MIDAS: Sustainability

Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era

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Image: Visit Britain / Nemorin

Welcome to MIDAS

A FOUNDATIONAL STUDY ON INTERNATIONAL TOURIST MOTIVATIONS, DECISION-MAKING & SUSTAINABILITY

The purpose of this study is to explore the population of international leisure travellers in a post-pandemic environment in order to inform how best to inspire, convert and delight them – each of these elements driving accretive economic benefit to Britain via its tourism offering.

This is a more in-depth analysis of the results of the study than the previously published report.

We spoke to global tourists/prospective tourists in the following markets: Australia, Austria, Belgium, Brazil, Canada, China, Denmark, France, Germany, Hong Kong, India, Ireland, Israel, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Saudi Arabia, South Korea, Spain, Sweden, Switzerland, South-East Asia (Malaysia, Singapore, Thailand), UAE, USA. Full sample sizes are shown here by Britain Considerers and Britain Visitors.

Fieldwork took place between 18th March and 23rd April 2022.

Country	Considerers	Visitors	Total
Australia	653	383	1,036
Austria	451	203	654
Belgium	398	263	661
Brazil	840	251	1,091
Canada	673	329	1,002
China	658	345	1,003
Denmark	369	239	608
France	661	342	1,003
Germany	702	302	1,004
Hong Kong	391	261	652
India	580	446	1,026
Irish Republic	184	513	697
Israel	382	234	616
Italy	715	285	1,000

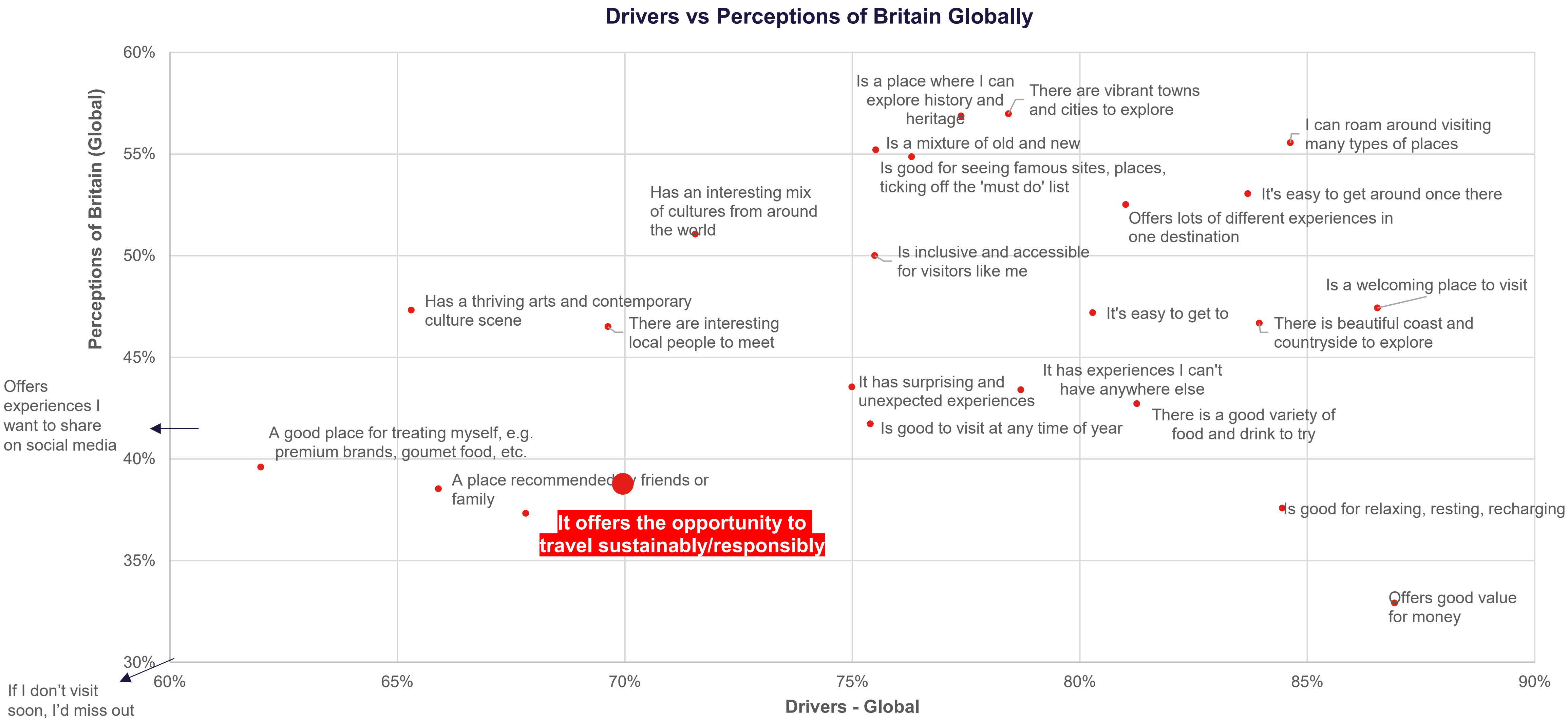
Country	Considerers	Visitors	Total
Japan	698	304	1,002
Netherlands	373	274	647
New Zealand	421	252	673
Norway	369	250	619
Poland	404	259	663
Saudi Arabia	369	278	647
SEA*	737	298	1,035
South Korea	686	316	1,002
Spain	617	384	1,001
Sweden	367	259	626
Switzerland	412	222	634
UAE	378	284	662
USA	855	721	1,576
TOTAL	**14,343**	**8,497**	**22,840**

Note:* South-East Asia (SEA) is comprised of equally-weighted samples from Malaysia, Singapore and Thailand

Emergent Driver: Sustainability

What can we learn from international tourists about sustainable tourism and its implications for British tourism?

Sustainability is not currently a top driver of destination choice, or a particularly strongly held perception of Britain



E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

Australia leads the way in terms of perceived Sustainability, but let's explore what this really means…

Of all the markets included, Australia is rated highest by long-haul travellers on perceptions of sustainability amongst visitors and considerers alike (+8% higher than Britain).

Websites and brands such as ajourneydownunder.co.uk offer a range of experiences, itineraries and information that support principles of **personalisation**, **localisation** and **discovery of hidden secrets** – people, places and products that **care.**

It is this tone which communicates most strongly to sustainability and can play an important role in harnessing tourism products

Image: Corfe Castle; Dorset; England; VisitBritain/National Trust/Paul Healy

Currently, the term ‘sustainable/responsible’ tourism is interpreted very broadly

What does sustainable/responsible tourism mean to you?

Top Ranked statements of those indicating they knew what it meant (93%)

H1: As a traveller what does sustainable/responsible tourism mean to you? Please rank the top 3 statements below that best reflect what sustainable/responsible tourism mean to you.
Base N=22,840 Global Total; global weighting applied

Higher than comparative bar @ 95% (colours may change for optimal visibility)
Lower than comparative bar @ 95% (colours may change for optimal visibility)

9 in 10 tourists claim to have engaged in some form of sustainable behaviour in the past, with ‘buying local’ by far the most dominant current behaviour for all tourists

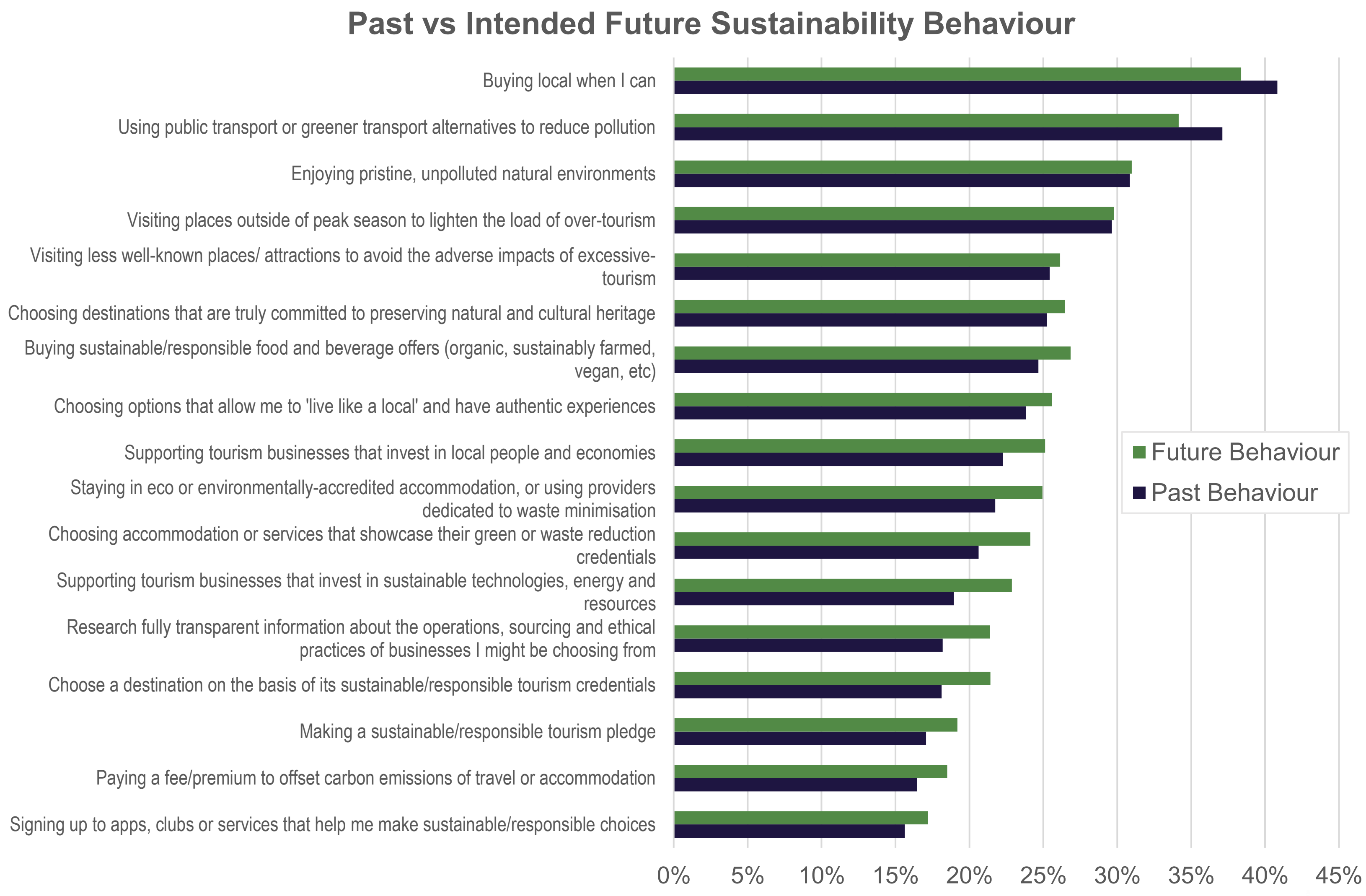
When it comes to taking leisure breaks/holidays abroad which of the following have you done in the past?

H2: And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?

Past behaviour mirrors intended future behaviour almost identically

Whilst there is a marginal difference between past and future intended behaviours (maximum of 4%) when it comes to tourists visiting Britain, **95% of these behaviours are represented by the same people.**

In other words, whilst there is an appetite for more sustainable behaviour in the future, the **immediate opportunity lies in reinforcing and enriching their commitment,** particularly given 92% of all tourists are already engaging in at least one of these behaviours.



H2a: And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?
H2b. And which do you plan to do on future breaks or holidays?

But there are barriers that we need to address, particularly perceived cost which is consistent across markets

***Perceived cost is the strongest stated barrier**,.*

*Reading beyond this, therefore, we see that **lack of clarity** around what sustainable tourism means, **its impact and how to navigate these behaviours** are more likely the true reasons for not changing behaviour.*

H3. Which of the following do you believe *prevent* you from travelling more sustainably/responsibly?
Select the top 3 statements that you feel prevent you from travelling more sustainably/responsibly when taking a leisure break or holiday abroad.

Sustainability is an emerging driver of importance in destination selection for international tourists, most relevant to **younger travellers**

It is interesting that 9 in 10 travellers claim to have engaged in sustainable tourism behaviours, illustrating **strong emotional engagement and positive endorsement.**

The perceived cost of sustainable choices is the most significant barrier when it comes to sustainable travel behaviour.

Future intentions mirror past behaviour, suggesting we focus on **reinforcing current behaviours around themes of localisation, nature, dispersion (geographic and seasonal) and preservation.**

We see evidence of a stronger imprint in terms of perceptions of sustainability in Australia (amongst long-haul travellers) where these themes are being utilised.

Key barriers are consistent across markets and segments, all pointing to a need for **greater clarity, signalling and impact reinforcement** to overcome behavioural apathy.

In Summary

An emerging driver of destination and product choice, but requiring clarity, signalling and impact reinforcement