



Byway

Impact report 23/24



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Introduction

Welcome from our founder



Cat Jones
Founder and CEO

This year, we're thrilled that our customers have saved 757 tonnes of carbon by opting for flight-free trips. That's three times more than last year, both because of customer growth (2,305 more passengers this year) and because we've attracted more frequent fliers than last year: 40% of our customers this year, compared to 27% last year.

Expanding our advertising efforts to attract travellers who'd otherwise have flown, strategic partnerships with mainstream providers such as First Choice, and enabling more customers to buy trips online, have all contributed to this shift. It's fantastic to see flight-free holidays appealing

to more mainstream audiences and we're looking forward to supporting the industry's shift towards sustainable travel further.

We've been expanding our sustainable travel activism and deepening links with our community, learning lots from your feedback and engagement and really enjoying the discovery process (especially over coffee and croissants!). Each step forward in our shared journey brings us closer to a world where sustainable, overland journeys are the norm.

Thank you for being part of the flight-free movement!



Our mission

Make flight-free travel mainstream

Our vision is a world in which flight-free holidays are the norm, and a vibrant sustainable travel ecosystem flourishes away from the beaten path.

Our goals

Reduce the climate impact of travel

Boost local economies

Increase sustainable tourist spend

Our values

Love the journey

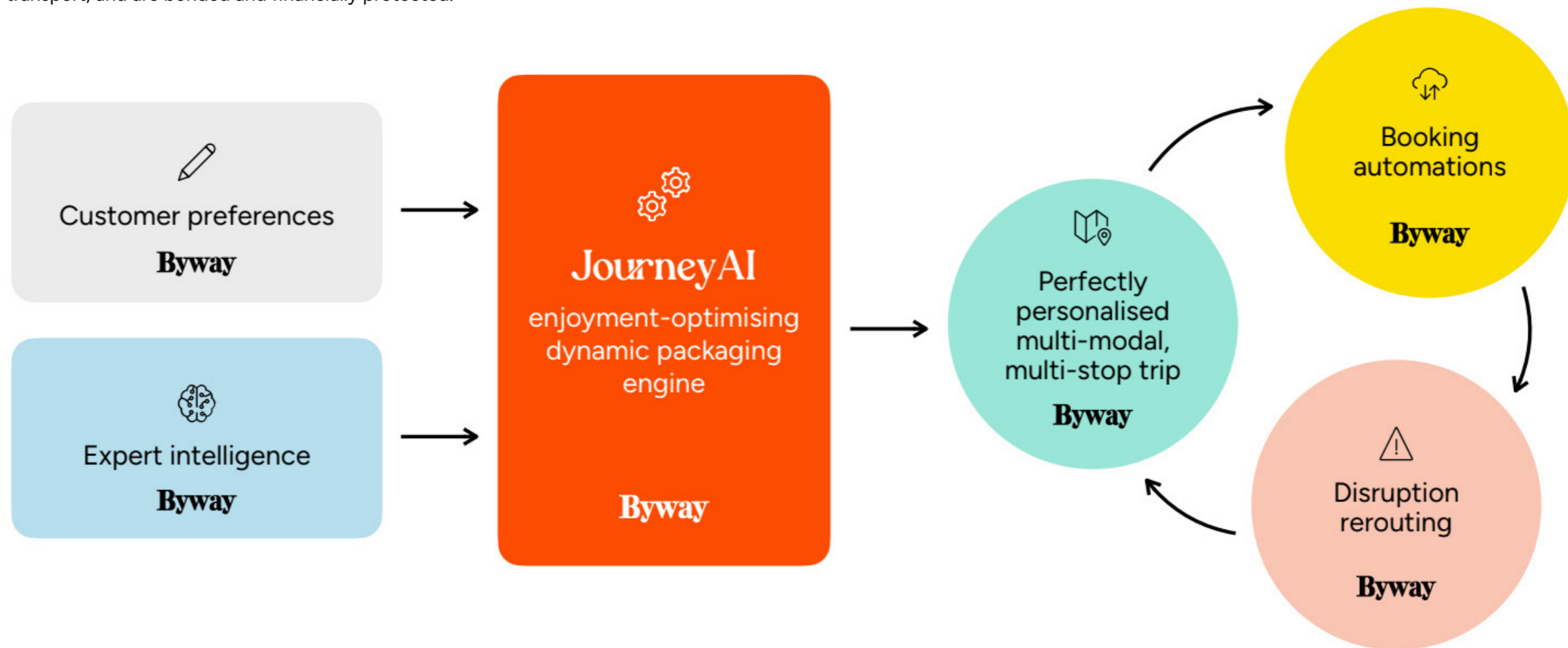
Trust and be trusted

Mainstream means everyone

Our product

We offer flight-free, journey-based holidays that optimise for enjoyment rather than speed.

We believe that flight-free travel will become mainstream when people choose to do it because they want to, not because they 'ought' to. Journey-based travel is a superb, enriching experience that is sought after not just because it feels like having multiple holidays in one, but also because it's more sustainable. However, many find these types of trips prohibitively complex to organise. That's where Byway, and our innovative JourneyAI, comes in. All of our customers' holidays are dynamically packaged, include accommodation and transport, and are bonded and financially protected.





Our industry

The travel industry is an essential part of the global economy, creating jobs, boosting local businesses and facilitating cross-cultural understanding and appreciation. It helps us explore new cultures, make lifelong memories, and develop a better understanding of the world and its people. However, the travel industry also faces significant sustainability challenges, particularly when it comes to the environment. Responsible and regenerative tourism practices are more important than ever and according to the World Travel & Tourism Council (WTTTC), tourism is responsible for 8-11% of global greenhouse gas emissions.

The industry is taking collective action to address its environmental challenges, and our model, which prioritises local businesses, non hotspot destinations and of course, low carbon transport, has an opportunity to help accelerate that action. We do this by partnering to help other brands offer flight-free options, and by sharing data and telling stories that give other travel brands confidence that people are ready for a more local, sustainable, overland way of travelling - and that when they try it, they love it.

Goals progress

Goal 1

Reduce the climate impact of travel

By making flight-free travel mainstream

This year we rolled out carbon labelling on all of our trips, as promised in the last report. We also successfully expanded our audiences as planned, including reaching more frequent fliers - with 3X customer growth year on year and 1.4X the percentage of customers who would have flown if they didn't book a Byway trip (27% to 40%). Our social following grew from 7k to 20k, helping build an engaged community around flight-free travel.

We launched a Luxe product and soft-launched to US customers travelling around Europe, but are yet to launch to European customers. We have laid the groundwork for this, including hiring a Financial Controller to help with the set up.

Methodology

We ask each customer a few questions to help us track our impact:

- What would you have done if you hadn't booked this trip?
- Where would you have gone?
- How often do you use [transport mode] for holidays?
- How likely are you to rebook / recommend us?

We use CO2 per passenger mile from the UK Department for Business, Energy & Industrial Strategy to estimate the impact of an equivalent trip.

Key results



1539
Byway trips run

3390
customers

65%
of customers fly
sometimes/often/always

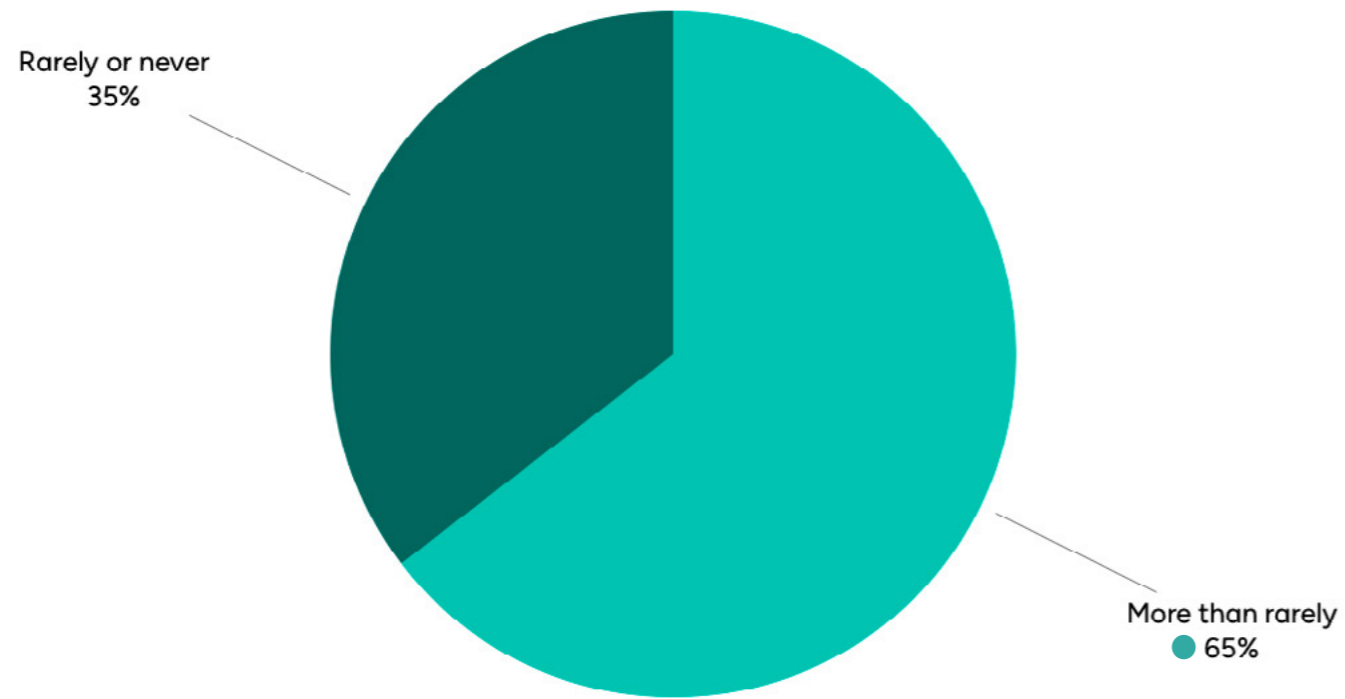


757
tonnes of CO2 saved

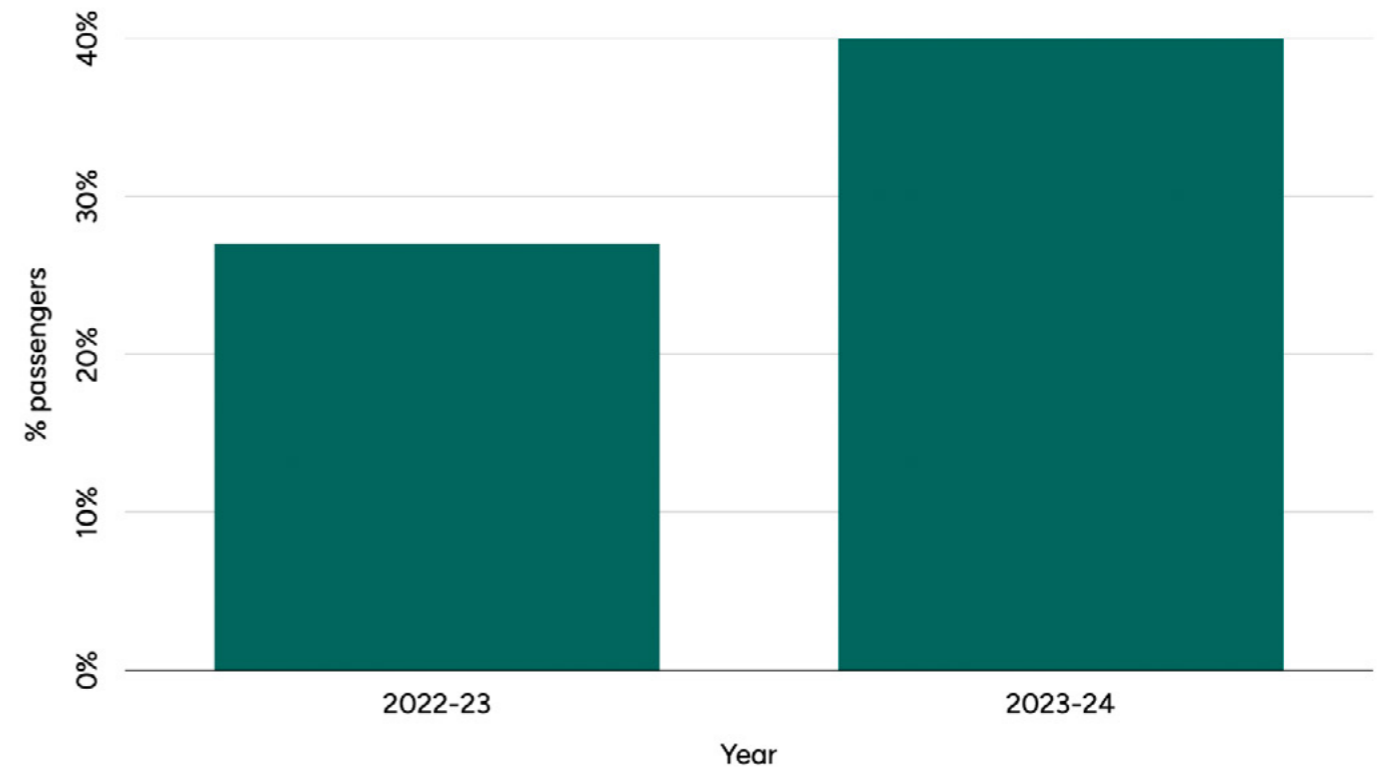
4545
trees' worth of impact

83%
of those would book
again or refer a friend

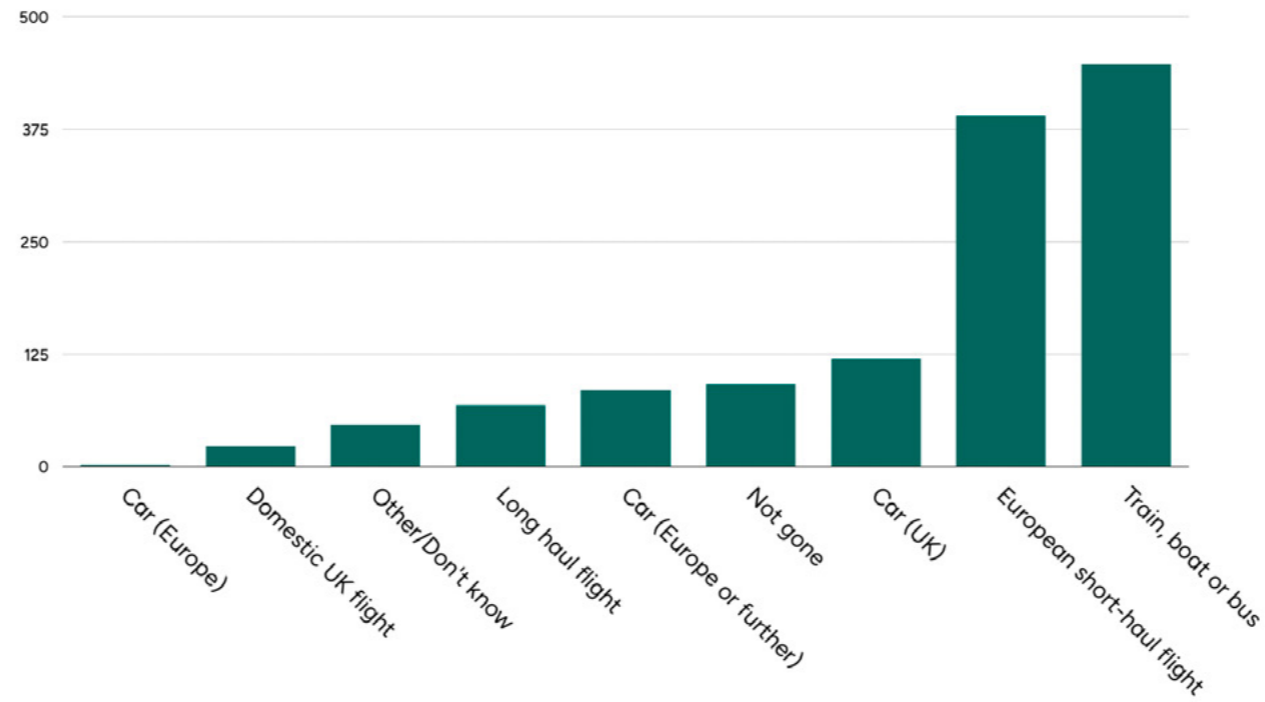
How often do you travel by plane?



The perctange of bookers who would have flown if they hadn't booked a Byway holiday rose to 40% (27% last year)



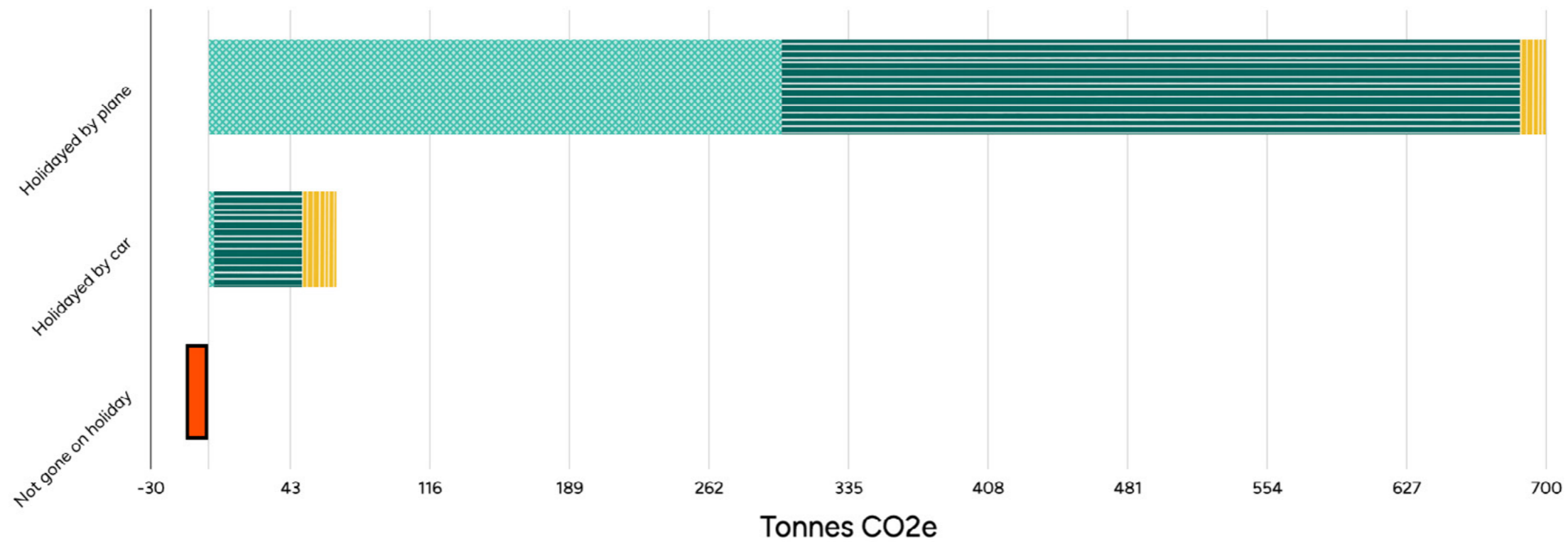
What would you have done if you hadn't booked with Byway?



Breakdown of CO2 savings

■ Long haul
 ■ Europe
 ■ UK
 ■ No plans

Savings are estimated using customers' responses to 'what would you have done if not booking with Byway?'



Actions this year

Carbon labelling

We launched our carbon labelling feature so customers can find out how much CO₂ a Byway holiday will cost compared to flying. The calculations are based on transport plus accommodation, using data from partners and national averages.

102 kg CO₂ **-86% EMISSIONS**

Emissions comparison

This trip	102 kg CO₂
Driving	532 kg CO ₂
Flying	749 kg CO ₂

86% fewer emissions than flying.
Emissions shown are for all passengers on your trip, and are approximate.

[Learn more](#)

Launched US

We became bonded and accredited in the US and have soft-launched and sold 157 trips. We target people who would be travelling to Europe anyway and aim to convert them from short-haul flying to ground transport. Of the 157 trips sold to US travellers this year, 23% would have flown if they hadn't booked with Byway.

Policy/activism

We furthered our activist voice and advocated for flight-free travel by:

- Opposing the government's shorter rail timetable proposal, contributing to its halt.
- Speaking out against private jets, domestic flights, and high rail prices on social media.
- Joining Take The Jump's event to promote flight-free travel awareness.
- Featuring at COP28 as a Glasgow Declaration signatory, promoting Byway in one of their booths.
- Participating in Business Declares' Queue for Climate & Nature protest, calling for more government action on sustainability for businesses.



New partnerships



Sawday's



MACS ADVENTURE

THE THINKING TRAVELLER



SUSTAINABLE JOURNEYS
taking steps to travel better

21.7M ad impressions

We expanded our advertising to Meta and grew our audience on social media to 20K from 7k.



Give up flying
without giving up
granita in Sicily



In the press

We've had 130 clippings in mainstream press this year.

Press coverage includes international press from the US (New York Times, USA Today) to Australia (The Australian) as well as BBC News and Radio, The Independent, Guardian, The Times, Telegraph, The Evening Standard, City AM, Mirror, The Sun and iNews. We've also been included in travel features in Time Out, NatGeo, Wanderlust, Marie Claire, The Big Issue, Condé Nast Traveller and Country & Townhouse. We also gave away a prize trip on ITV's This Morning!

THE  TIMES

My solo (yet romantic) rail journey to the French Riviera

The Guardian

In the tracks of the Orient Express: my train ride from London to Istanbul

B B C

'Tourists are rethinking their relationship with Earth'

itg

BYWAY LAUNCHES NEW FLIGHT-FREE CHRISTMAS MARKET TRIPS

 **INDEPENDENT**

Can you really travel to Europe car-free – and hassle-free – with a dog?

The Standard 

A foodie tour of Hauts-de-France — Europe's gastronomy region of 2023

Condé Nast
Traveller

These are the best (and easiest) European multi-destination train adventures

CITYA.M.

Train travel in Europe: London to Italy in a day with Byway Travel

The New York Times

My Tour Operator Is a B Corp. What Does That Mean? Should I Care?

Next steps

- Create a carbon savings report dashboard instead of our current manual process, so we can easily report on it to our team and our Board on a quarterly basis.
- Continue work on our new technology so that customers can compare route options. We will work on carbon labelling each route so customers can compare which is the more carbon-friendly option.
- Monitor the carbon of our internal tech, which so far has been negligible or hard to calculate. We will also research the carbon output of our team's travel and the office we rent for two days a month.
- Participate in more activism and community campaigns around making flight-free trips easier for all.



Goal 2

Boost local economies

Facilitate environmental recovery by drawing tourists away from hubs suffering overtourism to the wonderful places in between

Last year we planned to add seasonal timeframes for hotspots into our tech, which is still on our roadmap to achieve. It was pushed down our priorities list in favour of other tech scaling work, so we could handle more flight-free trips, but is planned for the next year. Our short-term approach to hotspot management has instead been promoting hotspot alternatives. This includes encouraging customers to travel to locations with high seasonal tourism off-peak, to help increase year-round income and combat peak season overtourism. We launched trips to several regions looking for tourism to help boost economies, such as Poland, Bosnia and Herzegovina. We also launched trips to Finland as an alternative to the more frequently visited cities across Norway, Sweden and Denmark.

Methodology

We identified tourism hotspots by reviewing qualitative sources such as news reports of local policies and destination marketing organisation strategies. We considered various factors, including tourism zoning, Airbnb restrictions, tourist taxes, seasonal environmental damage, and pre-registration requirements.

Key results

68%

non-hotspot nights

10

new regions

71%

paid to non-hotspot
accommodation

Actions this year

Give up flights
without giving up
tulips in Lelystad



NBTC partnership

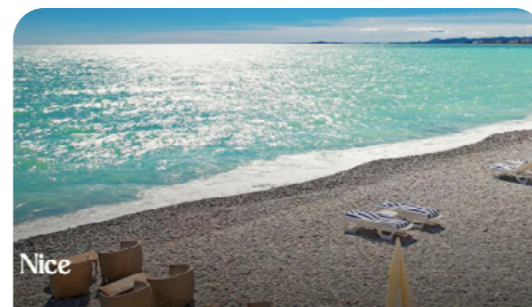
Similarly to last year, we launched another impactful partnership with NBTC (DMO for the Netherlands). NBTC directs tourism away from hotspots like Amsterdam, which we achieved by promoting lesser-known places in our cross-channel campaign.

Other tourist board partnerships

With the popularity of idyllic UK destinations including Cornwall and the Isles of Scilly, we've worked with the Guernsey tourist board to develop and promote our first offering that showcases the lesser-visited Channel Islands.

Seasonal content

We've encoded seasonally-updating content into our tech product, to help our itineraries reflect the changing seasons (e.g. skiing in winter). Most of our trips run across the entire calendar year, but seasonal content has allowed us to better promote our trips outside peak season, showcasing the beauty of off-season travel.



Length of your stay at Nice

The Côte d'Azur's chic capital, Nice is a charming, lively and sophisticated city. With sun-drenched beaches, Baroque buildings and an unrivalled food scene, Nice is the perfect place to soak up the splendour of the French riviera.

Your accommodation 2 nights

Hôtel du Centre

★ BYWAY FAVOURITE

In a fantastic location opposite Nice's Basilica, this cheerful hotel has a great atmosphere, colourful rooms and friendly staff.

[Find out more](#)

ROOM DETAILS

Room: Standard double room - courtyard view
Board: Breakfast included

[Find alternative hotels](#)



Along the Saimaa

Amsterdam, Hamburg, Copenhagen, Turku, Tampere, Lappeenranta, Savonlinna, Helsinki, Stockholm and Osnabrück with sleeper ferry

A cross-border journey across Scandinavia to Finland's UNESCO lake district, home to green, lakeside cities and islands that teem with wildlife.

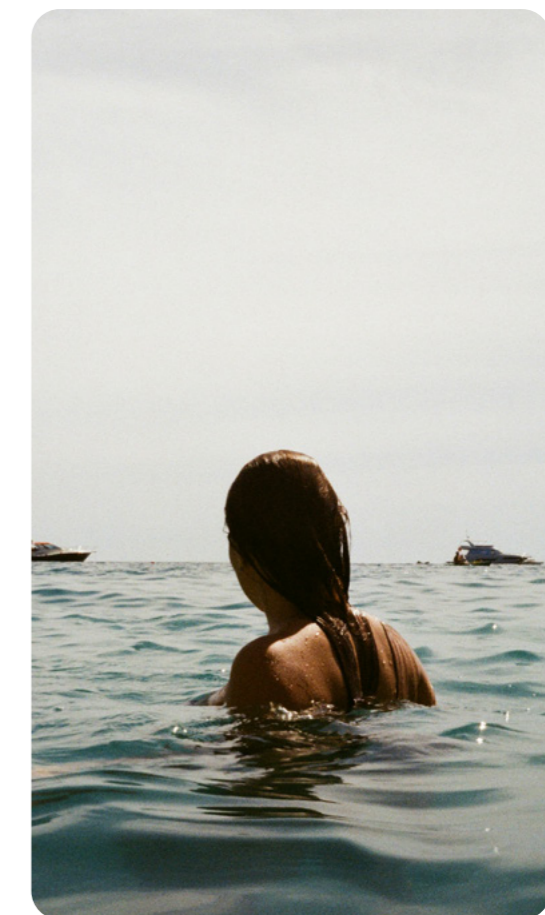
[See trip](#)

Non-hotspot locations

We've launched and developed regions that take tourists away from hotspot locations. For example, our latest Finland trips and subsequent press promotion explored the natural beauty of the region as an alternative to more frequented regions in Scandinavia.

Cool-cations

- Launched cheapest dates for each journey which often shows dates in low season and helps travellers to generate income for businesses all year round.
- Included cool-cations in our trends report.





Next steps

- Focus on developing relationships with regional destination marketing or management organisations actively looking to support sustainable tourism or to leverage tourism for local regeneration. By working closely with local experts we can leverage tourism for the good of the region and increase tourism dispersal.
- Keep monitoring and responding to overtourism by identifying and codifying hotspots into our technology, reducing stays in these places.
- Continue avoiding overtourism locations in our marketing and content and drive people to regions welcoming tourism.
- Consider expanding our hotspot-avoiding technology. Currently it has whole cities and regions marked as overtouristed, but local policymakers would only count certain boroughs or city regions as problematic. When we provide accommodation in these non-hotspot regions they should not be considered a hotspot night.



Goal 3

Increase proportion of sustainable tourist spend

Prioritise partnerships with sustainable businesses to increase tourism spend on sustainable products

This year we scaled our bookings significantly and introduced the ability for customers to choose accommodation from our hotel slider. With this, and rapid expansion to new audience demographics, we saw a drop in percentage of our spend going to locally owned hotels instead of chain hotels, 80% this year compared to 86% last year.

Some customers are looking for more traditional 'chain' hotels or high-star rating hotels, and people with mobility issues or concerns with using public transport opted for hotels close to major train stations, which are often chains. Despite this, we still ended up **increasing our spend on locally owned hotels 1.5X**.

Methodology

We reviewed our list of accommodation suppliers manually and tagged all international chains (e.g. Radisson, Hyatt) so that we could report on their prevalence.

Key results



80%

Spend on locally owned/
non-chain hotels



1.5X

YOY locally-owned
accommodation spend



Actions this year



Sustainable activities

We have created 203 new sustainably minded activity recommendations in the past year, with a further 208 being updated with more information.

Live pricing

We built new integrations to give us live pricing for all hotels, allowing us to feature smaller locally owned hotels that have limited availability and creating a bigger long tail of accommodation options.

Accommodation pinning

We introduced the ability to 'pin' accommodation to our online trips, so that we can showcase specific accommodation that we love, including more sustainable hotels and locally owned B&B's.



Your accommodation 2 nights

Sapphire House

★ BYWAY FAVOURITE † FEATURED HOTEL

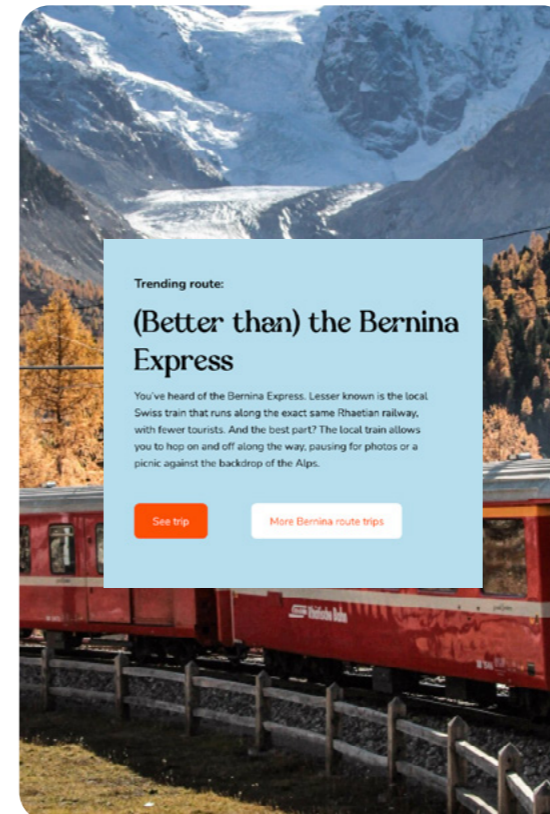
Antwerp's showstopping vegan hotel is located in the old quarter, complete with chic interiors and housed in a 16th-century building that embodies the city's Golden Age. Enjoy plant-based dishes from a Michelin-starred chef at their restaurant or bistro.

[Find out more](#)

ROOM DETAILS

Room: Room

Board: Breakfast included



Trending route:

(Better than) the Bernina Express

You've heard of the Bernina Express. Lesser known is the local Swiss train that runs along the exact same Rhaetian railway, with fewer tourists. And the best part? The local train allows you to hop on and off along the way, pausing for photos or a picnic against the backdrop of the Alps.

[See trip](#)

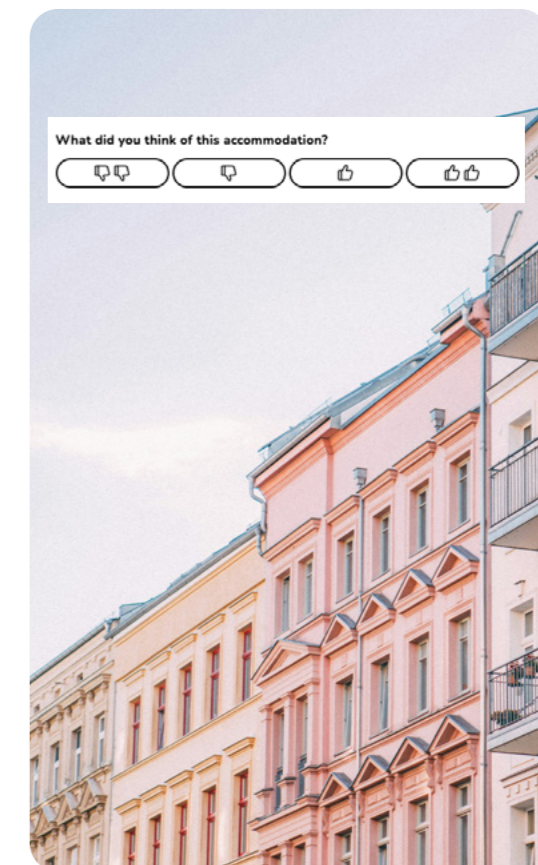
[More Bernina route trips](#)

Non-hotspot routes

We have moved away from many 'tourist' train routes, such as the Bernina Express in Switzerland or the Jacobite steam train in Scotland, favouring local trains that run along the same route and funnelling money back into local communities where these services are a lifeline.

Customer feedback

Based on customer feedback (either direct or through our team), we have marked down 503 hotels in our system so that they are no longer prioritised within our system using a newly introduced graded thumbs up/thumbs down system in our journey guides so customers can mark their hotels as they travel.





Next steps

- Find a way to source reliable sustainability data for accommodations and highlight these in the hotel carousel to incentivise customers to select these options.
- Consider highlighting locally-owned hotels in the hotel choice carousel.
- Expand the pin accommodation functionality to transport services and promote more local routes.
- Introduce an expanded customer rating system so we can crowdsource information about activities and transport as well as accommodation.
- Work to source more sustainable accommodation and activity options and continue to prioritise sustainable options in our marketing.

Values progress



Love the journey

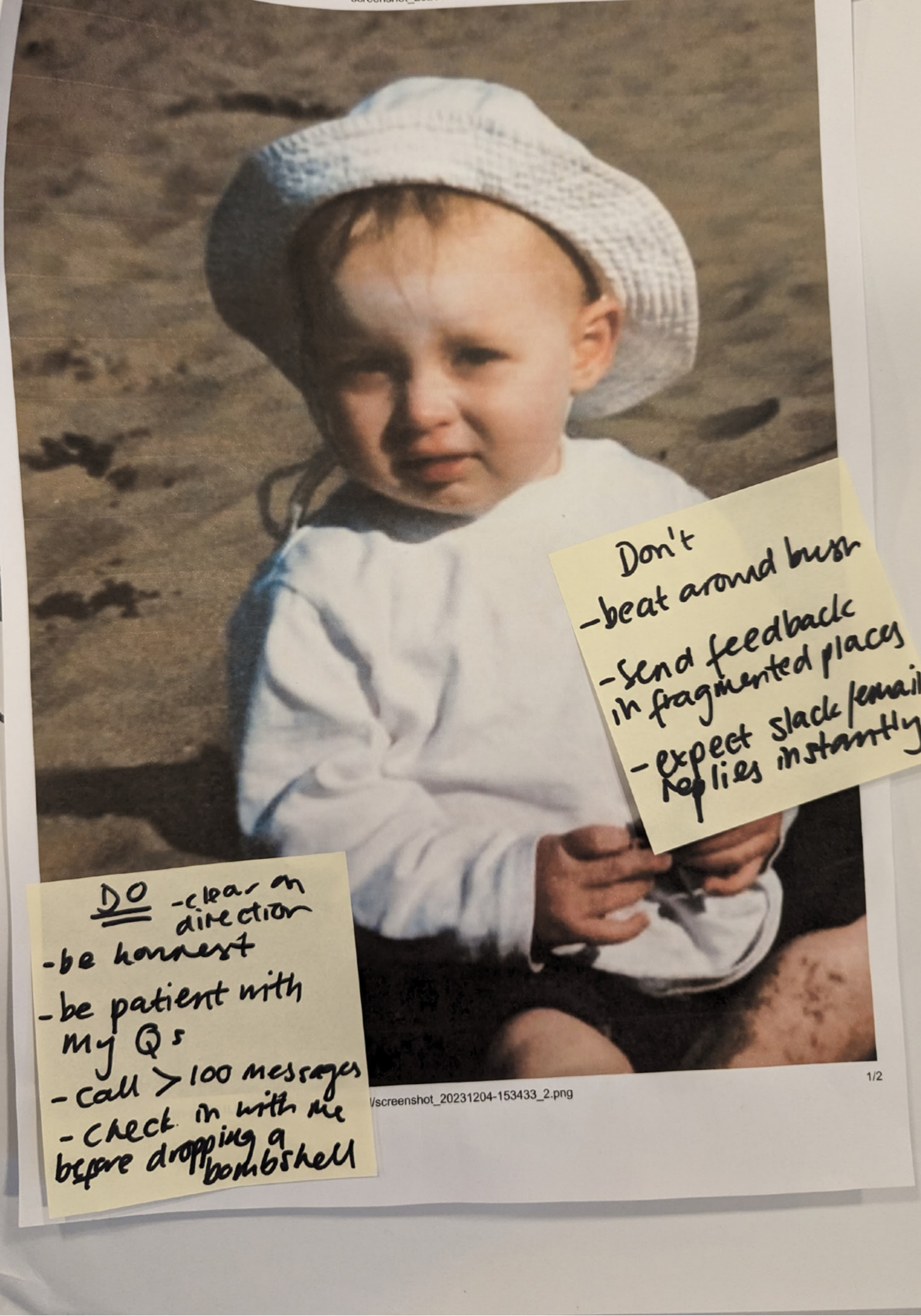
Making slow travel mainstream is a journey we approach with the optimism and openness needed to learn and grow.

- Maintained a high average happiness for our team, which is currently 8.6/10.
- Launched Climate Perks to allow our team to gain holiday days back for travelling overland.
- Introduced a new friends and family referral scheme and internal influencer affiliate scheme.
- Built a wellness hub with tools and recommendations for physical and mental health, stress management, work environment set-up, financial wellness, resilience and growth.
- Expanded our sick leave to 10 days instead of the statutory 5.
- Held a values award where we annually celebrate three members of the team who have best displayed our values, as voted by the team.

Trust and be trusted

Trust in each other is the foundation of our team. We share insights widely and are a trustworthy business grounded in openness.

- Organised a company-wide 360 review process resulting in "Me Maps" we can share with our teams that share strengths and growth areas for openness and to know who to go to for help.
- Launched a new capacity initiative where all employees who score high capacity scores weekly are able to speak to another member of the leadership team who is not their manager.
- Conducted a security review and launched new policies and procedures to ensure the safety of our customer and team data, and to mitigate risks.



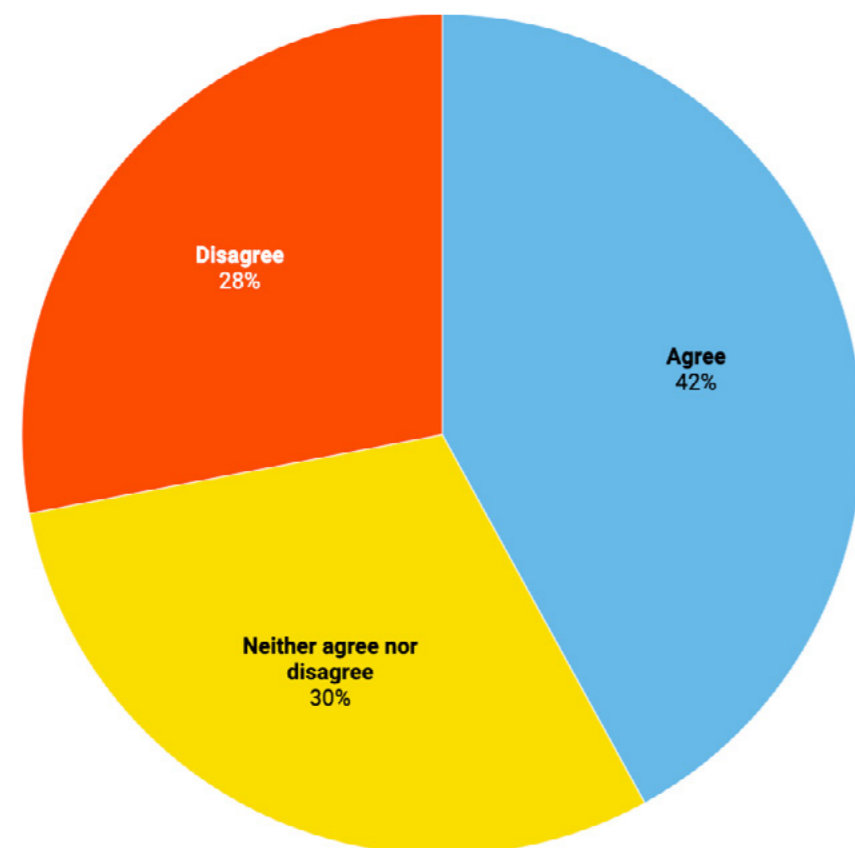


Mainstream means everyone

We listen to, respect, amplify and support all stakeholders and have guidelines around diversity, equity and inclusion.

I want to find alternatives to flying for my holidays/travel to reduce my carbon footprint

■ Agree
 ■ Neither agree nor disagree
 ■ Disagree



- Onboarded a new diversity-first hiring agency.
- Launched 'cheapest dates' for each journey - enabling those travelling on a budget to also be able to book a flight-free holiday.
- Started migrating our components to use the accessible Adobe component library, and adopt WCAG 2.1 level AA.
- Created an accessibility statement page on our website with an email address for feedback.
- Increased our stakeholder engagement by hosting a meet up group and running community surveys. Responses confirmed the strongest incentive for repeats/referrals is excellent customer experience, and our wider community are interested in a flight-free messageboard.
- Conducted a One Poll survey and found that 42% of UK holidaymakers seek alternatives to flying to reduce their carbon footprint. This rises to 65% of Londoners, and 60.5% of Gen Z travellers. The top three barriers were primarily time, cost and complexity.

Next steps

Support us



[Join our team](#)

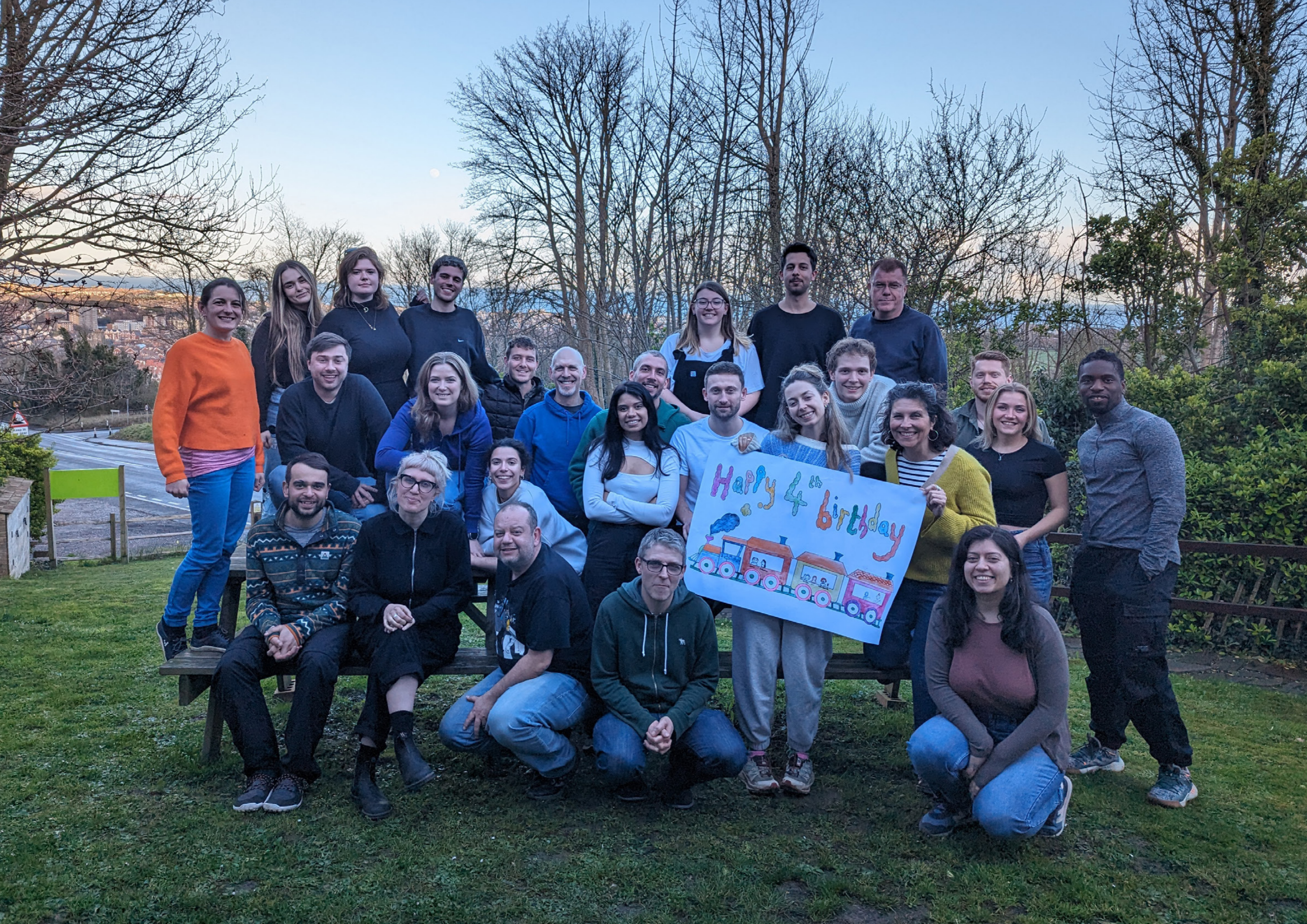
[Sign up for our newsletter](#)

As we move into the next year, we plan to further grow our impact. We will continue expanding our customer base, with a focus on increasing repeat and referral bookings - to encourage more customers to travel flight-free and create an engaged community. We're planning more activism and policy campaigns around making flight-free trips easier and more accessible for all.

Improving the technology behind our trips will be a priority, so we can programmatically deliver sustainable tourism at scale. This includes sourcing new data sets, creating new suggestive and intuitive UI, and algorithmically favouring sustainable options. We'll be enhancing the way we report on carbon data - both for trips and our technology/team carbon footprint. Additionally, we'll continue leveraging customer data to increase our travel database intelligence.

To continue to increase the proportion of tourism spend on sustainable products, we'll be evaluating our accommodation options and consider removing or demoting chain/tourist hub hotels. We'll be adding more sustainable accommodation into our system, and increasing our marketing efforts for these with our new 'hotel pinning' feature. To ensure our trips leverage tourism to benefit local regions and help increase tourism dispersal, we'll be developing more relationships with local experts.

Finally, we plan to make our reporting more frequent so we can act on it at least quarterly, and further accelerate our goal of making flight-free travel mainstream.



Happy 4th birthday

