

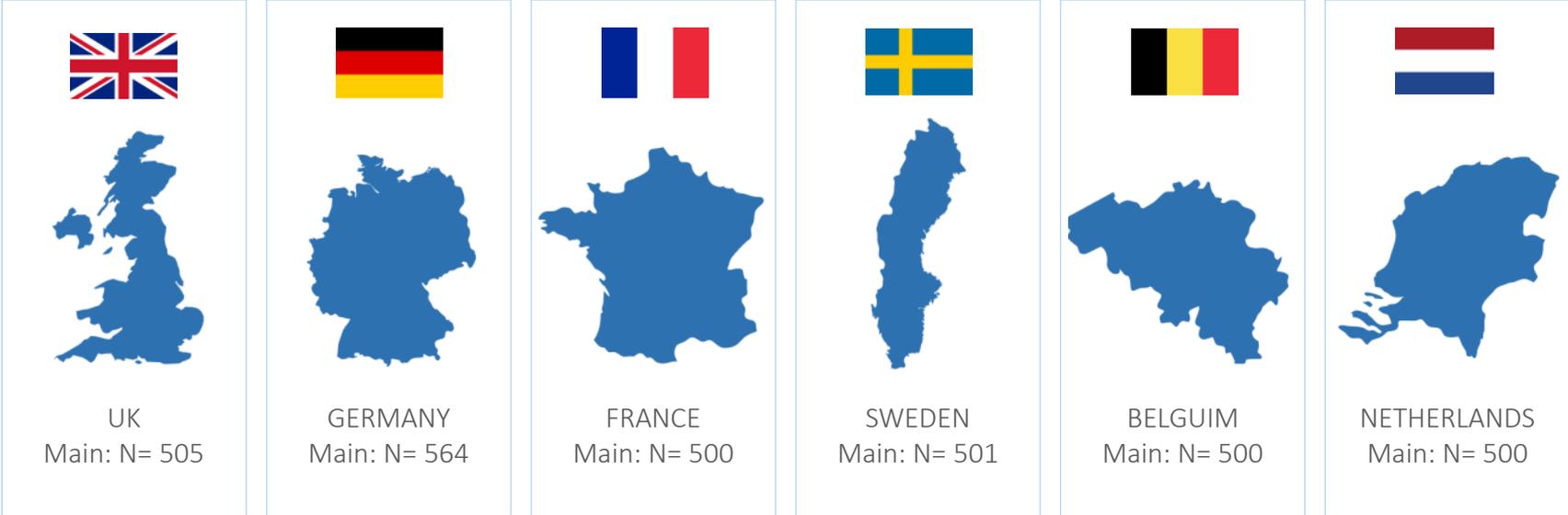
TUI Group: Sustainability Survey

Global Insights
2017



Methodology and Sample

- 20 Minute online quantitative survey amongst 18-70 year old holidaymakers, who have taken a flight in the past two years.
- We surveyed the following markets and achieved the following base sizes per market:

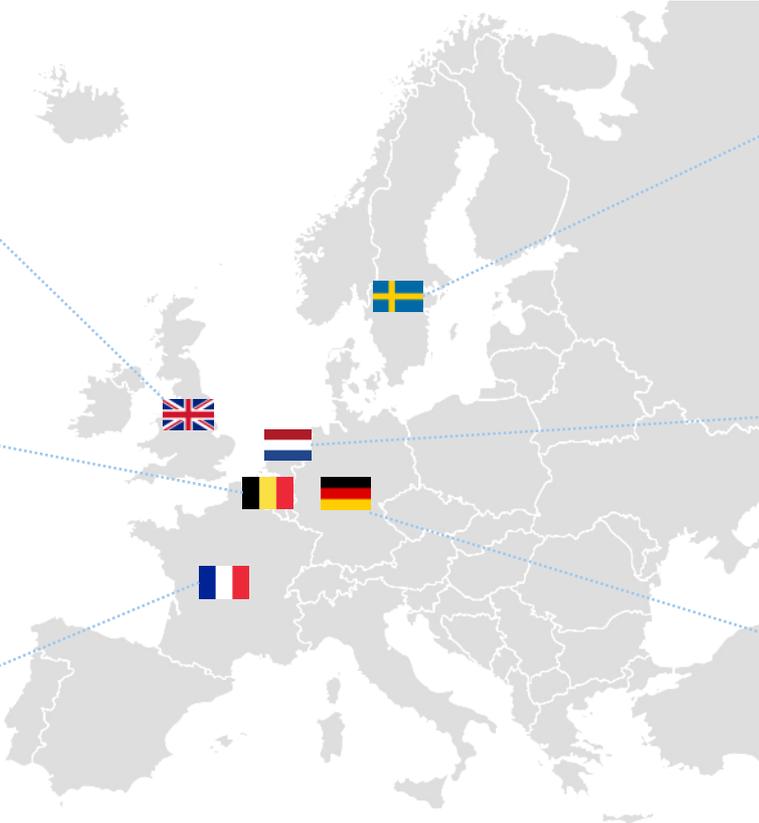


General market research behaviours in the different markets

UK
Typically neither extremely positive or negative as a market.

Belgium
Typically neither extremely positive or negative as a market.

France
Generally a slightly more positive responding market, which is reflected in high scores in this survey.



SWEDEN
Typically a more mid point scoring market.

NETHERLANDS
Generally a more negative scoring market, which is reflected in the lower scores in this survey.

GERMANY
Typically a lower scoring market, however we see a very positive response in this survey suggesting high engagement in this subject matter.

Summary market differences

UK

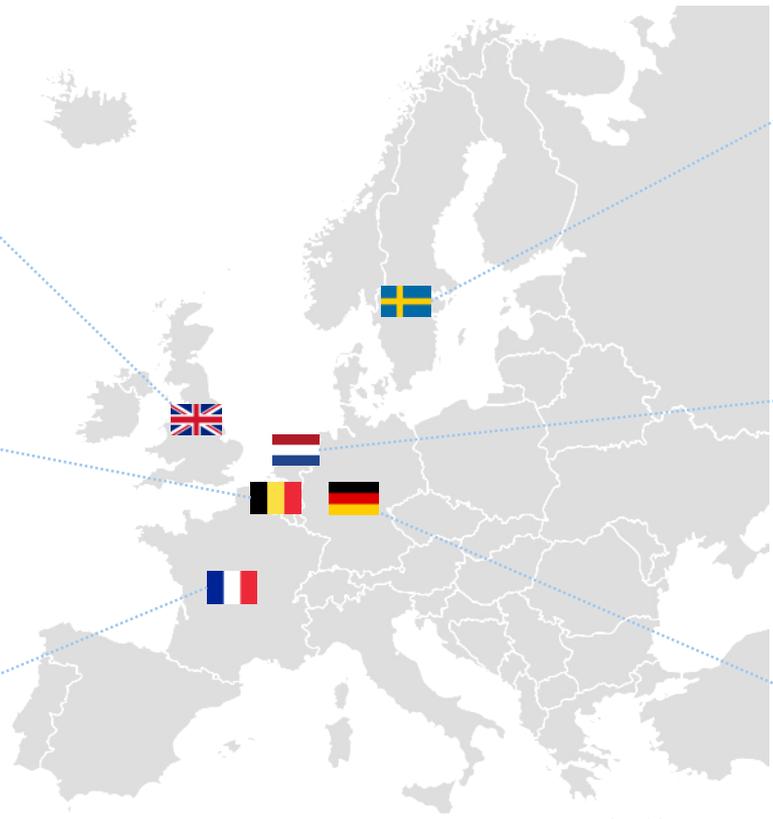
- Engage more in low commitment sustainable behaviours (e.g. avoid food waste, recycle etc.)
- Few going on sustainable breaks
- Hotels focus on food, renewable energy/energy saving and support/apprenticeships for locals

Belgium

- More likely to be trying to reduce energy / water usage & invest in A-rated appliances
- Few going on sustainable breaks
- Hotels focus on food, renewable energy/energy saving

France

- High engagement in sustainability – more likely to buy local/seasonal food and reduce waste
- Nearly 1 in 5 go on sustainable breaks
- Hotels focus on food and energy saving



SWEDEN

- Buying seasonal/organic / reducing waste and recycling important, but reducing energy / water use less so
- Few believe they are going on sustainable breaks
- Hotels focus on food, renewable energy, eco-cleaning

NETHERLANDS

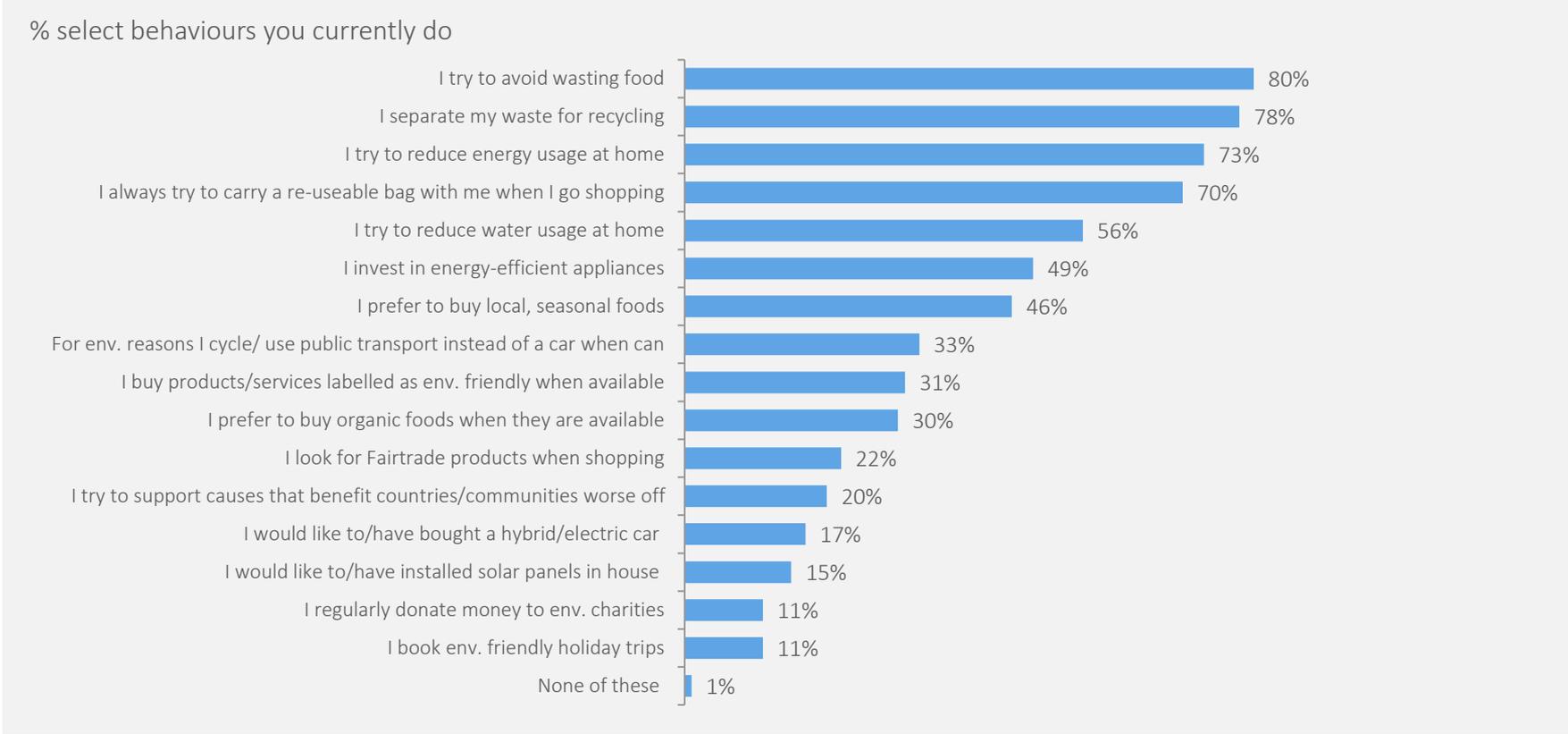
- Recycling / reducing energy usage is most common sustainable behaviours
- Very few believe they are going on sustainable breaks
- Hotels focus on food, energy saving and renewable energy, and hotel guests adopting sustainable behaviours

GERMANY

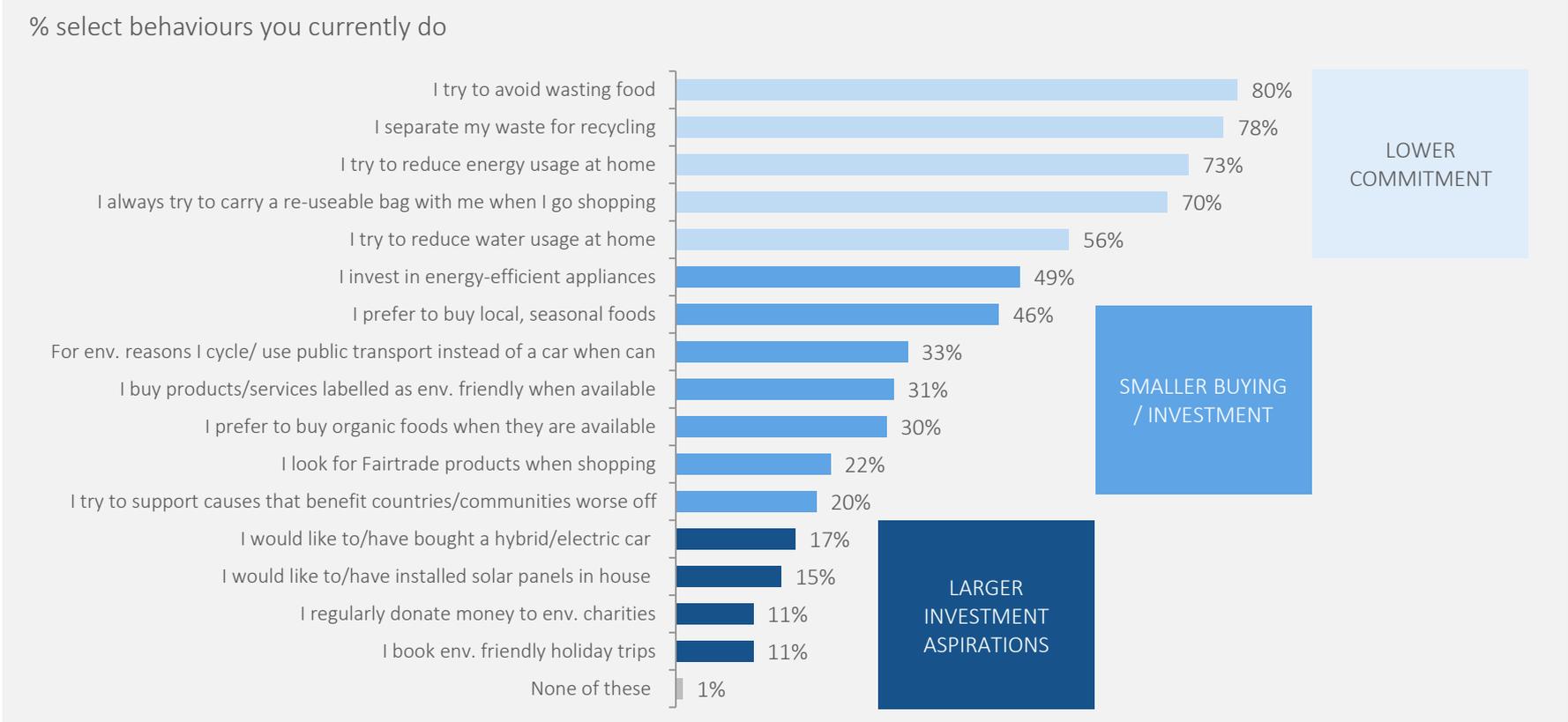
- Wide range of sustainability behaviours – more investing in A-rated appliances, and looking for environmentally friendly labels
- Almost 1 in 5 go on sustainable breaks
- Hotels focus on food, energy saving, renewable energy and eco-cleaning

How do consumers currently engage in sustainability?

People actively engage in a range of sustainable behaviours



These behaviours fall into three tiers



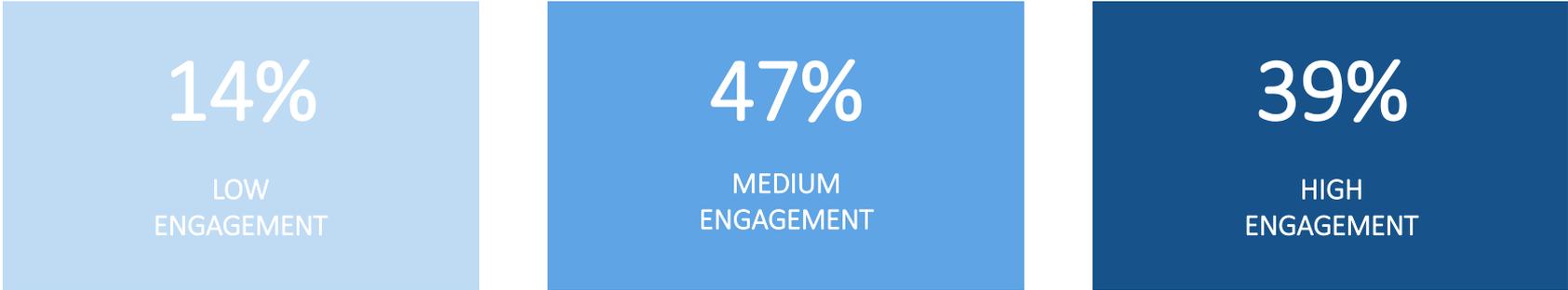
Based on these tiers, we have developed a 'Sustainability index'

SUSTAINABILITY INDEX: BASED ON BEHAVIOURS AND ASPIRATIONS



Most people do try to adopt sustainable behaviours where possible

SUSTAINABILITY INDEX: BASED ON BEHAVIOURS AND ASPIRATIONS
BY ALL MARKETS



Particularly in Germany and France

SUSTAINABILITY INDEX:
BY MARKET, DEMOGRAPHICS,



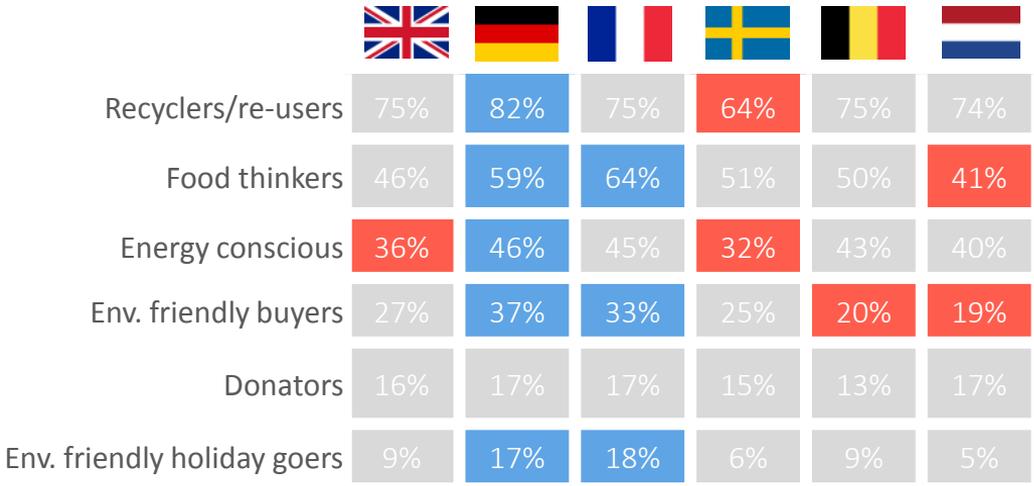
Low (14%)	19%	7%	8%	18%	14%	19%
Medium (47%)	49%	51%	43%	44%	45%	48%
High (39%)	32%	41%	48%	38%	41%	33%

Q12. Sustainability Index

Base: Main sample: UK (n=505), Germany (n=564), France (n=500), Sweden (n=501), Belgium (n=500), Netherlands (n=500), 18-29 (n=773), 30-49 (n=1174), 50-70 (n=1123), Female (n= 1548), Male (n=1522),

Where they engage in a wide range of sustainable behaviours

SUSTAINABILITY BEHAVIOUR CATEGORIES (% AVERAGES):
BY MARKET, DEMOGRAPHICS



Q12. Sustainability attitudes

Base: Main sample: UK (n=505), Germany (n=564), France (n=500), Sweden (n=501), Belgium (n=500), Netherlands (n=500), 18-29 (n=773), 30-49 (n=1174), 50-70 (n=1123), Female (n=1548), Male (n=1522)



Motivations to be sustainable are more selfless

68%

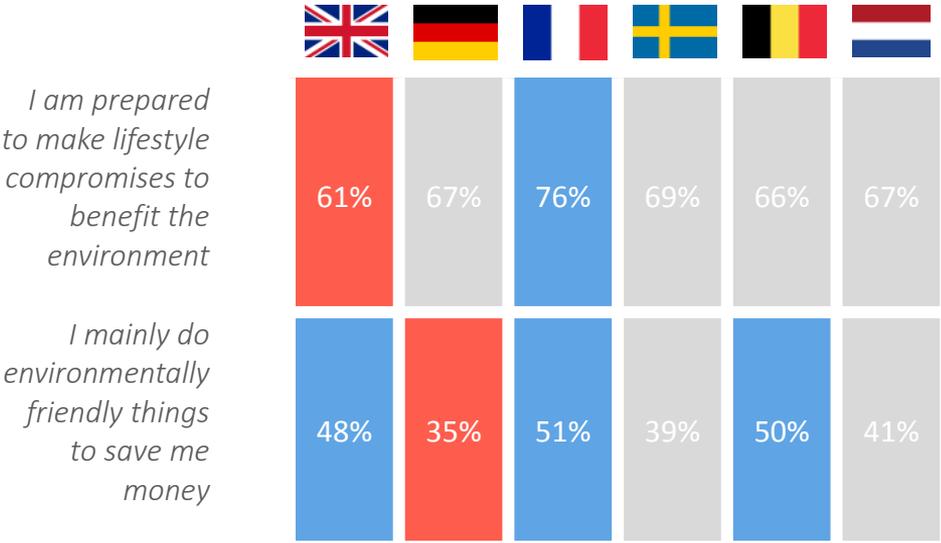
*'I am prepared to make **lifestyle compromises** to benefit the environment'*

44%

*'I mainly do environmentally friendly things to **save me money**'*

With some differences evident by market

SUSTAINABILITY ATTITUDES (T2B):
BY MARKET, DEMOGRAPHICS

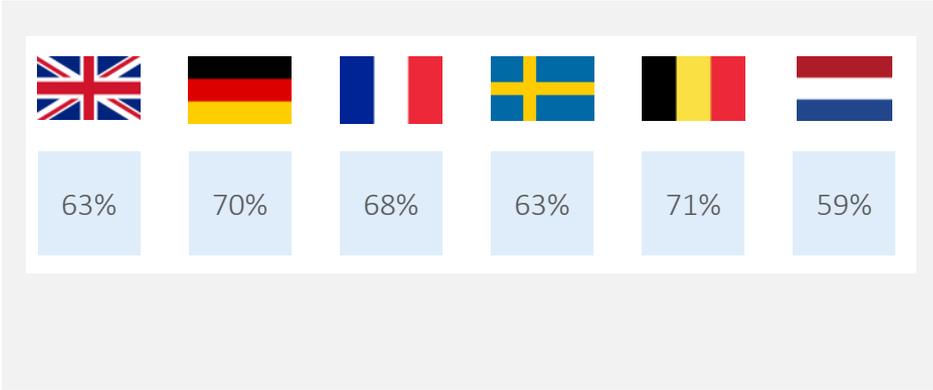
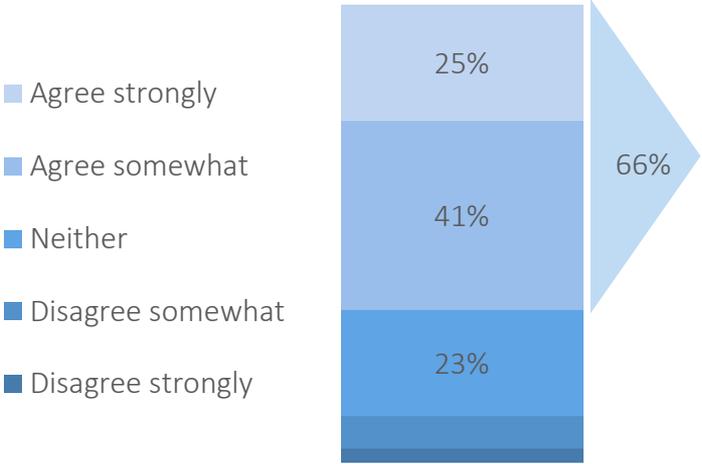


Q13. Sustainable attitudes

Base: Main sample: UK (n=505), Germany (n=564), France (n=500), Sweden (n=501), Belgium (n=500), Netherlands (n=500), 18-29 (n=773), 30-49 (n=1174), 50-70 (n=1123), Female (n=1548), Male (n=1522), P2Y Customers (n=1439)

People place more responsibility on brands than themselves

% agreement with sustainable attitudes



Brands have a **GREATER RESPONSIBILITY** to make sustainable decisions than I do as an individual

Summary market differences

UK

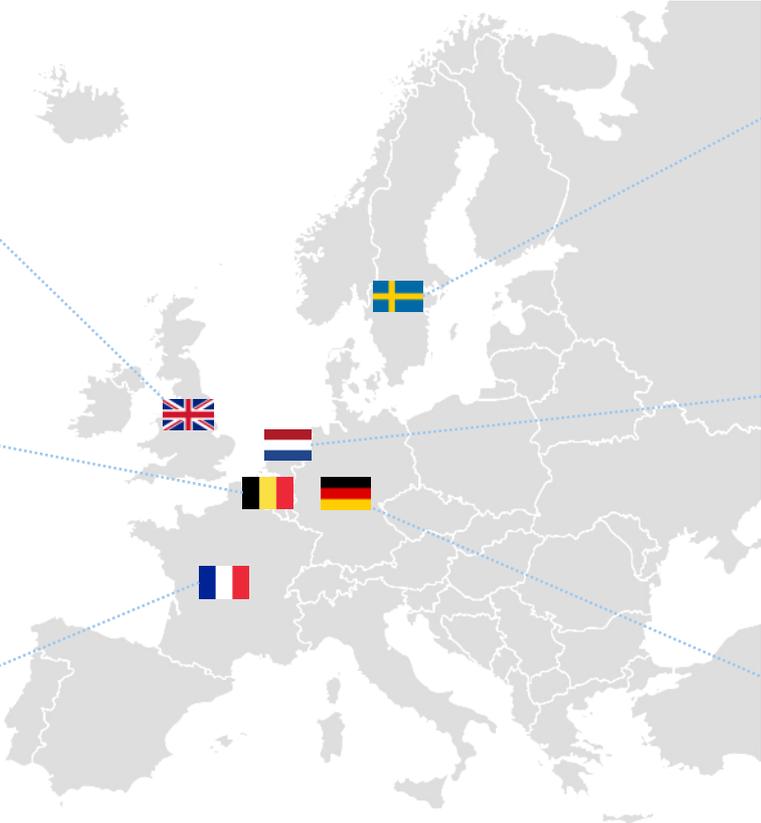
Charitable giving is a trend in the UK. Consumers are also more likely to support local businesses. However, UK consumers have a lower commitment to invest their own time and money in sustainability, engaging in more low commitment behaviours (e.g. avoid food waste, recycling etc.).

Belgium

Reducing energy / water usage is more common in BE and consumers are also more likely to say they invest in energy efficient appliances and solar panels. However, charitable giving and buying sustainable products is less apparent. They place more responsibility with brands than individuals.

France

One of the most engaged in sustainability, where nearly 1 in 5 claim to have been on a sustainable break. They are particularly interested in food and buying local/seasonal, organic and Fairtrade, as well as reducing water usage. Almost 1 in 3 have or would consider buying an electric car.



SWEDEN

SE consumers are less likely to be reducing energy / water usage at home or buying A-rated appliances (perhaps as SE energy comes from renewable sources?), mainly concentrating on reducing food waste and recycling. Survey results imply they care the least about holiday companies being more sustainable.

NETHERLANDS

NL are one of the least engaged in sustainable behaviours beyond recycling/reducing energy usage. Though they do use sustainable transport methods (e.g. cycling vs. car) more, survey results imply are the least interested in sustainable holidays. They do care more than other markets about whether brands are looking after their staff.

GERMANY

One of the most engaged in sustainability with a wide range of sustainability behaviours. They are prepared to invest in it with many buying A-rated appliances, and looking for environmentally friendly labels on products/food, as well as support local businesses and people. Almost 1 in 5 have been on a sustainable break.

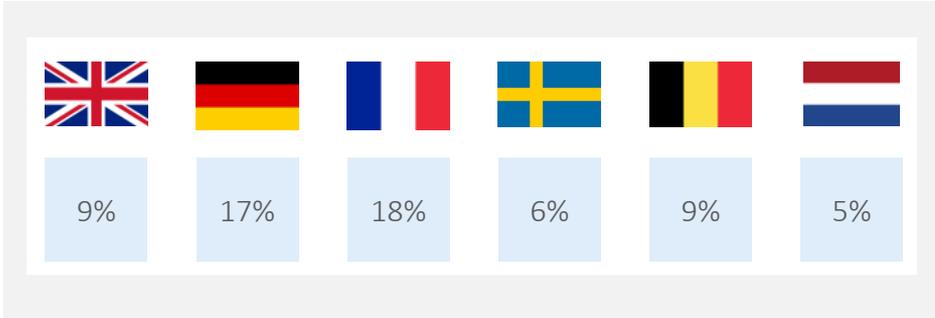
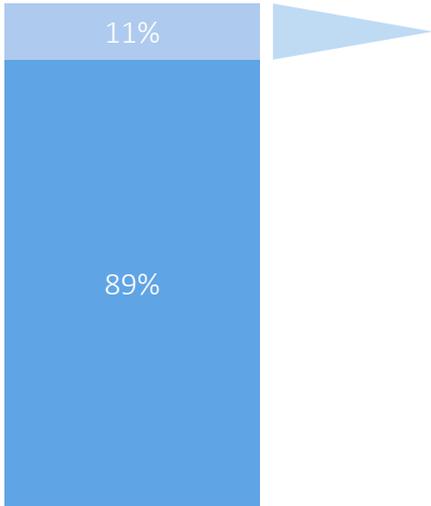
How do perceptions of sustainability impact the travel industry?

1 in 10 people book environmentally friendly holidays now

% select 'I book ENVIRONMENTALLY FRIENDLY HOLIDAY trips'

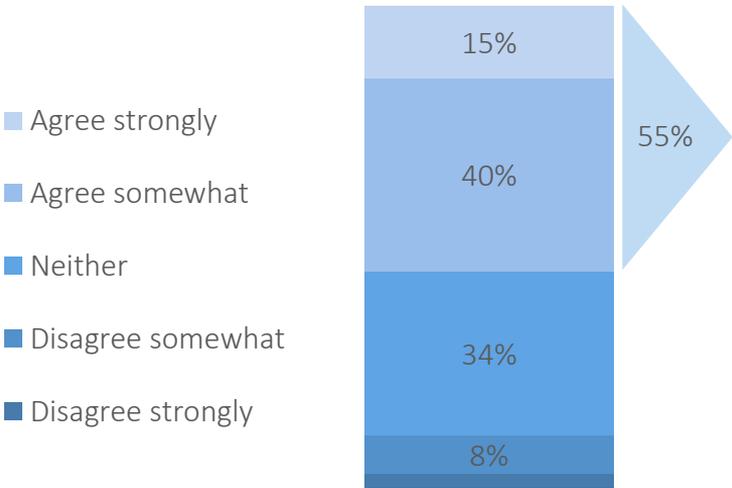
■ Yes

■ No



Availability and awareness is a barrier to uptake

% agreement with sustainable attitudes
(among those who don't currently book sustainable holidays)



I would book more environmentally sustainable holidays if they were
MORE READILY AVAILABLE

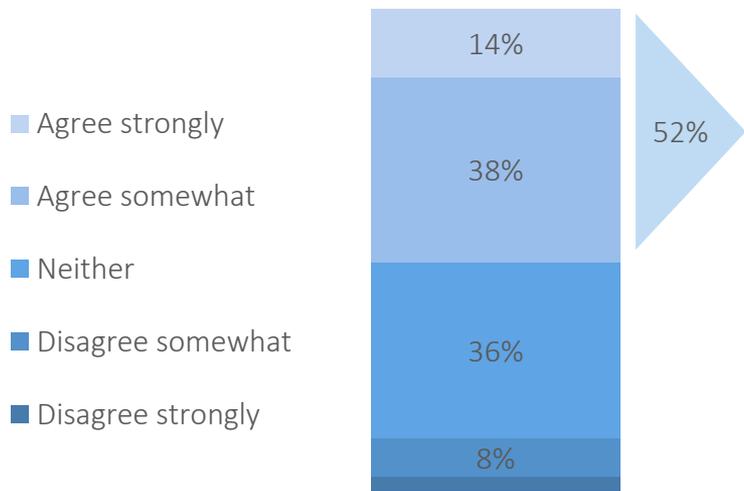
Animal welfare and reducing carbon footprint are areas of key interest

% T2B attitudes

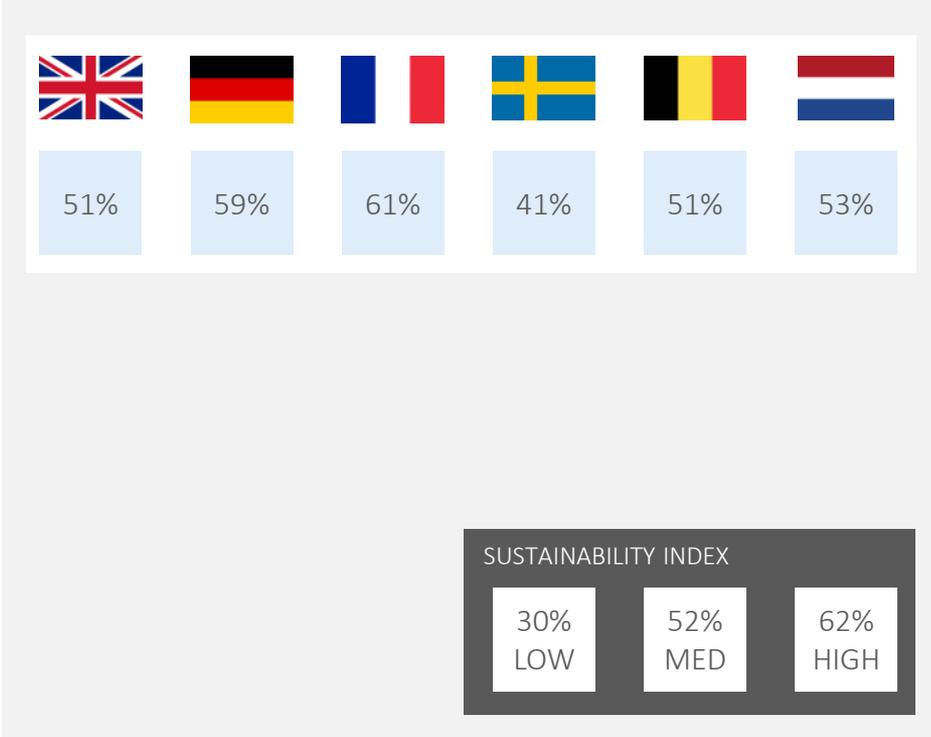


People see holiday brands that invest in sustainability more positively

% agreement with sustainable attitudes

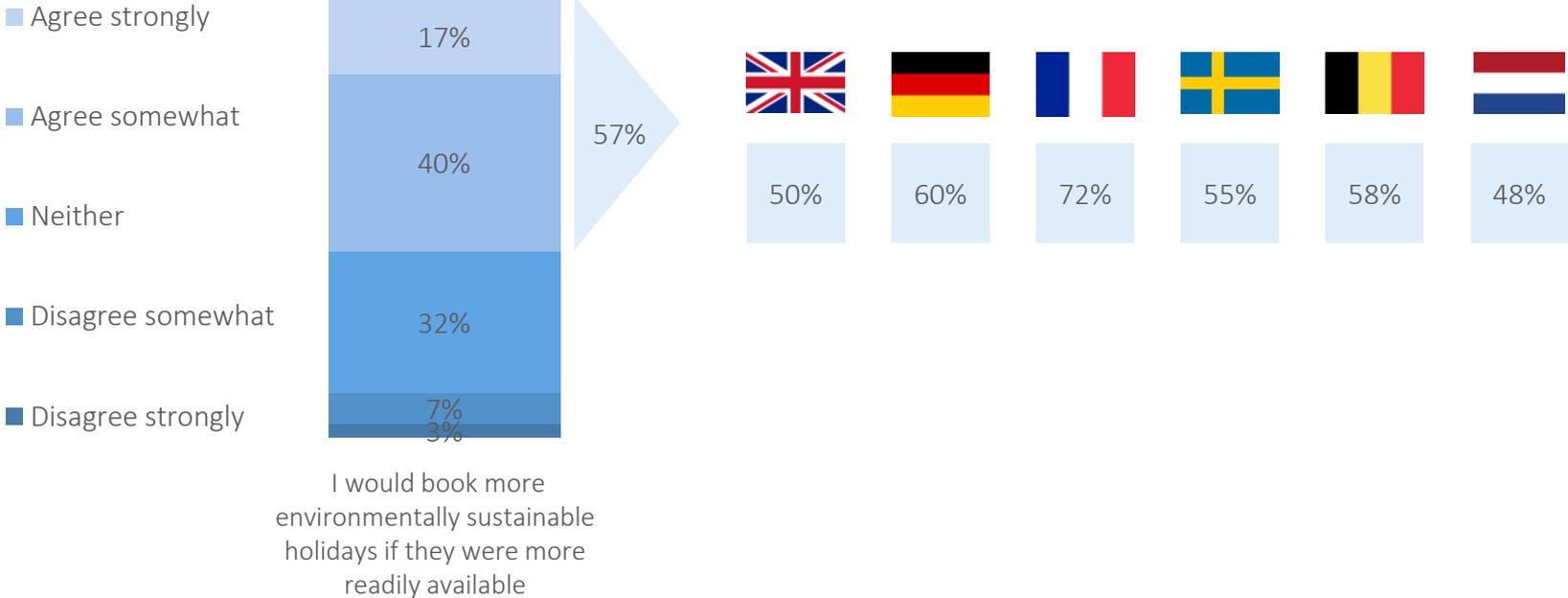


I have a better image of holiday companies that actively **INVEST IN ENVIRONMENTAL/SOCIAL INITIATIVES**



The majority do claim they would book sustainable holidays if they were more available

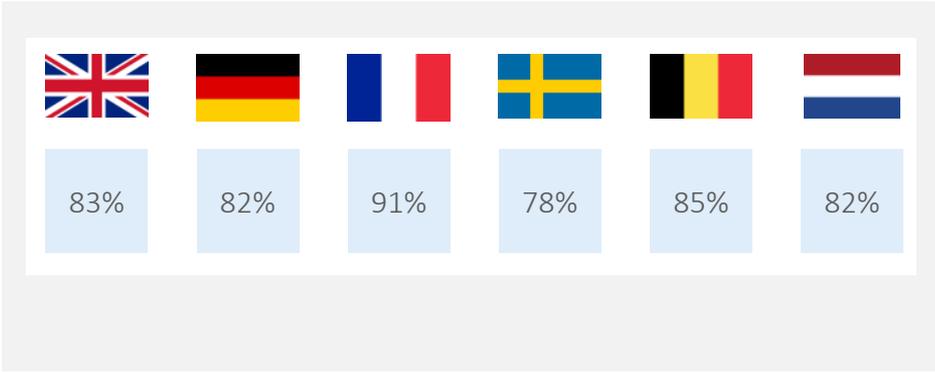
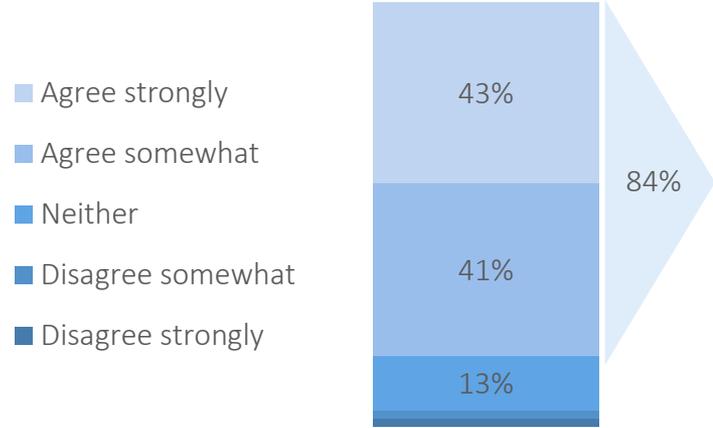
% agreement with sustainable attitudes



I would book more environmentally sustainable holidays if they were more readily available

Holidaymakers value the importance of reducing their carbon footprint

% agreement with sustainable attitudes



It is important that everyone does their bit to **REDUCE THEIR CARBON FOOTPRINT**

A point allocation task asked consumers to prioritise hotel features

We showed consumers a list of 10 ways in which hotels can be more sustainable for both the environment and local community.

We then asked them to imagine they had 100 points to spend across the 10 initiatives.

Respondents were asked to allocate their points across the initiatives they would most like to see.

The most engaging sustainable hotel initiatives are food related

Point allocation: Best hotel initiatives

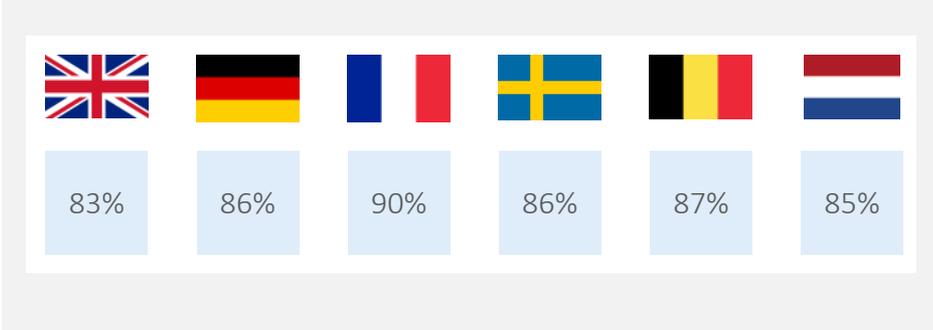
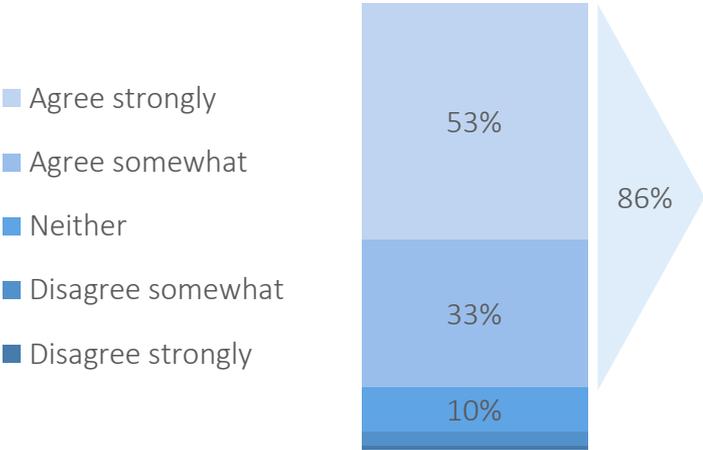
 Food
  Environment
  Communities

GLOBAL



Holidaymaker's attitudes towards protecting natural diversity

% agreement with sustainability attitudes

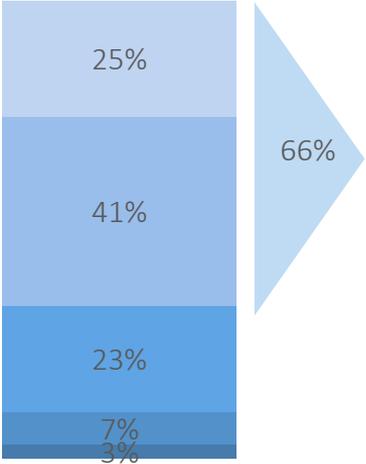


Protecting the **DIVERSITY OF ANIMALS AND PLANTS** in the world is important

The majority believe brands play a big role in sustainability

% agreement with sustainable attitudes

- Agree strongly
- Agree somewhat
- Neither
- Disagree somewhat
- Disagree strongly



Brands have a greater responsibility to make sustainable decisions than I do as an individual

