



Climate Change & Tourism in Europe

EXPLORING THE IMPACT OF CLIMATE CHANGE ON FUTURE TOURISM IN EUROPE

Monday, 11th of March 2024

By Diego Maldonado – Senior International Analyst



dmaldonado@tci-research.com



EUROPEAN
TRAVEL
COMMISSION

Contents

EXPLORING THE IMPACT OF CLIMATE CHANGE ON FUTURE TOURISM IN EUROPE

3

Introduction & Methodology

RESEARCHING CLIMATE CHANGE IN THE CONTEXT OF TRAVEL

21

Sustainability in Reviews

SUSTAINABLE TRAVEL IN GUESTS' WRITTEN REVIEWS

8

Climate Change & Reputation

RELEVANCE & REPUTATION EFFECT OF CLIMATE CHANGE WITHIN TRAVEL

26

Conclusion

THE FUTURE OF TRAVEL IN THE MIDST OF CLIMATE CHANGE

16

Climate Change & Traveller Perception

TRAVELLER CONVERSATIONS ON CLIMATE CHANGE & TRAVEL

29

Annexes

SOURCES PER TYPE OF DATA





Introduction & Methodology

RESEARCHING CLIMATE CHANGE IN THE CONTEXT OF TRAVEL

Background & Objectives

RESEARCHING CLIMATE CHANGE IN THE CONTEXT OF TRAVEL

The **challenges related to climate change**, such as heatwaves, wildfires, and floods, have been **increasingly stressing the need for the travel industry in Europe to adapt**. The summer of 2023 recorded **the highest temperatures on average since 1940**, when weather records began¹. Extreme temperatures and weather patterns were **particularly notable in Mediterranean destinations**, like Greece, Southern Italy, Malta, and eastern Spain², yet were not limited to this European region³.

Over time, these effects are anticipated to **change the patterns of seasonal tourism, shape travellers' decisions** on destinations, and **possibly diminish the allure of warmer tourism destinations** while **increasing the attractiveness of cooler regions in the summer**.

Under the present partnership with ETC, [MMGY TCI Research](#) - a leading DMO-dedicated data-based solution, **sought out to understand the effects that the topic of climate change had on the reputation of European destinations throughout 2023**. Using proprietary **social listening techniques**, as well as the **analysis of written reviews on sustainability**, the effects of climate-change related conversations were studied through their **incidence** in overall conversations on travel, the **polarity** of said conversations, the **qualitative topics** that were frequently mentioned, and the **tone** with which consumer concerns on climate change were placed. While predicting future travel planning behaviour in the midst of climate change is not straightforward, it is expected that the **seasonal demand for some destinations may change** in the long-run, as well as the **demand of their core offer in terms of activities**.

Results indicate that **climate change is a highly polarised topic** in the context of travel, with the **capacity to both dampen and heighten destination reputation** at large very quickly. Finally, **stories and consumer concerns are more severe when they involve hindrances to travel itineraries**, and especially **safety concerns**.

¹ <https://climate.copernicus.eu/summer-2023-hottest-record>

² https://etc-corporate.org/uploads/2023/11/ETC-Quarterly-Report-Q3_Public.pdf

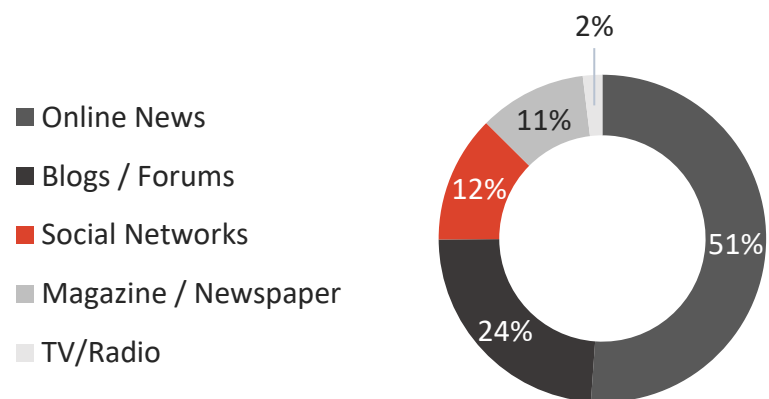
³ <https://www.euronews.com/2023/11/17/extreme-weather-flood-threat-lingers-in-northern-europe>

Sentiment Tracker

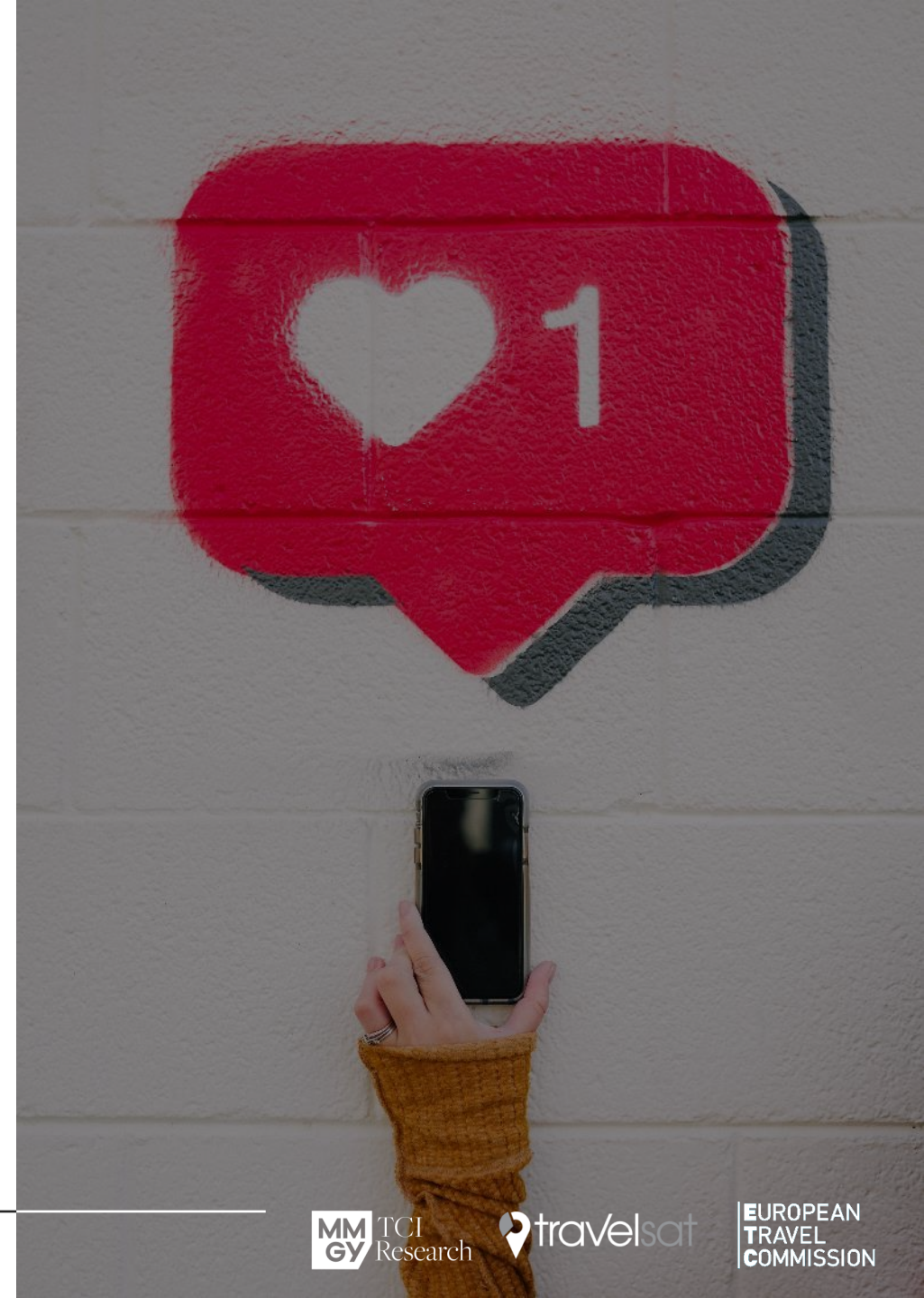
DESTINATION REPUTATION AT LARGE

Analysing online social data

- The “**sentiment**” reflects the **state of travel brands’ online reputation**. These are seen through **online social conversations at a global level**.
- They are shared by differing **media, consumers, companies, citizens, brands and officials on websites, forums, blogs & social networks**.
- While sentiment is not predictive of travellers’ planning, a **positive e-reputation is essential to generate favourability towards destinations** and travel brands, particularly in the planning phase of future travellers.
- Throughout the full year of 2023, **Europe was mentioned 58.8K times in social conversations** in relation to **travel and climate change**, generating **348.3K engagements**, shared by **27.6K unique authors** from **176 countries**.



Note: For a full list of sources, please see appendix A.



Ratings & Reviews

METHODOLOGICAL OVERVIEW

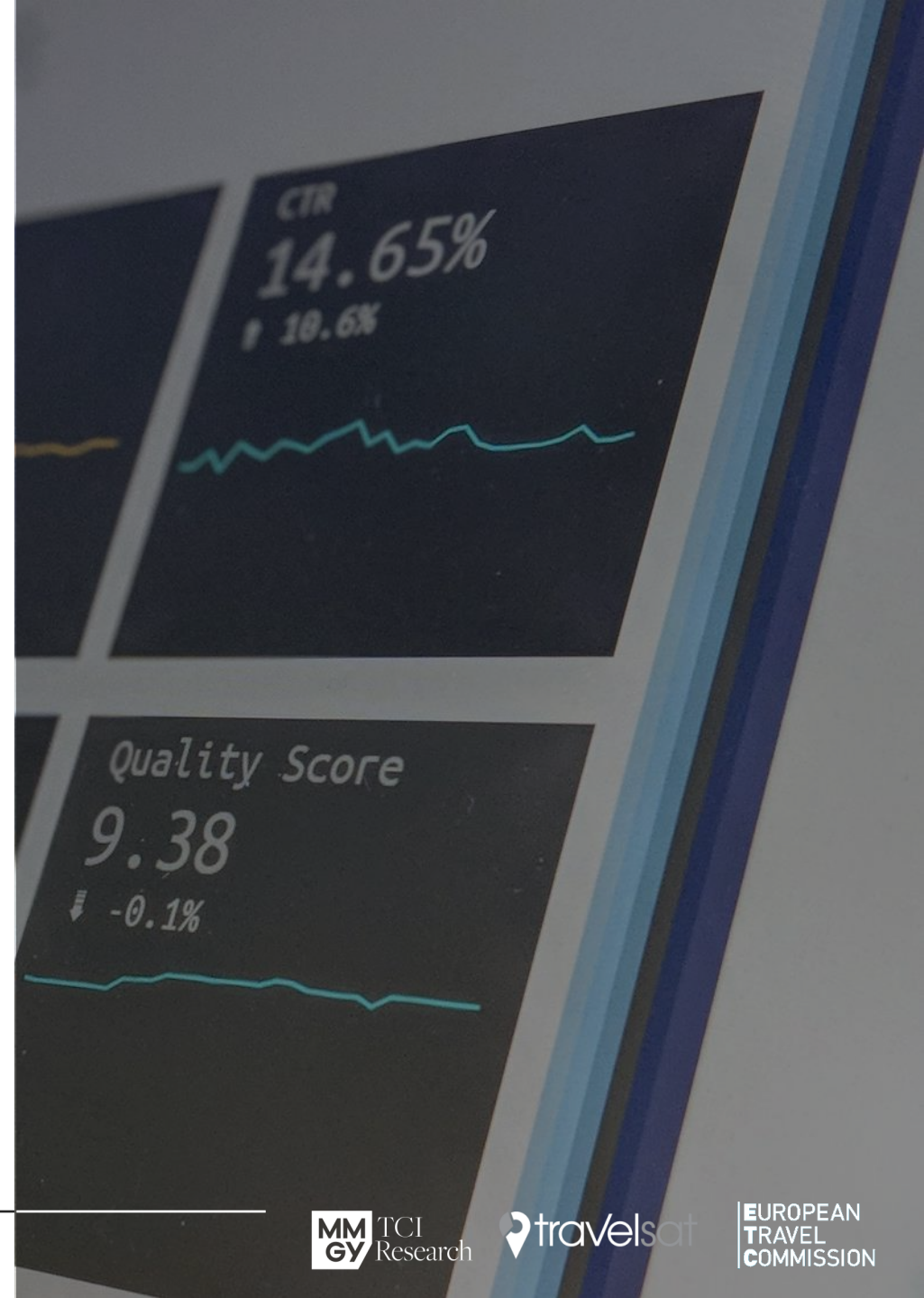
Consolidating ratings and reviews

- TRAVELSAT® Pulse uses a solid **aggregation methodology to consolidate reviews**, both **numerical scores** and **written feedback**, from sources that cater to different aspects of the tourism ecosystem.
- The platform presents all scores through a **consolidated scale of 0-10**. These have been **converted from their original source** and are **weighted to adjust the significance** that each source score has. Analyses are carried out across verticals, markets and guest profiles.

Sentiment analysis technology

- Beyond numerical ratings, **written reviews are also analysed using the most developed sentiment lexicon**. This allows for an analysis of **positive and negative deflections by keywords** by sub-category and guest profile.
- The AI semantic engine **covers 14 languages**: *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish*. However, **ratings and reviews are collected for all sourcing markets** sharing their experience on the rating platforms.

Note: For a full list of sources, please see appendix B.



Scope of Analysis

DEFINING SLOVENIA'S TOURISM ECOSYSTEM

Sample definition & analysis period

- A **sample of the 200 most highly reviewed POIs** in every ETC member destination was selected from its full Trip Advisor inventory to create a **representative picture of Europe's tourism ecosystem**.
- The current report **uses the topic of Sustainable Travel¹ in written reviews** to understand **travellers' perceptions of environmentally-friendly practices in the context of travel**.
- A **one-year period** has been selected for analysis, ranging from **January 1st, to December 31st, 2023**.

Sources connected to TRAVELSAT[®] Pulse

- The sources range from search engines with a review function, such as Google, to complete online travel agencies, like Trip Advisor and Booking.com. Currently having **45 sources connected**, 95% of all experience-based data available online is analysed.
- All rating platforms collect **global data on the same KPIs**, ensuring **accuracy when comparing to other destinations**. Benchmarking data is therefore based on the largest Hospitality Datasets available.

¹ **Sustainable Travel Score**: measures guests' perceptions of environmentally-friendly practices taken by operators, as well as the consideration for the local community.

Note: For a full list of sources, please see appendix B.

Reviews Corpus Analysed

Property Type	Sustainable Travel Mentions (January 1 st , to December 31 st , 2023)
Accommodations	240,213
Attractions	25,809
Total	266,022





Climate Change & Reputation

RELEVANCE & REPUTATION EFFECT OF CLIMATE CHANGE WITHIN TRAVEL

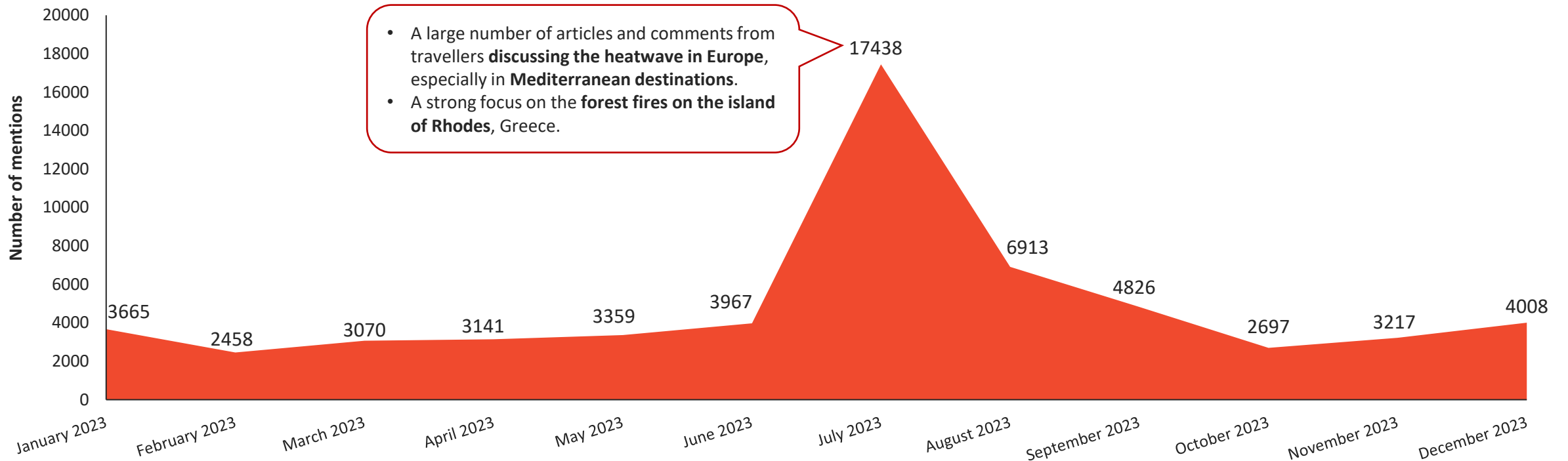


Volume of Conversations

FREQUENCY OF THE CLIMATE CHANGE THEME IN TRAVEL-RELATED CONVERSATIONS

A clear peak in the volume of conversations when safety concerns arise

The **number of mentions** of climate change within the context of travel in Europe had a **relatively stable level throughout most of 2023**, demonstrating a **clear peak during July**. While conversations on the effects of climate change **began to pick up during June** due to concerns over **heatwaves** and **droughts**, it was the **occurrence of the wildfires on the island of Rhodes** and the **safety concerns** surrounding the situation that **made the volume on the topic drastically increase in July**. Although the topic lost some traction in the succeeding months, stories on **floods**, **droughts**, and more forest fires **maintained its relevance in August and September**.

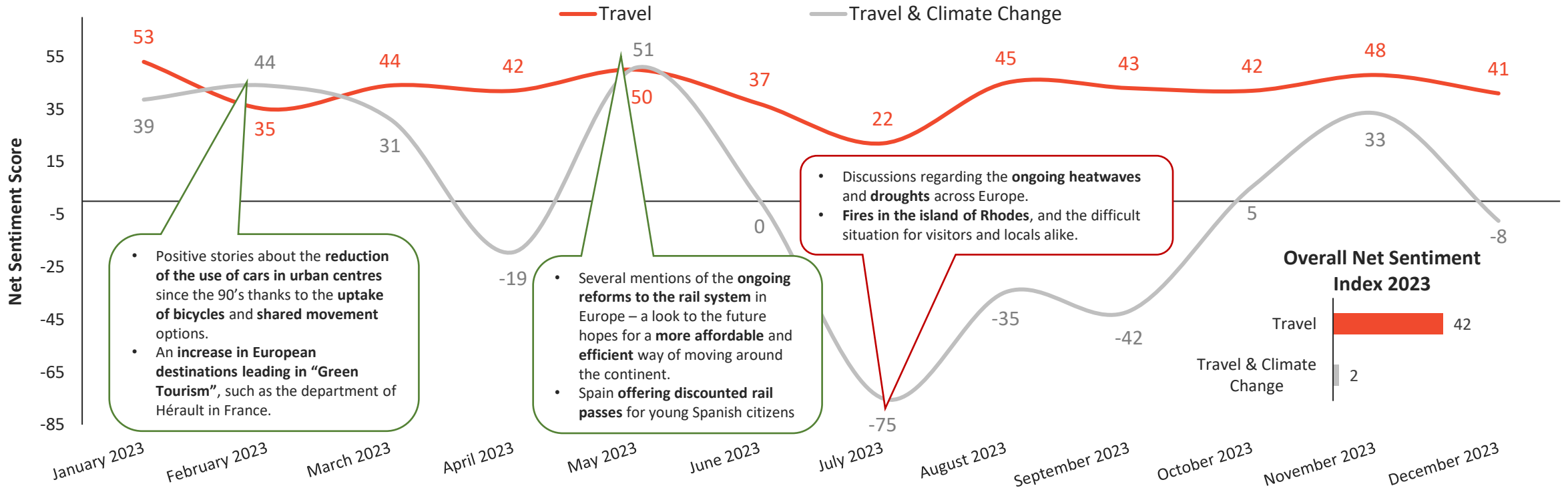


Net Sentiment Index

TRENDS FOR EUROPEAN TRAVEL ONLINE REPUTATION & CLIMATE CHANGE

A topic with a highly polarising effect on online destination reputation

Comparing the polarity of conversations about travel in Europe to those which include climate change as well, **the latter held an intrinsically more negative score in 2023**. At the same time, a view at the scores per month shows that **the topic of climate change was highly polarised, fluctuating from negative scores to positive ones in the span of a single month**. **February and May 2023** had scores in travel conversations **that surpassed those of the travel topic without the inclusion of climate change**, notably with stories around the **increase of “Green Tourism” initiatives**, and a **future outlook to the development of sustainable transportation options**.



Most Affected Destinations

TOP THREE DESTINATIONS AFFECTED BY THE TOPIC OF CLIMATE CHANGE

The Mediterranean as the European region most affected by the topic of climate change

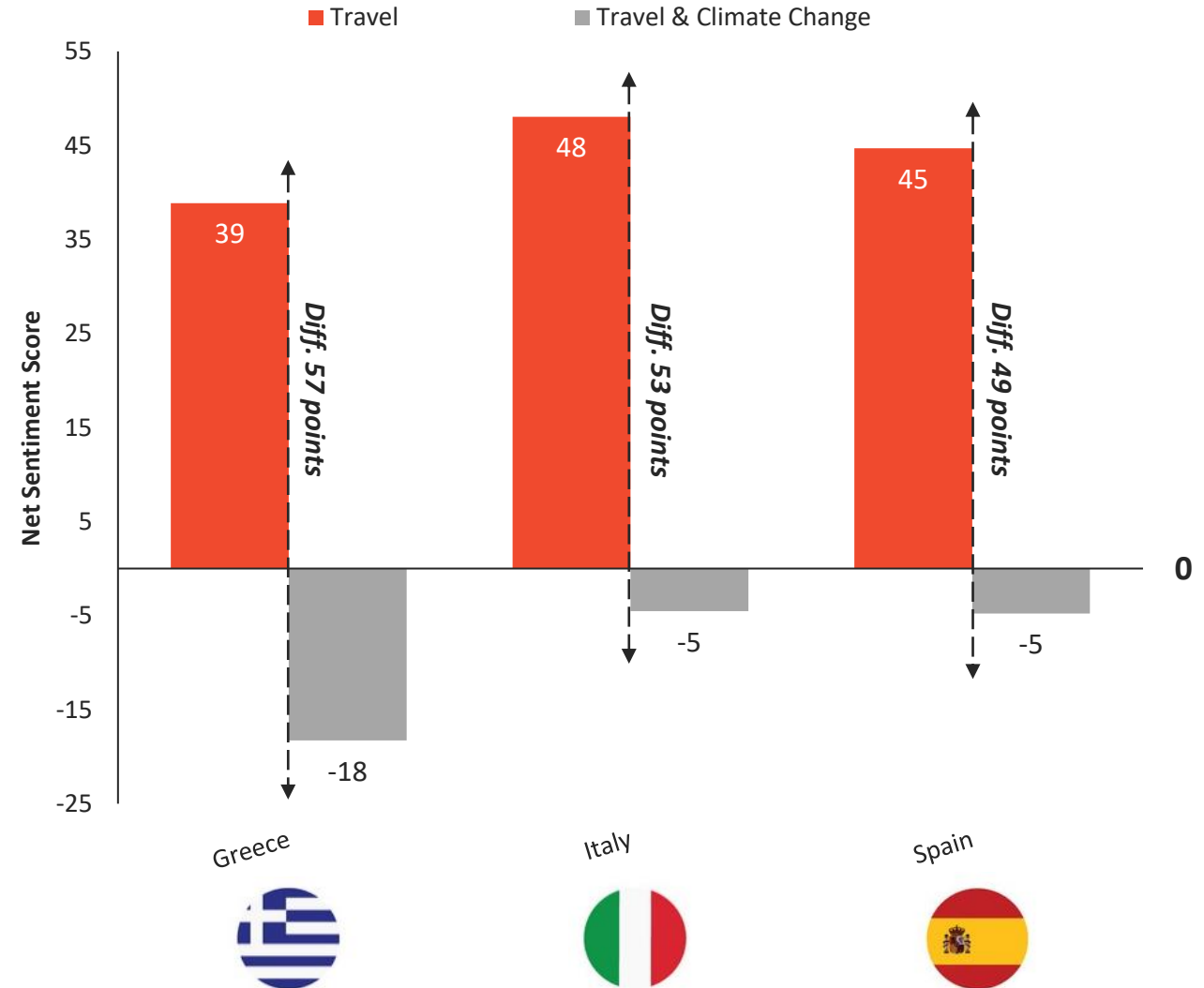
Greece, Italy, and Spain were most affected in terms of polarity by the topic of climate change within travel in 2023. Being also some of the warmest and most visited European destinations during summer, stories on the effects of climate change focusing on them were plentiful.

The effect of adding the topic of climate change within travel on each destination's reputation is noted firstly through its polarity level, with the net sentiment score dropping to levels that are more negatively polarised overall.

Greece had the lowest score for the full span of 2023. Coverage of the fires on the island of Rhodes, as well as the subsequent floods in September 2023, had a strong effect on its reputation in online conversations.

Italy and Spain shared the same polarity level when the topic of climate change is introduced, having had similar issues such as droughts, heatwaves, and forest fires. However, the content did not contain the level of focus on safety issues that it did in Greece.

At a second level, the difference in polarity between travel conversations alone and travel conversations with climate change was also highest for the three destinations. Greece sees a fall of 57 points, followed by Italy at 53 points, and finally Spain at 49 points.



Period of analysis: January 1st, to December 31st, 2023.

Positive Sentiment Drivers

STORIES REFLECTING POSITIVE SENTIMENT TOWARDS CLIMATE CHANGE

Although the topic of climate change within travel was often negatively polarised, **some content benefitted destination reputation**. In particular, **destinations which naturally offer an escape from heat**, such as mountains and northern European destinations, **increasingly obtained a spotlight**. Other stories that garnered positive sentiment included **pan-European projects that promote sustainable travel**. This was both in the **means of transportation used to travel to and within a destination**, and **through sustainable activities**, like restaurants that operate through subsidised local city farming and food sharing initiatives. Finally, some **destinations were put forth for their own sustainable actions**, attempting to **deter further decay of their environment**, **offer relief from heat** during the summer, and **optimise the use of crucial resources**.

Examples of positive reputation drivers

- Several European destinations **recommended to escape the heat** in 2024, including the **Albanian Alps**, **Belfast** in Northern Ireland, **Galloway** and **Southern Ayrshire** in Scotland, **Nordland** in Norway, **North Yorkshire** in England, **Saimaa** in Finland, and **Tartu** in Estonia.
- Travel and rental companies are seeing an **increased interest in northern and Scandinavian destinations among summer holiday renters**, including **Norway, Finland, Sweden, Iceland, Scotland, Latvia**, and **Estonia**.
- A **revival of Europe's railways**, in particular **sleeper trains**. Companies like **Austrian rail operator ÖBB** and the **European Sleeper** presented for rolling out new train routes.
- **City farming** and **food sharing** in Europe is growing, with **Poland** and the **Netherlands** leading on this front through an EU-funded project. The **integration of such initiatives holistically within a destination**, by offering a majority of accommodations, activities, and restaurants revolving around sustainability, can be a strong driver of reputation.
- The **transformation of the Seine into a swimmable river** in Paris for locals and visitors as a plan against the warming effects of climate change.
- **Seville** in Spain, **Paphos** in Cyprus, and **Kranj** in Slovenia named for their innovative sustainable projects that **improve visitor mobility, optimise water consumption, maintain beach water quality, and increase consumption of locally-sourced products**.

Period of analysis: January 1st, to December 31st, 2023.

Illustrative Social Posts

STORIES REFLECTING POSITIVE SENTIMENT TOWARDS CLIMATE CHANGE



5 of the best places to swim outdoors in Paris

vivian song created a post

The transformation of the Seine is also part of Mayor Anne Hidalgo's battle plan against the warming effects of **climate change**. Last year, the mercury broke the 40°C (104°F) threshold in Paris and by 2050, it's estimated that the city will face...

published on 25/07/23 at 23:58 | Magazine | Australia | www.lonelyplanet.com



Three European cities of innovation and what they're doing to build a better future

laura holt created a post

As a city that's feeling the effects of **climate change**, with summer temperatures soaring, Seville is also involved in ... lives of endangered olms, **Europe's** only cave-dwelling vertebrate. **Visitors** keen to try local food can join the Kranj Long...

published on 08/10/23 at 09:00 | Magazine | United States | www.nationalgeographic.com



The green shoots of urban agriculture | Research and Innovation

anthony king created a post

...in **Europe**. Volunteers collect perishable food left at the end of market day to cook soup, offering it to **tourists** and ... contribute to crises including malnutrition, **climate change**, biodiversity loss and resources scarcity. The framework brings...

published on 13/10/23 at 13:09 | TV/Radio | Belgium | ec.europa.eu



The 30 best destinations to visit in 2024

rory goulding created a post

...stars of Lima. **EUROPE** Albanian Alps, Albania A wild escape in **Europe's** rising star **Travellers** on the hunt for something ... Atlantic Way has become one of **Europe's** most exciting road **trips**, not least because it ticks off some of Ireland's most...

published on 31/10/23 at 10:30 | Magazine | United States | www.nationalgeographic.com



The Asturian who has recovered a hydraulic mill that is more than three centuries old and has...

Mónica R. Goya created a post

...towards the future with concern about **climate change**. "This summer there was very little water, I couldn't grind. Maybe with a... offers shipping to **Europe** and the United States. In the 18th century, Jovellanos described this **hacienda** of... translated by google

published on 29/10/23 at 05:28 | Online News Other | Spain | El País

Period of analysis: January 1st, to December 31st, 2023.

Negative Sentiment Drivers

STORIES REFLECTING **NEGATIVE** SENTIMENT TOWARDS CLIMATE CHANGE

Heatwaves and droughts made up the majority of negative content, as well as their **repercussions on the quantity of snow** in ski stations and **water in lakes**. Specific **destinations**, as well as entire **regions**, were **placed in lists of destinations that are not recommended** due to the effects of climate change. In some cases, **holidaymakers cancelled their travel plans**, and those who did travel saw themselves **limited in their capacity to enjoy the destination**. Finally, **a reduction in the interest for Mediterranean destinations was also noted by travel operators** in comparison to previous years.

Examples of negative reputation drivers

- Concerns around **Europe facing a growing water crisis** as **winter droughts worsen**, finding scenes of empty lakes in March unprecedented.
- **Calanques National Park** and the **Etretat Cliffs** named among a **list of 10 destinations to not visit due to the changes caused by climate change**.
- A Dutch news article **warning holidaymakers from the Netherlands that it is uncomfortably hot in the south of Europe**, and that it will be much cooler in the Netherlands.
- **Holidaymakers from Britain cancelling their travel plans to southern Europe** amidst the Cerberus Heatwave. Those who did not cancel expressed **having had to stay in their rooms most of the day**.
- **New travel insurance policies** offering travel planners the **possibility to get their money back on planned itineraries if temperatures rise above 40 degrees**.
- Several **ski centres in Europe closing down due to a lack of snow**.
- A London-based travel operator explains that they have seen a **shift in interest from travellers hoping to avoid the summer heat**, citing that **intention to visiting the Mediterranean dropped by 10% from June to November in 2023**.

Period of analysis: January 1st, to December 31st, 2023.

Illustrative Social Posts

STORIES REFLECTING **NEGATIVE** SENTIMENT TOWARDS CLIMATE CHANGE

BFM TV.

Tourism: two French places are among the ten tourist destinations to avoid

timothée talbi created a post

...significantly to **climate change** [...] As **climate change** intensifies, the damage... translated by google  



published on 29/01/23 at 14:25 | TV/Radio | France | www.bfmtv.com

rtlnieuws

On holiday in Europe ? 'It will be very hot, with temperatures up to 47 degrees'

bron rti nieuws created a post

...had already found it warm for weeks in the Netherlands and is going on **holiday** in **Europe**, he has to wet his chest - perhaps literally. On... Make your voice heard! You can register here. If we don't do anything about **climate change**, heat will continue to shift to... translated by google  




published on 11/07/23 at 12:19 | Online News Other | Netherlands | www.rtinieuws.nl

itv NEWS

itvnews created a post

If you're planning on going on **#holiday** but were worried about the extreme heat, one **#insurance** company is hoping to **change** that. **#ITVnews #europe #news #summer #greece #italy #heatwave #climatechange #globalwarming**



published on 31/07/23 at 16:35 | TikTok | United States | tiktok.com

The Guardian

'Very precarious': Europe faces growing water crisis as winter drought worsens

Jon Henley in Paris, Sam Jones in Madrid, Angela Giuffrida in Rome, and Philip Oltermann in Berlin created a post

...more likely because of human-caused **climate change**, warning that such extreme periods would become increasingly common with ... drought was caused by anthropogenic **climate change** and this winter's showed "the same characteristics". Local authorities...

published on 04/03/23 at 07:00 | Online News Other | United Kingdom | www.theguardian.com

CNN

Several ski centers in Europe had to close because there is no snow

por francesca street created a post

"There is literally no snow this year," he told **CNN Travel**. Much of **Europe** is currently experiencing skiing conditions in **Europe**. "The area that is very, very bad is relatively small," Wilkin told **CNN Travel**. But the impact... translated by google  



published on 04/01/23 at 03:33 | TV/Radio | United States | cnespanol.cnn.com

CNBC

Burned by the European heat, travelers are seeking new destinations this summer

monica pitrelli created a post

...wave in southern **Europe** is an anomaly or part of a longer-term pattern caused by **climate change**. Tom Marchant, co-founder ... published by the European **Travel** Commission. The summer of 2022 was **Europe's** hottest on record. On the flip side, summer...



published on 03/08/23 at 02:46 | TV/Radio | United States | www.cnbc.com

Period of analysis: January 1st, to December 31st, 2023.



Climate Change & Traveller Perception

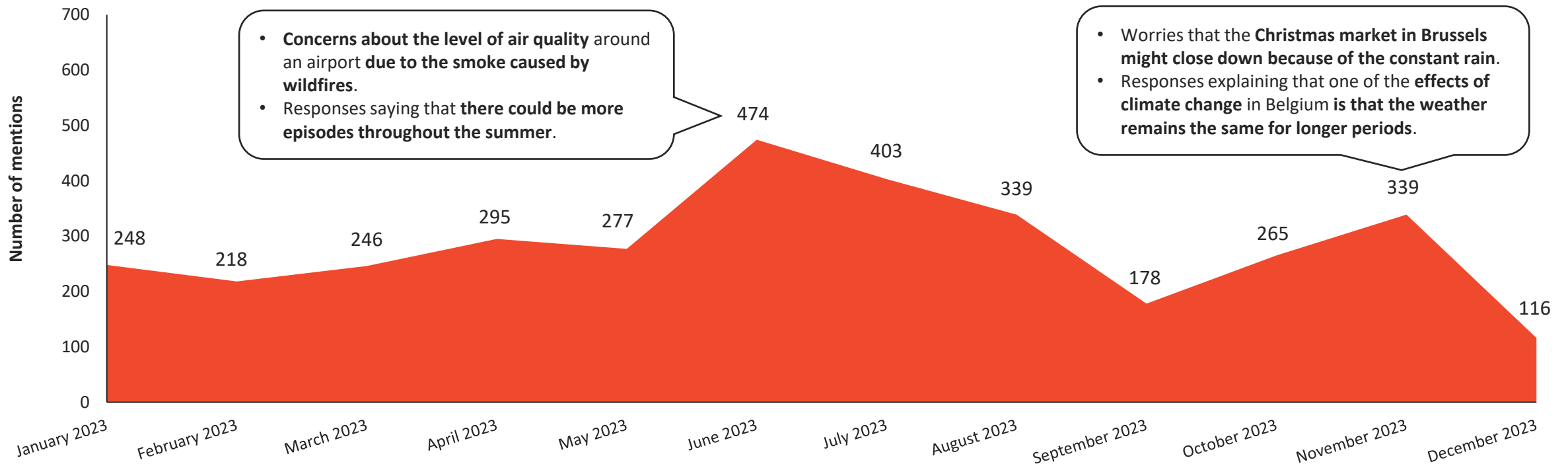
TRAVELLER CONVERSATIONS ON CLIMATE CHANGE & TRAVEL

Volume of Conversations

FREQUENCY OF THE CLIMATE CHANGE THEME IN TRAVEL PLANNING

Higher frequency in some seasons, yet consistent across the year

Conversations about climate change within travel planning forums globally were fairly consistent throughout 2023, with slight notable peaks during the summer and winter seasons. Among recommendations on where to travel to avoid the summer heat, June saw concern over the air quality around an airport due to the smoke from close by wildfires. In November, holidaymakers travelling to Brussels to visit its Christmas market were worried that these would close down due to constant raining. In both cases, responses from others conveyed a lack of predictability in the weather and changes in its behaviour in recent years.



Travel Planners' Concerns

CONSUMER CONCERNS, COMMENTS, AND QUESTIONS IN LIGHT OF CLIMATE CHANGE

While weather predictability was the most common concern, the tone around safety and itinerary success was more worrisome for travel planners

Travel planners' concerns in relation to climate change **turned mostly around the predictability of the weather**. Questions ranged from asking **whether the heat in summer would be bearable**, to the **plausibility of atypical storms** appearing on weather forecasts.

Responses from other visitors and locals **echoed the fact that the weather has become less predictable**, often ending their comments by blaming climate change. Other replies expressed that **shoulder months have become much more pleasant for visiting**.

At a secondary level, travel planners asked about **the effects of climate change**. One example was on the **presence of mosquitos in mid-October in Venice**, to which **responses confirmed that the continued warmth has extended their duration**.

Health-related concerns were another example, such as whether a **low level of air quality** would be long-lasting, or **whether a heatwave would hinder visitors** when trying to engage in outdoors activities.

Importantly, while **questions about possible health issues** or **hindrances to planned itineraries** were less common, the **tone used for them depicted a higher level of worry** from travel planners.

*"I know the **weather is not predictable** these days but would like to stay in a region [in Crete] that **tends to be warmest and less windy.**"*

*"**Late September and October are among the best bathing months** of the year [in Crete]. Temperatures are no longer so hot, but often still reach 30°C during the day until late October"*

*"**Climate change has also arrived on Crete** a few years ago... In October 2020, **there was a severe thunderstorm** with a lot of rain on the north coast."*

*"Yes, **there will be mosquitos in mid-October** [in Venice], especially if the weather continues to be warm. **Climate change is extending the range and duration** of their activity all over the planet."*

*"I have read about mosquitos at various forum posts, **are there any mosquitos in mid Oct. in Venice** or they are dead by the time due to start of cold weather?"*

*"**Much will change as climate change takes hold**. In the meantime, as you have said, **use water wisely** and thank you for being aware of the problem."*

*"Perhaps I should've known this, but I was unaware of the **severe drought in Spain**. We leave in a month and as far as I can tell, the **fountains are off**, some **ponds at parks may be drained?**"*

Period of analysis: January 1st, to December 31st, 2023.

Choosing a Destination

THE MOST IMPORTANT CRITERIA FOR LONG-HAUL TRAVEL PLANNERS

Safety perception and the quality tourism infrastructure have the highest impact on travel planning for long-haul travel planners

While the negative effects climate change has on destinations can be concerning or off-putting for long-haul travellers, **it is the possible interference with their capacity to fully enjoy their visit that has a stronger influence on their choice.** As an example, **having to forego certain experiences** due to the effect of climate change on a destination’s tourism infrastructure (e.g., roads, public transport, availability of water, etc.) **is likely to have a greater effect on destination choice** than unpleasant weather conditions. Moreover, **the perception that climate conditions may affect visitor safety will have the strongest effect on travellers’ choice in a destination.**

Criteria	All markets	Australia	Brazil	Canada	China	Japan	South Korea	USA
The destination is safe to visit (e.g., no civil unrest, low crime rates, etc.)	45%	39%	43%	46%	51%	45%	47%	44%
High quality tourism infrastructure	38%	36%	39%	30%	49%	28%	45%	35%
The destination hosts must-see sites (e.g., Eiffel Tower, etc.)	35%	31%	29%	31%	40%	38%	46%	32%
Affordable travel experiences	35%	41%	36%	45%	26%	37%	15%	44%
Pleasant weather conditions	31%	37%	31%	35%	39%	11%	33%	32%

Data collection: December 2023

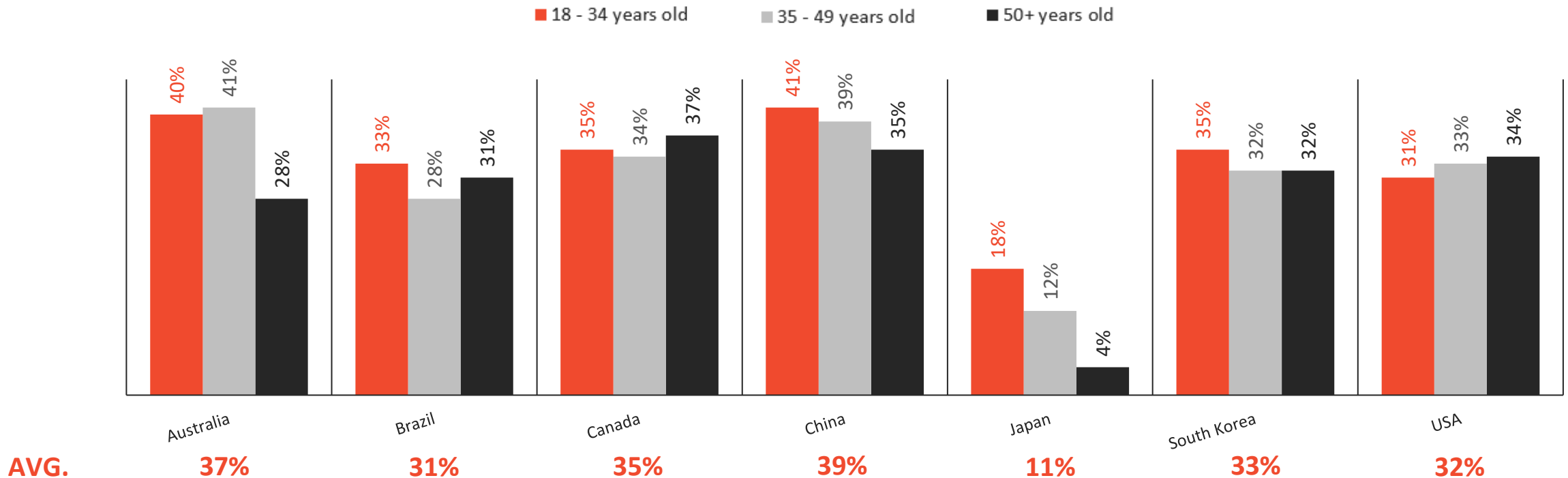
Source: ETC Long-Haul Sentiment Barometer 1/2024, Travel Horizon: January – December 2024 - *What are the most important criteria when choosing a destination?*

Weather Conditions

AGE DIFFERENCES IN CONSIDERING WEATHER CONDITIONS FOR DESTINATION PLANNING

The effects of age on considering weather conditions varies per long-haul market

Age-specific inclinations towards considering weather conditions are not clear-cut, varying in strength and tendency per long-haul market. In Asian markets, as well as the Brazilian and Australian ones, younger travel planners have a slightly higher tendency to find pleasant weather conditions important for destination choice, especially in Japan. Also, Australian and Japanese older cohorts are much less likely to take them into consideration than on average. On the other hand, those with 50 years of age and above in North American markets are slightly more likely to find weather conditions important than the norm.



Source: ETC Long-Haul Sentiment Barometer 1/2024, Travel Horizon: January – December 2024 - What are the most important criteria when choosing a destination? Age breakdown on the item "Pleasant weather conditions". Data collection: December 2023



Sustainability in Reviews

SUSTAINABLE TRAVEL IN GUESTS' WRITTEN REVIEWS

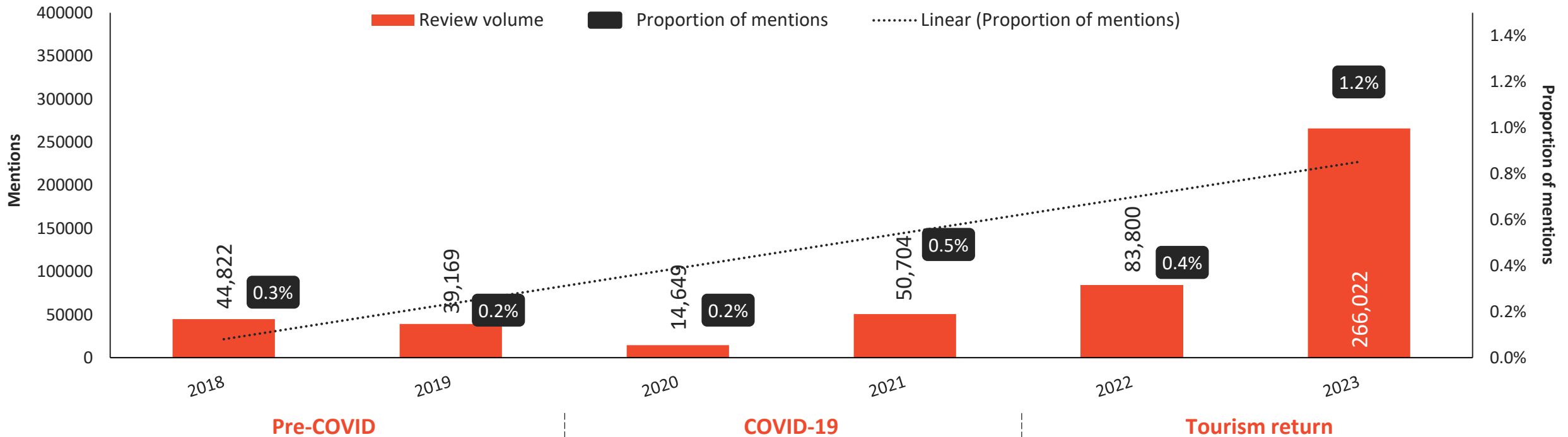


Sustainable Travel

MENTIONS ON SUSTAINABLE TRAVEL IN WRITTEN REVIEWS FOR EUROPE

Increasing importance given to operators' sustainable actions

Written reviews on the subject of operators' sustainable actions have seen an increase in the past six years, being especially the case between 2022 and 2023. While the increase is possibly due to the resumption of travel in the last four years, the number of reviews pre-COVID was also lower. More importantly, the proportion of written reviews has also seen an increase over time, with the year 2023 seeing written reviews on sustainability triple compared to 2022. Overall, although there have been varying proportions of mentions per year, a linear analysis shows an overall increase over time.



Sustainable Travel per Vertical

SUSTAINABLE TRAVEL IN ACCOMMODATIONS AND ATTRACTIONS

A higher focus on sustainability within the accommodations vertical

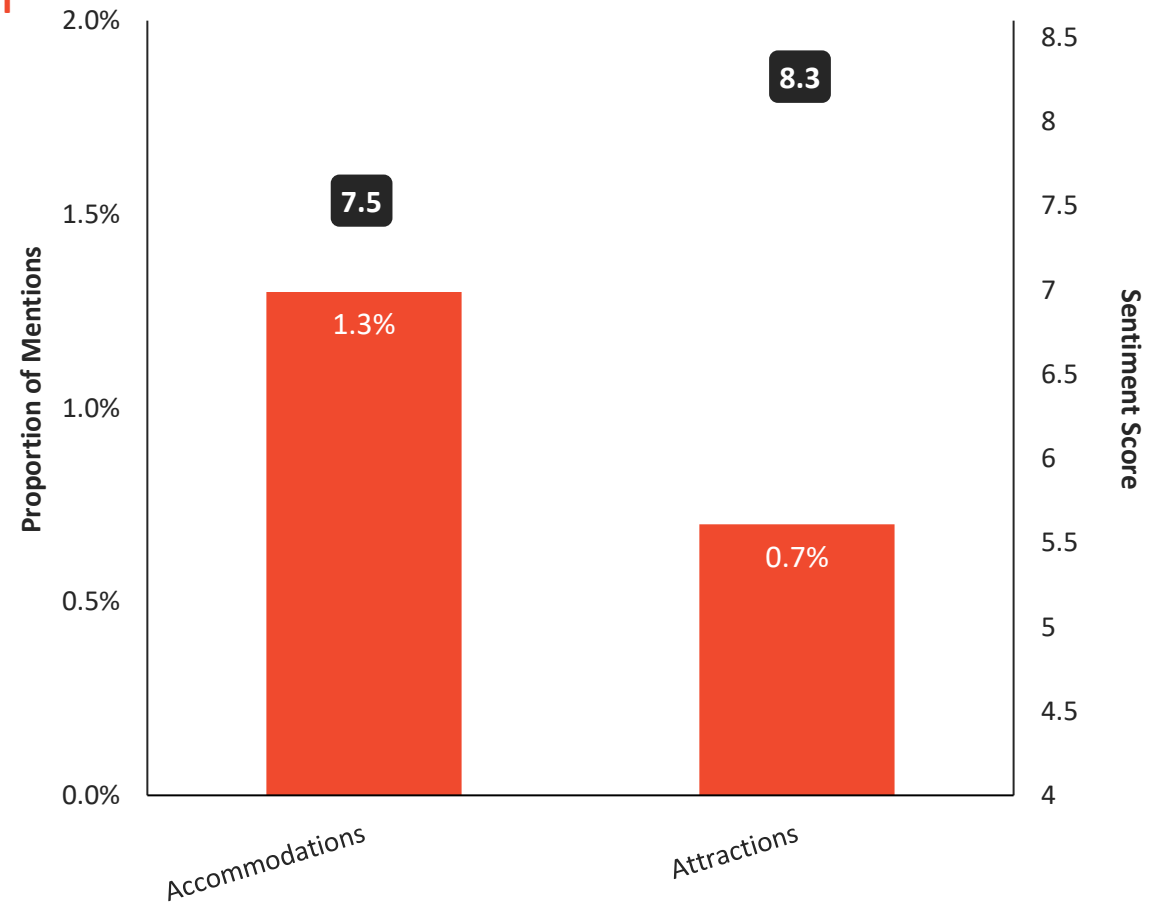
The **accommodations vertical** had almost double the proportion of mentions regarding sustainable travel in written reviews compared to attractions in 2023.

While it can be said that attractions certainly have an angle related to sustainable action, **experiences within accommodations include several facets where environmentally-friendly actions can be perceived by guests**, such as:

- The **sourcing** and **type of food and beverage**;
- **Cleaning practices** of shared areas and rooms;
- Policy on **changing towels** and **bed-sheets**;
- Means of **energy consumption**;
- Offer of **green transportation within the destination** (e.g., bicycle rentals).

Travellers **spend a relatively high proportion of their time in accommodations** during their visit, as well as idle time, **leaving more space to recognise and focus on such facets**.

This, in combination with the number of factors available for evaluation, may be an **influencing reason for the lower sentiment score seen in accommodations compared to attractions**.



Period of analysis: January 1st, to December 31st, 2023.

Mentions on Sustainability

SUSTAINABILITY-RELATED ASPECTS IN WRITTEN REVIEWS

Sustainability topics cover various facets within accommodations, while they focus more on a single product for attractions

Written reviews from guests focusing on sustainability tackled several different aspects in accommodations and attractions. However, while hotels have many factors to pay attention to that tend to repeat themselves, reviews on sustainability for attractions depend largely on the service offered.

Guests focused on the use of plastic, especially single-use plastic, in hotels. These were typically linked to cups for drinking water, or cutlery at the restaurant. Several reviews also focused on the materials used for the décor. To a lesser degree, some reviews mentioned energy efficiency.

At times, attractions also had mentions of the use of single-use materials, for example when drinking water. However, reviews were much more likely to focus on the actual service or product of the attraction, such as the maintenance of animals at a zoo, or the production methods of gin at a distillery.

The perception that sustainability is being used only as a marketing tool, an excuse for poor service, or a manner to overcharge customers was a common negative mention across both verticals.

Accommodations

"I also like the focus on sustainable choices (no single-use plastic, no plastic in the restaurant....)."

"Good conference rooms and nice and good organized coffee breaks. Sustainable – energy efficient hotel."

"I love that in their effort to be a sustainable hotel, [hotel] doesn't sacrifice style, quality, or fun."

"Stylish sustainable décor. Very close to train and tram like with excellent access to city centre."

"Since the property is part of the Travel Sustainable program, I have a feeling that it is only the excuse for poor services: there is no kettle and tea in the room...the heating is not really heating the room even when on maximum."

Attractions

"...Extremely disappointed about the constant use of paper coffee cups, we thought somewhere like [attraction] would be sustainable and ecofriendly."

"The tour was so informative and interesting, the emphasis on the sustainable element of the gin manufacturing was very inspiring."

"Really interesting story behind the distillery which made the visit really stand out since the owner clearly has a huge passion for what he does, ensuring to do it in an ethical and sustainable manner."

"Can't say I am a great fan of zoos, but this was different. A real opportunity to get close to some fabulous animals in a setting that does its best to provide a sustainable environment."

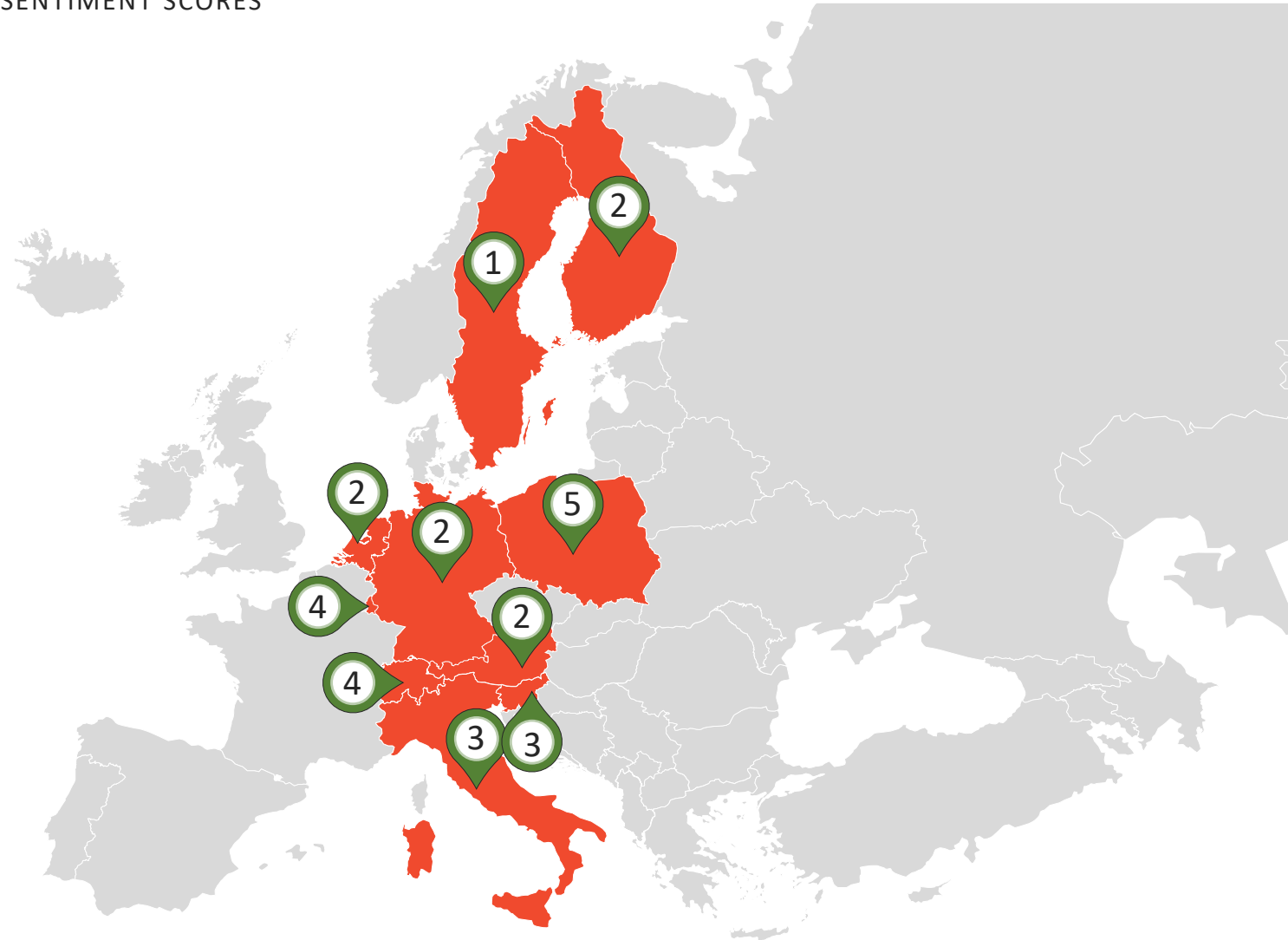
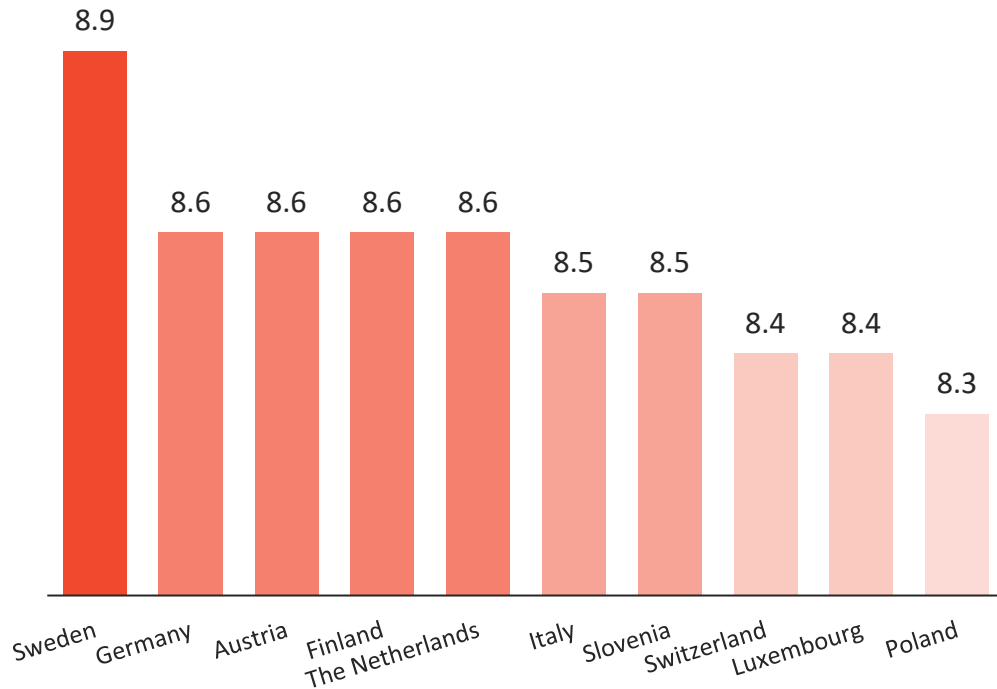
"I don't care how local, sustainably sourced, organically grown the ingredients may be...that is daylight robbery!"

Period of analysis: January 1st, to December 31st, 2023.

Sustainable Travel Experience

DESTINATIONS IN EUROPE WITH HIGH SUSTAINABLE TRAVEL SENTIMENT SCORES

While several **Scandinavian** and **northern European destinations** hold **high scores** in terms of visitor perception of operators' sustainable actions, **southern** and **central European destinations** also hold **high scores** in this regard.



Period of analysis: January 1st, to December 31st, 2023.



Conclusion

THE FUTURE OF TRAVEL IN THE MIDST OF CLIMATE CHANGE



Insights

THE FUTURE OF TRAVEL IN THE MIDST OF CLIMATE CHANGE

1. The **topic of climate change** within travel-related conversations for Europe generally **bore a more negative polarity** yet, **at times, was also a strong driver of positive reputation**. Overall, it was a **more polarised topic than general travel conversations**.
2. While conversations about climate change within travel **occurred throughout the whole year**, the **volume became much higher when issues of safety played a role**, also driving the polarity much lower than on average.
3. In 2023, **Mediterranean destinations were the most negatively affected in Europe** by the topic of climate change **in terms of reputation**. Stories focused mostly on **heatwaves, droughts, and forest fires**.
4. **Climate change-related concerns** in travel planning forums had a **consistent volume throughout the year**. The majority addressed the **predictability of the weather** in a destination.
5. While less common, travel planners' climate change-related concerns on the **feasibility of their travel itineraries** and their **health and safety** held a **higher degree of astonishment and disappointment** compared to those on weather predictability.
6. **Safety and quality tourism infrastructure** continue to be the **two most important factors long-haul travel planners consider**, an important point when weighing the effects of climate change on travel planning behaviour.
7. **Mentions on sustainability have risen** in within guests' written reviews in Europe **over the past six years**, with an especially high jump between 2022 and 2023. Moreover, **accommodations received almost twice as many reviews** on sustainability than attractions.
8. While **accommodations** see sustainability-related reviews **focus on several aspects of their offer**, these tend to **repeat themselves for all establishments**. On the other hand, **the focus changes between attractions operators**, being **largely dependent on their core product**.

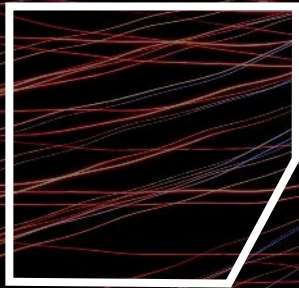


Take Aways

THE FUTURE OF TRAVEL IN THE MIDST OF CLIMATE CHANGE

1. While the effects of climate change can negatively affect a destination's reputation, **recovery in terms of polarity is often quick**. However, destinations will need to find ways to **ensure travel planners that their activities will be feasible and that they will be safe when visiting**.
2. Sustainable actions taken against climate change serve to heighten a destination's reputation. These are **more effective and long-lasting** in terms of positive reputation **when they are fully woven into the visitor journey, accessible to most, and widespread** across the destination.
3. Finally, although future travel planning behaviour in Europe is not clear-cut, **some tendencies are noted**:
 - a) Destinations are **likely to see a change in demand depending on the season**, for example through a greater demand for visiting during shoulder months;
 - b) Some destinations **may experience a re-focus in the demand of activities offered vis-à-vis their traditional focus** (e.g., more people visiting to hike in mountainous areas instead of skiing).
 - c) Destinations that may have previously been ruled out due to unpleasant weather could **gain demand as their climate becomes more temperate**.





Annexes

SOURCES PER TYPE OF DATA

Appendix A

SOURCES FOR DATA STEMMING FROM SOCIAL LISTENING

Unveiling the global online reputation of travel brands

Travel brands' online reputation is measured through **global online conversations and comments on various platforms**. These are shared by differing media, consumers, companies, citizens, brands and officials on websites, forums, blogs & social networks.

Social Networks:

- X
- TikTok
- YouTube
- Pinterest
- Vkontakte
- Reddit, etc.

Blogs / Forums

- Travel blogs

Magazine

- Travel magazine
- Lifestyle magazine, etc.

Online News

- Euro News
- National Geographic, etc.

Newspaper, News Agency

- Daily Mail
- The Washington post, etc.

TV/Radio

- RTBF, etc.

Podcasts

Press Releases

Substack

Twitch



Appendix B

SOURCES FOR DATA STEMMING FROM RATINGS & REVIEWS

Analysing visitor experience based on ratings and reviews data

Currently **45 sources** are connected to analyse ratings and reviews data. They account for **95% of all experience-based data available online.**

- Agoda
- AirBnB
- Booking.com
- BungaloSpecials.nl
- Camping.info
- Camping2be
- CheapTickets
- Ctrip (Trip.com)
- Dagjeweg
- Ebookers
- Expedia.com
- Facebook
- GetYourGuide
- Goibibo.com
- Google
- Holidaycheck.de
- Hostelworld
- Hotels.com
- Hotels.nl
- HotelSpecials.nl
- HRS
- Klook
- Latminute.com.au
- MakeMyTrip
- MeetingReview
- Musement
- Open Table
- Orbitz
- Otelpuan
- Parkvaccances
- Rooms for Africa
- Staycation
- TableOnline.fi
- Takeaway.com
- TheFork
- Travelocity
- Traveloka
- TripAdvisor
- Trustpilot
- Viator
- Weekendjeweg.nl
- Wotif
- Yelp
- Zomato
- Zoover



Contact:

Diego Maldonado – Senior International Analyst
+32 (0) 456 304 115
dmaldonado@tci-research.com

