NOVEMBER 2024

European travel 2025

Balancing growth and impact

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Foreword

Travel is amongst the most resilient of all industries. From a global standstill just four years ago, global travel is on track to reach new record levels in 2024.

This is also true in Europe specifically, which is ahead of the global curve on recovery. Despite subdued economic growth rate projections in Europe, travel is still being prioritised over competing areas of spend.

At Accor, we are seeing this resilience and continued hunger for travel. In our third quarter 2024 trading update we reported continued growth in revenues and RevPAR on a regional as well as global level.

Though there will always be bumps in the road, all the megatrends point to the continued growth of the global travelling population to feed the tourism industry.

But we must not be complacent. Fundamental challenges remain. From budget constraints to elevated costs, technological advancements, and the search for new destinations and experiences, travel providers must keep on top of the ever-evolving shifts and remain agile enough to adapt to them.

Chief amongst these challenges is sustainability. The most existential challenge we face is ensuring we grow in a way that considers and mitigates our impact on the climate and on the destinations and populations we depend upon. We must recognise, for example, that at times in

PATRICK MENDES
CEO, Premium, Midscale & Economy, Accor Europe & North Africa

some destinations, increased demand does put pressure on destinations and local communities, which is why cities including Venice, Amsterdam and Barcelona are taking measures to limit the number of visitors.

This is why, amongst a wide range of insights, we have focused particularly on this topic in this report. As well as examining European travellers' plans for 2025 and the factors shaping their decisions, we want to shine a light on how travellers consider issues around the impact of their travel, to help shape and drive the industry's response.

We hope the report provides some insight and inspiration to help guide your own strategies and address the challenges we collectively face.

Methodology

Accor commissioned One Poll to carry out research from the 22nd to the 28th of October 2024. A total of 8,000 adults who plan to travel domestically or abroad in 2025 were surveyed from across 7 European countries:

UNITED KINGDOM
2,000 people

GERMANY
1,000 people

NETHERLANDS
1,000 people

FRANCE
1,000 people

ITALY
1,000 people

SPAIN
1,000 people

POLAND
1,000 people

Travel optimism continues to rise

Despite forecasts of slow growth or stagnation across many of Europe's larger economies in 2025, travel remains high on the priority list of Europeans, continuing to demonstrate its resilience.

Over half of travellers (53%) responding to our survey across Europe expect they will have more money to spend on travel in 2025 than they did in 2024, compared to just 10% who expect their travel budget to decrease.

Of travellers in the seven countries surveyed, those in Poland were once again the most confident about their travel spending power this year compared to last, with 65% expecting an increased budget compared to just 8% expecting a decrease. Those in Germany were the second most confident (62% versus 8%). The confidence of French travellers has dipped the most since last year's survey, with 44% expecting an increased budget in 2025 compared to 54% who expected a rise in 2024 – but even there the proportion of travellers expecting to have more money to spend on travel far outweighs those who expect a lower budget (12%).

TRAVEL BUDGET EXPECTATIONS IN 2025 COMPARED TO 2024

	Increased budget	Decreased budget
Poland	65%	8%
Germany	62%	8%
Spain	55%	12%
Netherlands	52%	12%
GB	52%	10%
Italy	45%	9%
France	44%	12%

Do you think your total budget for travel in 2025 will increase or decrease compared to 2024? N=7,685

The volume of trips travellers intend to take in 2025 are also significantly up across almost all categories of trip.

Respondents expect to take an average of 2.15 international leisure trips in 2025 – up from 1.8 in last year's survey – with 88% of travellers saying they plan to take at least one overseas leisure trip next year.

People also expect to head abroad more for business, with Europeans expecting to take an average of 0.94 international business travel trips compared to an expectation of 0.6 in the previous survey. In 2024, business travel has undergone a significant rebound, beating all expectations.

Expectations of international "workation" trips – combining business with leisure – are also on the up, from 0.6 last year to an expectation of 0.87 for 2025. Remarkably, one in four European travellers (25%) now expects to take at least one combined work and play trip abroad in 2025, up from 19% in the previous survey.

Domestic workation expectations are also well up, from an average of 0.6 to 0.91; and travellers expect to take an average of 1.18 domestic business trips, up from 1.0 in the previous survey. Domestic leisure trips are the only area where expected volume has decreased, with a negligible decrease in expected average trips from 2.9 to 2.89.

Making budgets go further

Although travel remains the most essential non-essential in people's lives, cost of living pressures still have an impact on travellers and they will continue to seek ways to make their budget go further.

Some 88% of respondents will take at least one measure to reduce their travel costs as a result of inflation and a higher cost of living. Cost-saving plans include avoiding peak season trips (30%), selecting lower cost accommodation types (23%) and more affordable destinations (22%).

A smaller proportion of travellers will even make sacrifices to their on-holiday behaviours in order to manage their budgets, including take less luggage on flights (13%), having fewer drinks (9%), and skipping starters or desserts at mealtimes (7%).

HOW THE COST OF LIVING IS IMPACTING EUROPEANS' TRAVEL PLANS IN 2025

Top 10 steps travellers will take in 2025 because of cost pressures	Percentage of European travellers
Avoid trips in peak season	30%
Be flexible with travel dates to find cheaper deals	25%
Select cheaper accommodation types	23%
Use travel comparison websites	22%
Select cheaper destinations	22%
Eat out less	21%
Be more careful about avoiding unnecessary fees e.g. at ATMs or on credit card purchases	21%
Reduce their spending money while on holiday	21%
Take shorter trips	17%
Take cheaper forms of transport	14%

In which, if any, of the following ways do you think your 2025 travel plans will be impacted by inflation/ high cost of living? N=7,934

" Price pressures will always exist and fluctuate across different regions and demographics, but that doesn't have to compromise growth or the traveller experience. We know that people will prioritise travel spend even if they are seeking more affordable options, so the ability to offer them these choices is crucial – whether in an emerging destination at a lower price point, a more budget-friendly hotel, or by avoiding peak season rates. This is why a diversified offering can really help your resilience if travellers are feeling the pinch. "

Julie White*, Chief Commercial Officer, Premium, Midscale & Economy, Accor Europe & North Africa*

Sustainability is of rising importance to travel decisions

The travel industry has long been aware that finding ways to allow people to see the world without causing it harm is an existential priority. Despite this awareness and concerted action on many fronts from parts of the industry, it remains the single biggest challenge facing the sector.

While there remains a considerable gap between people's travel intentions and their actions, it is nonetheless encouraging to see an increase in how people describe the importance of climate change and sustainability to the travel decisions they make such as their mode of transport, their destination, where they stay and what they do on holiday.

Climate change and more sustainable options are important to 73% of travellers - up from 71% in the previous survey - including 25% who say these factors are very important (up from 22%).

Of the seven European countries sampled, travellers in Italy and Germany are most serious about green travel, with 81% claiming sustainable options are important to their decisions. These issues have seen a marked increase in importance for German travellers, rising by 9 percentage points since the previous survey.

IMPORTANCE OF SUSTAINABLE OPTIONS TO TRAVEL DECISIONS

Country	Percentage of travellers for whom sustainable options are important to their travel decisions	Last year	Change between this year and last in percentage points (pp)
Italy	81%	82%	-1pp
Germany	81%	72%	+9pp
Spain	78%	78%	0
Poland	77%	77%	0
France	75%	75%	0
Netherlands	67%	66%	+1pp
Great Britain	63%	61%	+2pp

How important are climate change and sustainability/ sustainable options to your travel decisions? (e.g., deciding your method of transport, your destination, where you stay, what you do etc.) N=8,000

As expected, younger generations are more likely to claim that sustainable considerations are important to them, falling from 79% for 18 to 34 year-olds, down to 65% for those aged 65 and over.

As well as its stated importance to travellers, three in four travellers (74%) also say that climate concerns will drive changes in the volume and type of travel they book – up from 66% last year.

IMPACTS OF CLIMATE CHANGE AND SUSTAINABILITY CHALLENGES ON TRAVEL DECISIONS IN 2025

Reducing travel	Changing modes of transport	Changing booking or destination choices
• 10% will travel less in general • 9% will travel abroad less • 9% will take fewer trips but make them last longer • 9% will take more short haul trips (up to 4 hrs) instead of long haul (9+hrs) • 8% will take more medium haul flights (4-8hrs) instead of long haul (9+hrs) • 5% will travel less for work domestically • 4% will travel less for work internationally	• 16% will travel by rail more • 14% will fly less • 10% will travel by car or van more • 10% will travel more slowly and make the journey part of the experience • 9% will travel by bus or coach more • 8% will take more cycling trips	• 21% will avoid peak season specifically to avoid the risk of heat waves • 20% will avoid areas prone to extreme weather conditions such as storms, floods and wildfires • 12% will avoid cruises • 11% will actively seek sustainable accommodation providers / tour operators • 10% will take a nature-positive holiday e.g. rewilding or conservation projects • 7% will offset their travel emissions

How, if at all, do you think climate change and sustainability challenges will impact your travel decisions in 2025? N=7,934

IN-DESTINATION BEHAVIOURS

European travellers also claim they will consciously make a range of personal behavioural choices while on their travels in 2025, in order to reduce their negative impacts. Indeed, 90% of respondents say they will take at least one of the actions listed.

Travellers will take a variety of steps to reduce their water usage including re-using towels (40%), having shorter showers (35%) and even flushing the toilet less (18%). Food choices are also common, including being careful not to over-order (34%), choosing locally-sourced and/or seasonal produce (32%), eating less meat (22%) and choosing sustainably-sourced produce (22%).

Avoiding single-use plastic is also high on the agenda, with 22% saying they will refuse to accept single-use plastic bottles, straws or cups, and 36% even planning to take their reusable water bottles with them.

PERSONAL BEHAVIOURS TO REDUCE NEGATIVE IMPACTS

Action	Percentage of European travellers that say they will do this while travelling in 2025
Re-use towels	40%
Take a reusable water bottle with them to avoid single-use plastic bottles	36%
Ensure their rubbish is recycled wherever possible	35%
Have shorter showers	35%
Be careful not to over-order, to reduce food waste	34%
Choose locally-sourced and/or seasonal produce	32%
Use public transport or cycle/walk to get around in the destination	32%
Consciously spend money with independent local businesses e.g. shops, restaurants in the destination	27%
Pack less to reduce travel emissions	24%
Refuse to accept single-use plastic bottles, straws or cups	22%
Eat less meat at restaurants	22%
Choose sustainably-sourced produce	22%
Flush the toilet less	18%

Which of the following steps do you believe you will consciously take on holiday in 2025 to reduce the negative impacts of your holiday? N=7,934

HOW TRAVEL PROVIDERS CAN ENCOURAGE SUSTAINABLE CHOICES

Travel providers are aware that there is a limit to what travellers will accept in the name of sustainability if it adversely affects their experience.

Currently, 42% of European travellers say they would accept the provision of reusable water bottles and water dispensers instead of single-use plastic bottles, in order to reduce the negative impacts of their travel. Some 41% would accept recycling bins in their room, and 37% would be happy to be provided with eco-friendly bathroom products with minimal packaging instead of miniatures.

In terms of food, 27% would be happy with more sustainable menus with locally-sourced produce and more vegetarian and fewer meat options. Almost one in four (23%) would gladly accept à la carte menus only and no buffets in order to reduce food waste, and one in five (20%) would be happy to see a small portion option for every meal on the menu.

The least amount of willingness is seen with measures such as having a non-heated swimming pool (14%) and having no air-con in their room (12%).

BARRIERS

Though less of an obstacle than in last year's survey, cost pressures represent the single biggest obstacle to consumers making sustainable travel choices, cited by 30% of respondents. A lack of information is cited by 29%, and a lack of availability of sustainable options by 27%. One in five (21%) cite a lack of time to research, suggesting that businesses need to make sustainable options clear and easy to find for today's time-poor consumers.

There are a number of core actions that travel companies could take, that people say would make them more likely to make more positive travel choices. Of these, price is the most significant, with 46% of respondents saying that reducing the premium for sustainable options would have an impact on their choices. Just 10% say they would be willing to pay more for a holiday if the operator had proven green credentials.

Travellers also claim their behaviours would be positively impacted by greater availability of sustainable options, clearer information and greater transparency, and being actively rewarded by the travel provider for taking sustainable options.

TRAVEL COMPANY ACTIONS THAT COULD MOTIVATE SUSTAINABLE TRAVEL CHOICES

Action	Percentage of European travellers that say this would make them more likely to make more sustainable travel choices
Reduce prices so they don't have to pay a premium for sustainable options	46%
Increase the number of sustainable choices	36%
Be more transparent about the sustainability of their offerings	34%
Provide rewards for taking sustainable options such as more loyalty points	31%
Provide more credible, clear and independently-verified claims	26%
Make short-haul travel more appealing than long-haul	22%

Which, if any, of the following kind of actions from travel companies would make you more likely to make sustainable travel choices? N=8,000

GOVERNMENTAL ACTIONS

The challenge of reducing the negative impacts and increasing the positive impacts of travel is a complex one, involving multiple levers operated by stakeholders outside as well as inside the industry, including governments.

Travellers expressed some support for possible governmental actions that would encourage greener travel choices, including reduced rail fares for certain journeys to reduce transport emissions to popular destinations (22%). Germany's national rail service has experimented with low cost rail services in recent years to reduce transport emissions.

In France, last June the government introduced a ban on domestic short-haul flights in an effort to bring down carbon emissions, prohibiting flights where a rail alternative under 2.5 hours exists. Some 16% of respondents to our survey around Europe said they would support moves to ban short-haul flights where much more sustainable alternatives are available.

More than one in ten (11%) would go a step further and support limits on the number of long-haul flights people take.

“For travel businesses, addressing the challenges of sustainability is not just an ethical imperative, it also increasingly influences guest demand and has a major impact on operational efficiency. Offering sustainable choices and working with hotel owners to move the sector in this direction is crucial to their own future, as well as the collective future of a healthy industry that safeguards the destinations and communities it relies upon.”

Cristina Ramos, *Head of Sustainability, Premium, Midscale & Economy, Accor Europe & North Africa*

The challenge of overtourism

Protests from local communities over the negative impacts of tourism in their localities have been highly visible in 2024 in some of Europe's most popular holiday destinations including the Canary Islands, Barcelona and Mallorca.

Of course, balancing the positive and negative impacts of tourism on the destinations and communities that support it is a complex problem, but it is clear that there is some understanding from European travellers of the issues raised by protestors, with one in four (25%) travellers saying they sympathise.

More than one in ten respondents (11%) say they have personally had a holiday experience spoilt by being in an overcrowded destination, and 8% have felt guilty about being in an overcrowded holiday spot.

OVERTOURISM WILL IMPACT TRAVEL CHOICES

The vast majority of travellers (90%) say that issues caused by overtourism will have some impact on where or how they choose to travel in 2025.

A third (31%) say they will avoid travelling in peak season in order to avoid overcrowding. One in four (27%) will avoid destinations that suffer from overtourism and 19% will specifically avoid destinations where locals have protested.

More than one in five (22%) will deliberately choose lesser-known destinations to visit, to avoid contributing to overtourism.

SUPPORT FOR ACTION

Though in the minority, significant numbers of travellers surveyed expressed support for a variety of actions to combat overtourism. One in four (24%) respondents agree that limits should be introduced on the number of tourists in destinations that suffer from overtourism.

One in five (21%) say destinations suffering from overtourism should limit the amount of private accommodation that can be turned into short-term holiday rentals. Amongst cities that have cracked down on short-term rentals, Barcelona plans to ban all short-term rentals by 2029 and Athens has temporarily banned new licenses for short-term rentals in three of its central districts. Other European locations with restrictions on short-term rentals include Vienna, Berlin, Amsterdam, London and Paris, as well as the whole of Mallorca and most parts of Portugal.

Short-term rentals are not the only accommodation type that is viewed as an issue, with one in five respondents (20%) saying destinations suffering from overtourism should reduce access to cruise ships. One in five respondents (20%) also think travel companies and destinations should reduce the marketing of locations that suffer from overtourism.

One in eight (12%) believe local authorities should impose higher taxes on tourists to better support their local economy; the same percentage that would support heavier taxation on cheap flights to reduce overtourism.

Workations picking up

With business travel truly back and beating all expectations in 2024, the travel industry is adapting to a new era of business travel where the value of face-to-face interaction is well understood but must be balanced against the need to minimise and justify the carbon footprints of business trips.

One such way of making trips more purposeful and reducing the overall travel per employee is by embracing and facilitating employees' ability to combine work trips with their own leisure trips.

Such "workation" trips are on the up. One in four European travellers (25%) now expects to take at least one combined work and play trip abroad in 2025, up from 19% in the previous survey.

Some will do this by extending the holidays they have planned. In 2025, 13% of European travellers expect to extend their holidays by working from the destination, up from 10% last year. This rises to over one in five (22%) 18-34 year olds.

Many travellers (14%) like to work from destinations they visit on their leisure trips in order to immerse themselves in the local community. This is particularly true of younger generations, with 22% of 18-34 year olds saying as much.

Others will plan leisure extensions onto their business trips. There is evidence that this is becoming easier, with 11% of respondents saying their employer is supportive of them combining a business trip with a leisure trip, up from 7% last year and rising to 20% amongst 25-34 year olds.

With 16% of European travellers - and up to 28% of 25-34 year olds – saying workations are straightforward as long as they have a good internet connection as they can work remotely, the concept of combined work and play trips is becoming a normality that travel businesses need to cater for and consider in their offerings.

> “We've seen a huge resurgence in business travel this year. Corporates are seeing a strong correlation between face-to-face meetings and revenue generation, but they also need to minimise and justify the carbon footprint of every business trip, so maximising the purpose of each one is key. Combining work and leisure trips can be a highly effective way of doing this, and as the idea becomes more normalised in organisations, creating ways to make the process and experience rich and rewarding for both the traveller and the company can bear fruit.”
>
> ***Julie White**, Chief Commercial Officer, Premium, Midscale & Economy,*
> *Accor Europe & North Africa*

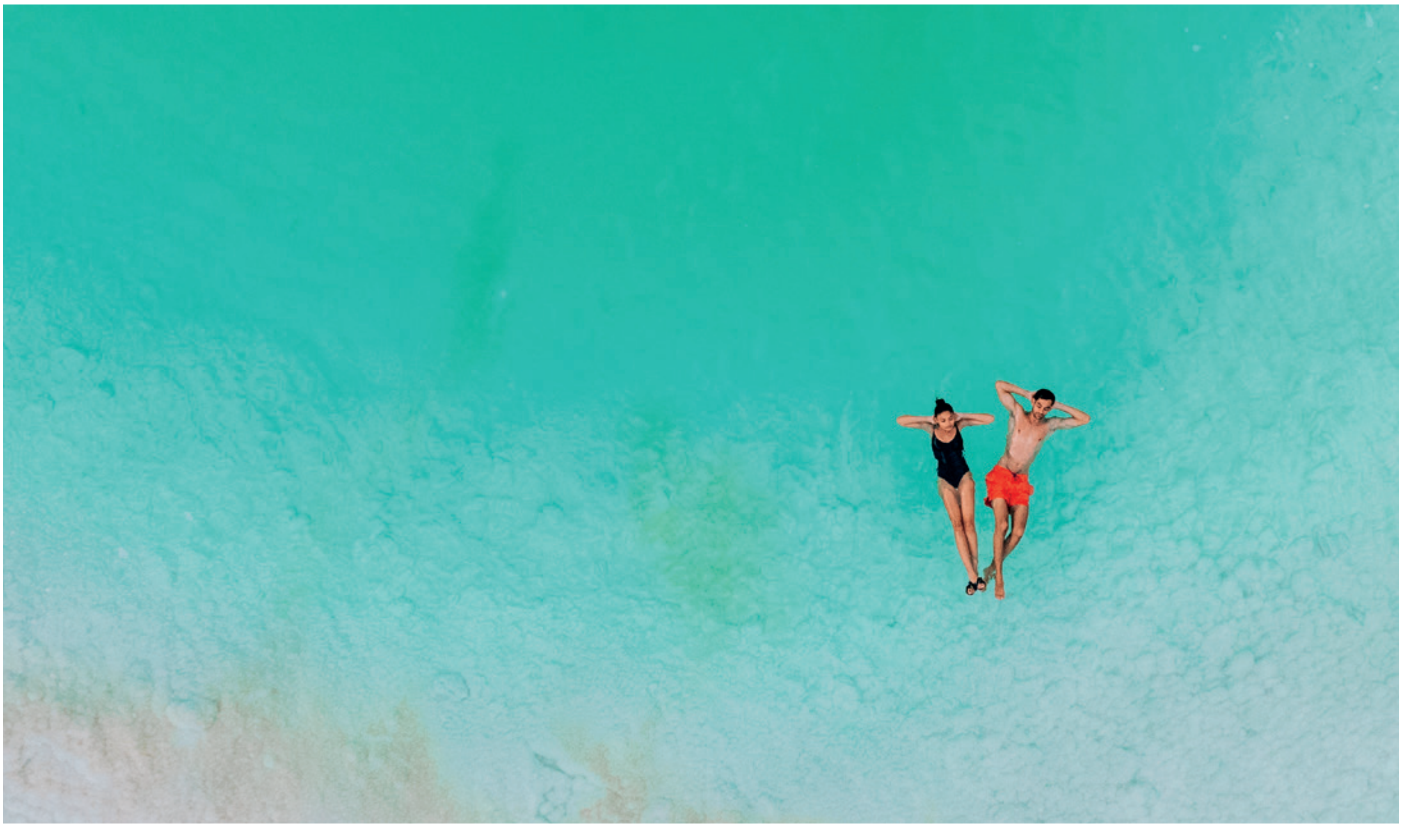
A search for connection

European travellers are looking to forge deeper connections when they travel. One in three travellers (34%) say it is important to immerse themselves into the local cultures and communities they visit when they travel.

This might be as simple as trying the local cuisine as much as possible, which 42% of respondents say they like to do. Others wish to go further, with 15% saying it is important to feel they are making a positive contribution to the destination they are visiting.

Some travellers wish to connect more deeply not just with the places and people they are visiting, but those they are travelling with, with almost one in four (23%) saying it is important to do so with their travel companions.

Switching off



Although travel now provides more options for rich and varied experiences and adventures than ever before, a large proportion of holidaymakers simply want to switch off. 40% of respondents say rest and relaxation is the most important thing about a holiday for them.

Many of these will be using travel as a means of escaping a stressful work life, and 15% of travellers say they are currently in need of a break because of an uneven work/life balance.

One in three travellers (34%) say it is important to choose a trip that allows them to look after their physical and mental wellbeing and leave their stresses behind. But switching off does not necessarily mean doing nothing, and with travel providers well aware of the rising importance of wellness to holidaymakers, catering to these needs with activities from yoga and meditation to spas, arts and crafts and a variety of sports and fitness pursuits, is key.

Where to go?

Cost is still the single biggest factor influencing where people choose to go on holiday, though its importance has softened since last year, cited by 51% against 58% in the previous survey.

Location is always key, and 35% of travellers name convenience of getting there as an important factor.

In terms of information sources, recommendations from friends and family remain the most important (35%), followed by online reviews (29%), word of mouth (23%), destinations they have seen on TV or movies (17%) or social media (14%), and advice from travel agents (13%).

Many travellers can be creatures of habit, and one in four (24%) cite having experienced the location before as a key influence. Knowing and trusting the company or brands providing the holiday is important for 18%, and 9% will be influenced by their membership of a particular loyalty programme.

FACTORS INFLUENCING WHERE PEOPLE CHOOSE TO GO ON HOLIDAY

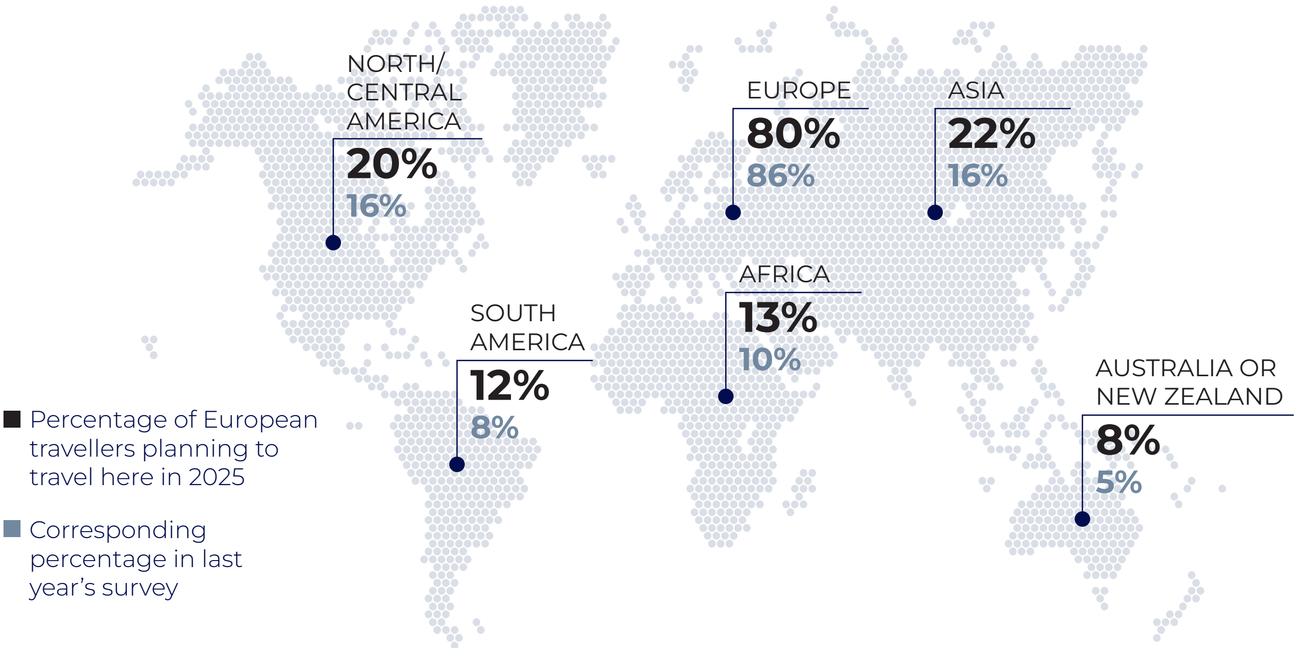
Selected influences over where people choose to go on holiday	Percentage of European travellers who name this as something that influences them
Online reviews e.g. TripAdvisor, hotel website	29%
Knowing and trusting the company or brands (e.g. of the tour operator or hotel/resort)	18%
Destinations they have seen on TV programmes or movies	17%
Destinations they have seen on social media	14%
Advice from travel agents	13%
Ability to travel with pets	11%
Being a member of a loyalty programme of a particular accommodation provider or tour operator	9%

Which, if any, of the following factors influence where you choose to go on holiday? N=8,000

The return of long haul?

While Europe will continue to dominate the destination list of European travellers in 2025, the survey suggests Europeans will venture further afield next year.

While the number of travellers planning to travel within Europe is down by six percentage points compared to last year, travellers intend to go to every other part of the world in greater numbers.



Which parts of the world do you plan to travel to in 2025? N=6,737

EUROPEANS' FAVOURITE INTRA-REGIONAL HOTSPOTS

Country	Percentage of Europeans who plan to travel there in 2025 (excluding visits to their own countries)	Corresponding percentage in last year's survey
Spain	24%	23%
Italy	20%	18%
France	16%	16%
Greece	16%	13%
Portugal	13%	13%
Germany	12%	11%
UK	10%	8%
Croatia	8%	6%
Netherlands	7%	7%
Austria	7%	7%

Which, if any, of the following countries do you plan to travel to in 2025? N=8,000

Holiday types

In 2025, beach holidays and city breaks will once again dominate. All-inclusive breaks are the biggest riser, planned by 29% of European travellers in this year's survey compared to 24% last year.

TOP 10 HOLIDAY TYPES EUROPEANS PLAN TO TAKE IN 2025

Beach trip
45%

City break
42%

All-inclusive holiday
29%

Lakes and mountains
24%

Countryside escape
20%

Road trip to multiple destinations
20%

Adventure or activity holiday
20%

Boat trip or cruise
11%

Trip based around a music event
11%

Trip based around food or drink
10%

Most popular accommodation types

Hotels retain their dominant position as the most popular type of holiday accommodation, distantly followed by holiday rental apartments and villas.

- Hotel 66%
- Holiday rental apartment 35%
- Holiday rental villa/house 24%

Travel companions

While family trips dominate, travel providers should bear in mind how to cater for the significant groups of those travelling with friends, their pets, or simply on their own.

- Immediate family 68%
- Friends 35%
- Solo trip 18%
- Extended family 12%
- Pets 11%
- Colleagues 8%

Long-term planners versus last-minute bookers

- 35% of travellers prefer to book their holidays a long time in advance
- 9% prefer to book at the last minute

Summary: take-outs for the travel industry

This report adds yet more weight to the evidence that travel will continue to grow. For 2025, our data shows that Europeans plan to travel more and spend more on their travels - despite subdued economic growth forecasts across the continent - as they prioritise it above other areas of discretionary spend.

As business travel has come back with a vengeance in 2024, next year may see a resurgence in long-haul travel.

But this growth is not just a short-term trend. All the socio-economic data including rising wealth and the growth of the "travelling class" point to an industry whose growth curve is heading upwards in the long-term.

Of course, this growth brings opportunities. And to take advantage of them, travel businesses must stay ahead of the many constantly evolving factors influencing people's travel choices. Spending power. Convenience. The hunger for new and varied experiences and destinations. The increasing ability to combine work trips with leisure. New sources of inspiration including movies, social media and AI-driven tools.

But this growth also brings challenges. The most important of these is how to manage this growth in a way that doesn't damage the planet, the destinations and the communities we depend on.

In Europe, such challenges are becoming evident with communities in several popular hotspots unhappy with some of the impacts tourism is having on them. We have also seen extreme weather, intensified by climate change, from wildfires in Greece to the tragic flash flooding recently seen in Spain.

Of course, tourism also brings many positive impacts, but the consequences of climate change and the impacts of overtourism are affecting cultural and historical sites and treasures, nature and local communities.

Our experience is that business travel is changing much more quickly than leisure travel in making better choices, partially driven by increased reporting requirements and reputation management. Globally 70% of our corporate clients have science-based environmental targets. The travel industry must equally help leisure clients to transform their good intentions into good choices.

We must work hard to give them sustainable choices that don't require them to pay a premium, and give them clear, well-evidenced and easy-to-find information to help them make those choices.

We must reduce the impact of our operations and our use of resources. Provide menus with more sustainable and seasonal offerings and generate less waste, and facilities that use less water and energy.

We must develop offerings in emerging destinations that will benefit from travel, rather than over-burden those that are suffering from an excess of tourism.

As a hospitality group with a long history of environmental commitments and a wide range of strong commitments, we have taken many actions in this direction but we know we must continue to do more, in partnership with our hotel and industry partners as well as governments around the world. Setting greater ambitions, taking bolder decisions, implementing sharper actions, challenging old habits and shaping brighter visions is more critical than ever before.

The continued growth of the travel industry provides fantastic opportunity, but it also means we all have to work even harder to find the solutions required to protect the resources we rely upon.

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