



## EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES

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EUROPEAN  
TRAVEL  
COMMISSION

**MINDHAUS**  
Tourism Marketing Strategy

# FOREWORD

## EUROPEAN TRAVEL COMMISSION

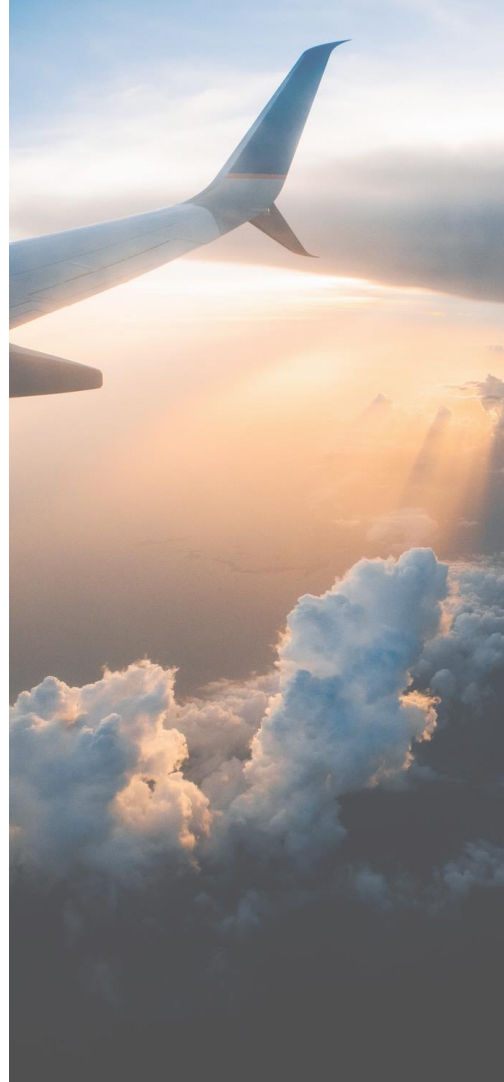
*“Changes in consumer travel preferences post-COVID-19 have already become evident, including a greater concern about personal wellbeing, air quality and man-made environmental impacts. The advantage of integrating sustainability elements is increasingly well recognised in the tourism sector and has already moved from the niche to the mainstream. A sustainable approach to tourism development presents a great opportunity; not only can destinations improve environmental quality and conserve natural resources, but they can also increase the benefit of tourism to local people and protect culture and heritage – all the while delivering a product that is increasingly in demand.”*

Eduardo Santander, Executive Director

## MINDHAUS

*“Offering sustainable travel options is already a “must-have” among places and brands. Our focus as an industry should be to demonstrate that the freedom and enthusiasm associated with travel can go hand in hand with a heightened sense of care and responsibility for host communities and the natural environment. As the pandemic and the climate crisis continue to shake our world, understanding the extent to which European travellers are ready to adapt their behaviour to a new reality is vital for policy makers, destinations and businesses alike. We trust that the results of this specific report will provide useful consumer insights with a view to building a better and more sustainable future for tourism.”*

Theofilos Kyratsoulis, General Manager



# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES

## RESEARCH HIGHLIGHTS



Concluding six waves of market research<sup>1</sup> into European travel sentiment from September 2020 to February 2021, this report spotlights consumers' attitudes towards responsible travel.

- The COVID-19 crisis had created an opportunity for European tourism to restart better with a **refocusing of priorities**: promoting responsible travel and working with a consolidated and consistent approach towards **natural, social and economic sustainability**.
- In addition to the positive sentiment for travelling, **Europeans are also demonstrating an enthusiasm for hosting travellers**, with 40% of respondents wanting to have more tourists visiting their community or country.
- In the context of the pandemic, excessive numbers of tourists at one destination means an undesirable level of overcrowding. Mindful of this, **44% of respondents say they will consider off-season travel** and **32% are willing to spend more** in order to visit less crowded destinations.



# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES RESEARCH HIGHLIGHTS

- 3 in 5 respondents are now willing to take fewer trips and spend more time in one destination - a critical factor considering that 75% of tourism CO2 emissions result from transportation<sup>1</sup>.
- In addition, 30% of Europeans are willing to spend more for green premium travel, acknowledging the need to reduce their own carbon footprint.



# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES

## RESEARCH HIGHLIGHTS



- Sustainable tourism aims to better manage the relations between the visitors, the tourism industry, the community and the environment. In line with this, **over 1 in 3 respondents are willing to spend more, benefiting local communities in both social and economic terms.**
- On a less positive note, the COVID-19 threat and personal health concerns **have led 50% of respondents to favour single-use packaging** for food and personal care products - representing a setback for the plastic-free travel lobby. Collective actions at a regional and country level will be necessary to ensure this trend will be reversed in the aftermath of the pandemic.

# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES

## RESEARCH HIGHLIGHTS



There was an overall tendency among respondents planning to travel during the pandemic to respond positively to sustainability-related questions. Compared to the overall sample, these pandemic travellers<sup>1</sup> demonstrated a stronger willingness to:

- Pay more for visiting less crowded destinations (37% vs. 32%);
- Travel more in the off-season (51% vs. 44%);
- Pay more to support the local economy and community (44% vs. 36%);
- Pay more to reduce their carbon footprint (37% vs. 30%).

These figures are in line with earlier observations that the disruption created by the pandemic (1) can potentially strengthen peoples' awareness and desire for sustainable travel options and (2) can be leveraged to promote responsible travel.

# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES RECOMMENDATIONS FOR DESTINATIONS



- The positive sentiment of residents for accepting more tourists can be leveraged to re-establish the relations between tourists and the host community and for implementing collaborative initiatives on a local level that will guide responsible tourism development.
- As more Europeans are willing to consider off-the-beaten-track destinations, NTBs<sup>1</sup> should promote lesser-known destinations and highlight the pristine beauty of crowd-free travel.
- Looking to better manage tourism seasonality, the growing interest in off-season travel should encourage DMOs<sup>1</sup> to develop a 365 strategy, with recommended products and experiences for every season.
- In view of the increasing desire to spend more time at a single destination, DMOs<sup>1</sup> should further develop and promote immersive experiences for the visitor planning an extended stay. These could include skills workshops conducted by local craftspeople, taking part in local events and activities and even volunteering on environmental projects and community enhancement schemes.

# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES RECOMMENDATIONS FOR BUSINESSES



- Resulting from tourists' interest in supporting the host community, local entrepreneurs **should offer social tourism products and community tourism experiences**, creating localised and highly immersive tours that will benefit both the tourists and the residents.
- For tourists who wish to pay more for a less crowded visit, tourism **sights can offer VIP experiences for those purchasing tickets at less busy times of the day.**
- To address the willingness of tourists to invest in a green premium travel, **businesses can offer green upgrades, carbon offsetting schemes and opportunities to take part in environmental projects**, as part of their value proposition.
- To counter the readoption of single-use packaging for food and personal care products, tourism businesses should ensure optimum health and hygiene protocols are in place and reward guests that refrain from using plastic. Furthermore, **governments should reward accommodation establishments and restaurants that adopt plastic-free policies.**

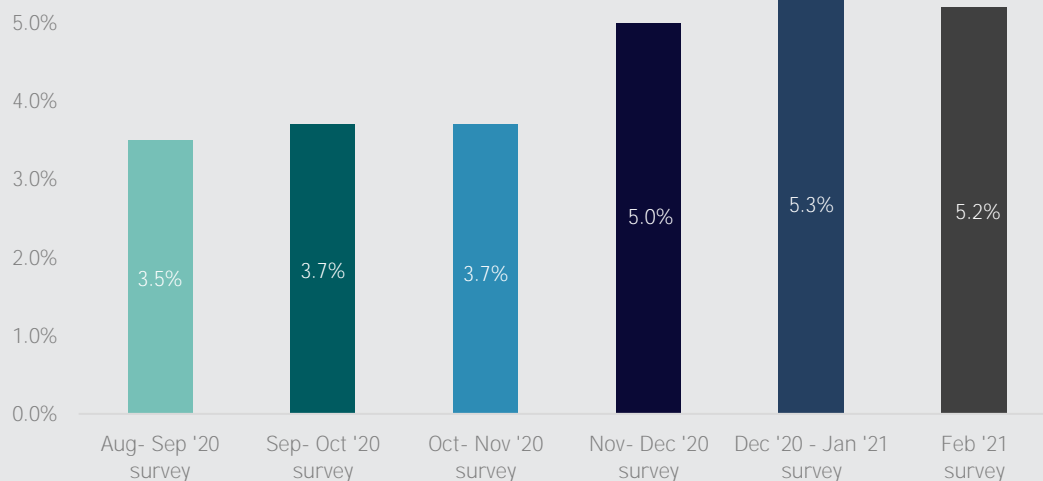


# EUROPEANS' ATTITUDES TOWARDS RESPONSIBLE TRAVEL CHOICES



## The importance of sustainability as a characteristic of the travel experience grew since summer 2020

Sustainability as a travel quality over time\*



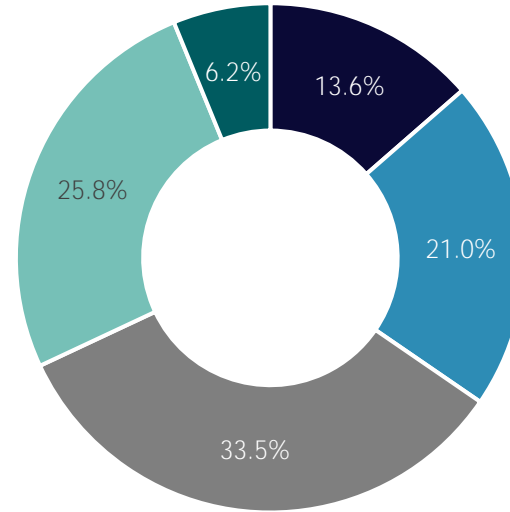
Sustainability was ranked higher than the travel qualities of 'adventure', 'authenticity' and 'proximity to home'\*\*

The term "Travel Qualities" refers to the nature, traits and characteristics of the travel experience sought by consumers

PAYING  
MORE TO  
AVOID THE  
CROWD

1 in 3 respondents would be willing to pay more for visiting a less crowded destination following the pandemic

Willingness to pay more for less crowded destinations and attractions



Strongly agree Agree Neutral Disagree Strongly disagree

Travellers going on a road trip (41%), culinary tour (37%) or a cruise (37%) are more likely to pay more for having a less crowded experience

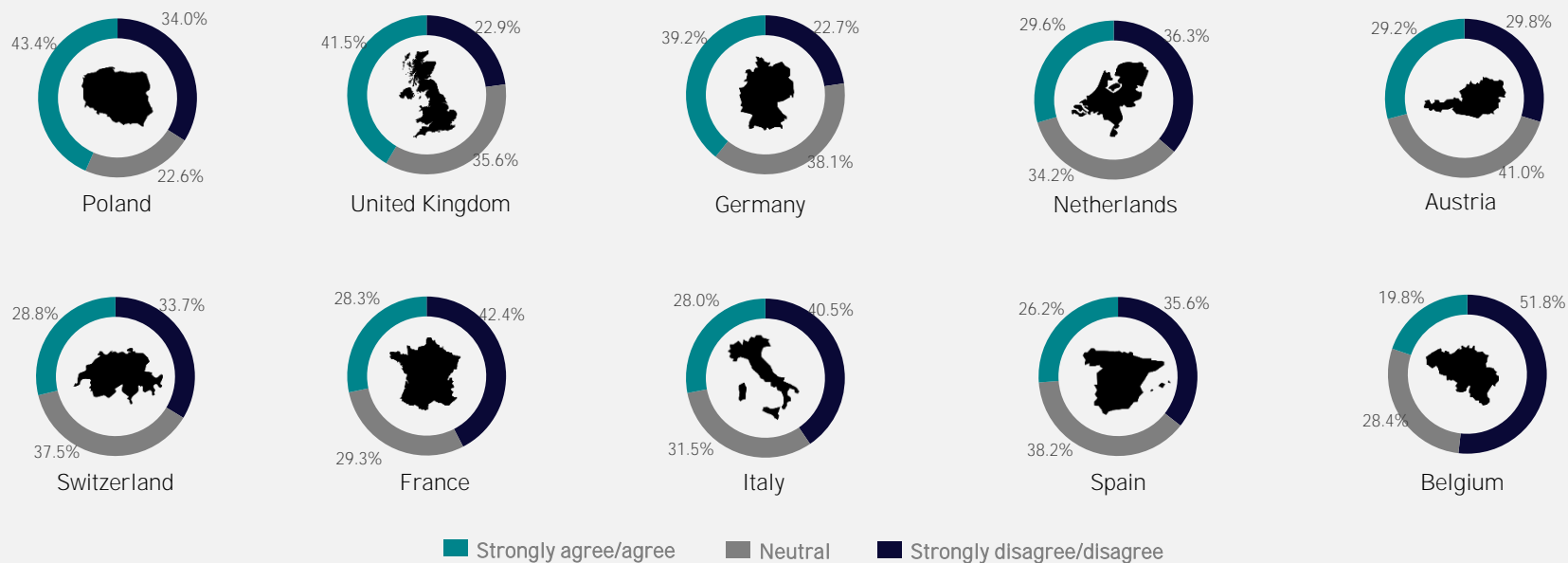
n: 5,762 | Aug-Sep '20 survey

To what extent do you agree/ disagree with the following statement? "Following the COVID-19 pandemic, I would be willing to pay more to visit less crowded destinations and attractions"

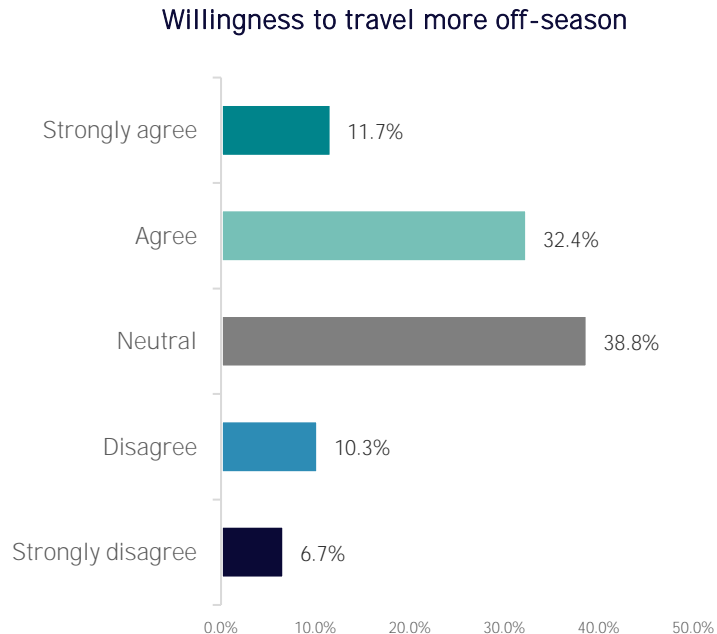
## Polish, British and German respondents are most likely to lay out extra money to avoid the crowds



Willingness per country to pay more for less crowded destinations and attractions



## 44% of Europeans are looking beyond the peak season for travel opportunities



### CHOOSING OFF-PEAK HOLIDAY PERIODS

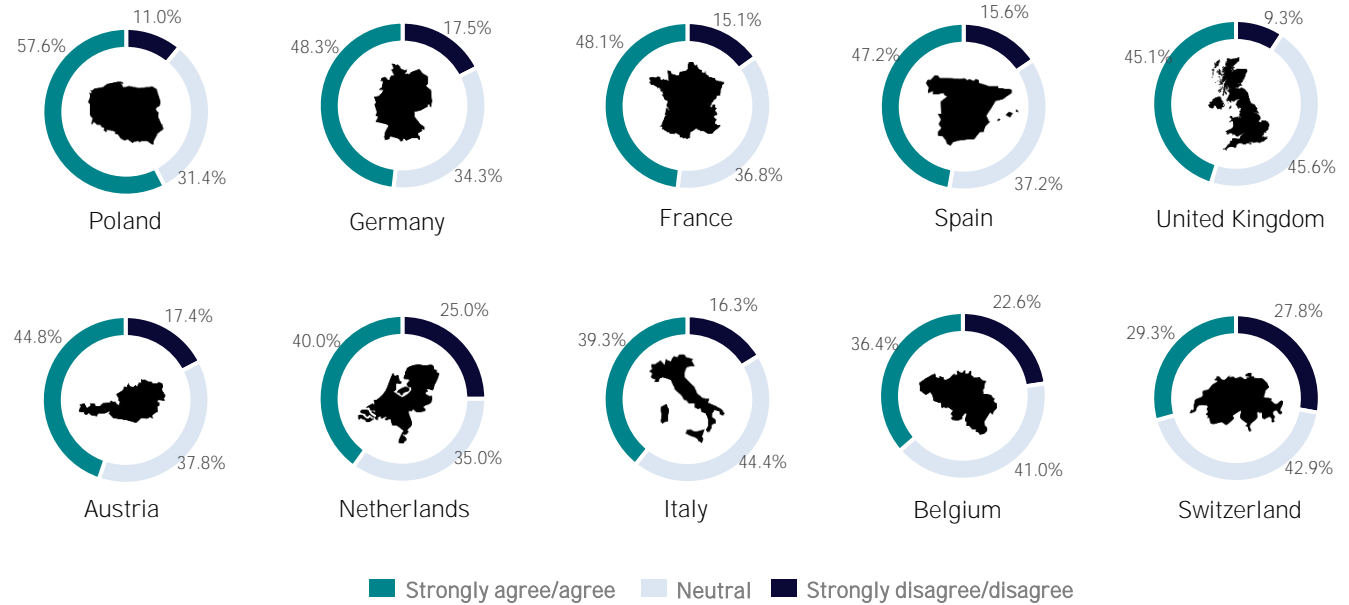
51% of respondents travelling with their partner will consider off-season travel, compared to 38% among those travelling with their family

n: 5,876 | Sep-Oct '20 survey



## Polish, German and French travellers are most likely to consider less traditional trip timings

Willingness per country to travel more off-season



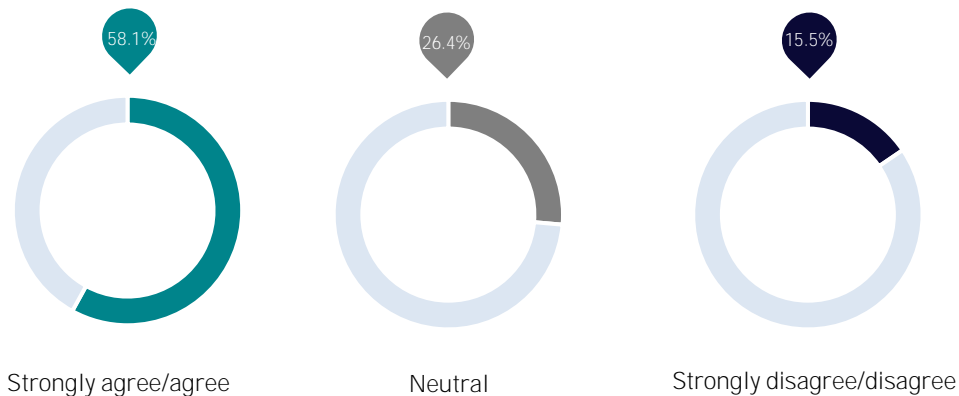
To what extent do you agree/ disagree with the following statement?  
"Resulting from the COVID-19 pandemic, I am willing to travel more off-season."

n: 5,876 | Sep-Oct '20 survey

## 3 in 5 look to cut down on trips and settle for a single destination

STICKING  
WITH A  
SINGLE  
DESTINATION

Willingness to take fewer trips and  
spend more time at a single destination



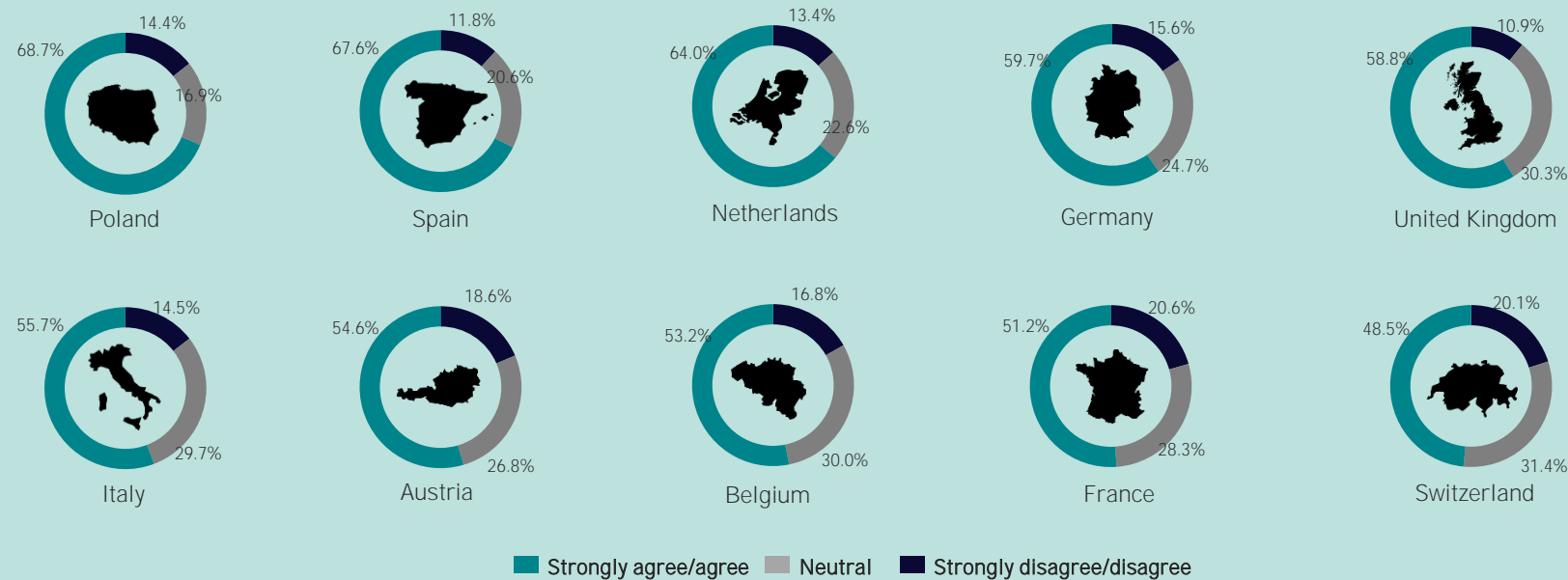
Respondents who planned  
travelling with their own car  
are more likely to spend more  
time in a single destination  
(64% vs. 58%)

To what extent do you agree/ disagree with the following statement?  
"Resulting from the COVID-19 pandemic, I am willing to take fewer trips  
and spend more time at a single destination."

n: 5,832 | Oct-Nov '20 survey

# Opting for a longer stay in a single destination is most appealing for Polish, Spanish and Dutch travellers

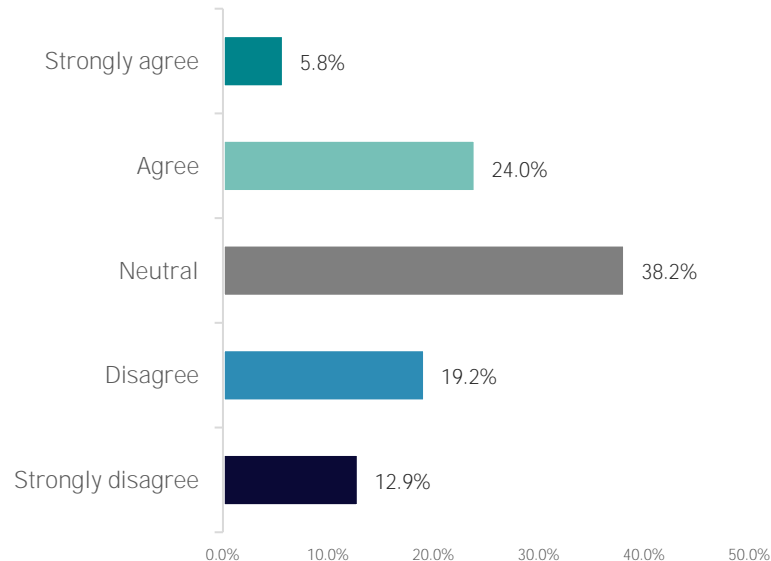
Willingness per country to take fewer trips and spend more time at a single destination



The question of whether to pay extra to reduce carbon footprint divides European travellers, with 30% for and 32% against



Willingness to pay for accommodation and transport that reduce carbon footprint



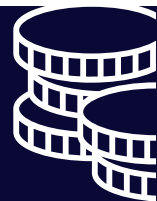
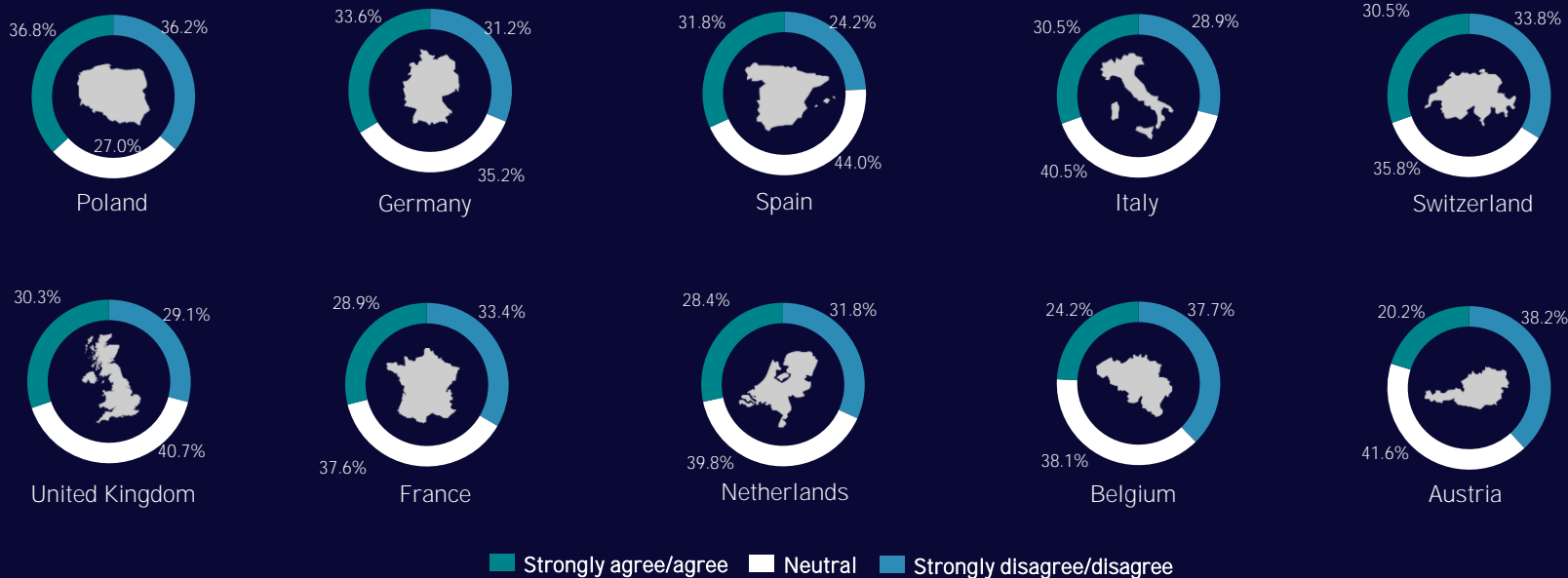
INVESTING TO  
MINIMISE  
CARBON  
FOOTPRINT

Travel personas most  
likely to pay for carbon  
offsetting are bleisure  
travellers (37%)

No differences were recorded  
among different age groups

# Poles, Germans and Spaniards are the most inclined to cover costs of reducing their carbon footprint during travel

Willingness per country to pay for accommodation and transport that reduce carbon footprint



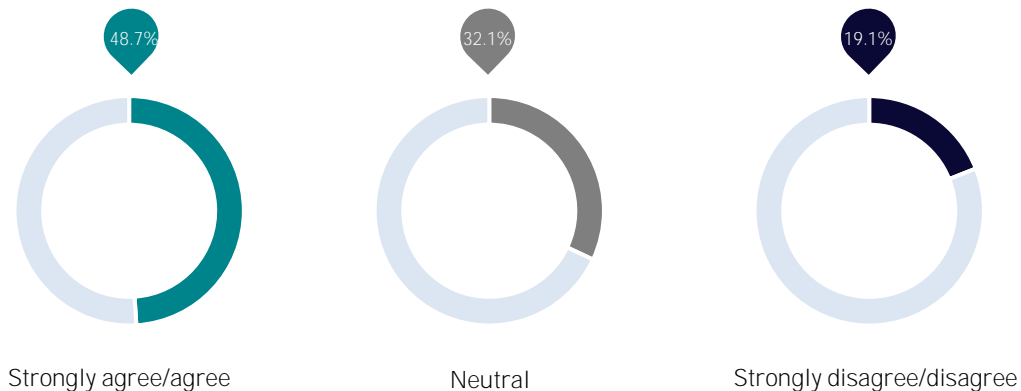


## FAVOURING SINGLE-USE PACKAGING

Younger travellers favour single-use packaging less: 37% among the 18-24 age group will now prefer single-use packaging vs. 59% among the over 54 age group

## The pandemic boosted preferences towards single-use packaging

Willingness to use single-use packaging for food and personal care products while travelling

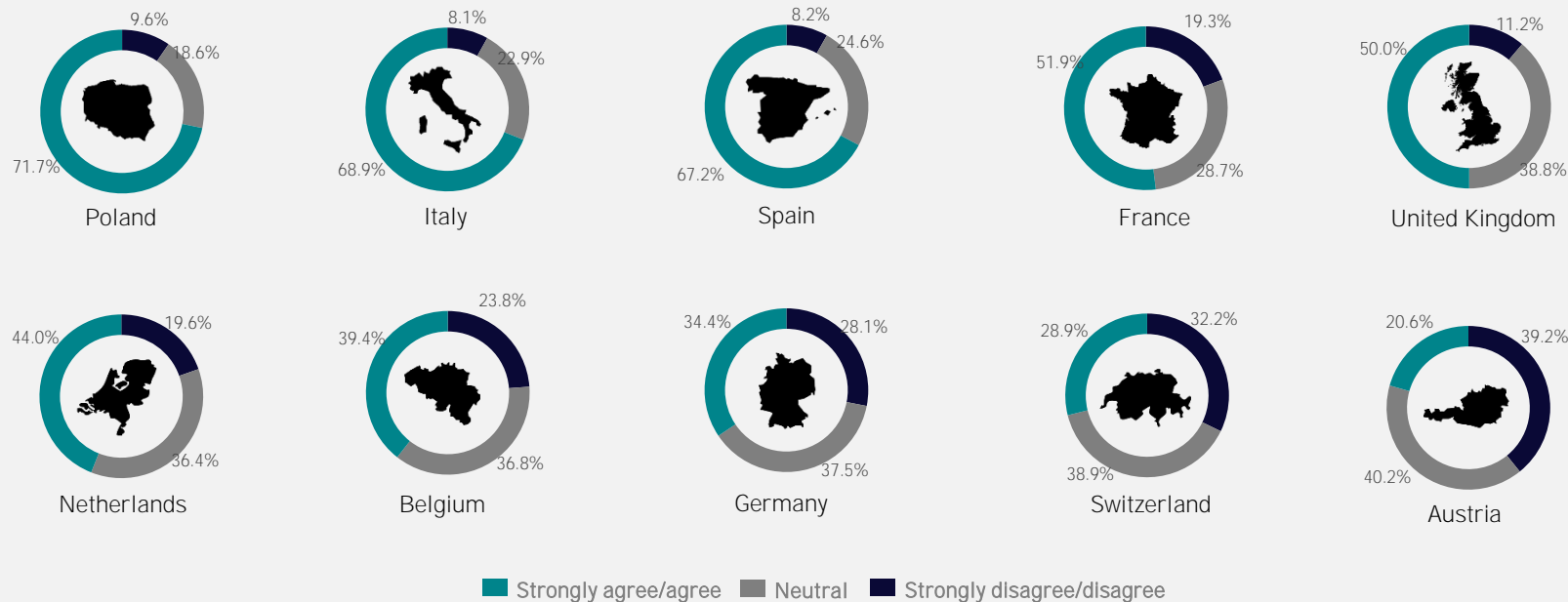


n: 5,851 | Dec '20 – Jan '21 survey

To what extent do you agree/ disagree with the following statement? 'Resulting from the COVID-19 pandemic, it is better now to use single-use packaging for food and personal care products while travelling.'

The COVID-19 pandemic has strengthened the preferences for single-use packaging. However, Austrians, Swiss and Germans citizens continue to strongly oppose to it

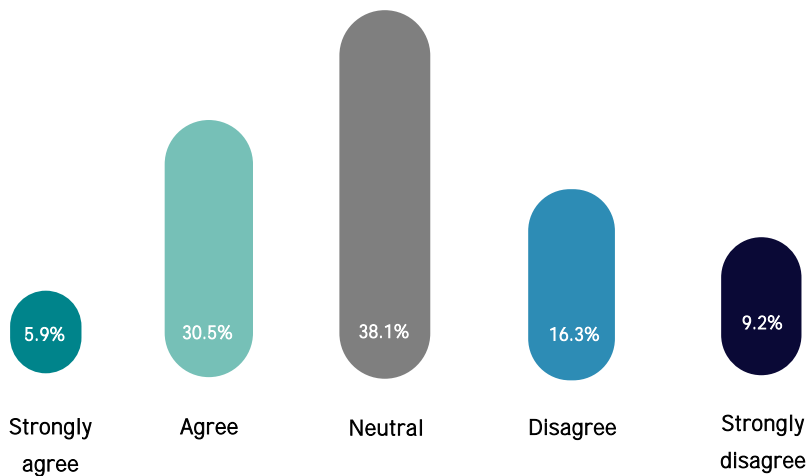
Willingness per country to use single-use packaging for food and personal care products while travelling



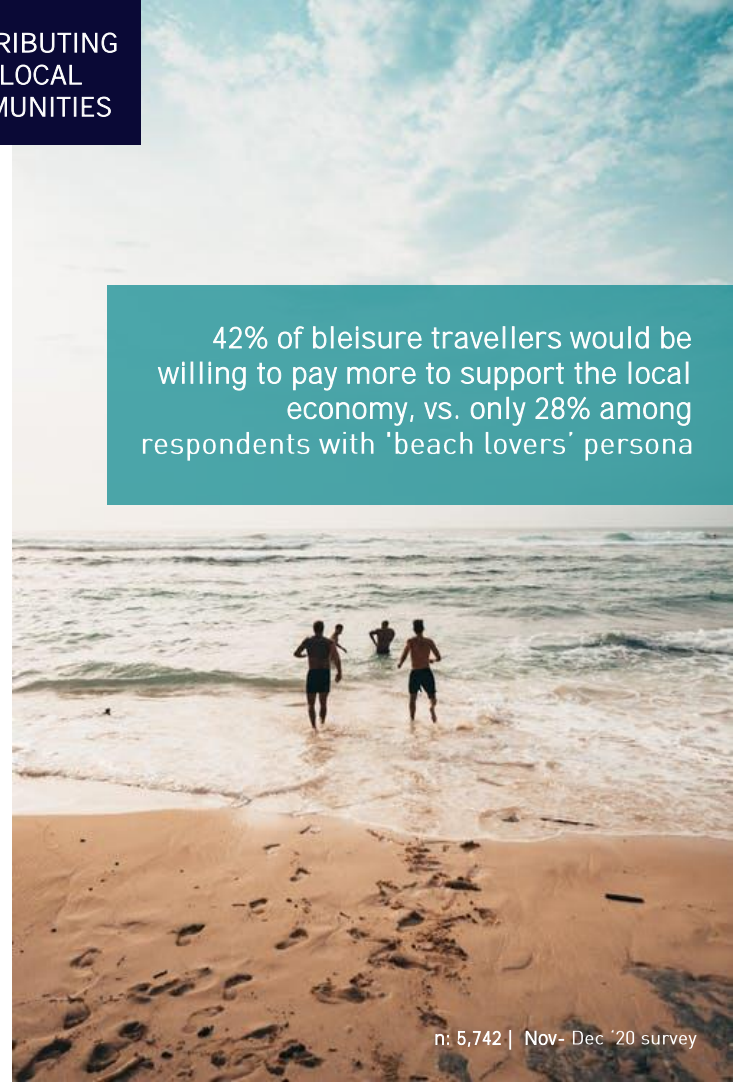
More than 1 in 3 respondents are willing to pay extra to support the host community

CONTRIBUTING  
TO LOCAL  
COMMUNITIES

Willingness to pay more to support local communities/economies

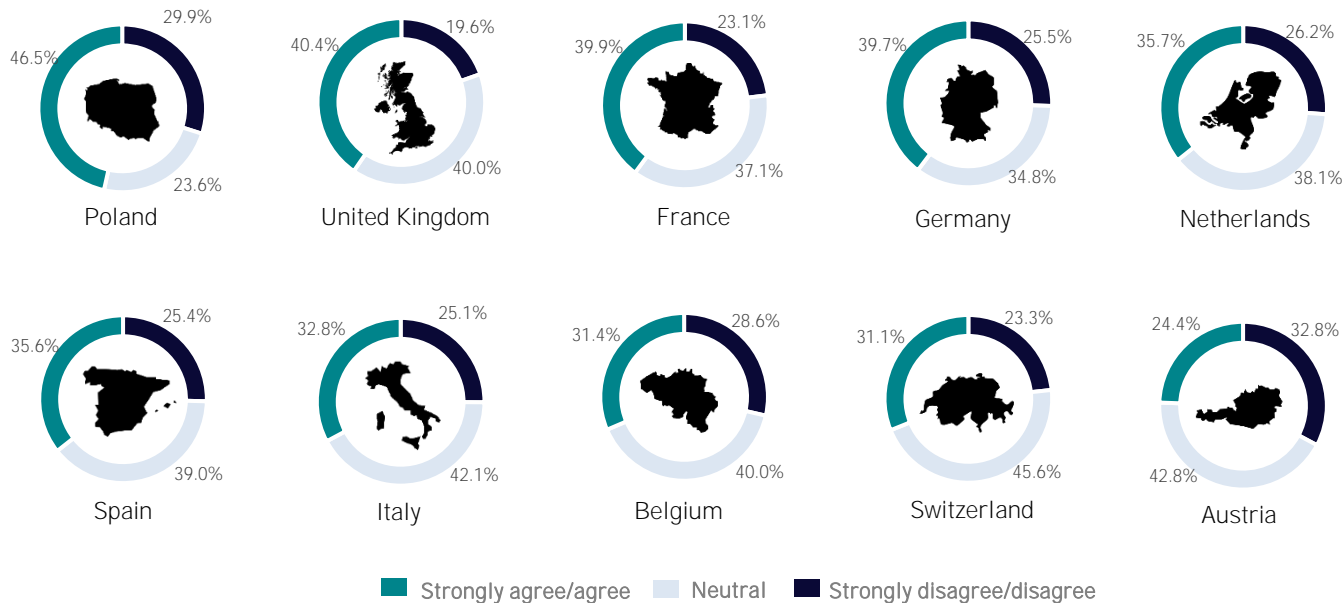


42% of bleisure travellers would be willing to pay more to support the local economy, vs. only 28% among respondents with 'beach lovers' persona



# Travellers from Poland, the UK, France and Germany are willing to pay more for services that support local businesses

Willingness per country to pay more to support local communities/economies



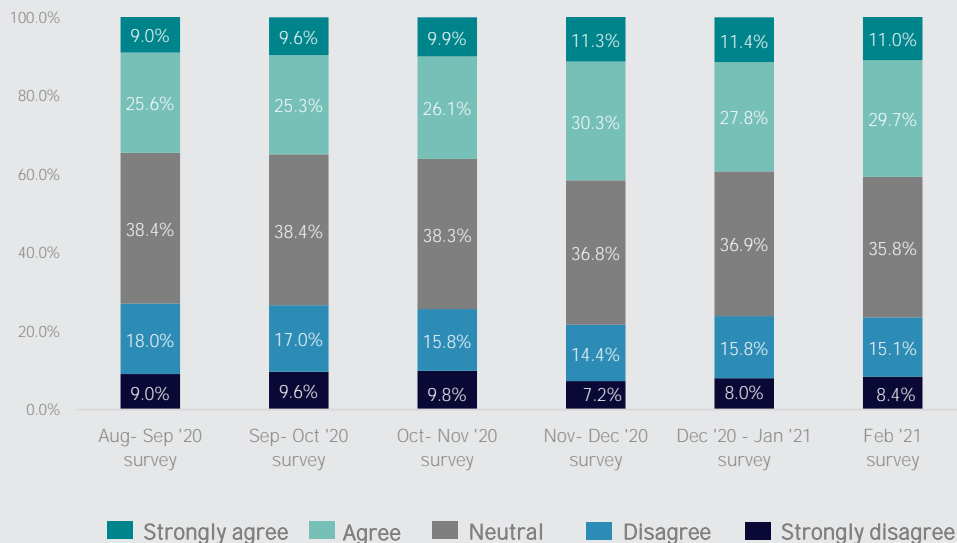
To what extent do you agree/ disagree with the following statement? 'Resulting from the COVID-19 pandemic, I am willing to pay more during my trips if I know that I support local communities/economies'.

n: 5,742 | Nov- Dec '20 survey

41% of Europeans are positive about welcoming more tourists, showing an 18% increase across all waves

WELCOMING  
TOURISTS TO  
ONE'S  
COUNTRY

Eagerness of respondents to see more tourists visiting their country/community\*



The rise of positive sentiment over time might reflect respondents' growing understanding of the importance of tourism for their economies and communities.

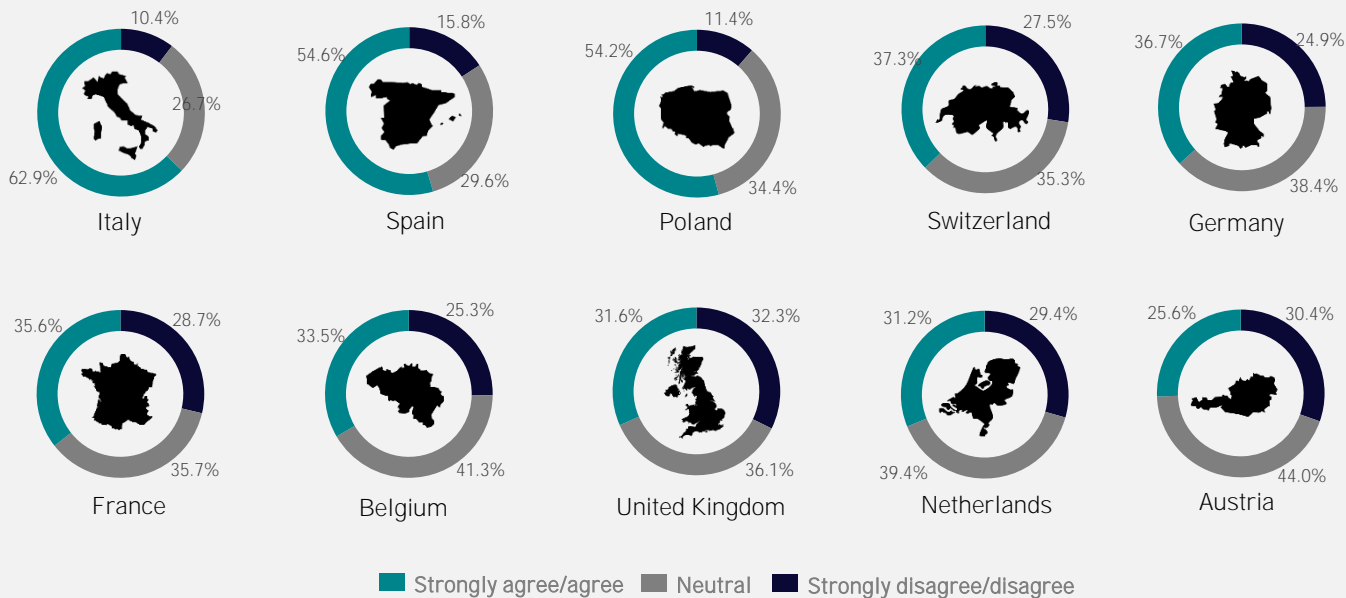
From a resident's point of view, to what extent do you agree/ disagree with the following statement? "I would like to see more tourists visiting my community/ country"

\*For sample sizes please refer to slide 26



Italians, Spaniards and Poles are most at ease welcoming back tourists, while Austrian, Dutch and UK residents seem to be less comfortable

### Eagerness per country to see more tourists visiting their country/community



# METHODOLOGICAL ANNEX



# METHODOLOGICAL ANNEX

## THE SURVEY



- The data for the responsible travel report was collected as part of an online market research to analyze Europeans' travel sentiment in the COVID-19 era. Survey participants are frequent European travellers with at least 2 overnight trips in 2019.
- Each research wave included two data sets: the total sample and the 'pandemic travellers' sample, which refers to respondents that are most likely to travel in the next 6 months/ have short term travel plans.

### Distribution/ data collection period:

- **Wave 1:** 27 August 2020 - 15 September 2020; sample= 5,762. 59% of respondents are male and 49% are female.
  - **Wave 2:** 21 September 2020 – 9 October 2020; sample= 5,876. 51% of respondents are male and 49% are female.
  - **Wave 3:** 19 October 2020 – 6 November 2020; sample= 5,832. 50% of respondents are male and 50% are female.
  - **Wave 4:** 20 November 2020 – 3 December 2020; sample= 5,742. 51% of respondents are male and 49% are female.
  - **Wave 5:** 18 December 2020 – 7 January 2021; sample= 5,855. 53% of respondents are male and 47% are female.
  - **Wave 6:** 5-19 February 2021; sample= 5,837. 50% of respondents are male and 50% are female.
- 
- Countries: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - Languages: English, French, German, Italian, Spanish, Polish and Dutch

# METHODOLOGICAL ANNEX

## THE RESPONDENTS

- Number of respondents and age group per source country:

Wave 1

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	74	96	100	75	183	92	145	971
	25 - 34	135	112	74	133	129	167	131	130	71	140	1222
	35 - 44	126	135	101	143	141	161	132	87	53	110	1189
	45 - 54	138	167	105	98	146	168	96	77	41	58	1094
	>54	263	263	175	52	238	154	66	23	28	24	1286
Total		750	750	500	500	750	750	500	500	285	477	5,762

Wave 2

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	78	106	92	56	153	108	143	942
	25 - 34	135	112	74	137	142	153	106	140	109	157	1265
	35 - 44	126	135	101	131	154	150	120	92	89	106	1204
	45 - 54	138	167	105	80	160	168	93	63	60	66	1100
	>54	263	263	175	74	172	187	125	52	26	28	1365
Total		750	750	500	500	734	750	500	500	392	500	5,876

Wave 3

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	73	106	92	56	138	96	149	916
	25 - 34	135	112	74	145	142	153	106	148	101	164	1280
	35 - 44	126	135	101	120	154	150	120	100	105	90	1201
	45 - 54	138	167	105	92	160	168	93	73	53	63	1112
	>54	263	263	175	70	153	187	104	41	33	34	1323
Total		750	750	500	500	715	750	479	500	388	500	5,832

Wave 4

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	79	45	58	106	92	56	140	82	139	885
	25 - 34	135	117	74	145	142	153	106	133	90	156	1251
	35 - 44	126	142	101	109	154	150	120	99	64	78	1143
	45 - 54	138	175	105	103	160	168	93	73	38	48	1101
	>55	263	237	175	85	188	187	120	55	22	30	1362
Total		750	750	500	500	750	750	495	500	296	451	5,742

Wave 5

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	78	96	92	56	135	108	145	916
	25 - 34	135	112	74	127	129	153	106	142	91	137	1206
	35 - 44	126	135	101	128	141	150	120	97	81	113	1192
	45 - 54	138	167	105	84	146	168	93	68	51	69	1089
	>55	263	263	175	83	234	187	125	58	28	36	1452
Total		750	750	500	500	746	750	500	500	359	500	5,855

Wave 6

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	79	45	74	105	92	56	109	97	149	894
	25 - 34	135	120	74	134	142	153	106	113	125	141	1,243
	35 - 44	126	146	101	113	155	150	120	120	106	109	1,246
	45 - 54	138	180	105	96	161	168	93	78	42	54	1,115
	>55	263	225	175	83	128	187	125	79	27	47	1,339
Total		750	750	500	500	691	750	500	499	397	500	5,837

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**Monitoring Sentiment for Intra-European Travel; A responsible approach to travel**

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Data sources: This report is based on research conducted by MINDHAUS ([www.mindhaus.gr](http://www.mindhaus.gr)) and should be interpreted by users according to their needs.

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to completely eliminate every margin of error.

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