

# Air travel, advertising and the growing consciousness of the consumer

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**Talon**  
**PLEXUS**

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# Context

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## **Talon Brief:**

**Air passenger numbers are likely to double over the next 20 years with a higher frequency of travelers from Asia, Middle East (existing travelers, emerging middle classes and a new generation of travelers)**

# Context

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**Global air passenger volumes set to double to 8.2 billion, by 2037**

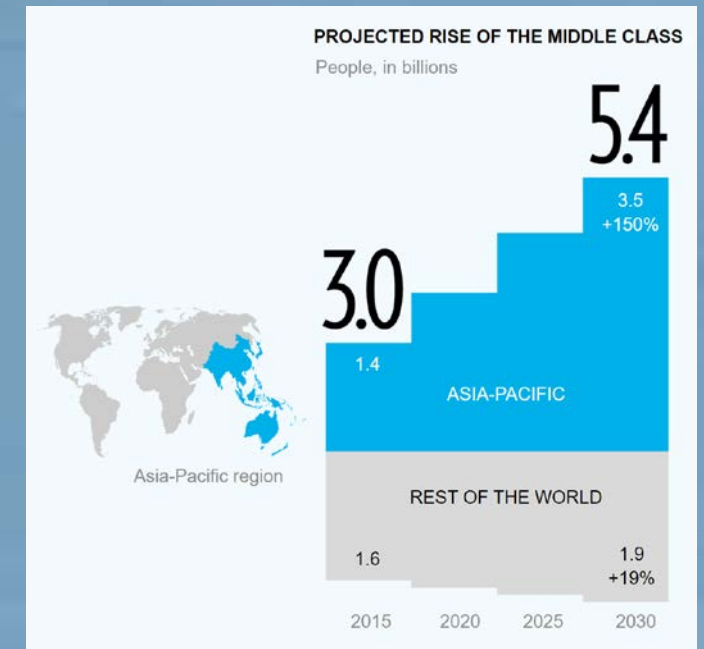
(Mintel, 2020)

**The 'travel boom' is being led by China, India and Southeast Asia**

(The Japan Times, 2019)



**By 2035, Asia Pacific region will account for more than 50% of the world's air passenger traffic**  
(National Geographic, 2017)



# Context

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Meanwhile, the prevalent conversation of climate change and environmental impact is leading to an increasingly aware consumer. (Mintel, 2020; Vox, 2018)



But how much is this affecting consumer behaviours in air travel?



# Live brief

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**Will a young person in Asia consider the environmental impact of air travel more or less than a European counterpart?**

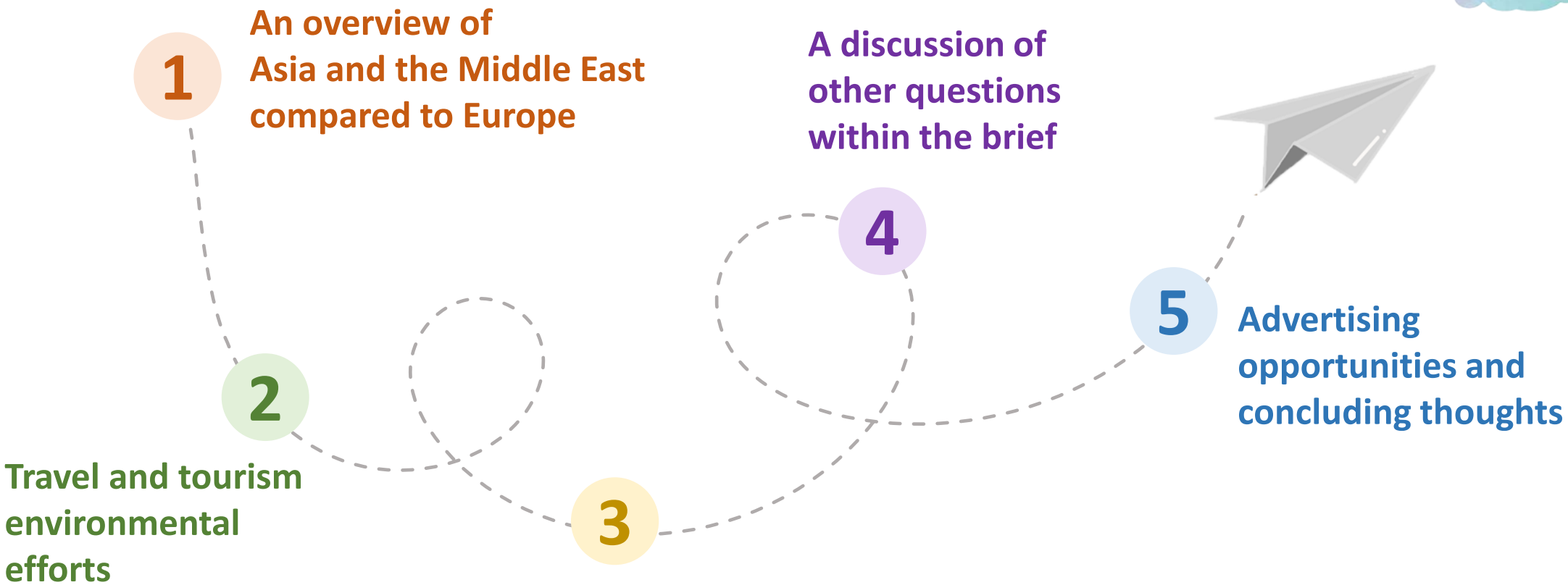
**What will advertisers need to take into consideration when looking to target these groups?**

**(Asian, Middle East and New Travellers)**

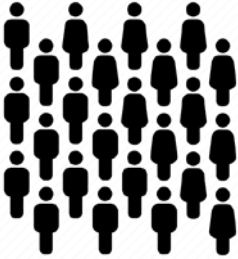




# Presentation outline



# 1 Asia and Middle East profile overview



Asia (particularly China)

- Dense population
- Rising of middle classes
- Air travel cheaper than ever (continuing to be competitive)
- Airports expanding rapidly

(The Telegraph, 2019; Japan Times, 2019)



Typically, Asian tourists (particularly Chinese) are interested in tourist attractions, arts, culture, photo opportunities and lavish shopping.

(The Telegraph, 2019)



Chinese tourists have the highest tourist spend of any country

(The Telegraph, 2019)

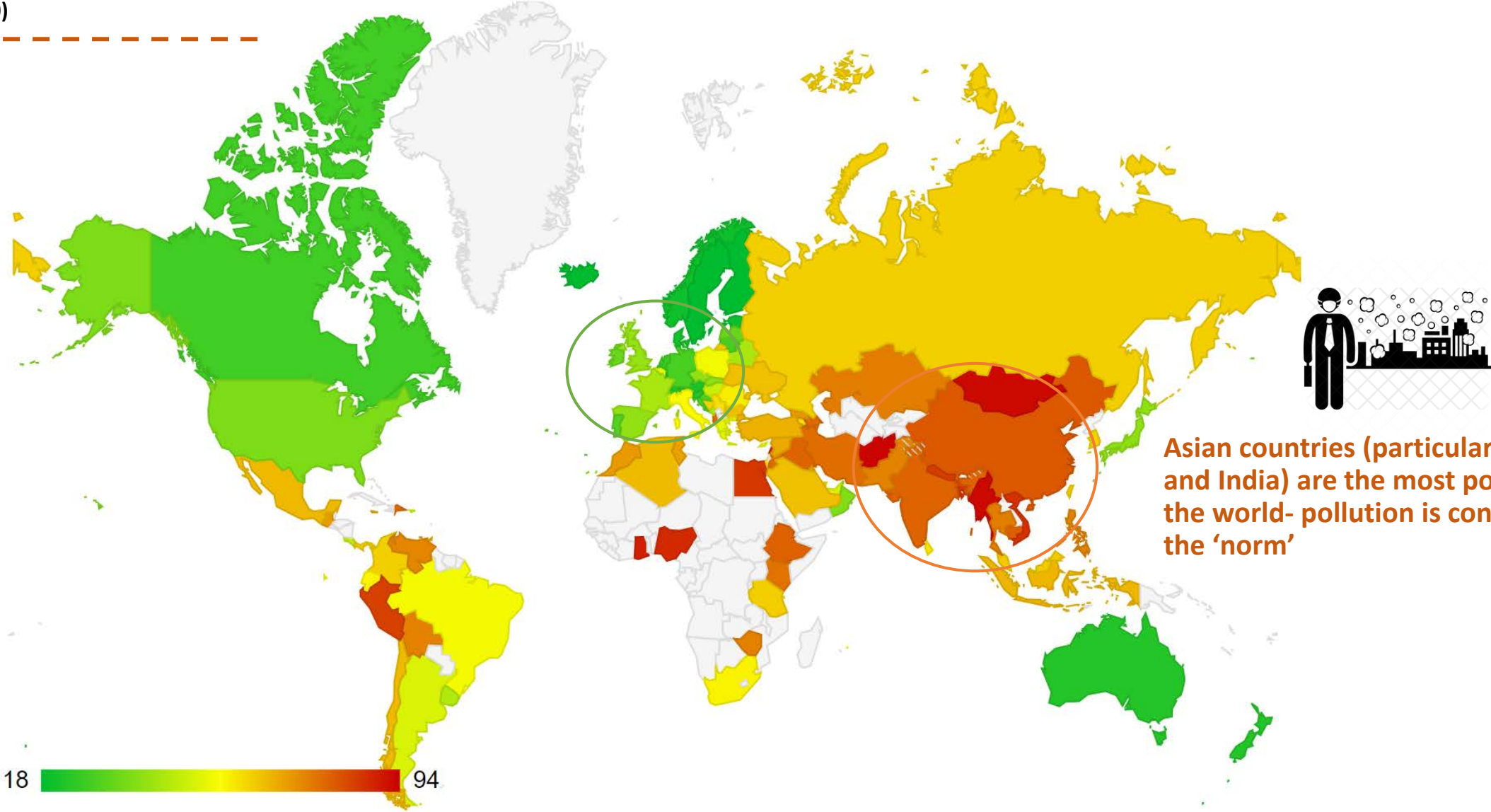


China, Japan and India are all in the top 5 highest consumerist countries.

(Euromonitor International, 2017)

# Global pollution rankings

(NUMBEO, 2020)





1

## Europe profile overview



Much lower emissions  
(NUMBEO, 2020)



**European consumers are more conscientious.**  
**Scandinavian countries leading the environmental conversation**

- Greta Thunberg (Extinction rebellion)
- 'Flygskam' Flight shaming movement  
(The guardian, 2019b)
- UK no-fly movement



In the UK, the 'adventure travel' market has more ethically conscious travelers than the mainstream traveler (Mintel, 2020)



Younger travelers, aged 16-35 are more concerned with the environmental impact of travelling than the average UK holiday maker (Mintel, 2020)

## 2

## Travel and tourism efforts

**As of January 2020, UN CORSIA carbon emissions offsetting scheme. Airlines involved either have to use lower carbon fuels or can buy emission reduction offsets e.g. by contributing to renewable energy or protecting forestry (Mintel, 2020)**

### Europe

- Many brands taking part in CORSIA such as BA and TUI who won an award for its 'better holidays better world' scheme. (Mintel, 2020; TUI, 2017)
- Flight and Holiday brands taking action such as Ryanair (Europe's cleanest airline!) with a carbon offsetting and reducing plastic waste scheme; and 'climate positive' travel companies 'explore', 'Intrepid' and 'World Expeditions' (Mintel, 2020)
- KLM and Delft University (Netherlands) work to make air travel more sustainable with 'V' Plane (TU Delft, 2019)
- UK consumers are concerned, and agree that travel companies should take responsibility to help protect the environment (Mintel, 2019)



### Asia

Asian countries like China, Japan and India would benefit from being part of the CORSIA scheme, but so far there is no evidence of this – yet it is still a relatively new scheme (Japan Times, 2019)

**Organisations must focus on education and transparency to make the travel industry greener.**

(Mintel, 2020)

**But there are very few schemes available for airlines to reduce emissions.**

(Financial Times, 2019)

Looking at the environment, both travel companies and (UK) travellers know they have **a responsibility to change their behaviour and reduce their impact on the environment**. However, there is a lack of knowledge among travellers about how they can contribute, as most only consider the fun aspects of their trip. Inspirational content, ethical labels/ratings and search criteria can help brands to resonate with travellers looking to **make greener choices**. (Intel, 2020)



3

## General findings

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Will a young person in Asia consider the environmental impact of air travel more or less than a European counterpart?



**Asian consumers are less likely to care about the environment.**

**Environmental consciousness is something associated with the already affluent, not considered a widespread issue.**

(Japan Times, 2019)

**European consumer is more environmentally conscious**

(Financial Times, 2019)

# 3

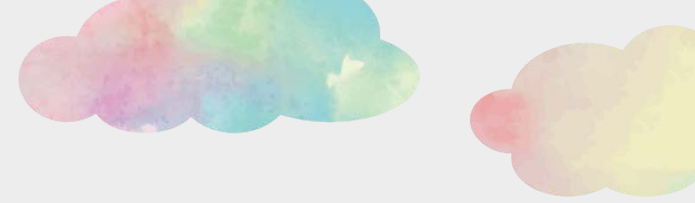
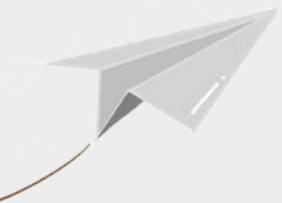
## Opposing evidence

### Evidence suggesting Asian consumers are concerned with environment

- Experienced Chinese travelers are spending less time shopping and more time in nature, demonstrating that the environment is important to them (The Telegraph, 2019)
- Chinese Millennials are increasingly opting for more adventures rather than traditional tourist trips. (The Telegraph, 2019)
- Asian countries are more collectivist, particularly China, Singapore and Japan (Hofstede Insights, 2020); when collective attitudes to carbon offsetting are high, consumers are more likely to respond strongly towards it (Araghi, Krosen, Moli and Van Wee 2014)
- Taiwanese consumers prefer to choose an airline that helps the environment, but only if it doesn't compromise holiday interests (Niu, Liu, Chang and Ye, 2016; Lu and Shon, 2012)

### Evidence suggesting UK consumers are less concerned with environment

- UK consumers are more aware, but don't want to give up the luxury of air travel. (The Telegraph, 2019)
- Although many companies have the option available, very few UK consumers use sustainability criteria to search for holidays (Intel, 2020)
- UK consumers may be more environmentally aware but this does not transfer at all to air travel (Alcock et al, 2017)
- UK more individualist: caring more about 'I' than 'we' (Hofstede Insights, 2020)



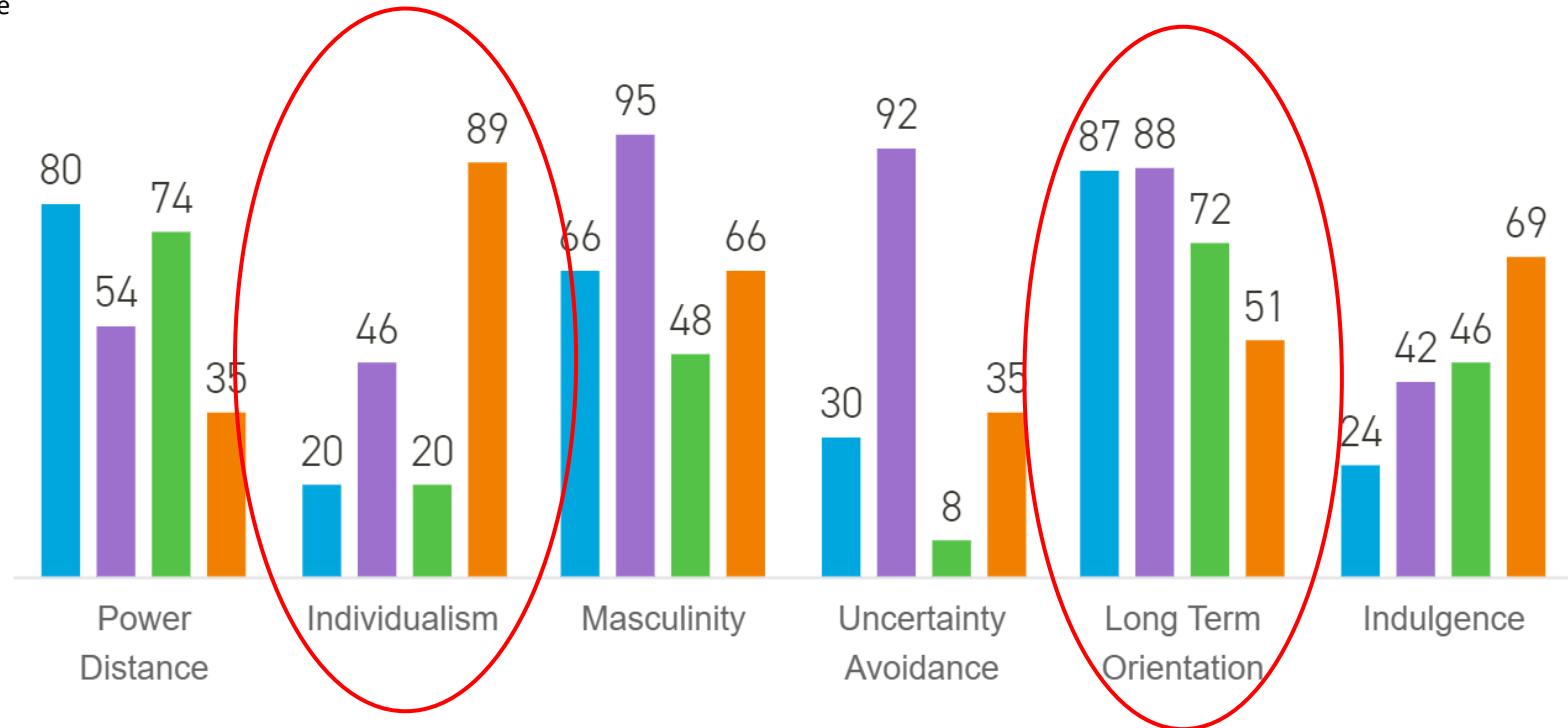
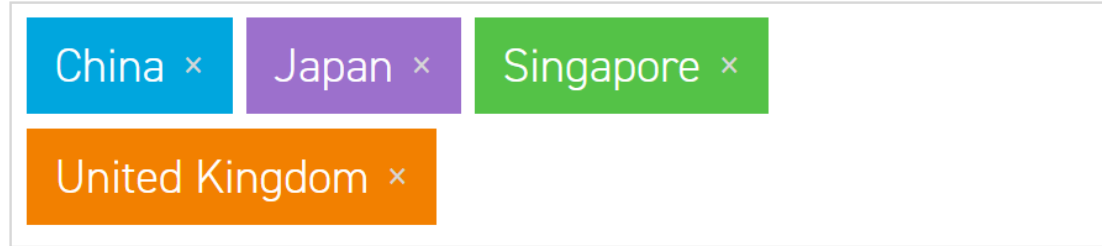
3



(Hofstede Insights 2020)

**Can be an excellent tool in marketing and business, to compare cultures of countries (predominantly work culture)**

Nb. There have been lots of criticism of these works, therefore critical thinking should be executed when using this tool, and perhaps used in tandem with primary research.



\* estimated

# 4

## Other questions

Are experiences really more valuable than material goods for these groups

### The evidence suggests:

Experience is becoming increasingly more valued to consumers, especially younger consumers (both Asian and European) (Mintel, 2020; The Telegraph, 2019)

### Additional thoughts:

Experiences vs material goods depends on individual consumers perception of both. Generally, travel is an experience through materiality, but how material the experience becomes is down to the individual's values. People travel for experience, to see beauty, we all share this beautiful world and have to play our part in looking after it.

# 4

## Other questions

**How important is posting abroad regularly on social media to (certain groups of) young people vs the environmental impact of travel?**

### **The evidence suggests:**

More young people and middle-classes are becoming increasingly aware of the environmental impact of travel, but are not willing to compromise on their experience

### **Additional thoughts:**

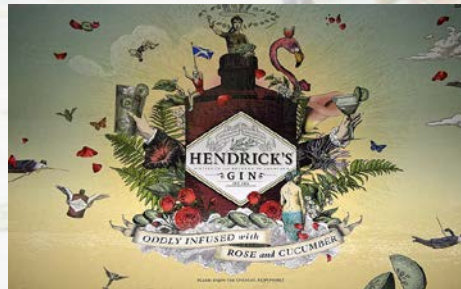
Similarly to the previous question, posting on social media is a part of every day life, but its value depends on the value set of that person. I do not believe that consciousness of environmental impact will have a direct correlation with social media posting.



## 4

## Other questions

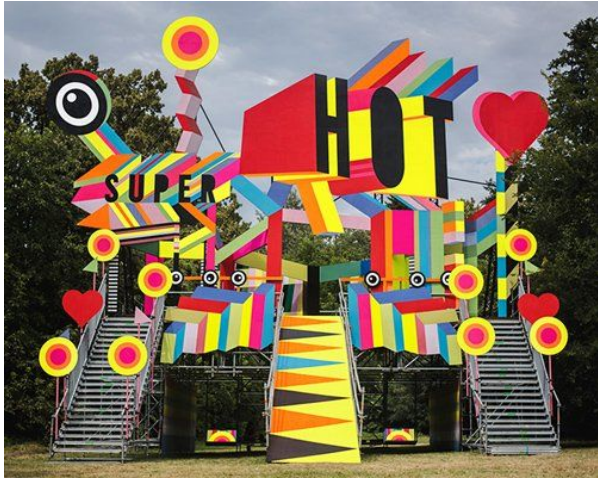
How does the airport environment and travel corridor overall represent an opportunity for brands to give something back of tangible value to these consumers? Or is it purely a branding opportunity?



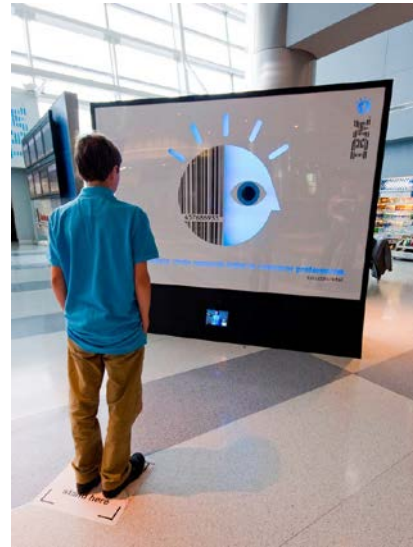
**The evidence suggests:** There is a rising demand for experience in airports – such as virtual experiences and exhibitions or shows. Dubai International Airport is leading the way with this. (Mintel, 2019b)

### Additional thoughts:

Airport environment and travel corridors, alike all advertising spaces are an opportunity. What makes airports unique is that they usually contain excited consumers awaiting experience. All advertising has the opportunity to give back to consumer, airports advertising, particularly can stand out as different through interactive and immersive campaigns.



Immersive advertng can transform a space



(Trendhunter, 2015; Drievopedia, 2020)



# 5

## Advertising opportunities

**Travel and tourism brands have the opportunity to get ahead of the curve and differentiate themselves from a point of sustainability and CSR.**

In 2019, the busiest airports in the world:  
2<sup>nd</sup> Beijing Capital International Airport  
3<sup>rd</sup> Dubai International Airport  
8<sup>th</sup> Shanghai Pudong International  
9<sup>th</sup> Hong Kong International Airport  
(The Telegraph, 2019)

**Global air passenger volumes set to double to 8.2 billion, by 2037** (Intel, 2020)

**88% of UK travel consumers expect waste reduction to be among travel companies priorities** (Intel, 2020)

**‘Going green’ and ‘wellness tourism’ are two of the five travel trends expected for UK travelers in 2020** (Intel, 2019c)

## 5

## Concluding thoughts

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Ultimately, in order to have more direct findings (over general findings), primary research would be invaluable (of both consumers and airports of interest) – unfortunately given the current circumstances I was unable to carry this out myself, but I would suggest this be conducted based of these secondary findings

**Understanding cultures is incredibly complex, and undoubtably consumer experience and cultural complexities will affect receptibility to advertising and to environmental matters. What would be most beneficial, would be to employ local agencies who know the advertising industries well within the countries of interest.** (Hackley, 2002; Akaka and Alden, 2010; De Mooij and Hofstede, 2010)

It should be mentioned that COVID-19 has brought the aviation industry, corporate travel and business events to a standstill; Asia has been particularly affected. This may substantially alter some of the presented findings and suggestions.

# Thank you

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...any questions?



*Hannah Silverstein*

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