TRAVEL & TOURISM:
Can We Still Roam a World on the Verge of Collapse?

For those of at least moderate financial means, international travel has become so commonplace that it's regarded as a standard part of life. Can this trend continue even as the world faces an escalating climate emergency—or will leisure travel become socially and politically unacceptable, an indulgence we can no longer afford?

To find out, Havas Group surveyed more than 14,000 women and men in 32 markets across Europe, Asia, Africa, and the Americas. Their responses revealed that it will take more than dire forecasts of planetary overheating to pry people—Prosumers especially—out of airplanes and tourist hotspots.

An Unstoppable Force

In the 21st century, hopping on a plane for long-haul holiday travel or a quick weekend adventure is hardly unusual. Analysts anticipate that some **10.5 billion passengers** will take to the airways in 2024, surpassing pre-pandemic levels.

Leisure travel is now so ingrained in human culture that it's easy to overlook that it's a relatively new phenomenon. The concept of tourism wasn't introduced until the late 18th century, and it took many more decades for leisure travel to become popularized. British entrepreneur Thomas Cook gave the industry a boost in 1869 when his travel firm debuted "all-inclusive" packages. Beginning in the 1990s, the rise of low-cost airlines further democratized the industry. Today, it has reached the point that, regardless of nagging ecological concerns, most mainstream consumers and two-thirds of Prosumers consider travel a vital source of pleasure.

Despite the ecological cost, it's important for me to travel for my own pleasure

67% PROSUMERS

58% MAINSTREAM

BACK WITH A VENGEANCE POST–COVID 19

In 2020, the travel and tourism industry was upended by COVID-19 and the closing of borders to slow the spread of infection. In the face of climate change, that might have represented an inflection point—an opportunity for people to rethink the need to fly. To an extent, that has been the case for **business travel**, though it is now on the upswing. Not so for leisure travel. When asked whether the pandemic motivated them to travel greater distances post-pandemic to "make up for lost time" or stick closer to home, more than two-thirds of Prosumers chose the former. It's a phenomenon that has come to be known as "**revenge travel**." There's a generational distinction here, however, with 63% of Gen Zs seeking to travel long distances while 6 in 10 baby boomers prefer to stay closer to home.

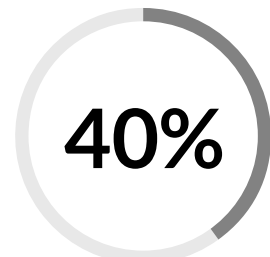**After the COVID-19 pandemic, I want to travel more often and far away to make up for lost time**

68% PROSUMERS

53% MAINSTREAM
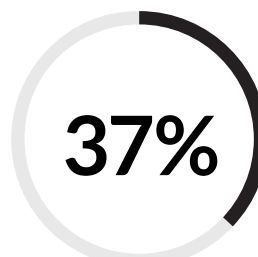
63% Gen Z
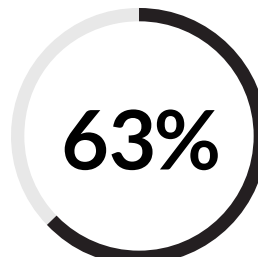
40% Boomers

VS.

During COVID-19, I discovered that I could travel less far, and I intend to keep this new habit

32% PROSUMERS

47% MAINSTREAM
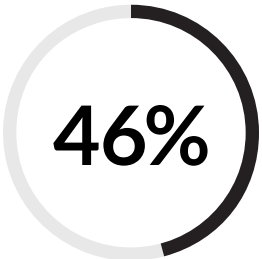
37% Gen Z
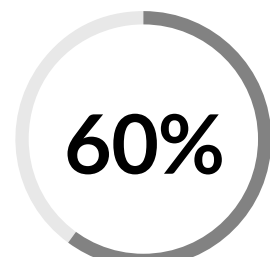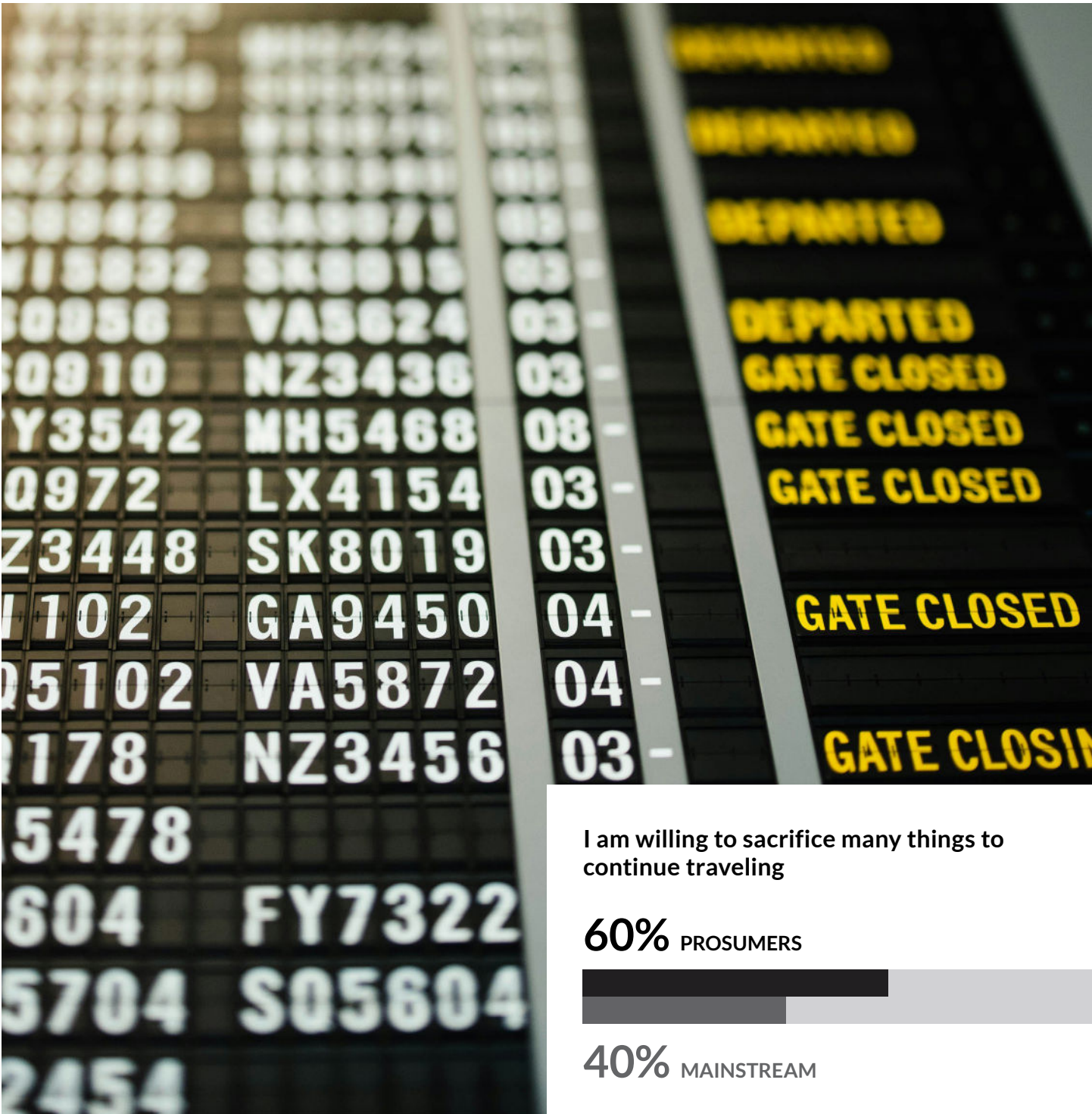
60% Boomers

I am willing to sacrifice many things to continue traveling
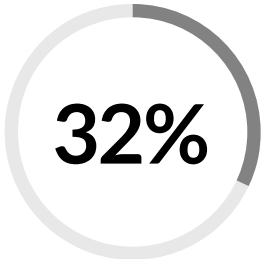
60% PROSUMERS

40% MAINSTREAM

46%
Gen Z

32%
Boomers

(% agreeing strongly/somewhat)

WHATEVER THE COST

Whether it's the financial burden, coping with airline hassles, or surviving overcrowded tourist destinations, the modern traveler is willing to put up with a lot to continue the pursuit. This is especially the case in India, where nearly three-quarters of Prosumers and two-thirds of the mainstream are willing to sacrifice many things to continue traveling.

Why Must We Travel?

Discovering the world—once a "nice to have" available only to the wealthy—has become a "vital need" for 78% of Prosumers and around two-thirds of Gen Zs. It's clear from this statistic that travel is about far more than getting from Point A to Point B. It's about transcending our day-to-day lives. We cling to travel because of how it makes us feel—and how we believe it leads others to perceive us.

I will never give up flying because discovering the world is too vital for me

78% PROSUMERS

56% MAINSTREAM

65% Gen Z

45% Boomers
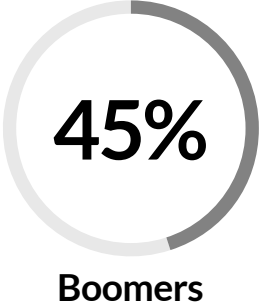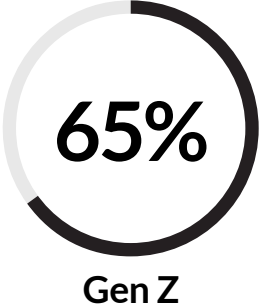
(% agreeing strongly/somewhat)

EXPLORATION

For most Prosumers, travel is about exploration and growth—seeing, doing, and learning new things. The quest for the unknown.

Interestingly, despite so much of the planet having been Google-mapped down to the millimeter, more than 9 in 10 Prosumers are convinced there are still places that are relatively unexplored. And that's a big part of the draw. Seven in 10 Prosumers point to discovering new places as an important reason to travel, and 59% say traveling is important to them because it opens them up to other cultures. The payoff is personal development—whether through self-discovery or gaining fresh insights into the wider world.

I'm convinced there are still places on the planet that are relatively unexplored

(% agreeing strongly/somewhat)

92% PROSUMERS

83% MAINSTREAM

It's important for me to travel:

To discover new places

70%
57%

Because it opens [me] up to other cultures

59%
46%

For personal development

55%
42%

To change air

42%
38%

■ PROSUMERS ■ MAINSTREAM

HITTING THE RESET BUTTON

Not so long ago, travel was all about collecting passport stamps while seeing nine countries in six days. That's no longer the case in today's hyperkinetic world. For more than three-quarters of Prosumers, travel represents a way to relax and unwind. Spend any time on TikTok or Insta, and you're sure to find content related to the *feeling* of leisure travel, whether it leans toward serenity and reconnecting with nature, the experience of cultural immersion, or the thrill of extreme sports.

Despite the ecological cost, it's important for me to travel to relax and unwind

77% PROSUMERS

67% MAINSTREAM

SELF-EXPRESSION

Travel also gives people a way to express themselves and stake claim to a coveted identity. There is social currency to be found in trips that venture off the beaten path and in experiencing things outside the norm. ("Did I ever tell you about the summer I herded yaks in Nepal?")

TRAVEL IRL TO BOOST URL LIFE

For many travelers, a big part of the payoff comes from social clout. Around three-quarters of Prosumers and 6 in 10 Gen Zs—versus just a quarter of boomers—love to share their travel experiences on their social channels.

And it's not just mountain vistas and Parisian café selfies that people are eager to share. It's also the process of planning the adventure. In recent years, travel planning has become an art form and group activity thanks to apps such as **Wanderlog** and **TripIt**.

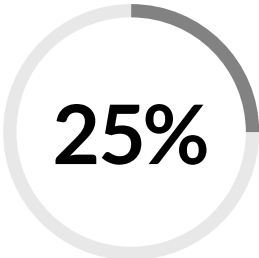**I love to share my travel experiences on social media**

74% PROSUMERS

45% MAINSTREAM

59% Gen Z   **25%** Boomers

Nothing is more gratifying than organizing a trip by yourself (without the help of a travel agent)

74% PROSUMERS

63% MAINSTREAM

(% agreeing strongly/somewhat)

HELL IS OTHER PEOPLE

One of the pleasures of resuming travel once vaccines allowed borders to reopen was the chance to sightsee free from crowds. That didn't last long. Congestion has become a huge pain point for many people, and they blame it not just on low-budget airlines but on social media luring everyone to the same spots. For nearly 4 in 10 Prosumers—rising to majorities in the UK and India—the increased accessibility of travel has led to horrible experiences for all. (It's also been a nightmare for people who live in popular tourist destinations. In July 2024, residents of Barcelona made their displeasure clear by **dousing tourists** with water pistols. Amsterdam is fighting back by **blocking construction** of new hotels.)

I think social media has ruined the experience of travel because everybody now goes to the same places
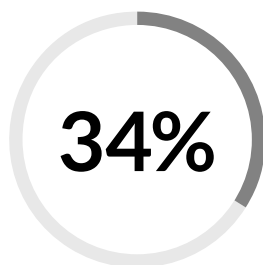
33% PROSUMERS

39% MAINSTREAM

42%
Gen Z
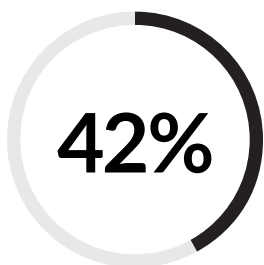
34%
Boomers

I believe low-cost plane companies have had a huge positive impact by making travel accessible to everyone

80% PROSUMERS

68% MAINSTREAM

VS.

Traveling has become more accessible to everybody, but the experience has become horrible in the meantime

37% PROSUMERS

37% MAINSTREAM

Guilty? Not Me

We know that travel—especially by air—contributes to climate change. In fact, 43% of Prosumers and around a third of the mainstream consider travel and airlines primarily responsible for the warming of our planet. We also know that **most people worry** that humankind is headed over an environmental cliff if people don't change their habits quickly. Governments and NGOs are raising the alarm, and we're seeing the birth of anti-flying movements such as Sweden's **Flygskam** ("flight shame"). Is the peer pressure working? Not so much. Less than a third of Prosumers feel guilty about the eco-impact of their travels.

I believe travel/airline brands are primarily responsible for climate change

43% PROSUMERS

32% MAINSTREAM

The environmental impact of each trip makes me feel guilty
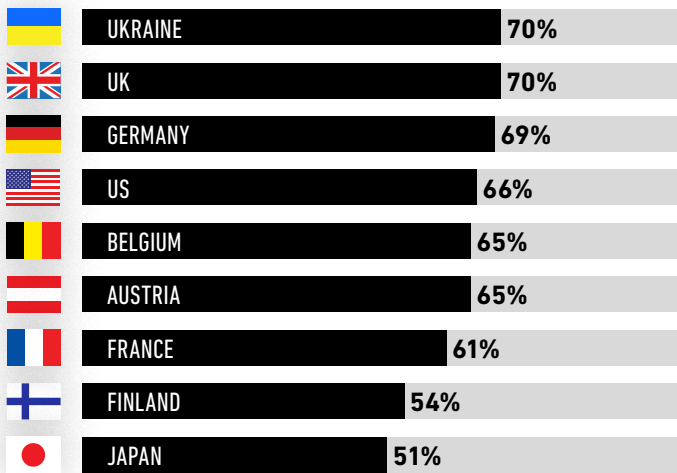
32% PROSUMERS

30% MAINSTREAM
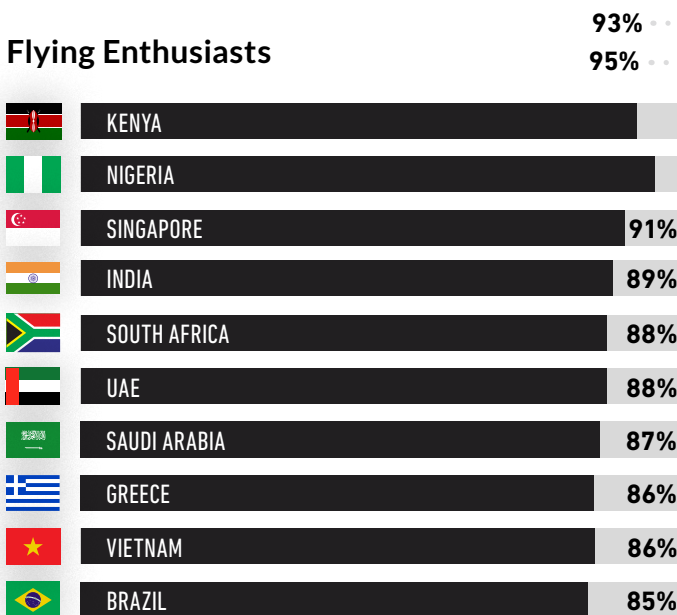
(% agreeing strongly/somewhat)

As shown in the graphic, there is a country divide in people's willingness to eliminate air travel, but even in the most "Flygskam influenced" nation, Japan, only a very slim majority of people are willing to stay grounded.

I would never give up flying, because discovering the world is too vital for me (Showing Prosumers)

Flygskam Influenced

Country	%
UKRAINE	70%
UK	70%
GERMANY	69%
US	66%
BELGIUM	65%
AUSTRIA	65%
FRANCE	61%
FINLAND	54%
JAPAN	51%

Flying Enthusiasts

| Country	%
KENYA	93%
NIGERIA	95%
SINGAPORE	91%
INDIA	89%
SOUTH AFRICA	88%
UAE	88%
SAUDI ARABIA	87%
GREECE	86%
VIETNAM	86%
BRAZIL	85%

IT'S NOT ME, IT'S THE AIRLINES!

Despite the industry's business model being dependent on human passengers, most people feel comfortable pointing their finger at the airlines for their contribution to global warming, not at the travelers who keep these businesses aloft. More than half of Prosumers—rising to two-thirds in China—don't think airlines do enough to compensate for the pollution they generate.

I don't think airlines do enough to compensate for the pollution they cause

55% PROSUMERS

50% MAINSTREAM
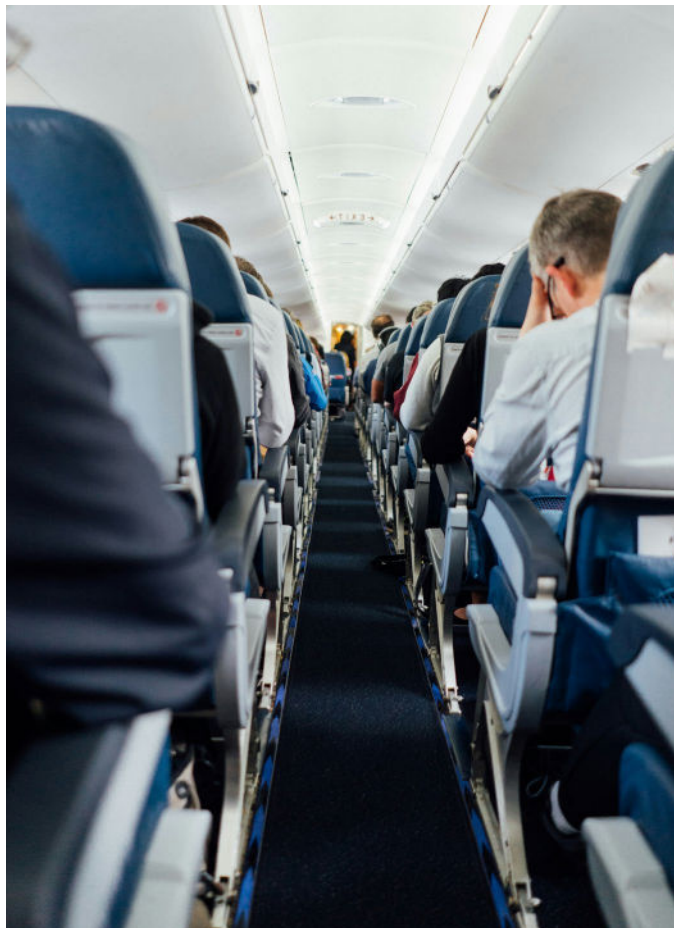
NOTE TO AIRLINES: ADAPT OR PERISH

Rather than fly less, many people are counting on the industry to come up with a technological solution to make flying less of an ecological burden. In fact, 1 in 5 Prosumers believe coming up with such solutions is the *primary* responsibility of airlines today, even above ensuring affordability and rich experiences. Half of Prosumers and 42% of Gen Zs expect hydrogen-powered airplanes to save the day.

I think the primary role of an airline company is to... (Choose one.)

Ensure the safety of my trip

43%
50%
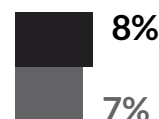
Find eco-friendly solutions to avoid travel limitations

20%
15%

Make my trip a rich experience

15%
11%

Make travel more financially accessible

14%
17%

Take care of trip planning and personalized activities for me
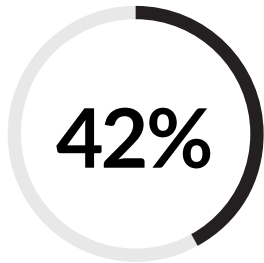
8%
7%

■ PROSUMERS
■ MAINSTREAM

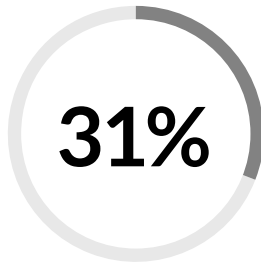**I believe hydrogen-powered airplanes are the only credible solution for a sustainable future of travel**

52% PROSUMERS

38% MAINSTREAM

42%
Gen Z

31%
Boomers

(% agreeing strongly/somewhat)

IT'S NOT ME, IT'S THE RICH!

There's also broad acceptance that the people most to blame for travel-connected climate change aren't "regular" folks but the wealthy jet-setters. Nearly two-thirds of Prosumers consider global travel overly expensive, and so it's easy for them to find fault with those well-heeled travelers who seem to flit across the globe at the slightest whim.

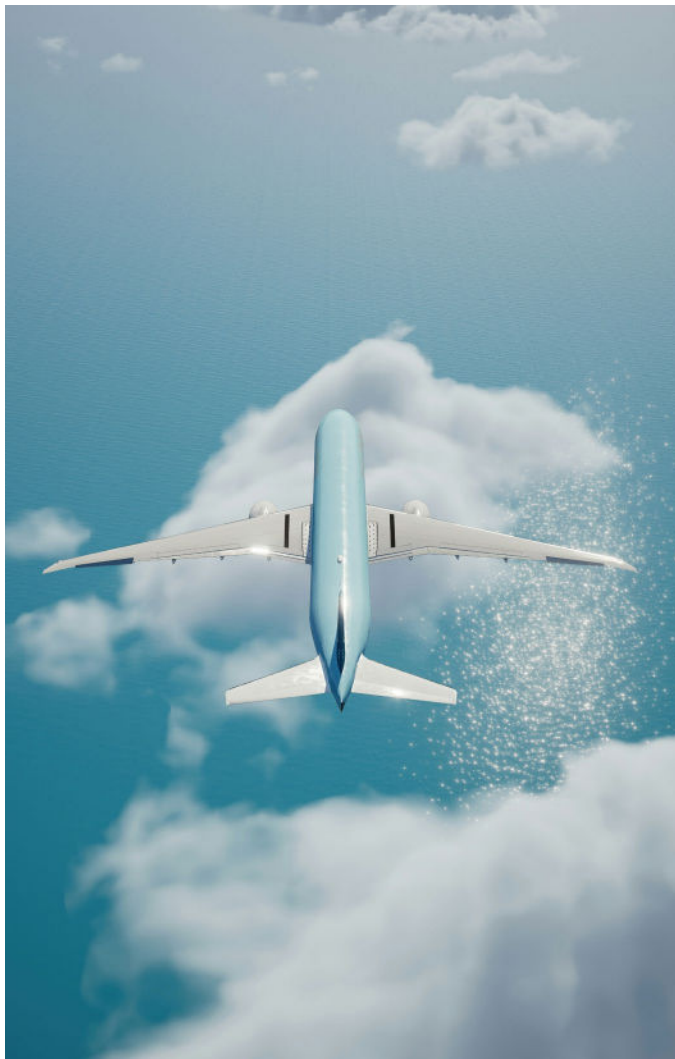**I find that traveling the world has become too expensive**

63% PROSUMERS

73% MAINSTREAM

I don't consider myself guilty when I take the plane; the fault is more on wealthy people who fly all the time

48% PROSUMERS

47% MAINSTREAM

MUST CHANGE BE MANDATED?

With few people willing to take personal responsibility for the eco-costs of travel, legal injunctions may be the only solution. Already, most Prosumers and Gen Zs agree that travel will need to be regulated to limit its environmental impact. In India, 76% of Prosumers agree.

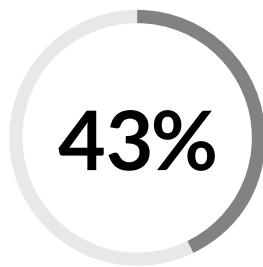**I think that in the future, travel will have to be regulated to limit its ecological impact**

56% PROSUMERS

47% MAINSTREAM

54%
Gen Z

43%
Boomers

THERE IS NO PLANET B
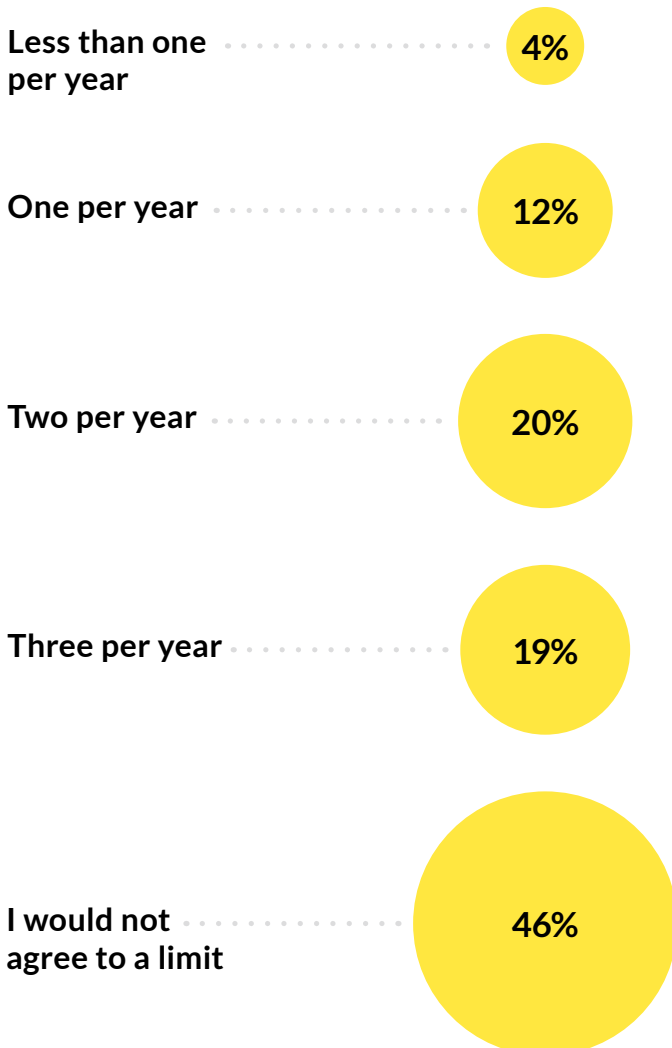
.de   #ACTNOW

ARTIFICIAL LIMITS ONLY, PLEASE

UK nonprofit the Travel Foundation is calling for **restrictions on long-haul travel** (which they define as return trips over 16,000 kilometers) to help meet the goals of the Paris Agreement. On the surface, a slight majority of Prosumers appear willing to accept some limit on their long-distance travel. In reality, most likely are agreeing to caps they already adhere to due to financial or time constraints or a disinclination to go to faraway destinations more than two or three times a year. In other words, they're willing to accept limits that don't restrict their current behaviors. Well played!

I would agree if my government were to limit the number of long-haul flights one could take to:

(Showing Prosumers)

| Less than one per year	4%
One per year	12%
Two per year	20%
Three per year	19%
I would not agree to a limit	46%

WHEN WILL WE BECOME RADICAL?

Nearly a third of Prosumers and Gen Zs think it's a matter of when, not if, governments will ban plane travel. It seems likely, however, that such an eventuality will come only when matters are so desperate that it's too late to turn things around.

To solve climate change issues, we'll have to ban plane travel at some point

30% PROSUMERS

28% MAINSTREAM

32% Gen Z

25% Boomers
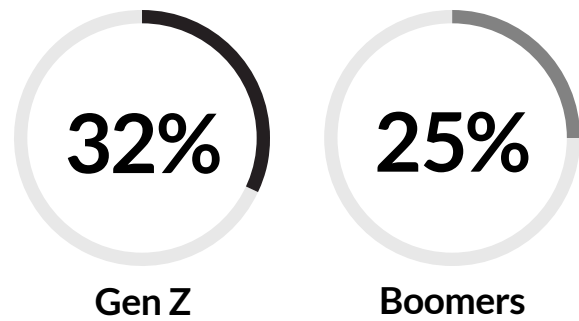
(% agreeing strongly/somewhat)

New Itineraries Ahead

As travel brands face challenges ranging from eco concerns to over-tourism and congestion, how can they enhance the sector in responsible and meaningful ways? Our survey results point to three pathways to success:
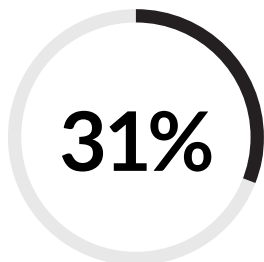
1. RE-ENCHANT TRAVEL

With nearly 1 in 3 Gen Zs already growing blasé about travel, brands need to reignite the magic.

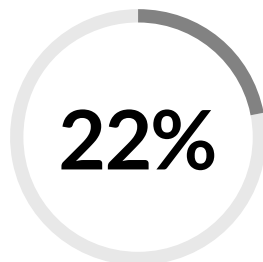**I have become less and less amazed by the places I go when I travel**

26% PROSUMERS

27% MAINSTREAM
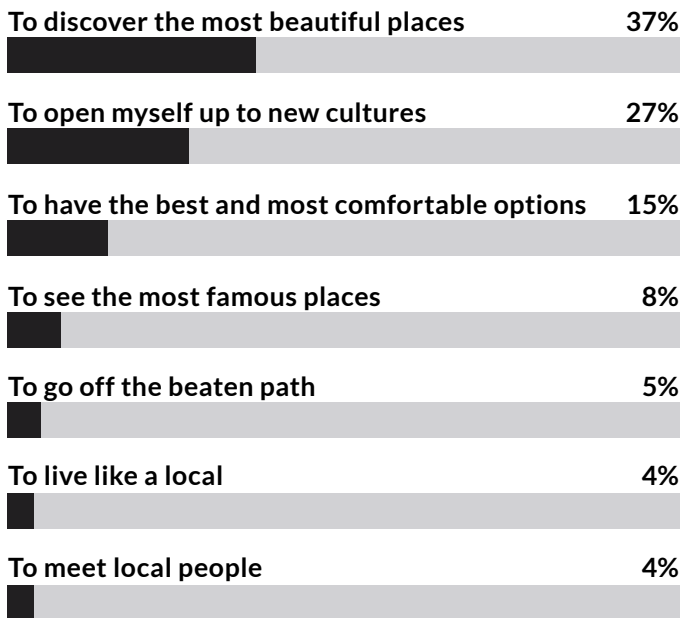
31% Gen Z

22% Boomers

HELP PEOPLE FIND THE BEAUTIFUL AND "UNDISCOVERED"

Despite record-breaking crowds of late in **tourist hotspots** ranging from Amsterdam and Athens to Miami and Phuket, Prosumers are far more apt to place value in discovering beautiful places and new cultures than in visiting the most famous sites.

Tourism Tasmania's recent campaign, "**TasmanAi**," emphasized the value of human creativity in a world increasingly reliant on artificial intelligence. Visitors to the campaign website were invited to enter prompts of images they'd like to see. The lucky few who caught the interest of one of the "flesh and blood" Tasmanian artists participating in the promotion will receive a physical work of art in the mail ("eventually")—a reminder that there are real people doing real things in real-time in the real world (and an invitation to discover in person the island's rugged beauty and creative spirit).

In another evocative campaign from a far-off site, a woman on the Faroe Islands equipped local sheep with solar-powered 360-degree cameras to capture and share images of her homeland. The "**Sheep View 360**" project was such a hit that Google added the islands to its Street View, leading to a spike in tourism.

The most important thing for me when I travel is... (Choose one—showing Prosumers)

To discover the most beautiful places   37%

To open myself up to new cultures   27%

To have the best and most comfortable options   15%

To see the most famous places   8%

To go off the beaten path   5%

To live like a local   4%

To meet local people   4%

TEAM WITH INFLUENCERS

Although there can be a vicious cycle of "newly discovered" places becoming overcrowded due to intense media focus, nearly two-thirds of Prosumers appreciate it when travel brands team with influencers to showcase new destinations.

Delta Air Lines created **SkyMilesLife**, a website on which would-be travelers could search for destinations based on photos found on Instagram. Insta influencers were recruited to post and share the #SkyMilesLife hashtag, boosting ticket sales by $2 million and resulting in 40 million miles redeemed for travel in just a few months.

I like it when travel brands partner with influencers to make me discover new destinations

64% PROSUMERS

43% MAINSTREAM

(% agreeing strongly/somewhat)

2. HELP PEOPLE TRAVEL LIKE THEY VOTE

For 71% of Prosumers and nearly 6 in 10 Gen Zs, living as much as possible "like a local" is high up on their travel wish lists. Beyond that, people want to travel according to their values, with 83% of Prosumers encouraging tourism brands to support and empower local communities.

In India, Astrostays, a homestay/astrotourism initiative, has launched **Cosmohub**, a three-and-a-half-hour experience that combines stargazing with a guided tour of a 700-year-old monastery. Guests are entertained with folklore, learn about local traditions and spiritual beliefs, and enjoy a home-cooked, traditional meal.

It's important for me to live as much as possible like a local when I visit a foreign country
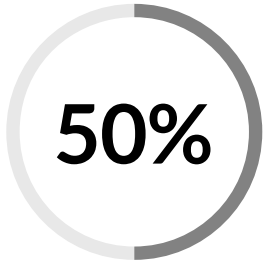
71% PROSUMERS

55% MAINSTREAM

59%
Gen Z

50%
Boomers

I think tourism brands should support and empower local communities

83% PROSUMERS

69% MAINSTREAM

(% agreeing strongly/somewhat)

Sociopolitical values also come into play when selecting travel destinations, with more than 6 in 10 Prosumers claiming to boycott brands that promote travel destinations that don't respect human rights, and around half boycotting brands that promote destinations that aren't environmentally friendly or socially conscious.

Why just travel when you can give back at the same time? With the health of the Great Barrier Reef in jeopardy, the Australian government enlisted eco-conscious tourists to help monitor the reef by collecting information about its health and area marine life. The **Eye on the Reef** program has since been augmented by the **Tourism Reef Protection Initiative**, which recruits tourism operators to monitor and protect the sites they visit.

Intrepid Travel offers **women-only expeditions** to several countries, inviting female travelers to "discover a new perspective on sisterhood." In Jordan, for instance, an eight-day adventure includes learning the art of henna from Bedouin women and about traditional marriage from a professional matchmaker, getting local cooking instruction, and supporting women-led businesses along the way.

I boycott brands that promote destinations that...

...do not respect human rights

62%
49%

...are not environmentally friendly or socially conscious

47%
35%

■ **PROSUMERS**
■ **MAINSTREAM**

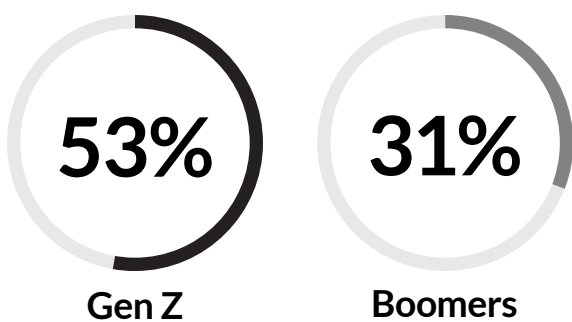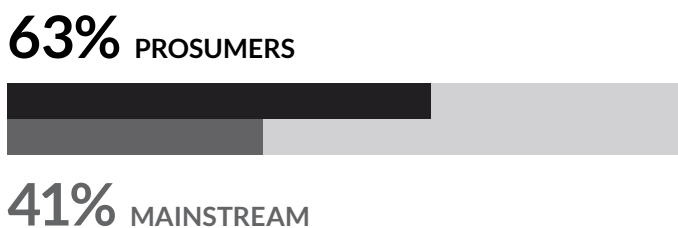(% agreeing strongly/somewhat)

3. OFFER NEW WAYS OF TRAVELING

Go back 10 or 15 years, and very few travelers would have given any thought to their carbon footprint. Today, some three-quarters of Prosumers want to understand the eco impacts of their travel choices. Moreover, nearly two-thirds of Prosumers would willingly pay more for lower-impact trips. There's a generational divide here, with 53% of Gen Zs agreeing with that statement compared with less than a third of boomers.

Pre-pandemic, German Rail hit upon a creative idea to convince Germans to save money by taking staycations rather than traveling abroad. Using an algorithm and images available online, it identified German locations that are **doppelgangers** for places tourists flock to worldwide. Why fly when you can see the same(ish) site for far less nearby?

I would like to be better informed of the ecological impact of my choices when I travel

74% PROSUMERS

58% MAINSTREAM
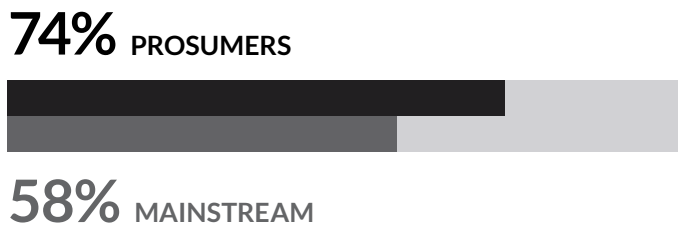
I am willing to pay more for trips that have a lower environmental impact

63% PROSUMERS

41% MAINSTREAM

53%
Gen Z

31%
Boomers

(% agreeing strongly/somewhat)

TRAVEL LESS, STAY LONGER

Around half of Prosumers and Gen Zs expect a future in which short-stint travel is replaced by fewer, longer trips.

In Australia, NRMA Insurance has debuted the **Sloways** network, a collection of slow-drive routes for RVers and other travelers who want to bypass fast-paced highways and savor less explored parts of the country.

In the future, we'll travel less but for longer

47% PROSUMERS

37% MAINSTREAM

46%
Gen Z

30%
Boomers
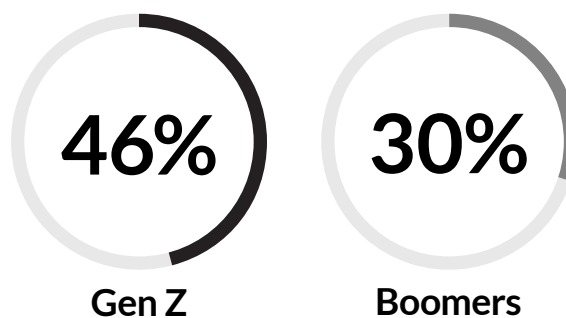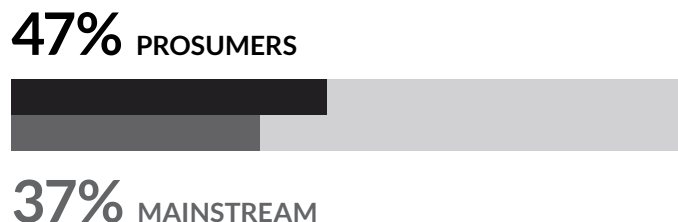
(% agreeing strongly/somewhat)

FIND NEW SOLUTIONS

We're also seeing frustration over how expensive it is to travel more sustainably. A **study by Greenpeace** found, for instance, that train trips in Europe cost twice as much on average as flying between the same cities. Travel between London and Barcelona costs 30 times more via train compared with flying. Overnight **bus** and **train** trips that allow passengers to avoid hotel costs may be part of the solution, but most Prosumers are also looking forward to technology that permits immersive virtual travel experiences. What better way to skip the crowds and see amazing sights up close?

The **Apple Vision Pro** VR headset is being touted as a gateway to virtual travel. Apple's partnerships with Disney, National Geographic, and other brands allow users to engage in immersive travel experiences without leaving home.

I'm fed up that the most sustainable ways to travel (e.g., by train) are often more expensive options

51% PROSUMERS

53% MAINSTREAM

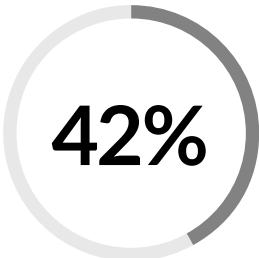**In the future, technology will enable me to travel to destinations without leaving my place**

60% PROSUMERS

47% MAINSTREAM

51%
Gen Z

42%
Boomers

(% agreeing strongly/somewhat)

IN A NUTSHELL

1. COVID-19 didn't make us question our love of travel; instead, it fueled revenge travel.

2. Modern consumers consider travel a vital need—and we're willing to sacrifice for it.

3. Globalization has brought new challenges to the space (e.g., over-tourism, accelerated climate change), highlighting the need to change our behaviors.

4. Travelers point the finger of blame for climate change at airlines and wealthy globetrotters, not themselves.

5. Since no one is willing to accept blame or change their habits, legislation will be required.

6. These mounting pressures create new challenges and responsibilities for brands in the space: 1) to encourage good behaviors and help leisure travelers plan more ecologically and socially responsible trips, and 2) to re-enchant travel and create fulfilling and immersive experiences.

About the Study

In the first quarter of 2024, Havas partnered with Market Probe International to survey 14,355 people ages 18+ in 32 markets: Africa Bundle (Ivory Coast, Kenya, Nigeria), Australia, Austria, Belgium, Brazil, China, Canada, Chile, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Korea, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, South Africa, Spain, Thailand, Ukraine, United States, United Kingdom, United Arab Emirates, and Vietnam.

The survey sample was made up of **19%** leading-edge **Prosumers**
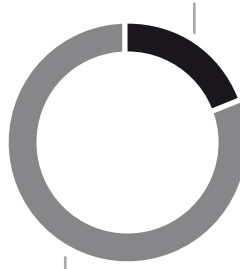
and **81% mainstream** consumers.

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

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