

Measuring Sustainability for Travel and Tourism in Europe

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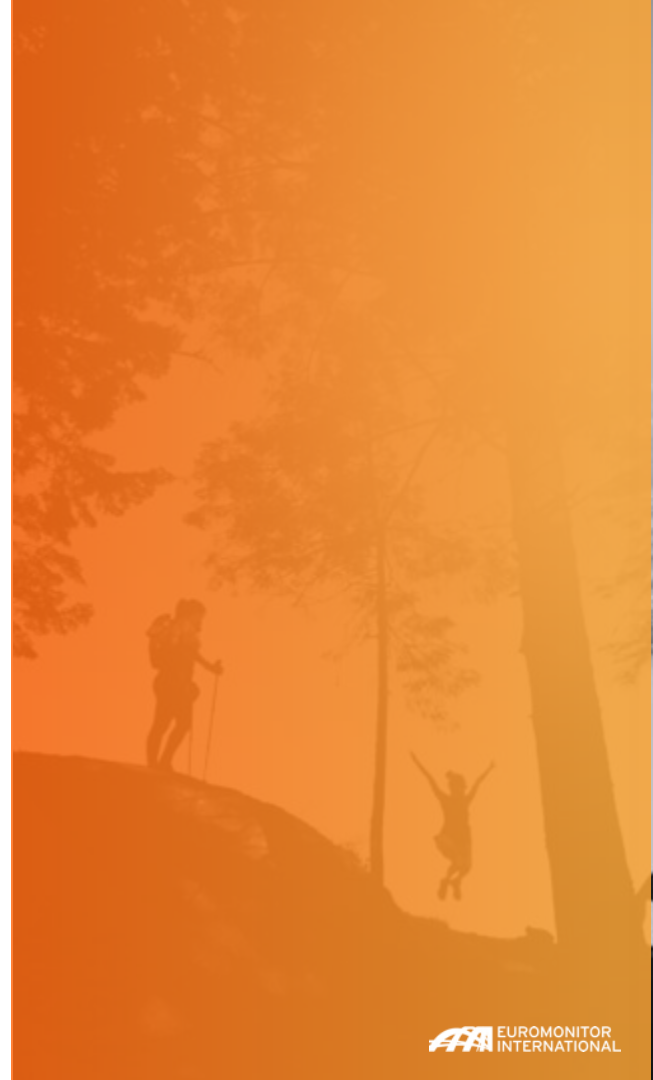
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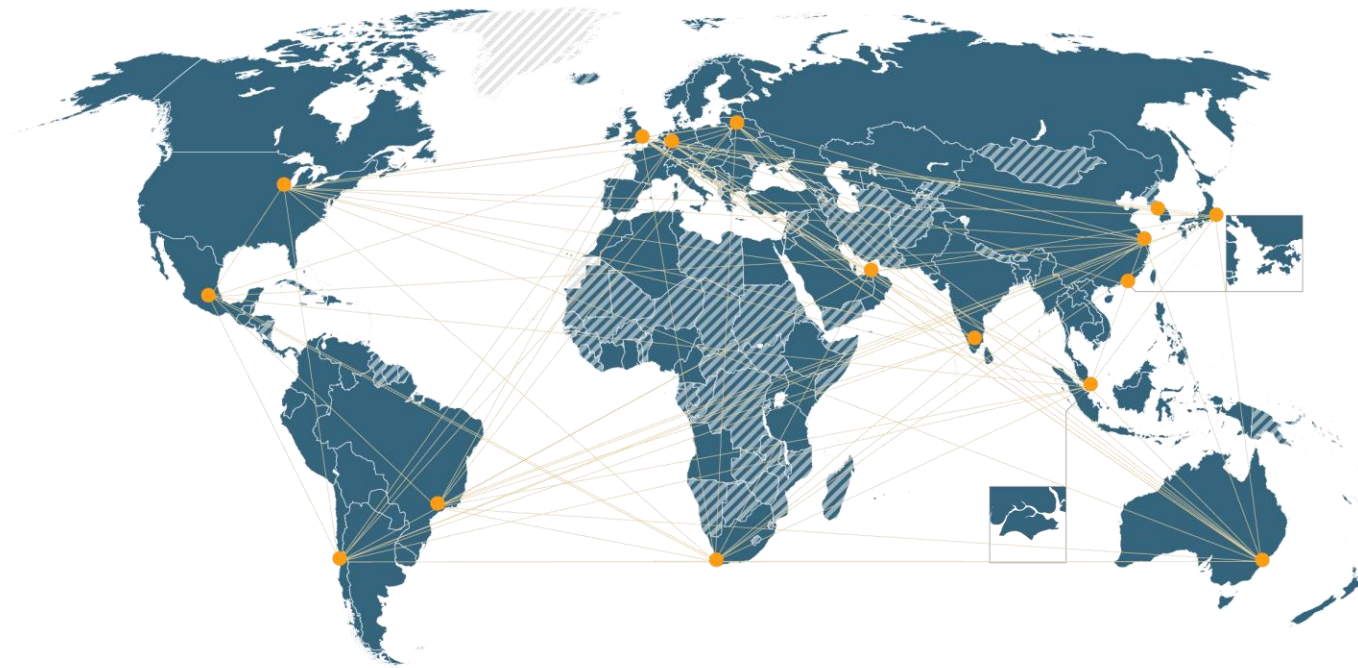
Key takeaways





Index Methodology

Euromonitor International network and coverage



16 OFFICES

London	Tokyo
Chicago	Sydney
Singapore	Bangalore
Shanghai	São Paulo
Vilnius	Hong Kong
Santiago	Seoul
Dubai	Düsseldorf
Cape Town	Mexico City

100 COUNTRIES

in-depth analysis on
consumer goods and
service industries

210 COUNTRIES + TERRITORIES

demographic, macro- and
socio-economic data on
consumers and economies

Sustainable travel index to help with transition



Environmental
sustainability

10%



Social
sustainability

10%



Economic
sustainability

10%



Risk

10%



Sustainable
demand

20%



Sustainable
transport

20%



Sustainable
lodging

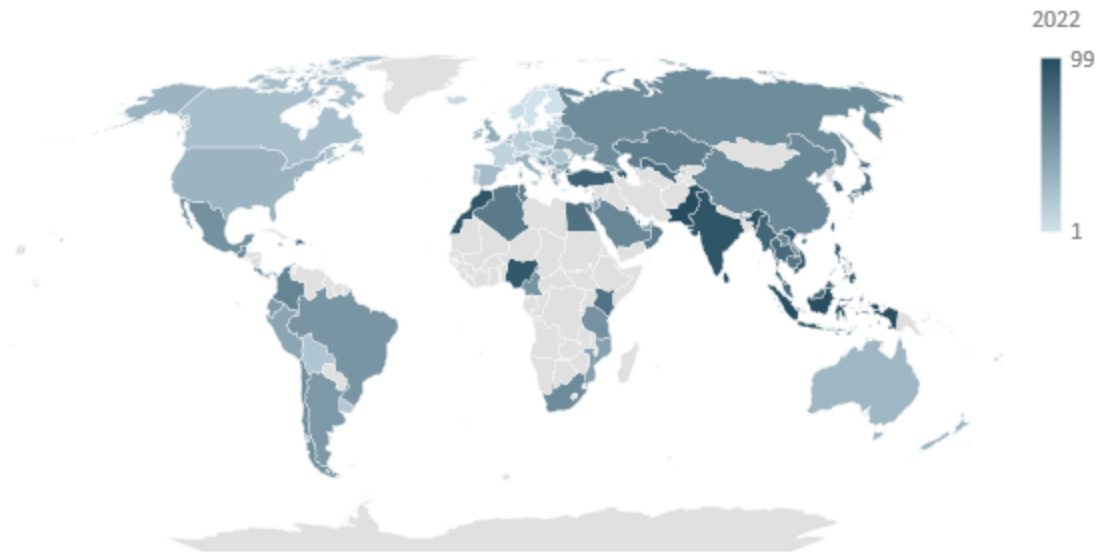
20%



Leaders in Sustainable Transformation

Europe leads the way in sustainable travel transformation

Sustainable Travel Index, Ranking 2022



#1 to 17

Top positions dominated by
Europe

1

Sweden

Powered by Bing
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Source: Euromonitor International
Note: Rank 1 = best performing

Sweden tops the leader board

- Green and eco-chic travel experiences
- Forests, lakes, Arctic adventures, foraging, indigenous Sami culture, oyster safaris, Northern Lights to timber rafting
- Nature's Best eco-tourism charter
- 23 eco-cities
- 30 National Parks

Top 20 Countries in the Sustainable Travel Index 2022

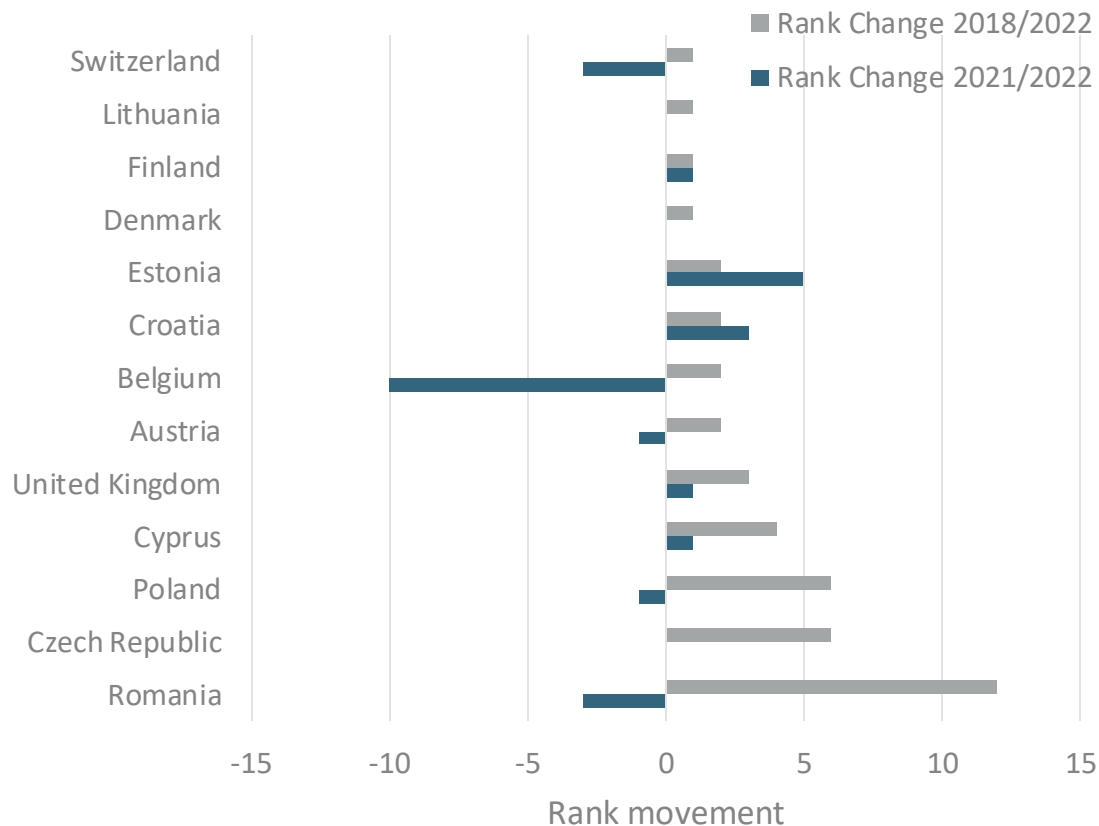
Sustainable Travel Index 2022

Country	2017	2022	Rank Change 2021/2022	Rank Change 2017/2022
Sweden	2	1	▲ 0	▲ 1
Finland	3	2	▲ 1	▲ 1
Austria	5	3	▼ -1	▲ 2
Estonia	7	4	▲ 5	▲ 3
Norway	4	5	▲ 1	▼ -1
Slovakia	1	6	▼ -1	▼ -5
Slovenia	6	7	▼ -3	▼ -1
Iceland	8	8	■ 0	■ 0
Latvia	10	9	▲ 1	▲ 1
Switzerland	12	10	▼ -3	▲ 2
France	9	11	■ 0	▼ -2
Lithuania	13	12	■ 0	▲ 1
Denmark	11	13	■ 0	▼ -2
Czech Republic	16	14	■ 0	▲ 2
Germany	14	15	■ 0	▼ -1
Portugal	22	16	▲ 1	▲ 6
Croatia	18	17	▲ 3	▲ 1
Uruguay	35	18	▲ 15	▲ 17
Romania	26	19	▼ -3	▲ 7
Bolivia	20	20	▲ 4	■ 0

Source: Euromonitor International

Note: Rank 1 = best performing, shows position movement over the short and long term

Most Improved Rank Performance for Europe in the Sustainable Travel Index 2017/2022



#19

Romania moves up 12 positions
to no 19 over 2018/2022

-10

Belgium drops 10 places over
2021/2022 to #28

Madrid, Seville and Stockholm top the Sustainability Pillar of Top Cities

Top 100 City Destinations Index

CHOOSE DASHBOARD ▼

Overview

Map View

Compare Cities by Pillars

View Cities by Ranking

Methodology

Regions

(Multiple values) ▼

Countries

(All) ▼

Pillar

Sustainability ▼

Year

2022 ▼

Rank

1-20

○

Cities Ranking 1-20 in 2022

Pillar	Cities	Countries	
Sustainability	Madrid	Spain	2
	Seville	Spain	3
	Stockholm	Sweden	4
	Tallinn	Estonia	5
	Palma de Mallorca	Spain	7
	Lisbon	Portugal	9
	Munich	Germany	10
	Valencia	Spain	11
	Frankfurt am Main	Germany	12
	Berlin	Germany	13
	Porto	Portugal	15
	Nice	France	16
	Vienna	Austria	17
	Brussels	Belgium	18
	Dublin	Ireland	19

Amsterdam

- Amsterdam turned its back on destination marketing a few years back
- Focus on creating a cleaner, greener and happier liveable city for residents through its Amsterdam Smart City platform
- Launched the crowd monitoring project, “Public Eye” - AI to navigate large flows of people to ease congestion

Resident-first approach

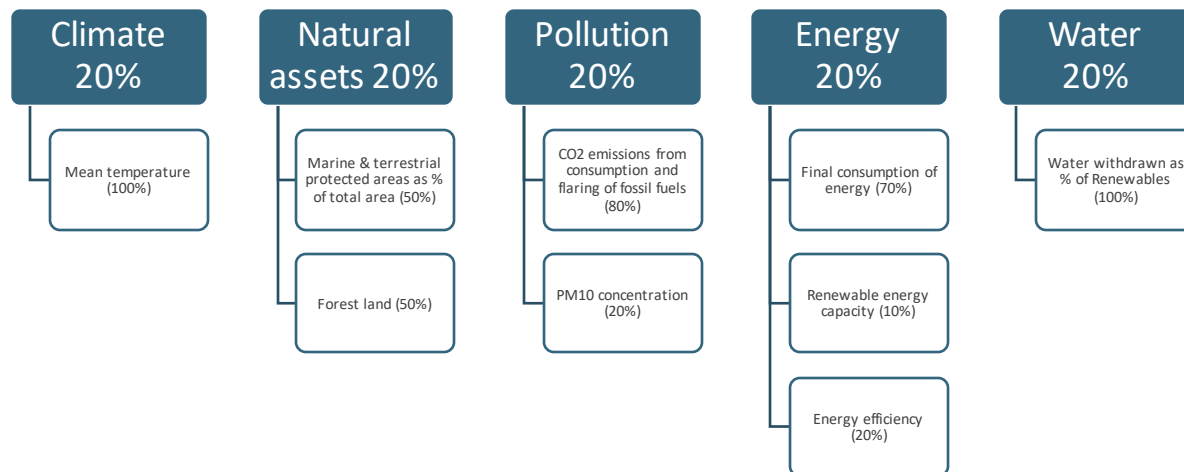
Goal to achieve carbon neutrality by 2050

Reduce emissions by 55% by 2030 and by 95% by 2050



Destination Performance

Environmental sustainability - weightings



Environmental sustainability

- **Croatia:** 2nd in the environmental sustainability pillar after Mozambique
- **Cyprus:** moves up 18 places to #38
- **Spain:** drops 18 positions over 2018/2022

Pillar 1 - Environmental Sustainability

Country	Rank 2022	Rank Change 2021/2022	Rank Change 2018/2022
Croatia	2	↓ -1	→ 0
Latvia	11	↑ 5	↑ 3
Estonia	16	↑ 8	→ 0
Sweden	18	↓ -7	↓ -6
Georgia	19	↑ 15	↑ 17
Lithuania	21	↑ 1	→ 0
Finland	29	↑ 2	↑ 3
Slovenia	32	↓ -17	↓ -10
Greece	33	↑ 12	↑ 7
Slovakia	34	↓ -13	↑ 3
Austria	35	↓ -25	↓ -4
Portugal	37	↑ 3	↓ -12
Cyprus	38	↑ 23	↑ 18
Hungary	39	↓ -6	↑ 5
Belarus	43	↓ -4	↑ 23
Romania	45	↓ -22	↓ -6
Denmark	47	↓ -9	↑ 12
Poland	48	↑ 4	↑ 20
Norway	49	↓ -7	↓ -14
Switzerland	51	↓ -33	↑ 7

Source: Euromonitor International

Note: Rank 1 = best performing, shows position movement over the short and long term

Croatia tackling over-tourism

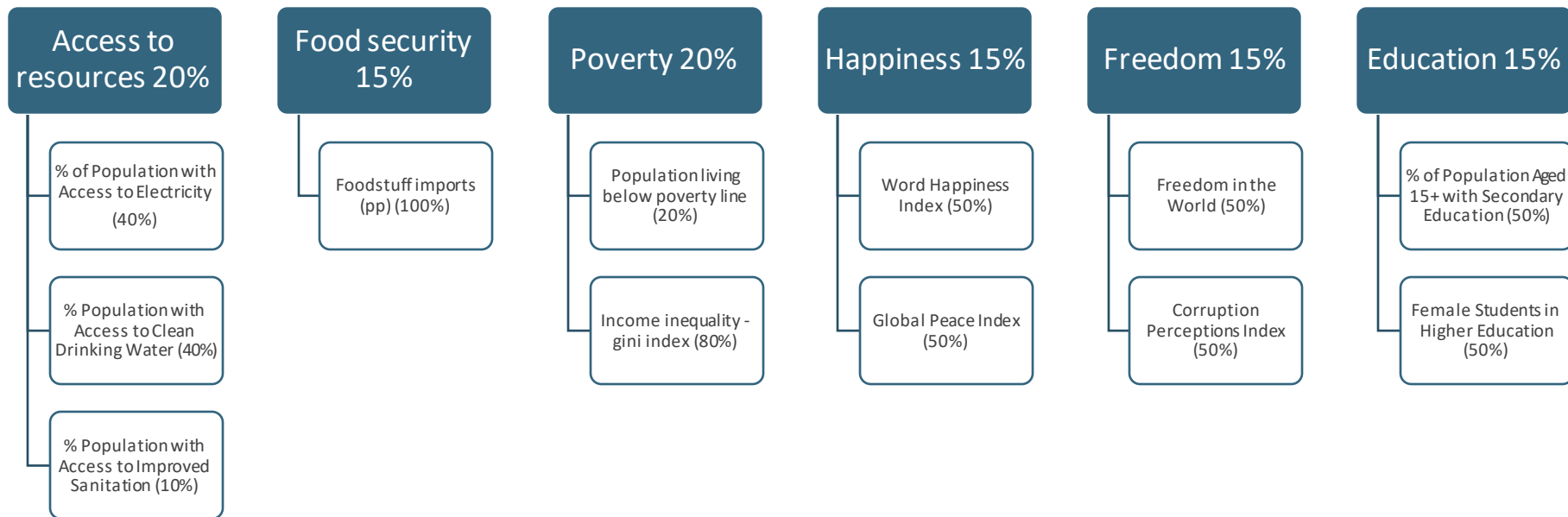
1,140 thousand international arrivals to
Dubrovnik, 2023

USD71 million visitor spending on national
parks, 2028

Source: np-plitvicka-jezera.hr

- Croatia is the only advanced market in the top 15 of the environmental pillar of the Sustainable Travel Index
- According to the SGI Network, 28.5% of the country's energy comes from renewables, above the 19% average for the EU
- 34.7% of its land is forest and it aims to have no deforestation by 2030, as well as phasing out coal by 2033
- 23.7% of the country's marine and terrestrial areas is protected, including eight national parks, among which Plitvice Lakes is the most famous with its own app

Social sustainability pillar - weightings



Pillar 2 - Social Sustainability

	Rank 2022		Rank Change 2021/2022		Rank Change 2018/2022
Austria	1	↑	1	↑	1
Poland	2	↓	-1	↑	2
Czech Republic	3	→	0	→	0
Iceland	4	→	0	↓	-3
Denmark	5	→	0	→	0
Finland	6	→	0	↑	4
Switzerland	8	↑	2	→	0
Hungary	9	↓	-1	↓	-3
Slovakia	10	↑	1	↑	1
Norway	11	↑	5	↓	-2
Italy	12	↓	-5	↑	5
Slovenia	14	↑	1	→	0
Estonia	15	↑	2	→	0
Netherlands	16	↑	5	↑	2
France	17	↓	-5	↓	-5
Germany	18	↑	2	↑	1
United Kingdom	19	↓	-5	↓	-6
Romania	20	↓	-2	↑	4
Sweden	21	↑	5	↓	-1
Croatia	22	↓	-3	↑	3

Identify opportunities for positive social impacts

- **Austria:** tops the social sustainability pillar
- **Portugal and Georgia:** make biggest improvements over 2018/2022
- **UK:** drops six places to rank #19
- **Turkey:** at bottom of the ranking #70

Source: Euromonitor International

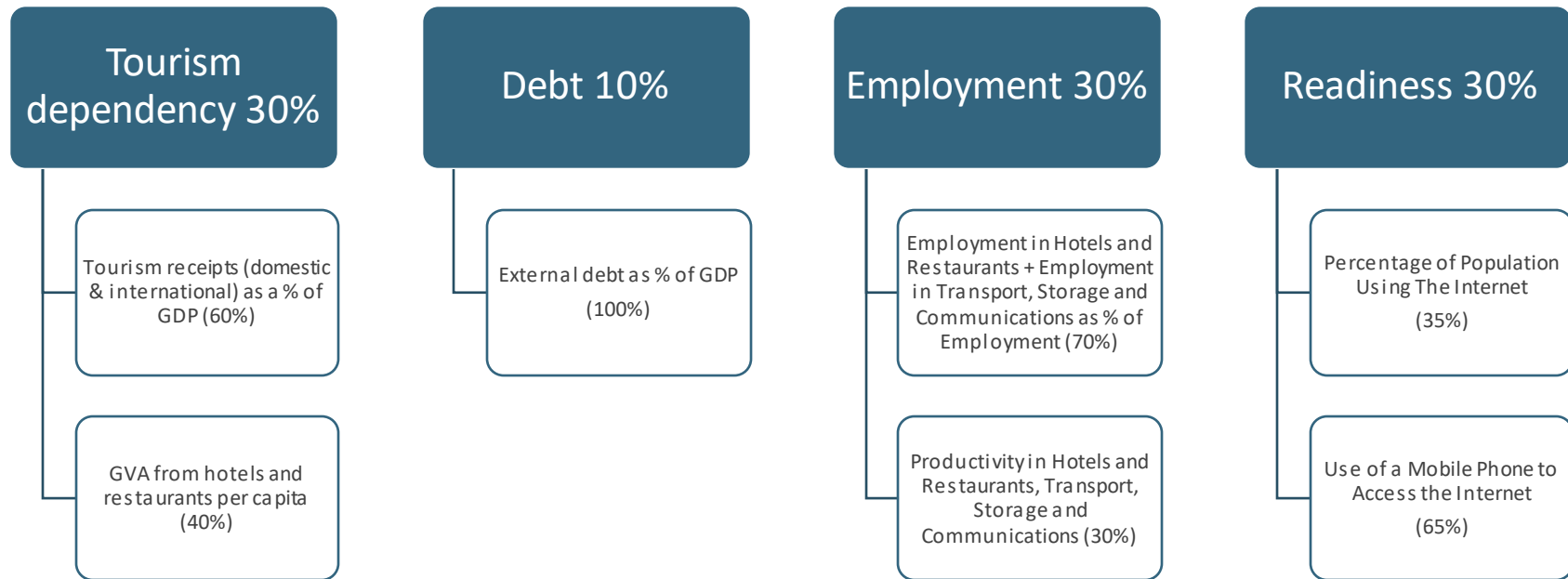
Note: Rank 1 = best performing, shows position movement over the short and long term

- Planeterra is an NGO, and the philanthropic arm of G Adventures, connecting travellers with positive social impact projects through its 454 community tourism partners
- In Naples, Italy, Planeterra partners with Casba Social Cooperative that runs MigrantTours
- Provides a more inclusive perspective for locals as much as for visitors to explore the local city by foot
- The company reports that eight guides are employed and it benefits 24 community members.
- Europe is facing the biggest migration crisis since World War II, and the need for integration is being accelerated by the work of Planeterra partners

Social impact

Planeterra's Global Tourism Community Network provides practical advice to those that need it

Economic sustainability pillar - weightings



Pillar 3 - Economic Sustainability

Country	Rank 2022	Rank Change 2021/2022	Rank Change 2018/2022
Spain	1	⇒ 0	↑ 2
Cyprus	3	⇒ 0	↑ 3
Iceland	4	↓ -2	↓ -3
Austria	9	↓ -3	↑ 3
Croatia	11	↓ -2	↑ 3
Greece	13	↑ 1	↑ 5
United Kingdom	14	↑ 2	↑ 8
Estonia	21	↓ -1	↓ -8
Sweden	22	↓ -1	↑ 3
Netherlands	24	↓ -1	↓ -1
France	26	⇒ 0	↑ 7
Norway	28	↓ -3	↑ 10
Ireland	29	↓ -1	↓ -12
Switzerland	33	↓ -4	↑ 13
Denmark	35	↓ -2	↓ -3
Italy	36	↓ -2	↑ 8
Czech Republic	37	↓ -5	↑ 3
Portugal	38	↓ -3	↓ -12
Finland	42	↓ -18	↓ -14

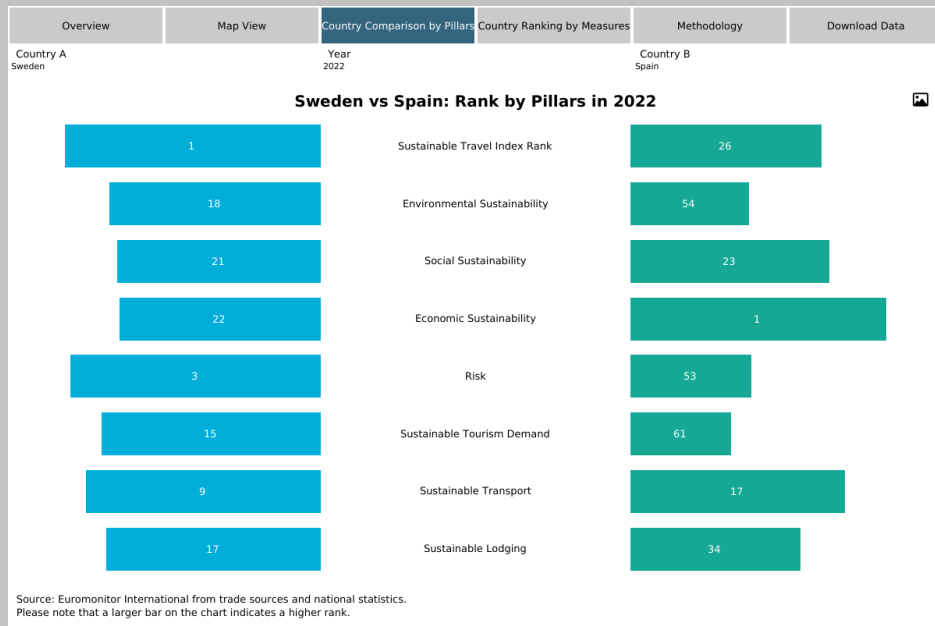
Economic sustainability

- **Spain:** top of the ranking for economic sustainability
- **Switzerland:** best performer moving up 13 places
- **Finland:** dropped the most places (14) to rank #42

Source: Euromonitor International

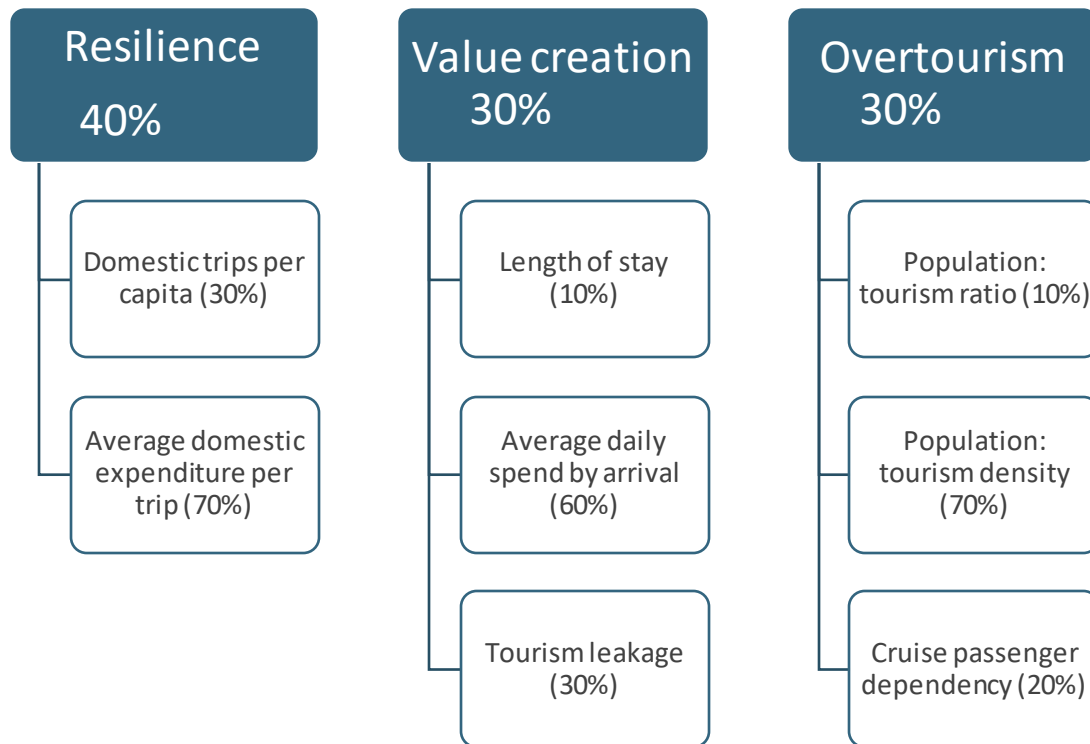
Note: Rank 1 = best performing, shows position movement over the short and long term

Spain



- Travel and tourism is a fundamental pillar of Spain's economy, with already 2019 pre-pandemic inbound tourism spending of USD101 billion forecast in 2023, whilst arrivals are due to exceed peak levels by 2024
- The country's Sustainable Tourism Strategy 2030 lays out its objectives for a sustainable and digital transformation focused on quality, diversification of source markets, enhanced competitive capacity, developing new segments such as inland tourism away from beach and sun
- Aim to mitigate negative impacts such as over-tourism and dependency on peak season travel
- Spain is overly dependent on intra-regional visitors but actively looking to higher spend, long haul markets in North Asia, Middle East and the Americas
- From 2024, the ETIAS visa waiver system will be introduced working in conjunction with the EES (Entry/Exit System) and visa free countries will still need to apply for this form that is valid for three years

Sustainable tourism demand - weightings



Pillar 5 - Sustainable Tourism Demand

	Rank 2022		Rank Change 2021/2022		Rank Change 2018/2022
Iceland	2	➡	0	⬇	-1
Norway	4	⬇	-1	➡	0
Finland	7	⬆	3	⬇	-1
Slovenia	14	⬆	2	⬆	5
Sweden	15	⬇	-1	⬇	-8
Slovakia	18	⬆	6	⬇	-1
Switzerland	20	⬇	-2	⬇	-4
Belgium	23	⬇	-6	⬇	-5
Germany	24	⬇	-1	⬇	-4
Czech Republic	27	⬆	6	⬆	12
Serbia	28	⬆	18	⬆	3
Netherlands	30	➡	0	⬇	-5
Latvia	32	⬆	2	⬆	6
Portugal	34	⬇	-9	⬇	-5
Romania	35	⬆	2	⬇	-1
Italy	37	⬇	-1	⬇	-4
Austria	38	⬆	4	⬇	-6
France	41	➡	0	⬇	-13
Lithuania	44	⬇	-17	⬆	1
Ireland	45	⬇	-5	⬇	-5

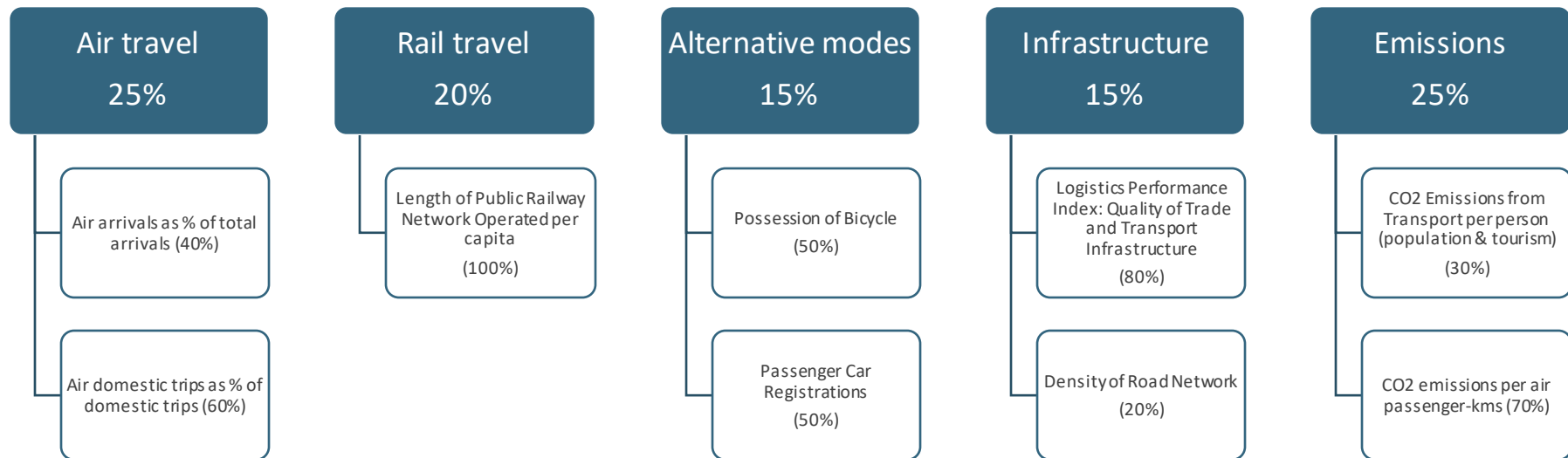
Sustainable demand, balancing needs of communities

- **Iceland:** best performing in Europe for sustainable tourism demand at #2
- **Denmark:** drops 18 places over review period to #85
- **Croatia:** moves up 13 places to #80

Source: Euromonitor International

Note: Rank 1 = best performing, shows position movement over the short and long term

Sustainable transport - weightings



Pillar 6 - Sustainable Transport

	Rank 2022	Rank Change 2021/2022	Rank Change 2018/2022
Hungary	1	⇒ 0	↑ 2
Slovakia	2	↑ 4	↓ -1
Austria	3	⇒ 0	↓ -1
Croatia	4	↓ -2	↑ 5
Czech Republic	5	↑ 3	↑ 1
Estonia	6	↑ 1	↓ -2
Bulgaria	7	↓ -2	↓ -2
Denmark	8	↑ 3	↑ 9
Sweden	9	↑ 1	↑ 6
Slovenia	10	↓ -1	↓ -3
Poland	11	↓ -7	↑ 3
Finland	12	⇒ 0	↓ -2
Latvia	13	↑ 1	↓ -5
Greece	14	↑ 3	↓ -2
Portugal	15	↑ 4	↑ 3
Ireland	16	↑ 4	↓ -3
Spain	17	↑ 6	↑ 7
France	18	↓ -3	↑ 1
Netherlands	19	↑ 2	↑ 7
Romania	20	↓ -2	↑ 5

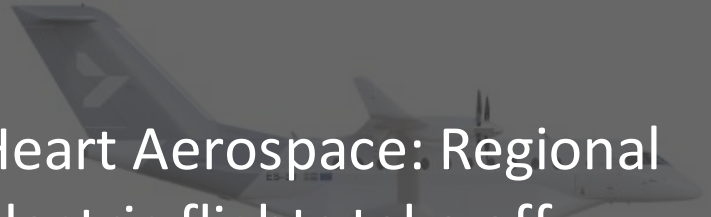
Sustainable transport

- **Hungary**: #1 in the sustainable transport pillar
- **Italy**: fastest mover, up 13 places to #28

Source: Euromonitor International

Note: Rank 1 = best performing, shows position movement over the short and long term

- The company's mission is to “create the world's greenest, most affordable and accessible form of transport”
- The company partners with major players such as United Airlines and Air Canada
- The ES-30's range will carry up to 30 passengers for 200km, with up to 800km possible for 25 passengers and will produce net zero emissions thanks to its battery-powered engines
- It is working with the Åland Islands as a test case



Heart Aerospace: Regional electric flights take off

Swedish start-up that is aiming to electrify regional flights with its ES-30 electric aircraft

Electrifying aviation is not a silver bullet; however, it can be transformational especially for short-haul flights

- Schiphol is one of hundreds of airports that have signed up to be net zero aiming for 2030, ahead of the ACI deadline of 2050
- Leveraging the next generation of energy technology and digitalisation will help Schiphol to achieve its future vision
- Key to the airport's transformation are transition to sustainable synthetic fuel, improved aerodynamic aircraft, producing more electricity than is needed and use of wind, thermal and solar
- Getting to and from the airport will be facilitated by electric public transport, self-driving EV taxis or drone, along with a planned hyperloop to major cities

Net zero airport: Schiphol aims for 2030

Hyperloop uses 10x less energy than road/air

Source: Hardt

41.5 million passengers at Schiphol Airport
2022

- Norway has taken some bold steps in protecting its coastal waters and the biodiversity of its fjords, with a ban on carbon emissions in 2026, following the global ban on sulphur in 2020
- Government-backed schemes like Hav Hydrogen's FreeCO2ast are exploring hydrogen as a way to achieve clean energy. This move could be transformative and enable the country to reduce emissions by over 50% over the period to 2050
- With hydrogen, cruise ships will go a step beyond the electric ferries like Fjord1 already operating short journeys of 30 minutes, with charging infrastructure at each embarkation site. Vision of the Fjords has two electric ferries, carrying 400 passengers
- Large ships, like Havila Krystruten, retrofitted with a fuel cell system and be able to undertake long journeys of 20 hours with zero emissions up to the Arctic from Bergen to Kirkenes

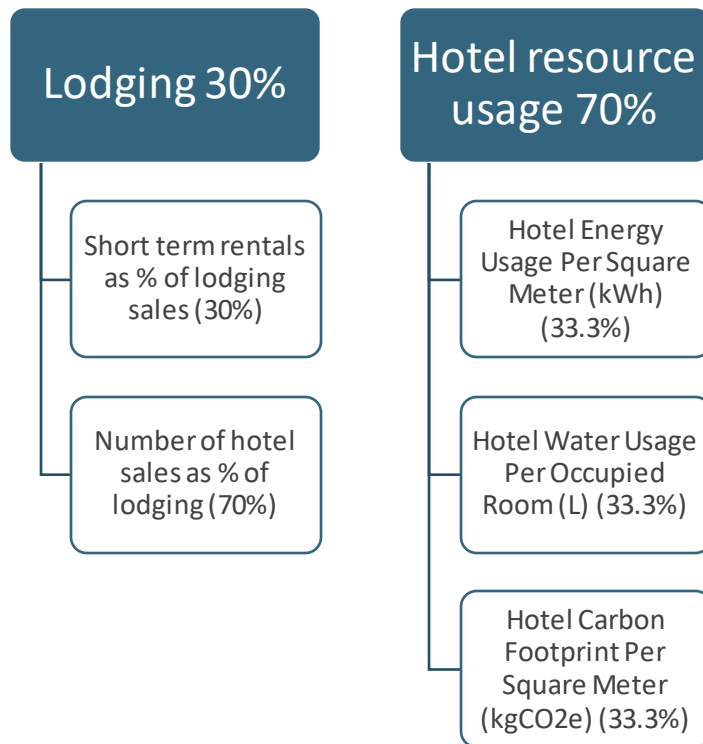
Norway uses hydrogen to protect UNESCO World Heritage fjords

Shipping accounts for 3% of global greenhouse gases

Source: IMO



Sustainable lodging - weightings



Pillar 6 - Sustainable Lodging

	Rank 2022		Rank Change 2021/2022		Rank Change 2018/2022
Denmark	1	⇒	0	↑	2
Lithuania	2	⇒	0	↓	-1
Iceland	4	⇒	0	↑	1
Norway	6	⇒	0	↓	-4
Latvia	7	↓	-2	↓	-1
Estonia	9	↑	2	↑	6
Slovenia	10	↓	-2	↑	2
France	11	↑	3	↑	9
Portugal	12	↑	3	↑	9
Belarus	14	↓	-7	↓	-3
Croatia	15	↑	2	↓	-8
Germany	16	↑	3	↓	-6
Sweden	17	↓	-5	↓	-3
Switzerland	19	↑	2	↑	6
Austria	20	↓	-7	↑	16
Belgium	23	↓	-3	↑	3
Finland	24	↓	-1	↑	8
Slovakia	27	↓	-3	↓	-11
Romania	29	⇒	0	↑	29
Ireland	30	↑	2	↑	17

Decarbonising lodging

Denmark: top of the leader board

Romania: moves up 29 places to #29

Hungary: biggest drops of 37 places to #56

Source: Euromonitor International/Greenview

Note: Rank 1 = best performing, shows position movement over the short and long term

Iberostar

Sharp focus on decarbonisation and nature-based solutions

- Spanish family hotel group, Iberostar, is aligned with the UN's 17 Sustainable Development Goals
- Iberostar is a global leader in sustainability, championing responsible and quality tourism. It aims to be carbon neutral with net zero emissions by 2030, and in 2022 it reduced its carbon footprint by 10%
- It intends to reduce its scope 1 and 2 emissions by 85% and scope 3 by 50% by 2030
- Its recent strategic partnership with IHG will drive profitability as its beach properties will benefit from IHG's distribution and loyalty programme
- It launched its first 100% electric hotel in Spain in March 2023



Key Takeaways



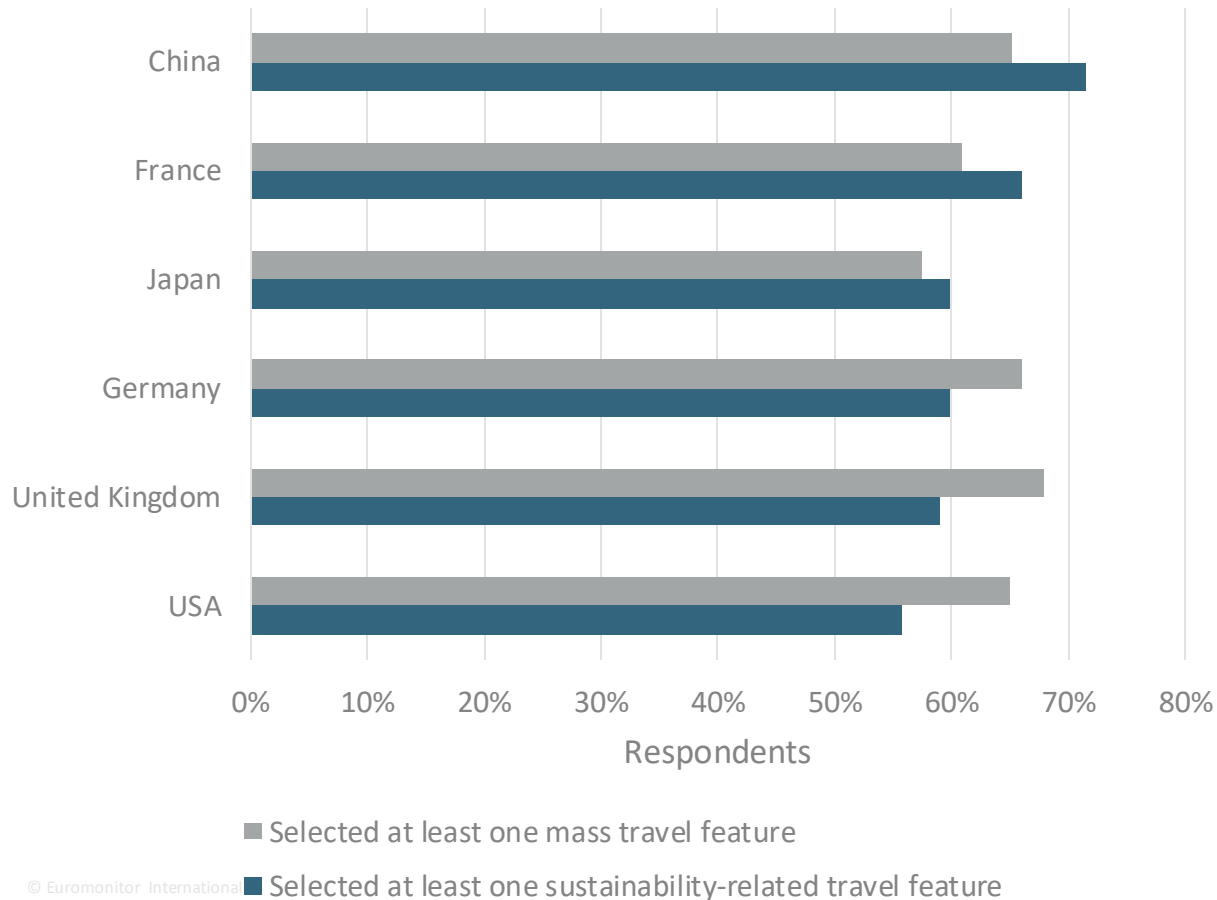
60% of European consumers want to have a positive impact on the environment through their daily lives

61% are worried about climate change

— *Euromonitor International Lifestyles Survey*



Selection of Sustainable vs Mass Market Travel Features 2023



63%

Of consumers globally seek sustainable travel features

73%

Of consumers choose mass market features 2023

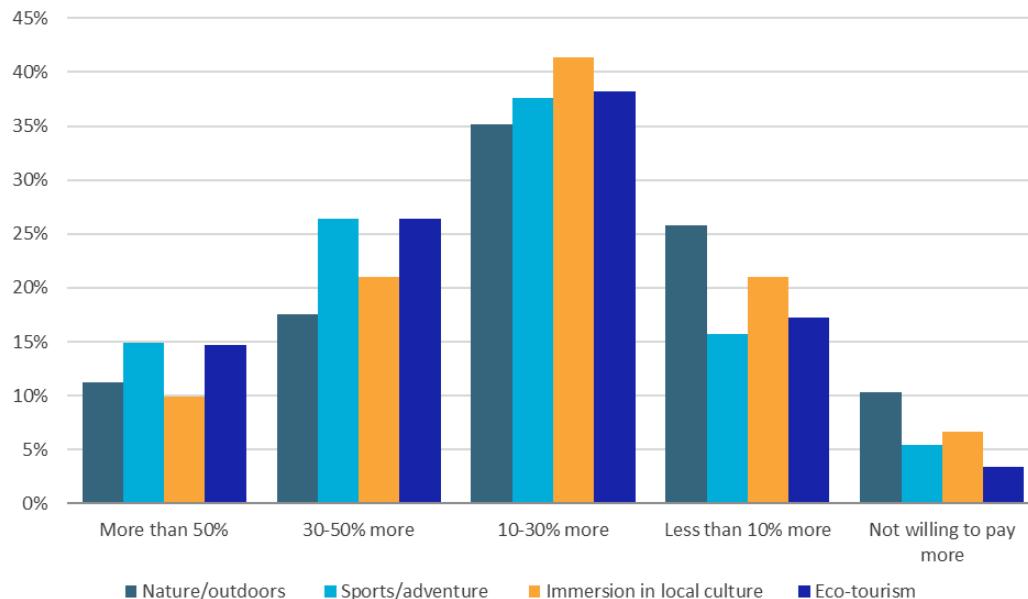
Sustainable travel categorised as:

*Arts and heritage, Immersion in local culture
Nature and outdoor activities, Sports and/or
adventure activities, Volunteer opportunities,
Eco-tourism or sustainable travel options, Quality
of food or dining at destination, Able to reach by
car/train, rather than flying, Self-catering
accommodations*

Consumer willingness to pay more for sustainable travel features

Amount of Willingness to Pay More for Sustainable Travel Features 2023

% of respondents



Source: Euromonitor International – Voice of the Consumer: Lifestyles Survey, fielded in February/March 2023 (n=40,324)

Supporting
destinations in
their sustainable
transition



Focus on critical
areas to drive
positive change



Consumers,
governments and
businesses onboard





Thank you!



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t [@CarolineBremner](https://twitter.com/CarolineBremner)