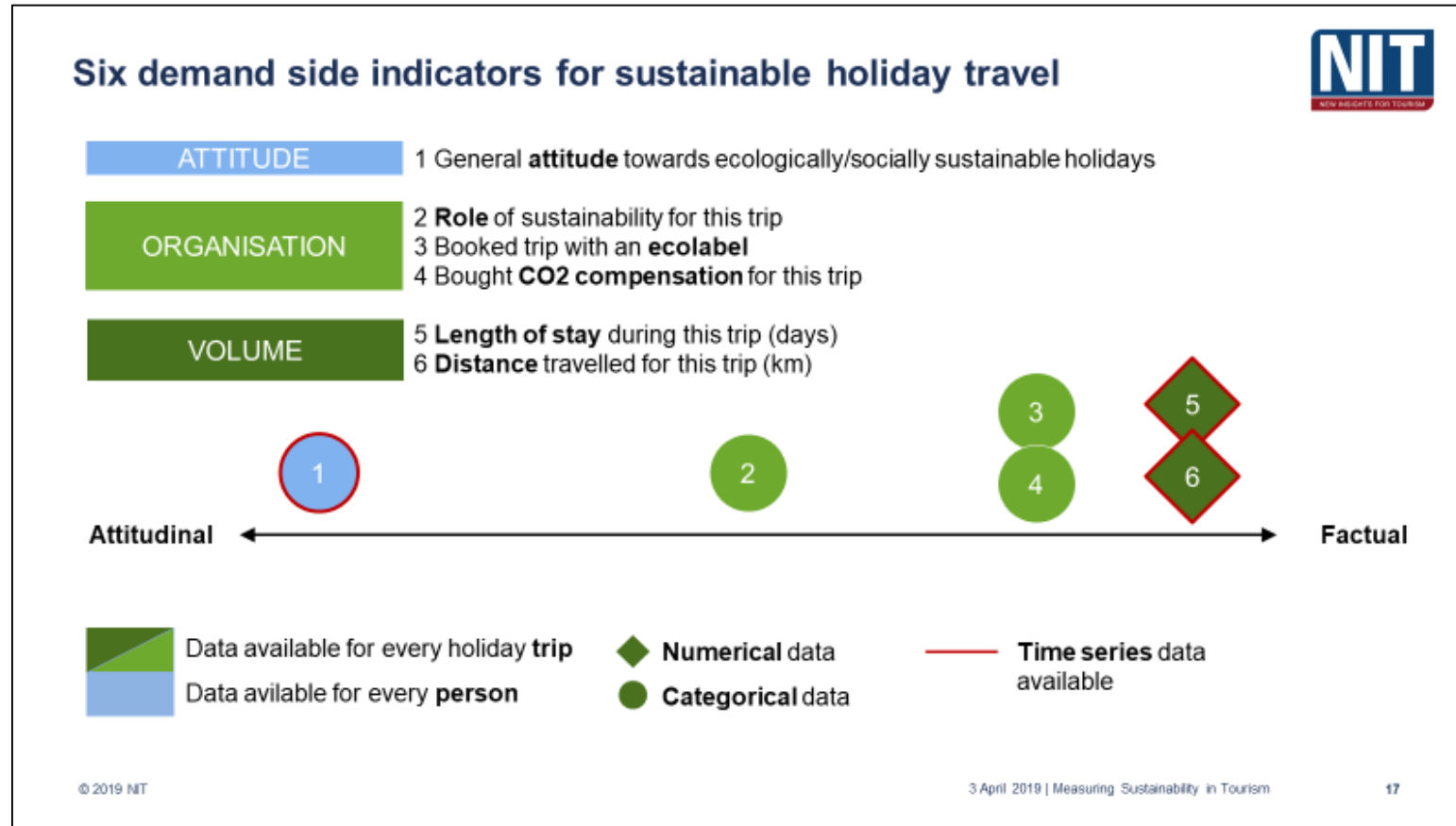
European citizens depend in many ways on the services that marine *ecosystems* provide, including fish and seafood, coastal protection, degradation of pollutants and climate regulation. In addition, the marine environment offers recreation and *tourism* opportunities. The European Commission and Member States have taken multiple steps to combat the loss of aquatic *habitats* and *biodiversity*, which poses a serious threat to human livelihoods, food security and climate stability (*). A crucial step in terms of the protection of *habitats* and *biodiversity* has

The word „tourism“ appears exactly once in this 356 pages report

Taken from: Eurostat. 2018. „Sustainable development in the European Union“. Luxembourg.
<https://ec.europa.eu/eurostat/documents/3217494/9237449/KS-01-18-656-EN-N.pdf/>, p. 11, p. 261

Guiding questions

1. Which **experience** do you have with demand-side indicators from your city, region, country, continent, industry?
2. What could be **advantages and disadvantages** of demand-side indicators, compared to supply-side indicators?
3. Which demand-side indicators, if any, would you find **useful** for measuring sustainability in tourism? Under which **conditions**?



NIT – Institut für Tourismus- und
Bäderforschung in Nordeuropa GmbH
Fleethörn 23
D- 24103 Kiel

📞 +49 431 666 567 0

✉ info@nit-kiel.de

www.nit-kiel.de

Dr. Dirk Schmücker

Leiter Forschung / Head of Research

📞 +49 431 666 567 20

✉ dirk.schmuecker@nit-kiel.de