Assessment of Responsible Travel Behaviours of Long-Haul Travellers to Europe

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

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Wave Two

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Executive Summary

This report presents results from the second project within a monitoring initiative that tracks four responsible travel behaviours among long-haul visitors to Europe: *travel off-season*, *go off the beaten track*, *love local* and *travel green*. The study combines a 3,000-respondent survey, a qualitative netnographic study of online travel-related conversations, and an AI-assisted text analysis of editorial media in six source markets (Australia, Brazil, Canada, China, Japan and the United States). Four survey-based behavioural metrics have been constructed and indexed to allow straightforward comparison across research waves.

Key findings

- **All four behavioural metrics improved year-on-year in 2025.** When aggregated across markets the indices moved from the 2024 baseline (100) to *travel green* **108**, *go off the beaten track* **106**, *love local* **105**, and *travel off-season* **102**.
- **Intention–behaviour gaps vary by behaviour.** The gaps are measured as the difference between self-assessments of intended behaviours ahead of conducted trips and of actual behaviours during the same trips. *Travel off-season* sees a gap of **4 percentage points**, while it is **5 percentage points** for *go off the beaten track*. *Love local* and *travel green* show **no measurable gap** in this wave. In addition to the noted gaps between intended and actual behaviour during conducted trips, the study notes that upcoming trips that respondents are planning for tend to be 'greener', more local and more off-track than trips that they have already completed.
- **Practical friction remains a barrier.** Netnographic observations highlight uncertainty among travellers regarding what times of the year are off-season, fragmented rail booking systems and EV charging logistics as commonly cited obstacles to turning intentions into action. Cost is also an important consideration for many travellers.
- **Media coverage related to responsible travel continues to centre on concrete travel topics**. Articles link responsible behaviours to themes such as rail travel, seasonal travel advice, alternative or lesser-known destinations as well as local cultural experiences.

Implications for stakeholders

- **Prioritise practical enablers** (simpler rail booking, clearer seasonality guidance, EV rental support).
- **Reframe responsible choices as value propositions** (clearly communicate the cost and convenience benefits of off-peak travel, going off the beaten track and, where applicable, local experiences and green transport options).
- **Leverage the slow-travel narrative**: position longer stays, deeper local engagement and immersion within a region as accessible, attractive propositions that bundle responsible options for travellers.

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Introduction

A framework for assessing travel behaviours over time

Europe remains the most popular destination for long-haul travel in a world of steadily growing international mobility. At the same time, concerns about tourism's long-term impact on destinations, local communities and the environment have intensified. Against this background, **the European Travel Commission (ETC) has initiated a market research initiative to assess how responsibly long-haul visitors to Europe behave, and how such behaviours develop over time.**

The project focuses on four dimensions of responsible travel that are both relevant to European destinations, observable from the traveller perspective, and present within ETC marketing campaigns: **travelling outside peak season, venturing off the beaten tourism trail, engaging in local culture while supporting local businesses and communities**, and **making green transport choices**. Six long-haul source markets are in focus: **Australia, Brazil, Canada, China, Japan**, and the **United States**.

Two research projects within the framework have been conducted to date, in late 2024 and in late 2025. The assessment framework has been designed to allow results to be compared over time. An in-depth description of the methodological choices made in the design of the framework can be found in the report from the first project[1].

This report presents empirical results from the second project for each behaviour, including developments since the baseline. The final chapter provides high-level conclusions and discusses implications for stakeholders.

To better understand how responsible the behaviours of long-haul travellers are, the European Travel Commission has commissioned a market research initiative to assess the level of responsibility and follow its development over time.

Sustainability has a limited share of global attention

In a time of geopolitical instability, economic worries and heightened security concerns, **sustainability currently occupies a smaller share of global public attention** than it did just a few years ago. Media coverage and political debate in many parts of the world are today dominated by questions of conflict, inflation, energy security and migration, with issues of environmental as well as social sustainability having a smaller share of public attention than during the late 2010s and early 2020s. The media analysis conducted as part of this study further indicates that, also among media coverage about travelling to Europe, the share of articles that relate to responsible travel – the sustainability topic in focus of this report – has become smaller year-on-year.

However, despite this headwind in public discourse, the results of this study indicate that responsible travel behaviours among long-haul visitors to Europe have not weakened. On the contrary, when measured using the project's behavioural indices, all four assessed dimensions show a modest improvement from 2024 to 2025. This suggests that responsible travel choices persist even in a context where sustainability is less visible in public debate.

[1] This report is available to ETC members only.

Chapter 2
Methodology

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Methodology

The study uses a mixed-methods approach to produce a repeatable assessment of responsible travel behaviours among long-haul visitors to Europe. The primary goals are to measure the four defined responsible behaviours, to understand drivers and barriers that explain those behaviours, and to track how patterns evolve over time. The design combines a survey, as the quantitative core, with a qualitative study of online conversations and an analysis of editorial media as a contextual component.

Three complimentary research methods:

1. **Survey** with **3,000 respondents** who have visited and/or plan to visit Europe for leisure. Questions on **itineraries, activities** and responsible travel **behaviours.**
2. **Netnography**: Qualitative analysis of **online discussions about travelling to Europe.** Examined **perceptions, intentions, and behaviours** visible in the conversations.
3. **Media analysis**: AI-assisted analysis of **travel-related articles.** Examined how responsible travel appears in **public discourse.**

Three research methods

Survey

The survey is the project's primary data source. It targets long-haul independent and semi-independent leisure travellers in six source markets: Australia, Brazil, Canada, China, Japan, and the United States. Apart from a small number of minor refinements of the questionnaire, the survey was conducted in the same way in the second project as in the first.

The sample size is 3,000, with 500 respondents in each market. Data collection was conducted via online panels administered by Norstat, with fieldwork taking place in November 2025, which is twelve months after the first project wave. This timing was chosen to minimise seasonal effects when comparing results over time.

Participation was limited to respondents aged 18 or older who had visited Europe for leisure as FIT[2] or semi-FIT travellers at least once during the last ten years and/or were planning such a trip within the coming five years. The questionnaire collects information on both the most recent conducted trip and the earliest planned upcoming trip, where applicable.

The questionnaire combines multiple-choice questions, scale questions and free-text questions. It was administered in the primary language of each market and is included in its English-language version in the Appendix, with changes relative to the questionnaire used in wave 1 marked.

[2] Free independent travellers

In the analysis, the data was weighted by source market, with all six markets weighted equally. Within each market sample, the data was also weighted by age and gender according to the average age and gender distribution of the total sample.[3] Open-text survey responses were analysed using automated and semi-automated text analysis methods to identify recurring themes and quantifiable patterns among the text responses.

A social desirability variable, identical to that used in the first project wave, was included to assess potential response bias. Analysis shows only weak correlations between this variable and the behavioural measures, indicating limited influence on reported travel behaviours.

The survey data was also used to construct the project's four behavioural metrics. Each behaviour is operationalised through a defined set of survey items capturing concrete travel choices and actions. Item scores are combined and indexed to the baseline year[4], allowing subsequent waves to report change relative to that baseline. Media analysis and netnography are used to contextualise and interpret these results, but do not feed into the behavioural metrics.

Netnography

Netnography examines public traveller conversations in online social channels to capture accounts of decision-making, motivations and practical constraints. The netnographic research has been conducted at a global level, with a focus on inbound long-haul travellers and with particular attention to discussions among travellers from the six focus countries wherever travellers' origin has been possible to assess. Six international platforms have been studied as well as eleven platforms specific to Brazil, China, or Japan. The platforms are listed in the Appendix. The research was limited to conversations taking place between November 2024 and November 2025, which is the 12-month period following that in focus during wave 1.

The netnographic component is deliberately exploratory in order to surface behaviours and trade-offs that the structured survey items may not capture. Findings are used to give nuance to patterns observed in the survey.

Media analysis

The media analysis focuses on the public discourse around travelling to Europe. It is included in the study in order get a view of the context in which travellers' perceptions are shaped and in which upcoming trips are planned. This project component analyses content from editorial media (newspapers, magazines and travel press) in the six focal countries with an aim to understand how responsible travel themes are framed and how prominent they are within mainstream media coverage.

30,000 articles from media in each market were collected through the media aggregator Opoint using sets of broad keywords related to travel and to Europe (see Appendix). Because this approach produces substantial noise, several stages of automated and semi-automated filtering were then applied to retain articles relevant to leisure

[3] This approach ensures that observed differences between markets are not driven by discrepancies in age or gender composition. Weighting by national population distributions was not applied, as the target group of long-haul travellers to Europe is not representative of national populations. (The group differs from national populations in terms of characteristics such as income and education.) No further weighting was applied.
[4] The baseline year is 2024, as the survey data in the first wave was collected in November that year.

travel to Europe.[5] The final dataset comprises 13,799 articles. These were vectorised using a large-language model (GPT-3), with the resulting vectors projected in two dimensions. The outcome of this process is a semantic 'map', in which articles are clustered around different themes. The semantic map has been visualised in a form that resembles a topographic map of a natural landscape and is referred to as the 'media landscape' throughout this report. It can be seen on page 12.

A large-language model was also used to assess whether each article is related to one or more of the four responsible travel behaviours. This assessment was used to provide four contextual 'media metrics', indicating the extent to which each responsible behaviour is reflected in media coverage about travelling to Europe (see Chapter 8).

Integration and interpretation

The three components play complementary roles. The survey provides the behavioural metrics that are the project's primary outputs. Netnography supplies insights into how travellers make choices and practical factors that drive or hinder responsible actions. Media analysis provides a picture of the discursive environment that shapes awareness and norms.

[5] There were several steps of filtration. First, duplicates were removed. Then, articles on non-relevant topics were removed. Such topics, which formed part of the collected material because of how the keyword sets were defined, notably included news about political leaders travelling to Europe. Other removed topics revolved around domestic tourism within the source markets. In a few cases, it was not obvious where to draw the line when determining whether a topic is relevant or not; for example a cluster of articles about celebrities (mostly from Japan) travelling to Europe for leisure was kept, as those can be seen as travel influencers.

Chapter 3

The big picture of travelling to Europe

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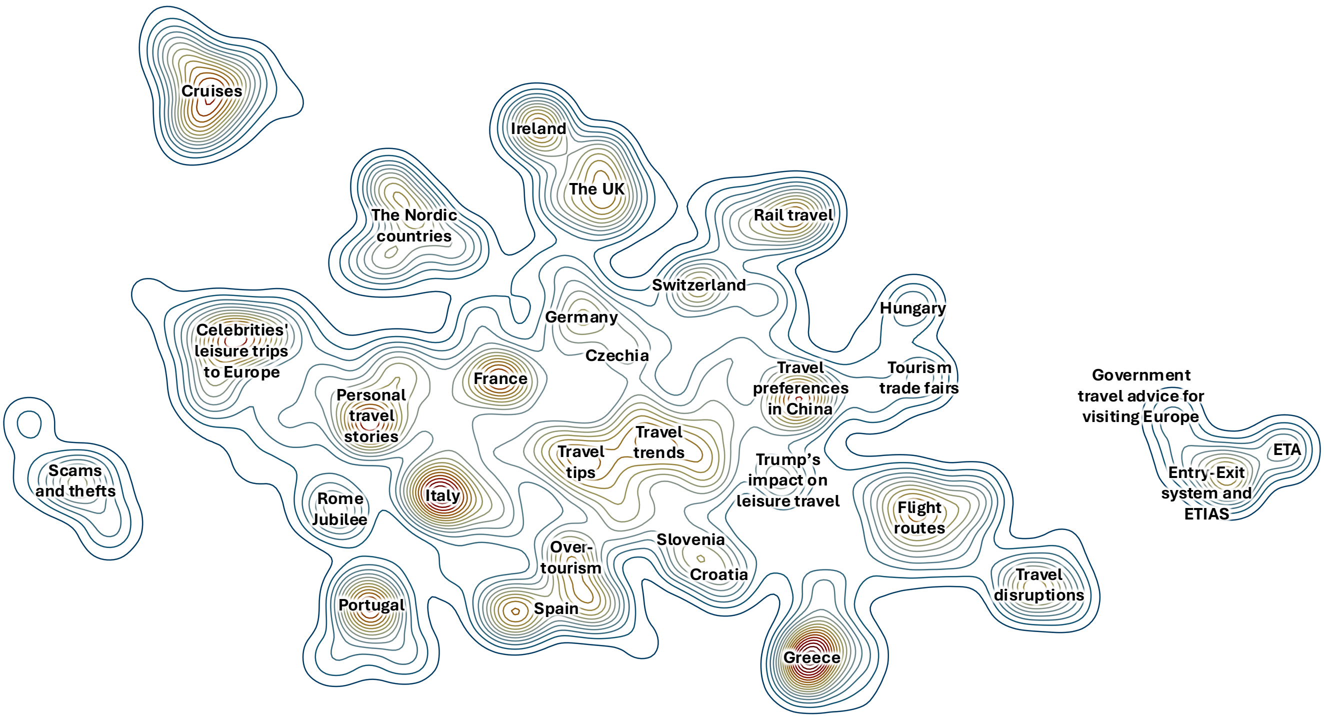
The big picture of travelling to Europe

This chapter is aimed at painting the big picture of travelling to Europe, as a backdrop for the findings related to the four responsible travel behaviours which are presented in subsequent chapters.

The media landscape

To understand the public discourse surrounding travel to Europe, the study examines editorial media coverage in the six source markets. This analysis examines themes, narratives and concerns that travellers are likely to encounter when planning trips.

Figure 1. The 'media landscape': a thematic map of topics in the media coverage of travel to Europe.



The resulting media landscape (Figure 1) is structured around a set of identifiable thematic and destination-based clusters. Some clusters centre on specific countries or regions, while others reflect cross-cutting themes that are not tied to a single destination. Dense clusters, marked with high numbers of contour lines in the map, represent distinct topics.

Alongside destination clusters, several thematic clusters stand out. Examples include reporting on **theft** and **tourist safety incidents** (particularly prominent in Chinese-language media), coverage of **crowding** and **local demonstrations** in heavily visited European destinations, and articles related to **major events** such as the Catholic Jubilee year in Rome. There are also clusters reflecting **external push factors**, such as Canadian media coverage of travellers choosing Europe over the United States in response to political developments there.

Compared with the previous year, the overall structure of the media landscape is largely stable. Most country clusters observed in the baseline year reappear, indicating continuity in how European destinations are framed. There are also some notable shifts: Hungary emerges as a small but distinct cluster this year, while Türkiye no longer forms a separate cluster. Articles about Iceland, which appeared as a separate cluster in last year's study, are now grouped together with articles about the other Nordic countries.

From a thematic perspective, transport-related discourse has gained prominence; clusters related to flight routes and rail travel are more visible than in the previous year. By contrast, sports-related travel, which stood out more clearly in the 2024 landscape (then partly focused on the Paris Olympics), no longer appears as a distinct theme.

More than half of the analysed media content is related to responsible travel

Across the analysed media corpus, 61% of articles are related to at least one of the four responsible travel behaviours. This is a smaller share than in the previous year, when the corresponding media analysis in the first project showed that the share of articles related to at least one of the behaviours was 71%.

***Love local* is the most prevalent theme in the media coverage**, with 50% of the analysed articles being identified as related to it. *Go off the beaten track* is identified in 20% of articles, followed by *travel off-season* (14%) and *travel green* (13%).

Compared with the previous year, three of the four behaviours show increased representation in the media landscape. Articles related to *love local*, *go off the beaten track* and *travel green* now account for a larger share of coverage than in the baseline year. In contrast, *travel off-season* appears less frequently. There is a strong overlap, with many articles being related to more than one of the responsible behaviours.

Articles associated with the four behaviours are not evenly distributed across the thematic landscape. Instead, they cluster in different parts of the discourse, reflecting distinct narrative contexts. (See Chapters 4–7.)

Social media conversations about travelling to Europe

As noted in the report from wave 1, social media conversations about travelling to Europe differ markedly by platform type, with content on **visual platforms** primarily **inspirational** and to a high extent **supply-driven**. Prominent videos and photos are typically posted by influencers, many of which have commercial partnerships. It is not always clear which senders are primarily travellers themselves and which are primarily marketers. **Forums** are markedly different, with conversations structured around **questions**, **recommendations** and **first-hand travel accounts**. Threads typically start with accounts of concrete travel plans and itineraries (for example, 'What about this trip idea?'), followed by responses from other travellers and, in some cases, locals acting as informal experts.

Practical issues are particularly prominent in forums. Questions about **how to travel between destinations**, as well as about visas and **costs**, are recurring. Cost sensitivity appears to be spreading; in the first project it was mainly noted in Chinese-language discussions, but it can now be seen in more markets. Notably, Japanese travellers are commenting on reduced purchasing power due to a weaker yen.

Safety is another recurring topic. Some discussions frame parts of Eastern Europe as safer than Western Europe, while less crowded or off-the-beaten-track destinations are sometimes perceived as safer than major tourism hotspots.

Mainstream destinations remain the centre in respondents' travel accounts

When survey respondents are asked to describe where they went and what they experienced in Europe, their accounts remain centred on well-known destinations. **References to major countries, cities and landmarks dominate the 'where did you go' component of responses**, indicating that mainstream destinations are the typical top-of-mind component of long-haul trips to Europe.

Analysis of the 'what did you experience' component shows a similar concentration. What is most salient in respondents' descriptions are **sights and landmarks**, **urban environments**, **local culture**, and **food and drink**. The most common themes appear in more than 500 responses each. Less common themes are marginal by comparison. For example, 'walking' appears in only 11 responses.

These patterns suggest that, despite growing interest in alternative travel modes and destinations, **the core mental image of a European trip among long-haul travellers is still structured around iconic places and recognisable cultural experiences**.

Figure 2. Locations frequently mentioned in responses to the open-ended survey question 'Where did you go and what did you experience in Europe?'

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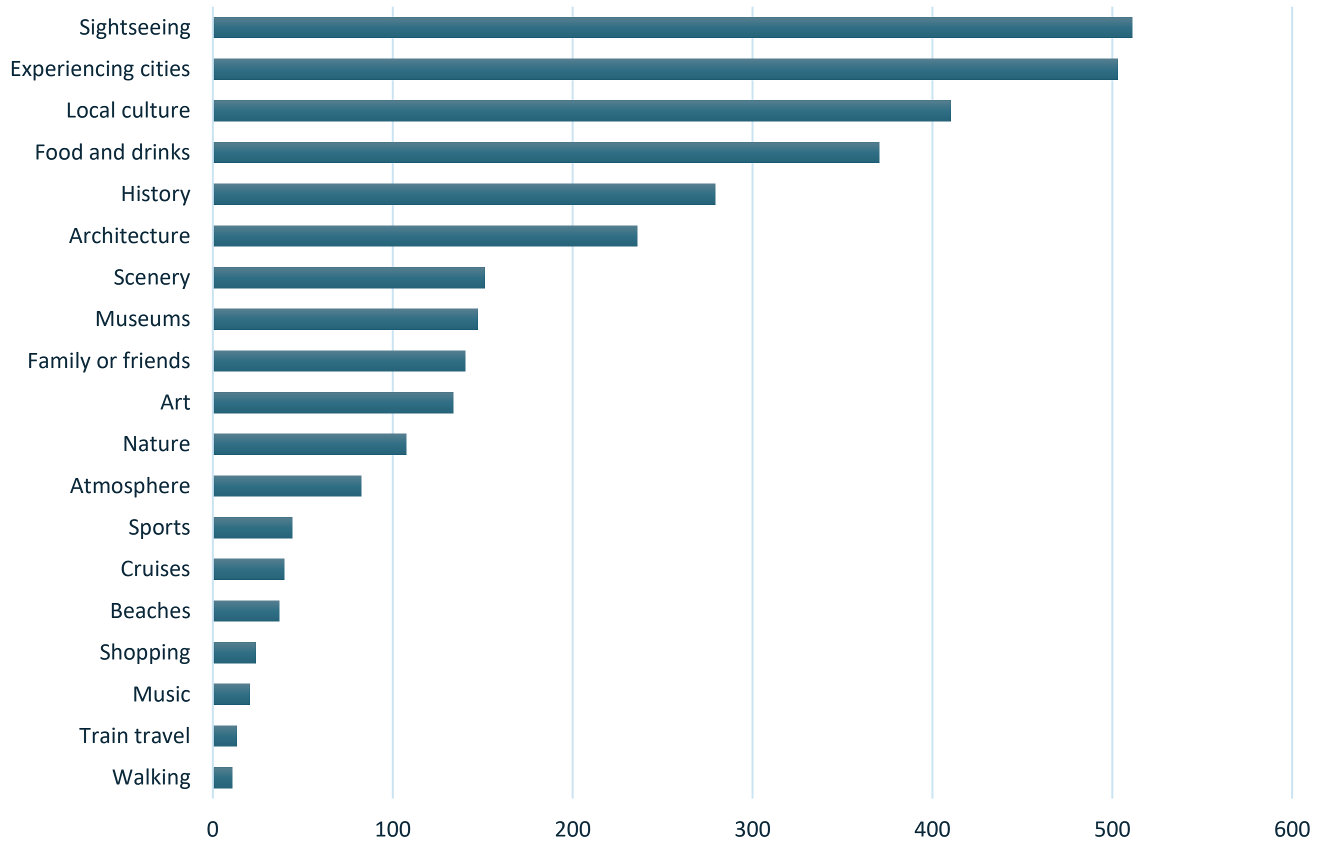
Figure 3. Themes and experiences frequently mentioned in responses to the open-ended survey question 'Where did you go and what did you experience in Europe?'



Key insights – big picture

- **The mainstream persists**.
- **The media landscape contains roughly the same elements as last year**. The shares of content identified as relating to the four responsible travel behaviours have risen for all except *travel off-season*, while there is also a growing share of articles on leisure travel to Europe that do not relate to any of the responsible behaviours.
- **Many issues that are top-mind-for travellers are not directly related to responsible travel.**

Chapter 4

Behaviour 1: Travel off-season

Behaviour 1: Travel off-season

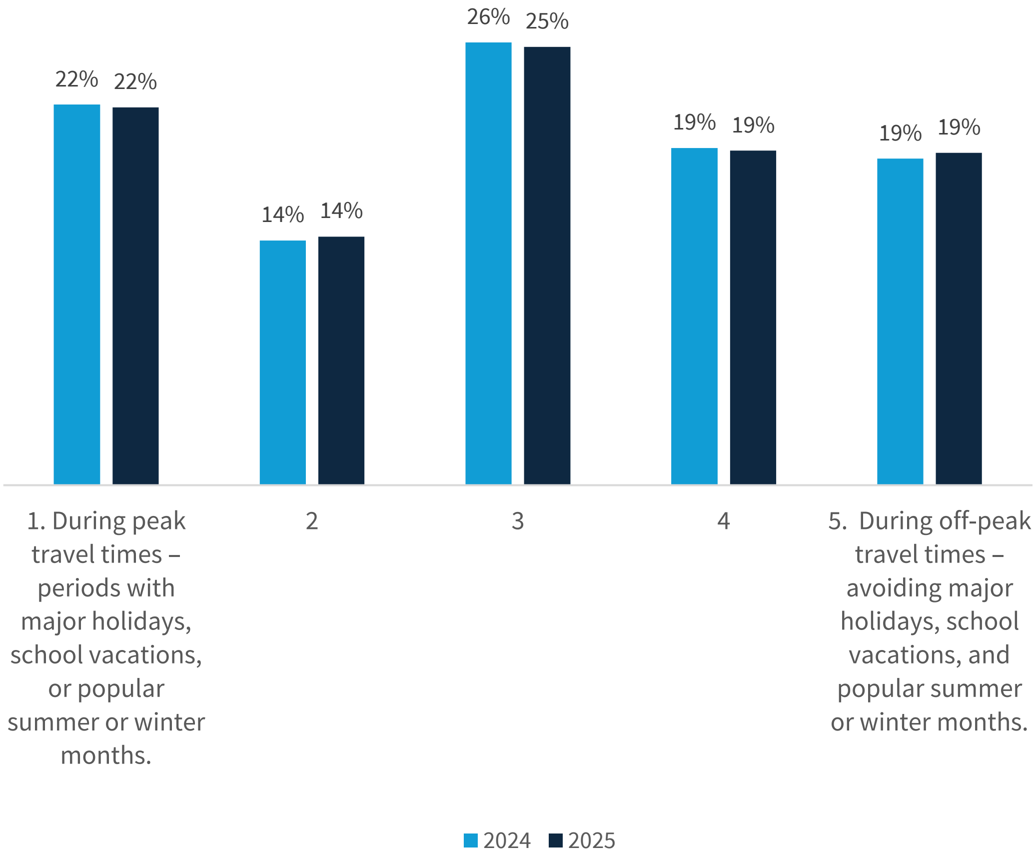
Definition: 'Travel to Europe outside the peak seasons, primarily avoiding summer (or avoiding winter for typical winter destinations, etc)'

The metric index for *travel off-season* has increased slightly, from 100 in 2024 to **102 in 2025**. While the change is modest, it suggests a small but positive movement towards travelling outside peak periods.

Same assessment of off-peak travelling in 2025 as in 2024

As shown in Figure 4, long-haul travellers' self-assessment of off-peak travel in 2025 is largely unchanged compared with the 2024 baseline year. Across markets, respondents report similar degrees of avoidance of peak travel periods in both years.

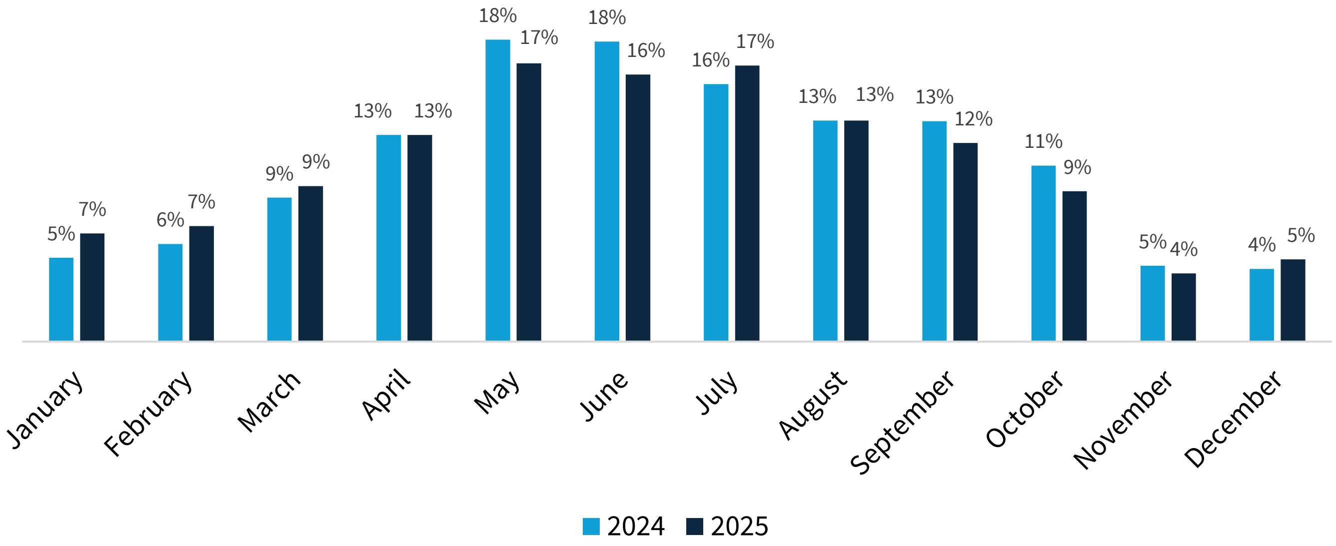
Figure 4. Distribution of responses to the survey question 'When would you say your trip took place? Please indicate on the scale below.'



Similar seasonal pattern 2025 as in 2024

Figure 5 shows the distribution of respondents' most recent leisure trip to Europe over the calendar year.

Figure 5. Distribution of responses to the survey question 'When did you visit Europe? You can select more than one month.'



The overall seasonal distribution in 2025 closely mirrors that observed in 2024. Travel remains concentrated in the late spring and summer months, with May–July accounting for the largest share of reported trips in both years.

There are, however, two notable shifts. The share of trips reported during the peak months of May–June is slightly lower in 2025 than in 2024. At the same time, the share of trips reported during the winter months of December–February is higher in 2025. While these changes are modest, they indicate a small redistribution of travel away from the summer peak and toward winter travel.

Off-season travel in the media coverage

The media landscape (visualised in Figure 1 on page 12) contains several recurring topics related to travelling off-season. These include coverage of **cruises in spring**, autumn, or in some cases winter, as well as destination-specific features such as **autumn travel in Sweden** and **shoulder-season experiences in Switzerland**. Other articles note a **growing interest in winter trips** to countries traditionally perceived as summer destinations, such as Greece. **Practical advice** also features prominently, including recommendations to visit Mediterranean destinations in early spring and **warnings against summer travel** to parts of southern Europe due to **heat** and **wildfire risks**.

In addition, some coverage portrays asymmetries that exist between source-market travel patterns and European seasonality as a positive force. For example, articles note that peak travel periods for Chinese travellers, in some cases, coincide with shoulder or low season in Europe – reflecting that off-season travel from a destination point of view sometimes is the default choice from travellers' perspectives.

Knowing what times are off-season is not always straightforward

Online discussions indicate that **travellers do not always have a clear understanding of destination-specific seasonality**. Some travellers describe having deliberately planned trips outside what they believed to be peak periods, only to encounter large crowds on arrival. As a Japanese forum user, describing a January visit to Prague, expresses:

> ***'So many people! I thought it would be off-season, but that wasn't the case at all.' (4travel.jp)***

Some travel influencers address the uncertainty by arguing that peak and shoulder seasons are shifting. One video, for example, argues that the peak summer season of many European destinations has expanded into what used to be the shoulder seasons – and the best times to visit – in spring and autumn, pushing the shoulder seasons closer towards winter time:

> ***'For much of Europe, the sweet spot has seemed to be April to May and September to October, but lately even this has started to change.' (YouTube)***

Online warnings about summer heatwaves in Europe

Warnings about extreme summer heat in Europe are increasingly visible in online travel content. Travellers are advised to avoid certain destinations during summer months due to high temperatures and limited access to air conditioning. This suggests that climate change, with rising summer temperatures, is a factor pushing visitors to southern Europe in particular to travel off-season.

One YouTuber lists European countries not recommended for summer travel, citing heat as a primary reason. Spain is described as reaching 'unbearable temperatures of 46 degrees', while Greece is portrayed as 'extremely hot and exhausting' for sightseeing. A video on Douyin shows a Chinese family living in Germany coping with a 42-degree summer day, explaining that many homes there lack air conditioning.

Cost-consciousness as a driver of responsible travel, including off-season

Cost considerations appear frequently in online discussions and can motivate off-season travel choices. For example, travellers describe accepting colder weather in exchange for substantially lower airfares:

> ***'there have been awesome international flight deals departing the US Thanksgiving weekend [...] I've built it in my travel rhythm to travel last week of November and first two of December for this reason.' (Reddit)***

> ***'I just got a really good opportunity to travel to Frankfurt at the end of October [...] I'm not a big fan of going to Europe in the cold, but I couldn't miss the chance to go for R$1700 in business class.' (Mochileiros)***

Cost considerations also appear to be driving other responsible behaviours. Travelling outside peak season, avoiding major tourism hotspots and adopting travel patterns to 'live like a local' are all described as ways to reduce expenses. Among Japanese travellers in particular, cost sensitivity appears to have increased as the yen has weakened. Some online comments in Japanese channels describe Europe as no longer financially accessible for travellers who previously visited regularly.

Travelling off-season to attend events

Events are a pull factor drawing travellers to Europe outside peak seasons. Last year's report mentioned Christmas markets, but a wide range of cultural, culinary and religious events are also discussed as motivations for off-season travel. One Japanese traveller, for example, describes travelling independently to the Beaune Wine Festival in France in November after reading about it in a newspaper, enjoying the festive atmosphere and expressing surprise of how many people were there. Others express a general preference for travelling to a destination when major local events are taking place there.

At the same time, **some large-scale events discourage travel due to anticipated crowding**. In 2024, the Paris Olympics were cited in this way, and similar concerns have now been voiced in relation to the Rome Jubilee in 2025.

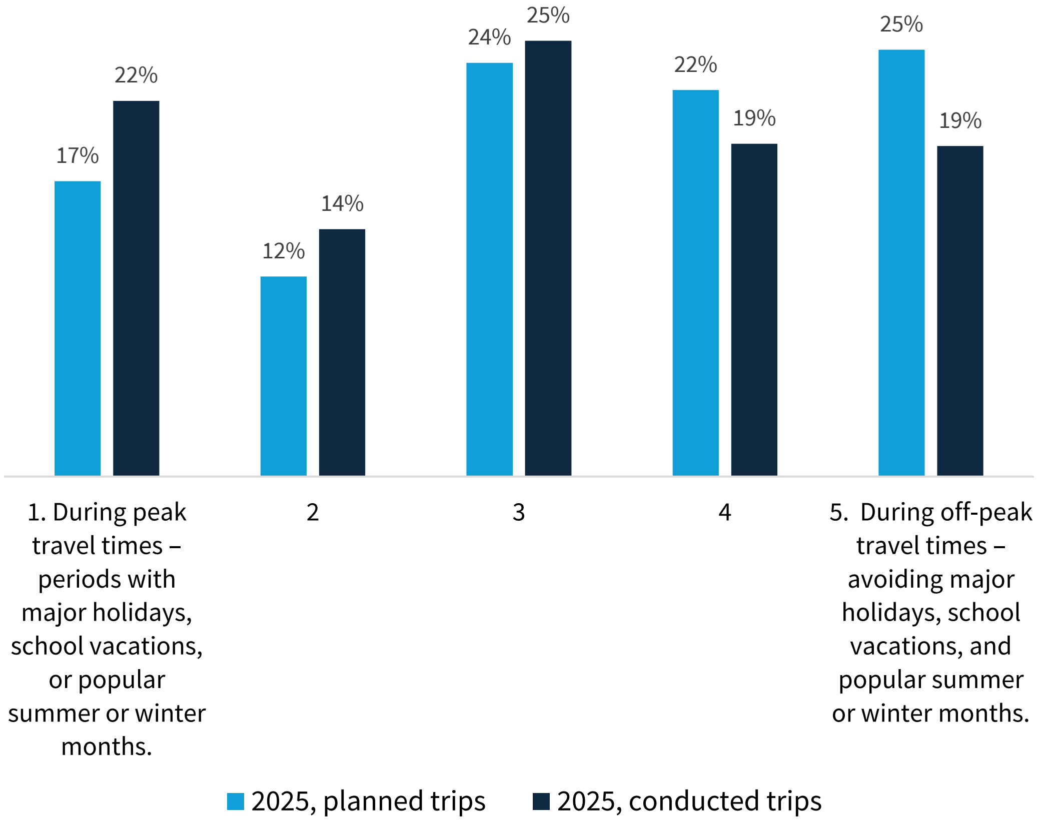
> ***'2025 is jubilee. Rome will be standing room only because of tourists and pilgrims.' (Reddit)***

Planned trips are more off-season than conducted trips

Survey results show a consistent difference between conducted and planned trips. When respondents assess the extent to which they travelled during peak or off-peak periods on a five-point scale, planned upcoming trips are rated as more off-season than trips already completed (Figure 6).

This pattern mirrors the findings from the 2024 survey and suggests that intentions to avoid peak travel periods remain stronger than realised behaviour.

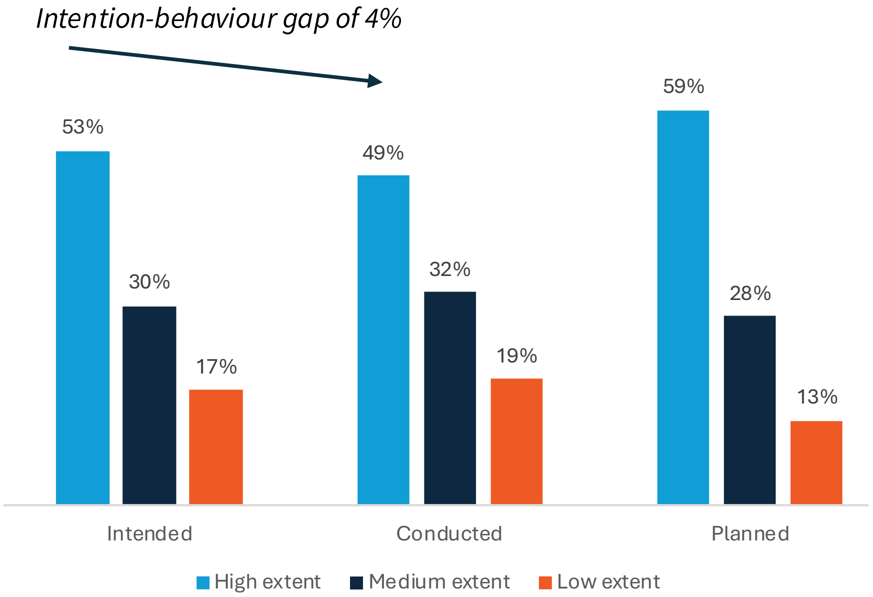
Figure 6. Distribution of responses to the survey question 'When would you say your trip took place? Please indicate on the scale below.'



Intention-behaviour gap of 4% for travelling off-season

Comparing intentions with reported behaviour reveals a measurable intention–behaviour gap. The share of respondents who report intending to travel off-season to a high extent exceeds the share who report having done so by four percentage points.

Figure 7. The 4% intention-behaviour gap for travel off-season can be seen when comparing the share of respondents who say they were intending to avoid peak travel times, encounter fewer crowds, and travel in a climate that is more temperate to a high extent ahead of their trip (53%, left) with the share who say that they did so to a high extent (49%, middle). The right group of bars shows the degree to which respondents are planning to do the same during upcoming trips.



In the 2024 survey, the corresponding gap was five percentage points. The reduction suggests a **slight narrowing of the gap** between intention and realised behaviour.

Key insights – *travel off-season*

- **The tendency is that long-haul travellers report more off-peak travelling** in 2025 compared to in 2024. The differences are, however, small.
- **Planned trips are more off-season than conducted trips are**. There is an intention-behaviour gap of 4%. That indicates that there are barriers that prevent people from travelling off-season.
- Online conversations show that **it is not always easy for travellers to know what times of the year are off-season in certain destinations**.

Chapter 5

Behaviour 2: Love local

Behaviour 2: Love local

Definition: 'Travel experiences in Europe that facilitate active engagement and immersion in the local culture, traditions, and way of life of a destination, for example by choosing local products, hotels, restaurants, etc'

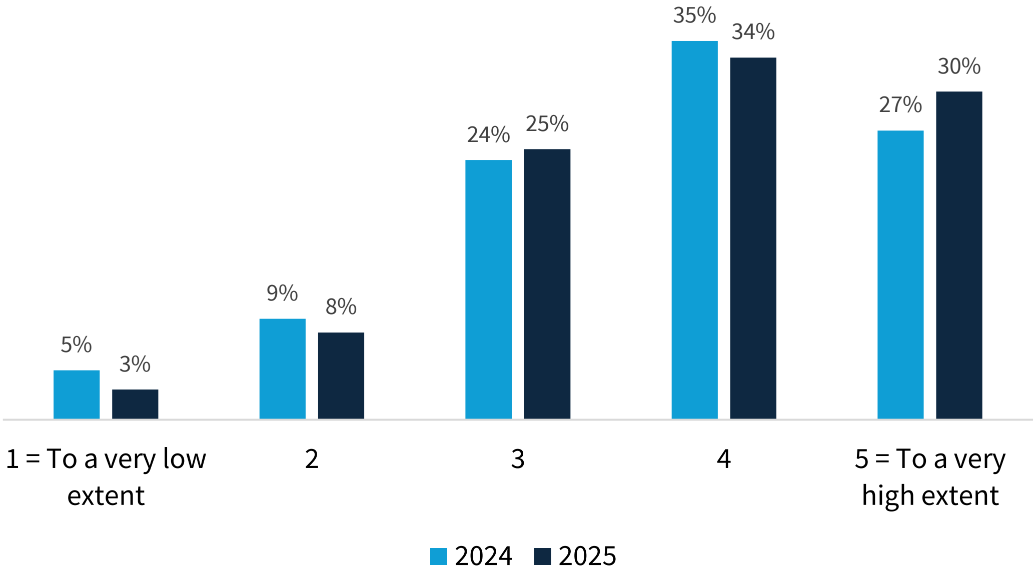
The metric index for *love local* rose from 100 in 2024 to **105 in 2025**. This reflects a moderate increase in reported engagement with local products, services, and locally oriented experiences during travel.

Self-assessed engagement with local culture remains high

Figure 8 shows travellers' self-assessment of the extent to which they engaged with local culture during their trips to Europe. The share of respondents reporting high engagement is slightly higher in 2025 than in 2024, while the share reporting low engagement is lower.

At the same time, the average AI-based assessment of free-text responses to the question "Please describe the contact and engagement in the local cultures you experienced" indicates marginally lower levels of immersion in 2025. Taken together, the two measures point to **a broadly stable level of engagement with local culture** year-on-year.

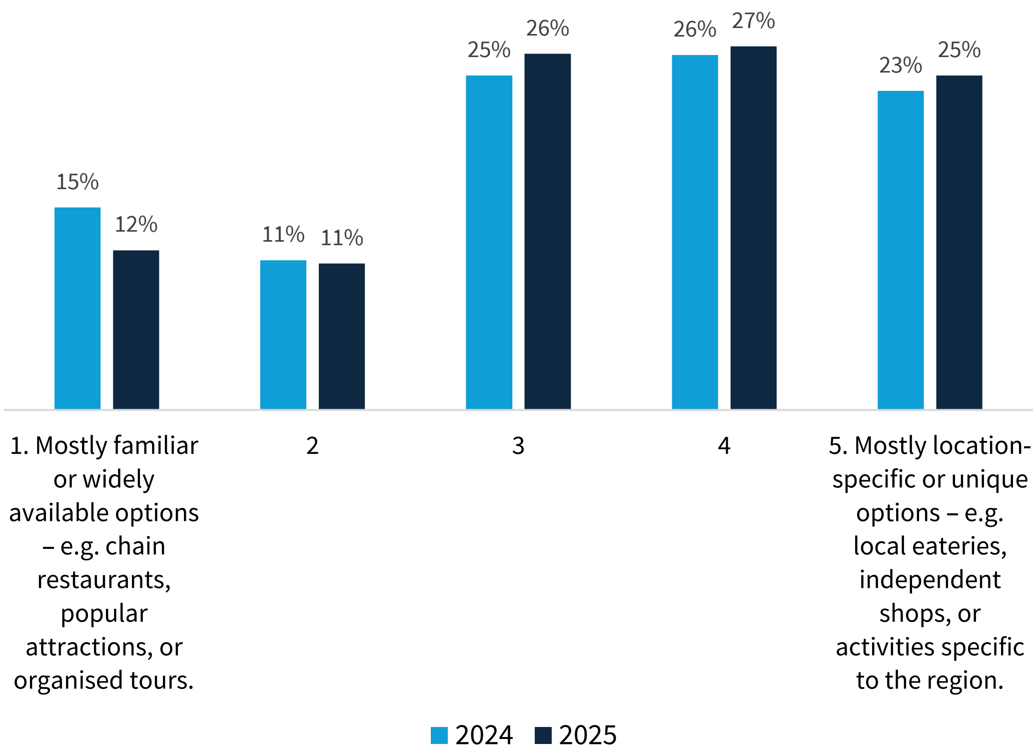
Figure 8. Distribution of responses to the survey question 'During your trip, to what extent did you engage with the local culture (e.g. interacting with locals, attending local events, visiting local markets)?'



Slightly more local experiences in 2025 compared to 2024

Survey responses relating to conducted trips show a small increase in the share of travellers who report choosing location-specific or unique experiences rather than familiar or widely available options (Figure 9). As with cultural engagement, the difference compared with 2024 is modest.

Figure 9. Distribution of responses to the survey question 'During your trip, how would you describe the type of experiences you had?'



Travellers may perceive almost any travel experiences as local experiences

Responses to a free-text survey question on contact with and engagement in local culture show that travellers apply a very broad understanding of what such engagement entails. For many respondents, engaging with local culture appears to be closely intertwined with the core purpose of travelling itself: meeting people and experiencing places, food, history, and a daily life that differ from one's everyday life back home. Two examples:

> ***I went to the English countryside to get away from the big city and have more contact with the locals. I heard several interesting stories and sampled the local cuisine.***

> ***In France, I immersed myself in the café culture of Paris — sitting outdoors sipping espresso while watching daily life unfold felt quintessentially French. I practiced bits of the language, interacted with local bakers and artists in Montmartre***

In this sense, *love local* is not perceived as a distinct or optional behaviour, but as **an integral part of the travel experience**. For some other respondents, the engagement lies in **finding their own family roots**:

> ***I visited Vienna, Austria, and took the train to visit Poland's Krakow and Warsaw. To discover where my grandfather was born.***

The very broad possibilities for how to interpret engagement in the local culture of a destination was also evident in the first project wave. All in all, the collected accounts suggest that, from the traveller's point of view, contact with local culture to a high extent relates to personal experience and a feeling of immersion on the side of the traveller. A potential conclusion is that, for an experience to be perceived by the traveller as 'local', it does not necessarily need to be contributing in a meaningful way to neither local communities nor to the local economy. In other words, visiting iconic sites, observing local life, or consuming cultural representations may deepen understanding and appreciation, but do not automatically translate into local economic or social benefit.

Rather than indicating a lack of responsibility, the breadth of interpretations suggests that a high degree of clarity may be called for when communicating what kinds of local engagement are most likely to generate tangible benefits for destinations and communities.

Love local in the media coverage

Topics in the media landscape (shown in Figure 1 on page 12) related to *love local* are typically destination-focused and centred on concrete expressions of local culture. Coverage includes **festivals and seasonals events**, such as Christmas markets and regional celebrations. Other texts point to specific towns and neighbourhoods as places where visitors can immerse themselves in a local culture and experience everyday local life. Food and drink play a prominent role, with articles highlighting, for example, **regional cuisine** and locally rooted culinary traditions as authentic ways to experience a destination. Some coverage goes further with profiles of winemakers, farmers or small-scale food producers.

Cultural practices – for example **Finnish sauna culture** – are presented as immersive experiences that allow visitors to engage directly with destination-specific customs. The emphasis on immersion also extends to accommodation, with **boutique hotels, heritage properties** and **small-scale lodgings** described as ways to connect travellers to local character, tradition, and communities. As in the survey responses, the breadth of topics indicates that engagement with local culture – including through food, traditions, and events – is a dominant framing of leisure travel to Europe also in the media coverage.

Diverging views on Christmas markets

Christmas markets remain a prominent topic in online conversations about of local culture. As noted during the first project, many travellers actively seek them out, often travelling off-season or to smaller destinations to experience what is perceived as a **local atmosphere**.

> ***'I went to [Europe to see] the Christmas markets again this year. As usual, I only visited the markets and didn't do any general sightseeing!' (4travel.jp)***

At the same time, there are also views in online discussions of Christmas markets as examples of a kind of attractions that only give a very **superficial connection** with local culture. Some travellers describe Christmas markets as overcrowded and overly commercialised, with little perceived local value and without any strong connection to the local communities where they are held. There is **debate around which markets are authentic**, with some arguing that markets in smaller towns are both nicer and more local.

> ***'The good ones are busy but not so crowded that you get swept away [...] Try Spreewaldweihnacht, Baumschule Späth, Biedermeierweihnacht in Werben, Quedliburg Advent in den Höfen, Schloss Britz, the Silesian market in Görlitz, or the market in the Black Forest living history museum' (Reddit)***

Hands-on engagement in local tradition

Netnographic material highlights interest in hands-on participation in local traditions, not least through **craft-related activities**. A Xiaohongshu post describing a **weaving workshop** in Latvia, for example, emphasises intergenerational and cross-cultural knowledge transfer, artistic continuity and **mutual exchange** between host and visitor:

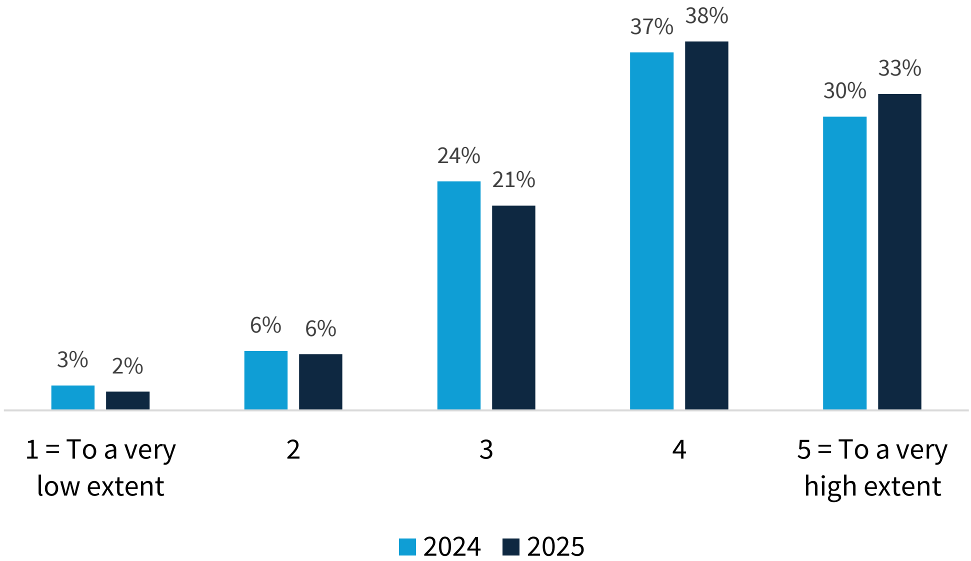
> ***'I was deeply moved by the vibrant artistic energy of an 80+ year old grandmother in Latvia! This is a local artisan's studio, filled with elderly women. The grandmother who taught me weaving had been studying textile art at an art academy since her teens, and her room was filled with her works. [...] The key to preserving handicrafts is to allow everyone, ordinary people, to participate and experience the joy of creation! Finally, we gave the grandmother the plant-dyed cotton thread we brought from China, hoping she would use European techniques to create works with Chinese colours, which we can pick up next year!' (Xiaohongshu)***

This is an example of *love local* behaviour that involves **participating rather than observing**, and is a form of cultural exchange at least as much as it is a form of consumption.

Slightly more local consumption in 2025 compared to 2024

Figure 10 shows responses to the survey question 'During your trip, to what extent did you buy local products or services?' The share reporting high levels of local consumption is slightly higher in 2025 than in 2024, while the share reporting low levels is correspondingly lower. As with other *love local* indicators, the change is small.

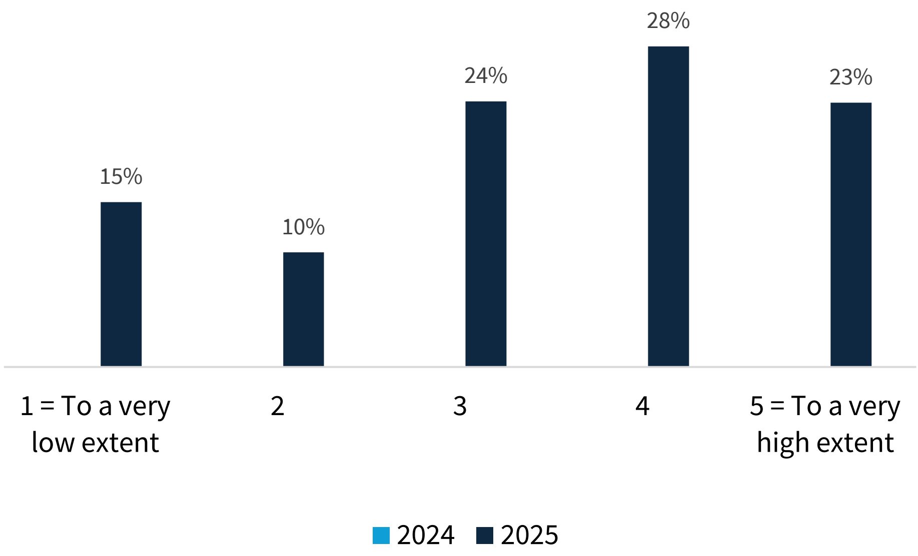
Figure 10. Distribution of responses to the survey question 'During your trip, to what extent did you buy local products or services?'



Half of travellers report staying in locally owned accommodation

Figure 11 shows responses to the question 'During your trip, to what extent did you stay in locally owned or independent accommodation?' In 2025, approximately half of respondents report staying in locally owned or independent accommodation to a high extent. This question was introduced in the second project wave and can therefore not yet be compared year-on-year.

Figure 11. Distribution of responses to the survey question 'During your trip, to what extent did you stay in locally owned or independent accommodation (e.g. guesthouse, B&B, small hotel or hostel)?'



Anti-sightseeing and slow travel

'Slow travel' appears as a recurring theme across online discussions. It is described both as a way to deepen engagement with local life and as a means to reduce travel intensity. For some travellers, slow travel is what **enables local immersion** by leaving room for everyday experiences – such as spending unstructured time in local neighbourhoods – that they perceive as more 'local' than what checklist-style sightseeing is.

> ***'There were times when I simply didn't want to be a tourist, I just wanted to have a beer by the river. I like to plan, but it's always good to leave some days or periods for you to relax too; it's in those moments that you really feel the place you're in. [...] This thing about taking photos in front of beautiful churches, so-and-so's cathedral, the abbey of I don't know whom – we shouldn't get stuck on that, because Europe is simply beautiful all-over. Focus more on enjoying the cities.' (Mochileiros)***

Apart from local immersion, the slow travel ideal is also often linked to *going off the beaten track*, as it can allow you to explore a region in-depth rather than rushing between top destinations. It is also frequently linked to a wish to keep expenses down.

Travelling responsibly = travelling slowly?

The *slow travel* narrative suggests that **slow/long** and **cost-effective** travel is more aligned with the responsible behaviours than **intensive/short** and **time-effective** travel.

Resident-style life while travelling

Some travellers express a desire to adopt everyday routines while travelling, including **cooking at their accommodation**, shopping in **local supermarkets** and **staying longer in one place**. This approach is often framed as **'living like a local'** in social channels and is frequently connected to the slow travel ideal.

> ***'POV: going to the supermarket in another country to experience their culture' (Instagram)***

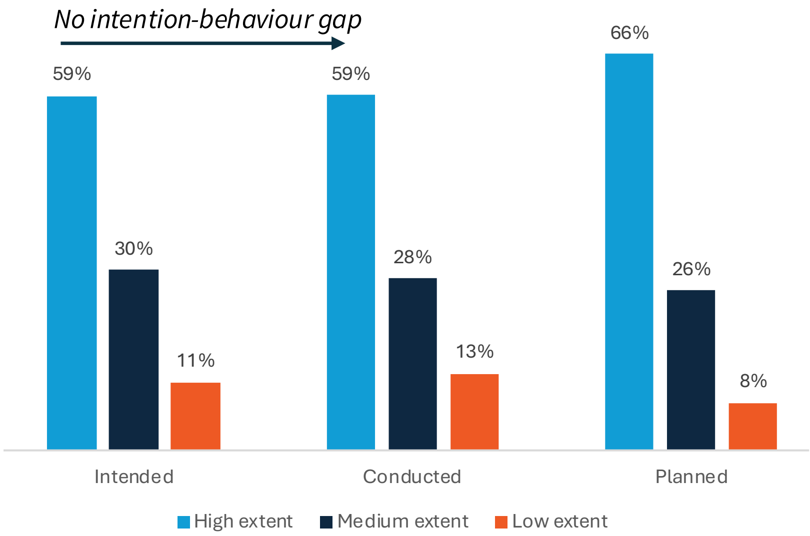
Examples range from choosing **homestays** and small B&Bs as accommodation to extended **remote work trips** that are longer and less tourism-intensive than pure leisure trips, including workdays just like locals have. Across these variations, the emphasis is on reduced tourist intensity, greater integration into **local rhythms**, and a **sense of immersion** in local communities.

> ***'Staying with a local family is like briefly living the life of a protagonist in a story.' (Xiahongshu)***

No intention-behaviour gap for loving local

Comparing the intentions that respondents say they had ahead of conducted trips with what they say they actually did during those trips shows no measurable intention–behaviour gap for *love local*. The share of respondents who report having intended to engage with local culture and local businesses to a high extent is equal to the share who report having done so. In the 2024 survey, there was a corresponding gap of one percentage point.

Figure 12. The absence of an intention-behaviour gap for love local can be seen when comparing the share of respondents who say they were intending to choose local accommodations, shops, and businesses and to engage with local cultures and communities to a high extent ahead of their trip (59%, left) with the share who say that they did so to a high extent (also 59%, middle). The right group of bars shows the degree to which respondents are planning to do the same during upcoming trips.

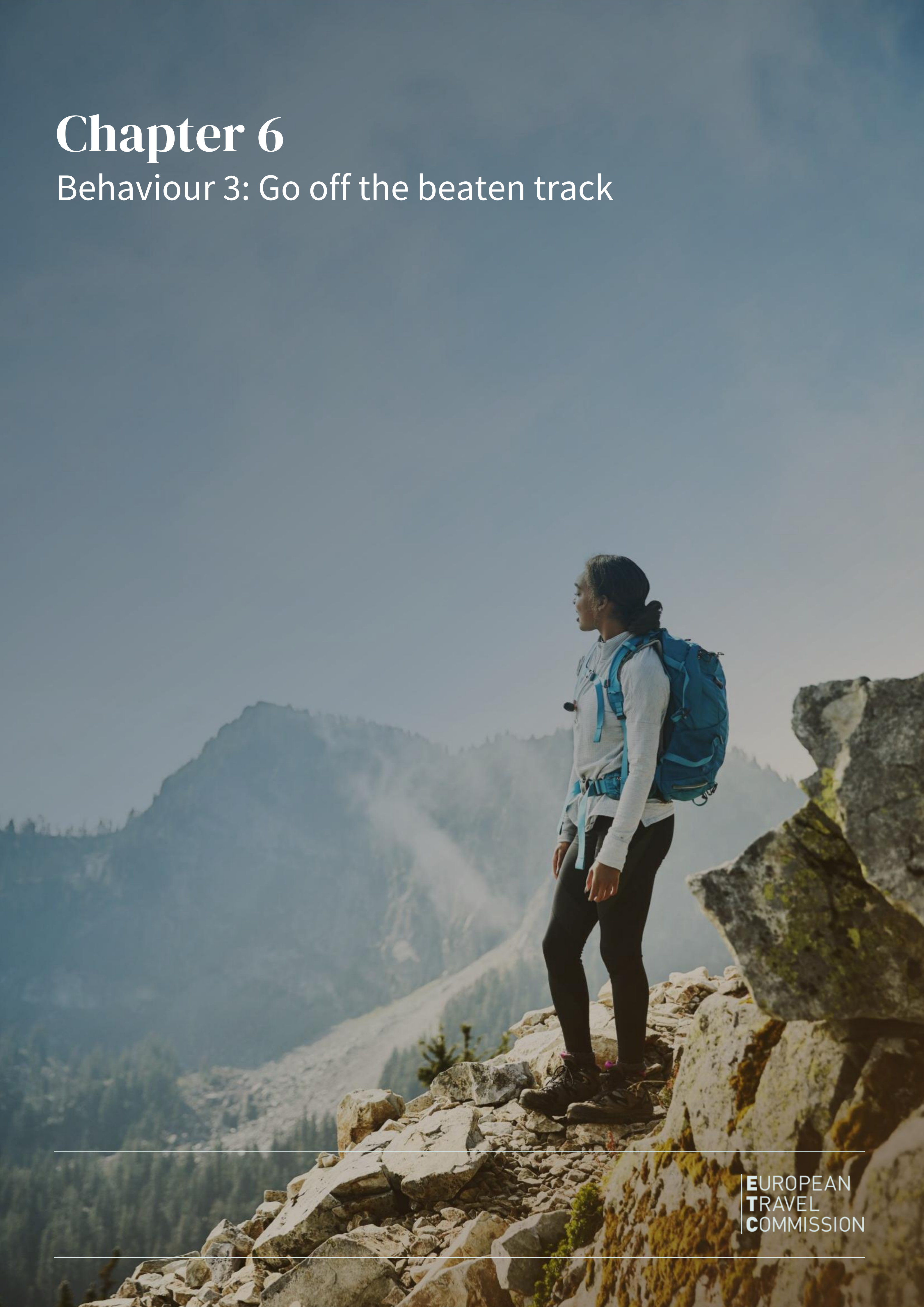


Key insights – *love local*

- **Long-haul travellers to Europe reported slightly more local experiences** and consumption in 2025 compared to in 2024.
- **Online conversations show a connection between local immersion and slow travel.** Some travellers choose to reduce the intensity of sightseeing and paid experiences with an explicit aim to 'live like a local'.
- **There is no intention-behaviour gap regarding *love local*.** However, people plan to love local to a higher extent than what is reported for conducted trips.

Chapter 6

Behaviour 3: Go off the beaten track



Behaviour 3: Go off the beaten track

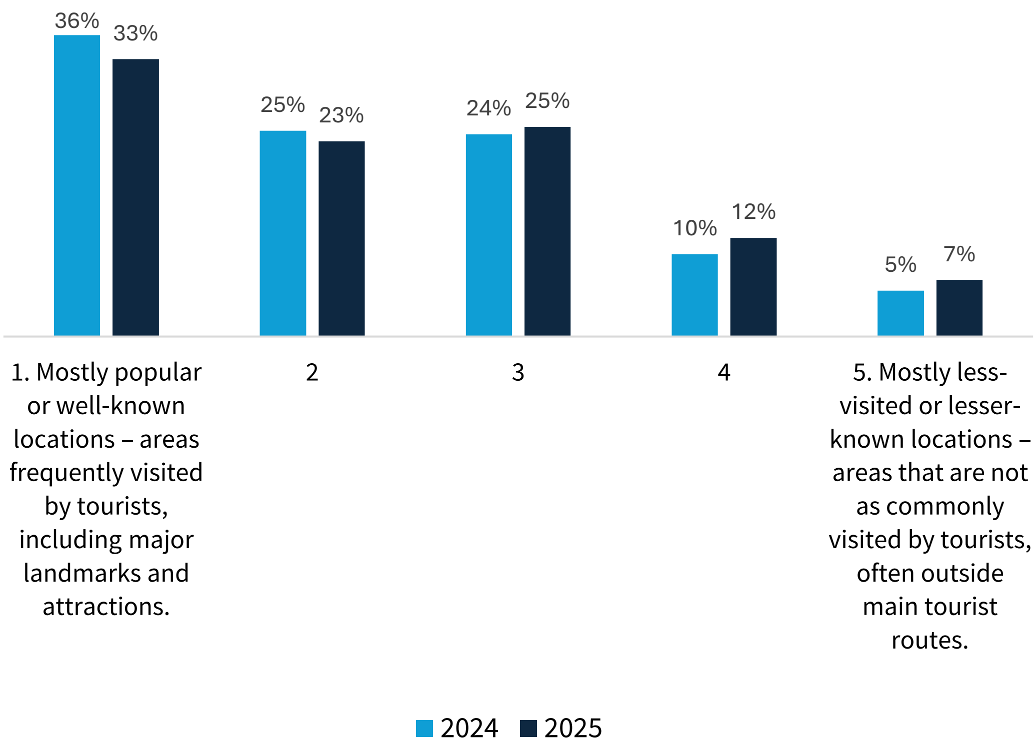
Definition: 'Visiting lesser-known or unconventional destinations in Europe that are not typically frequented by travellers'

The metric index for go off the beaten track increased from 100 in 2024 to **106 in 2025**. This indicates a year-on-year increase in the extent to which travellers report visiting lesser-known destinations and exploring areas beyond the main tourist routes.

More off the beaten track travelling 2025 compared to 2024

Survey responses to a survey question in which respondents were asked to assess where the destinations they have visited belong on a scale between 'mostly popular or well-known locations' and 'mostly less-visited or lesser-known locations' show a year-on-year shift toward the latter. The share reporting mainly lesser-known locations increased in 2025; the share reporting mainly popular locations decreased. Free-text trip descriptions likewise contain a larger proportion of off-track itineraries than in 2024.

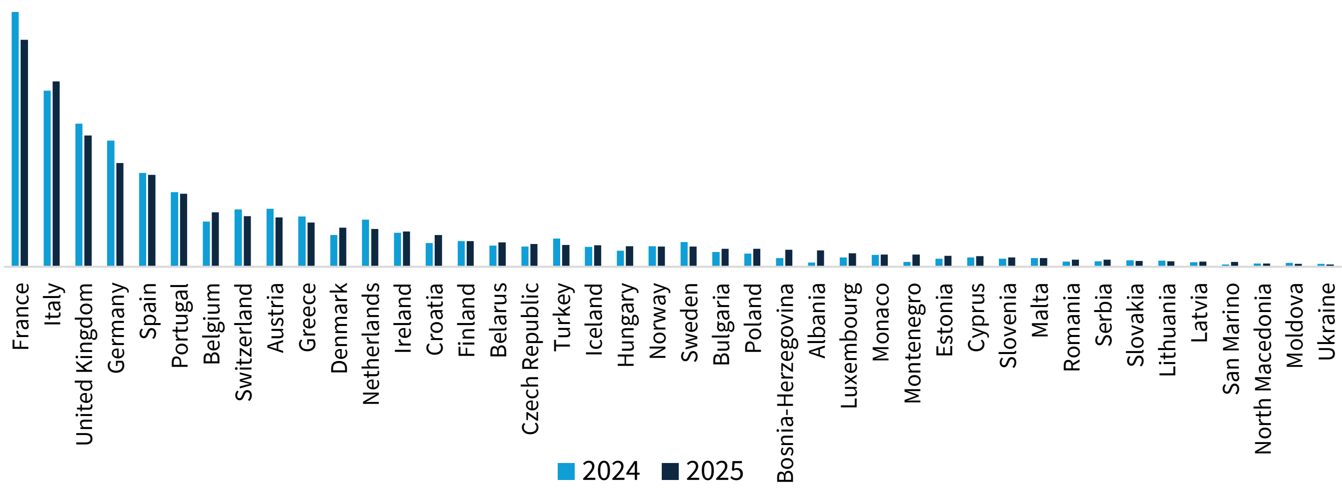
Figure 13. Respondents' assessments of where the locations they have visited belong on a scale from 'mostly popular or well-known' to 'mostly less-visited or lesser-known'.



Most trips remain concentrated to a small number of top destinations

Responses to the survey question ‘Which countries did you visit?’ place France at the top for long-haul travellers. Italy shows a modest uptick in visits relative to the baseline, consistent with indications about planned trips in last year’s survey.

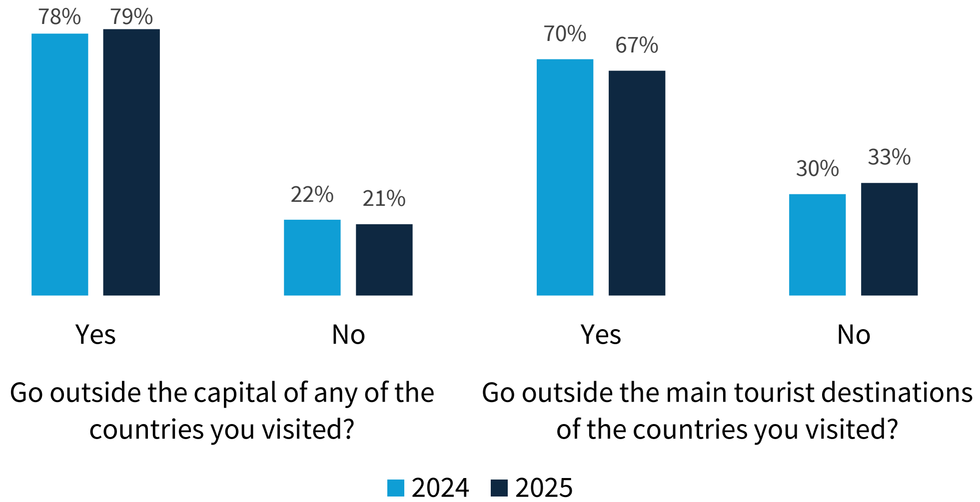
Figure 14. Distribution of responses to the survey question ‘Which countries did you visit?’



Slight rise in travel outside capitals; slight decline beyond main tourist sites

Responses to whether travellers went outside national capitals show a small increase in 2025. At the same time, however, the share reporting travel beyond the main tourist destinations decreased slightly. In other words, more respondents say they visited areas outside capitals, but fewer reported excursions outside mainstream tourism corridors.

Figure 15. Distribution of responses to the survey questions ‘Did you go outside of the capital of any of the countries you visited?’ (left) and ‘Did you go outside the main tourist destinations of the countries you visited?’ (right)



Go off the beaten track in the media coverage

Media coverage linked to going off the beaten track tends to be concrete and focused on specific off-track destinations and itineraries. It includes recommendations of **alternatives to well-known regions** and ‘hidden gems’, such as ‘charming alternatives to the Cotswolds’ or lesser-known Italian towns. Recommendations aimed at avoiding crowds also include suggestions for **daytrip escapes to quieter places** near popular destinations. Other articles refer to lists compiled to help travellers **avoid destinations with unbalanced tourism**, such as Fodor’s ‘No list’.

Further recommendations for going off the beaten track point to other values. Those include suggestions for itineraries that can make a trip to Europe more **budget-friendly** by avoiding famous destinations where prices tend to be higher. There are also reports of cruise operators that promote itineraries which include **less-visited ports**, as well as of off-track regions held forth as prime destinations for **culinary tourism**. Apart from coverage of specific destinations and itineraries, trend reports note a **growing appetite for off-track destinations**, not least among travellers in Generation Z.

‘Be part of the solution – not the problem’

There is an awareness among online forum participants as well as among influencers in the visual channels of **unbalanced tourism** and its consequences in over-visited destinations. There are frequent references to **local resistance** to tourism in parts of Europe and, especially, to **crowding** – something which is inconvenient not only to residents, but also to travellers themselves.

Some influencers provide **advice for what travellers can do** to not contribute to the problems facing destinations with unbalanced tourism. One YouTube video presents six suggestions for travelling more responsibly: following basic tourism rules, spending locally, travelling in the shoulder season, exploring a region rather than just main tourism centres, timing visits to attractions, and choosing less visited destinations. Several of these suggestions align closely with the responsible travel behaviours assessed in this project, with two (**exploring a region** and **choosing less-visited destinations**) directly in line with the *go off the beaten track* behaviour.

Going off-track as a way to experience a country during peak travel times

Going off the beaten track is sometimes proposed online as **a way to travel responsibly without avoiding peak season** altogether. Rather than cancelling or postponing trips, travellers suggest how itineraries can be redesigned to reduce exposure to congestion while still travelling at popular times of year.

This can for example be seen in discussions around major events and expected crowd surges. In relation to the 2025 Jubilee in Rome, one forum participant notes that while Rome itself is likely to be heavily affected, it is still possible to design a trip to Italy that avoids significant crowding by focusing on other parts of the country. The emphasis is on **redistributing travel within a country or region** rather than avoiding it entirely.

Balancing off-track and off-season choices

Online discussions also suggest that travellers sometimes face a trade-off between going off-track and travelling off-season, and that combining the two is not always seen as desirable. Some travellers warn that going both off-season and off-track can result in destinations feeling empty rather than simply less crowded. Examples used include Mediterranean island destinations in winter and early spring, when businesses close and services are limited. ‘Coral Bay will be deserted in March’, a local Cypriot replies on Tripadvisor to a Canadian who considers visiting. In such cases, travellers advise those considering off-season travel to stay on the beaten track, where major attractions and infrastructure remain accessible and you have a great opportunity to experience them without crowds.

> ***'Early December is my favorite time to go Romeing, as there aren't any crowds. Even the Vatican Museum is navigable – any other time of year it's like being churned in a mosh pit.' (Tripadvisor)***

Conversely, **going off-track is often recommended as the better option during peak season**, to avoid overcrowding while still benefiting from favourable weather and seasonal conditions.

Going out of your way for food and drink

Many off-track itineraries are driven by culinary interest. Posts and reviews emphasise **journeys planned around local food producers, wineries and distinctive dining spots**, often in smaller towns or regions rather than capital cities.

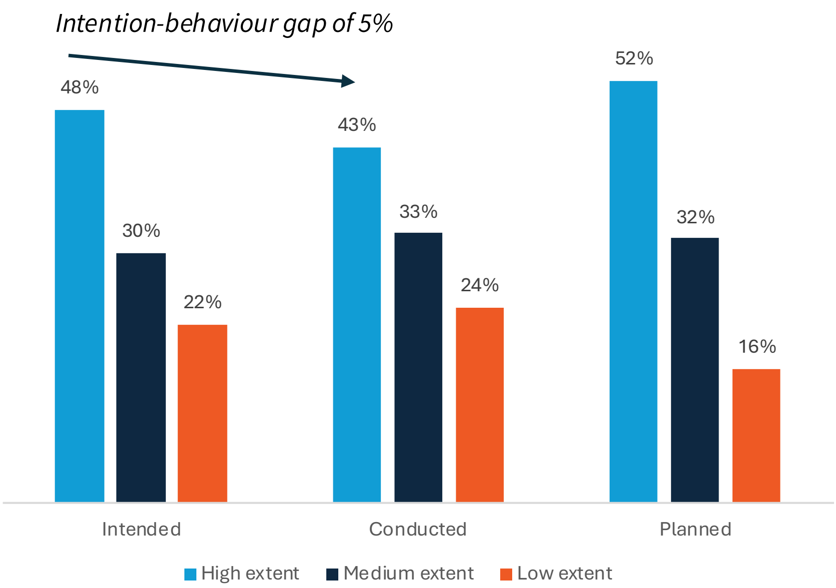
> ***'The entire town is basically composed of wineries and cellars. Here, you can visit a winery, taste some wines, listen to the winery's story, and experience the rich local wine culture.' (Mafengwo)***

> ***'Oh my, my trips are always based around food!! This year will try a place in Medina I've been hearing about for years, LA DUQUESA, on the main road.' (Tripadvisor)***

5% intention-behaviour gap for off-track travelling

Comparing intended, planned and conducted trips shows a 5 percentage-point intention–behaviour gap for off-track travel (48% intended to visit lesser-known areas to a high extent; 43% report having done so). The corresponding gap in 2024 was 6 percentage points, indicating a modest narrowing.

Figure 16. The 5% intention-behaviour gap for go off the beaten track can be seen when comparing the share of respondents who say that they were intending to visit areas less frequented by tourists, explore less common destinations, and encounter lesser-known aspects of the destinations to a high extent ahead of their trip (48%, left) with the share who say that they did so to a high extent (43%, middle). The right group of bars shows the degree to which respondents are planning to do the same during upcoming trips.



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Key insights – *go off-track*

- **Long-haul travellers to Europe report more *off the beaten track* travelling** in 2025 compared to in 2024.
- Planned trips are more off-track than conducted trips. **There is an intention–behaviour gap of 5%.** This indicates that there are barriers preventing people from going off-track.
- **An online discourse highlights a trade-off between travelling off-track and off-season.** Going both off-track and off-season can in some cases be a bad idea – just as going both on-track and on-season is.
- **Food and niche interests** attract people off the beaten track.

Chapter 7

Behaviour 4: Travel green

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Behaviour 4: Travel green

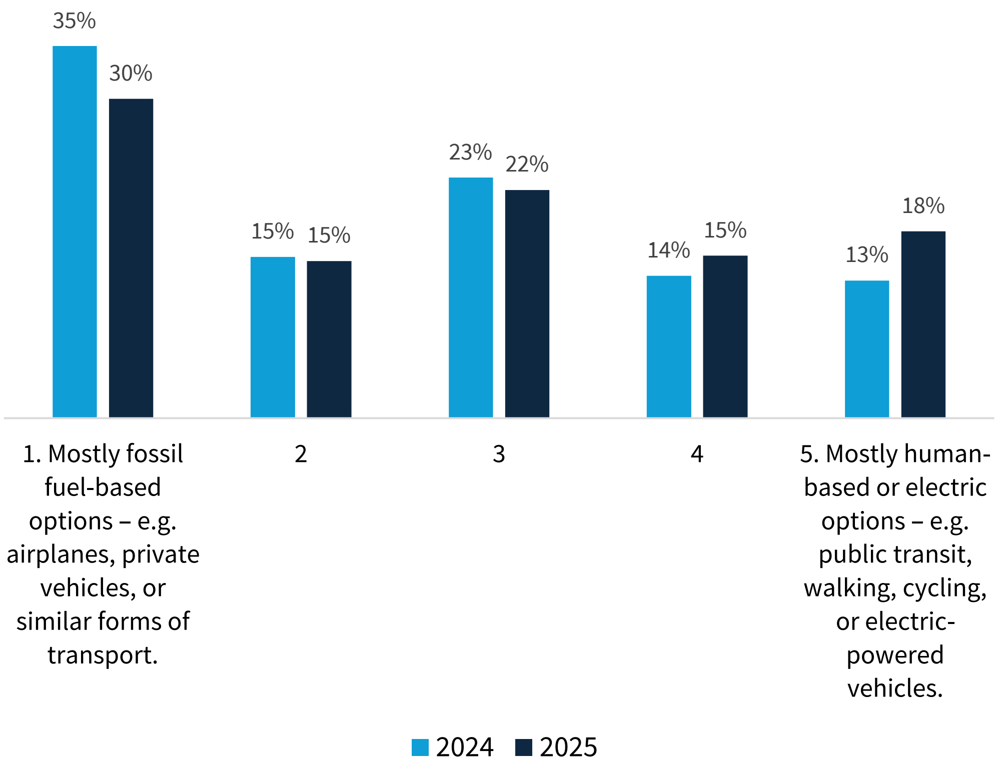
Definition: 'Environmentally friendly travel experiences and practices in Europe, especially those involving public, electric, or human-powered modes of transportation'

The metric index for *travel green* shows the strongest improvement among the four travel behaviours, increasing from 100 in 2024 to **108 in 2025**. The change points to a shift towards greener transport choices and mobility patterns among long-haul travellers to Europe.

More green travelling in 2025 compared to 2024

Responses to a survey question on primary modes of transportation (Figure 17) show a clear shift in 2025. The share of respondents reporting that their travel relied mostly on human-powered or electric options increased substantially compared with 2024, while reported reliance on fossil fuel-based options declined.

Figure 17. Distribution of responses to the survey question 'During your trip, would you say your primary modes of transportation, when traveling within and between cities and countries, were…'



Similar transport mix, with a slight decrease for flying

When respondents assessed the extent to which they used ten different modes of transportation during their trip, the overall transport mix in 2025 resembles that of 2024. Aeroplane use declined slightly, while trains and local public transport maintained or increased their relative importance. Note that the presented list of options was modified slightly ahead at the onset of the current research wave; we now ask separately about electric cars, fossil fuel-driven cars and taxis (the three of which were combined in the questionnaire used in the first wave).

Table 1. Survey self-assessments in 2025 of the extent to which respondents used ten categories of transportation during their trip. (Numbers in parentheses refer to 2024.)

USE OF TRANSPORTATION FORMS				
	LOW EXTENT	MEDIUM EXTENT	HIGH EXTENT	GENERALLY...
CAR (FOSSIL-FUEL)	32%	21%	**47%**	**High**
CAR (ELECTRIC OR RENEWABLE)	**55%**	18%	27%	**Low**
TAXI	**40%**	24%	**36%**	**Polarised**
BICYCLE	**69%** (70%)	14% (14%)	17% (16%)	**Low**
TRAIN	31% (31%)	21% (22%)	**47%** (48%)	**High**
AEROPLANE	29% (27%)	20% (21%)	**51%** (52%)	**High**
BOAT/FERRY	**57%** (57%)	20% (19%)	23% (24%)	**Low**
BUS	**35%** (35%)	24% (22%)	**41%** (42%)	**Polarised**
MOTOR-CYCLE	**73%** (75%)	11% (11%)	16% (14%)	**Low**
SUBWAY OR TRAM	**36%** (36%)	21% (22%)	**43%** (42%)	**Polarised**

Slightly higher plane-to-train ratio than in 2024

Across both free-text responses and multiple-choice questions, train travel gained some ground relative to air travel. Respondents more frequently describe trains as a primary mode of transport than in 2024, while the opposite is the case for planes.

Travel green in the media coverage

Topics in the media landscape (Figure 1 on page 12) related to green travel are dominated by **rail travel**, which is covered in several ways. Those include announcements of **new cross-border and high-speed rail lines**, the revival and expansion of **night-train** services, and the introduction of new or upgraded **train models**, as well as recommendations for **scenic railways** or of regional rail itineraries. For example, Eurostar's planned routes from London to Frankfurt and Geneva are reported as developments that will make rail travel within Europe even more competitive relative to flying in the future. Slower, scenic routes through mountainous regions – such as the 11-hour ride between Belgrade and Bar – are presented as **travel experiences in their own right**. Scenic tramways, for example in Trondheim, are also highlighted as attractions in a similar way.

Alongside rail, the media coverage also includes articles about electric and human-powered transport. Electric cars feature in accounts of **EV road trips** and reflections on the practicalities of charging and range. **Hiking** and **cycling** routes are suggested as **great ways to experience various regions**, for example in Scandinavia, the Netherlands and the Alps.

There are also recommendations for **thematic itineraries** within regions that can conveniently be explored by rail or bicycle, such as **wine tours** by train in Switzerland or by bike along the new Furmint Trail through Austria and Slovenia. In this coverage – as well as in that centred on travelling by rail, EV, hiking or cycling in itself – the focus tends to be on green travel as **practical** and **experiential** rather than as explicit environmental choices.

Flights remain easier to plan and book

Price and **ease of booking** are two central aspects in forum discussions about whether to choose rail or air travel between destinations. Flights are consistently framed as easier to compare, plan and book than trains, not least because global online **tools that travellers are already familiar with can be used to arrange air transport** within Europe, while train travel typically requires you to navigate a new booking system for each country or train operator.

> ***'What would be the best apps to use for comparing rail and bus prices? For flights, I use Skyscanner' (Reddit)***

> ***'I'm researching how to get from Paris to Barcelona. I have two options: plane or train [...] If anyone recommends the train, I'd love to hear about its pros and cons. However, I'm not really sure how to book or purchase tickets for the train.' (4travel.jp)***

The most picturesque of travel forms has room for improvements

Scenic train journeys remain popular in visual social channels, not least with photos taken from train windows in mountainous landscapes. There is often an element of **train romanticism** in such content.

In more practically oriented content, however, especially night trains are frequently described as falling short of expectations. While travellers welcome the return of sleeper services, complaints focus on signs of **ageing carriages**, poor ventilation and **lack of air conditioning**.

> ***'second and third-hand carriages that have not been refurbished [...] The lack of air conditioning on most coaches [...] is not really suitable anymore, and by now they're just too worn' (Reddit)***

At the same time, there are also many positive accounts of the joy of travelling by train, and there are positive reviews of newer 'pod' and 'capsule' sleeper concepts.

EV road trips: smooth with preparation, difficult without

The netnography shows a clear divide in EV road-trip experiences. Travellers who plan charging in advance or travel in EV-friendly regions report smooth trips, while those without preparation describe stress, lost time and constrained itineraries. Some travellers report having **unexpectedly received an electric vehicle** at a rental outlet although they had booked a fossil fuel-driven car – which has left them in a challenging position as they have not been prepared for the charging logistics.

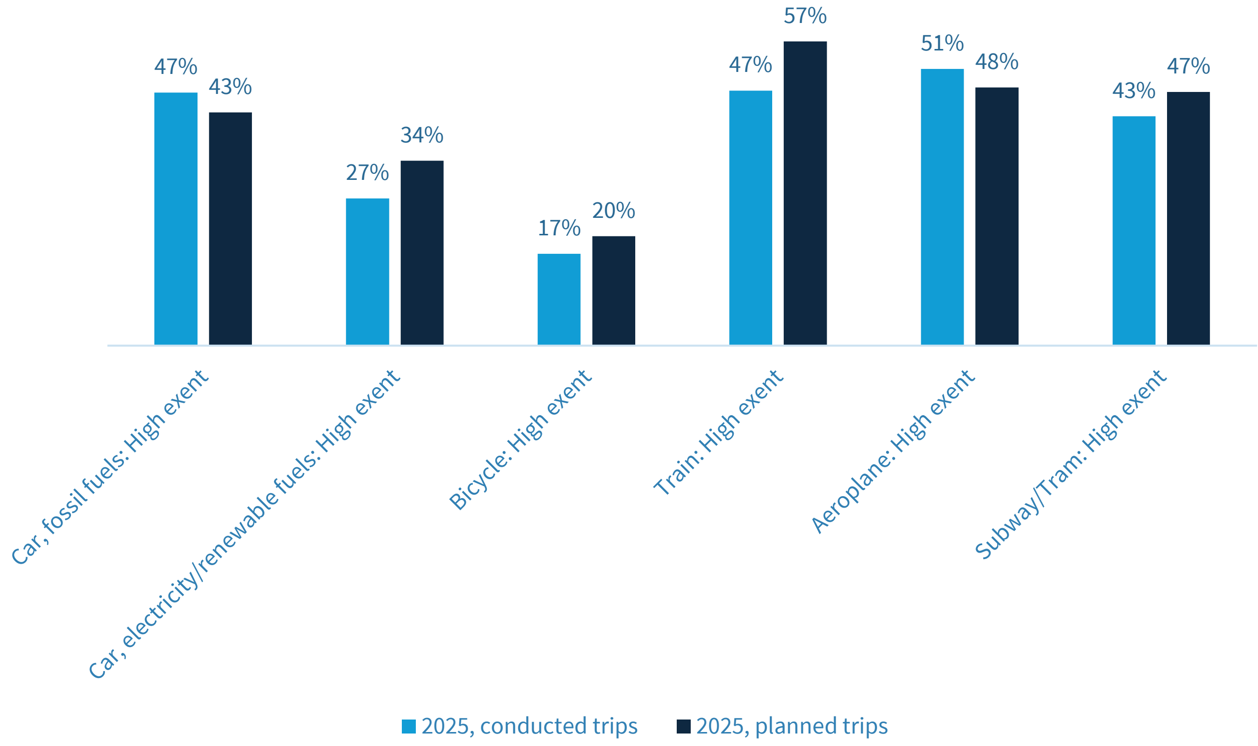
Practical advice shared online for a good electric road trip:

- **Research charging possibilities** before you go and adjust your itinerary if necessary
- **Download charging apps** for the countries you will be in
- **Try to book accommodation** where you can charge your car overnight
- **Rent from a firm that doesn't require you to charge** the car before returning it, as trying to fast-charge near the airport can be stressful
- **Make sure that the rental firm explains** in detail everything you need to know about how to charge
- **Give up on the EV** and rent a fossil-fuel car if you will be in a part of Europe that does not yet have good charging infrastructure

Greener transport plans ahead

When conducted and planned trips are compared, it is obvious that the planned means of transport are greener than the means of transport for conducted trips, with **greater anticipated use of trains, public transport and electric cars**. Regarding EV travel, the tendency aligns with broader expectations of increasing EV penetration in both European fleets and long-haul travellers' home markets, which is likely to further push electric car travel.

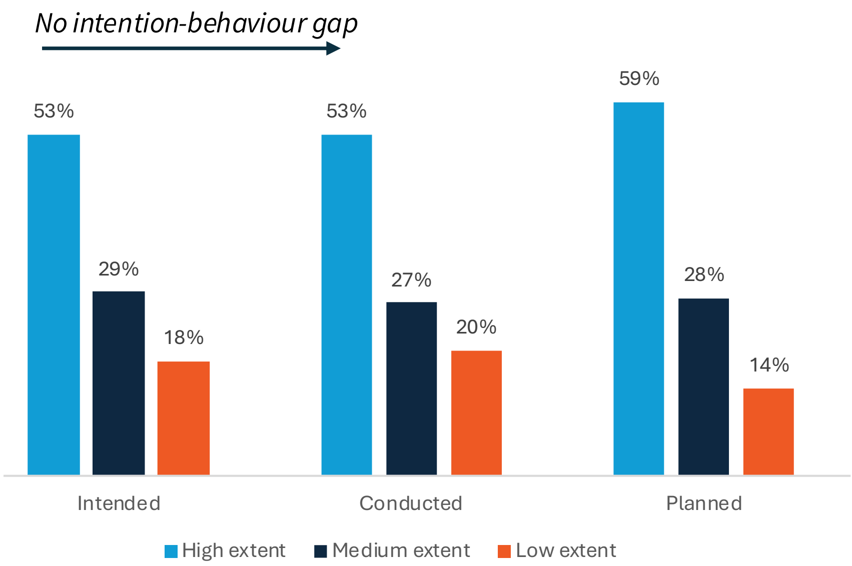
Figure 18. Modes of transportation by the shares of survey respondents who used them to a high extent during their most recent conducted trip and who plan to use them to a high extent in their next upcoming trip.



No intention–behaviour gap for *travel green*

Comparison of intended, conducted and planned trips shows no intention–behaviour gap for *travel green* in 2025. The share of respondents who intended to travel green to a high extent (53%) is identical to the share who report having done so. In 2024, the corresponding gap was 3 percentage points.

Figure 19. The absence of an intention-behaviour gap for travel green can be seen when comparing the share of respondents who say they were intending to use public, electric, or human-powered transportation and explore various areas by moving through them more like locals might to a high extent ahead of their trip (53%, left) with the share who say that they did so to a high extent (also 53%, middle). The right group of bars shows the degree to which respondents are planning to do the same during upcoming trips.

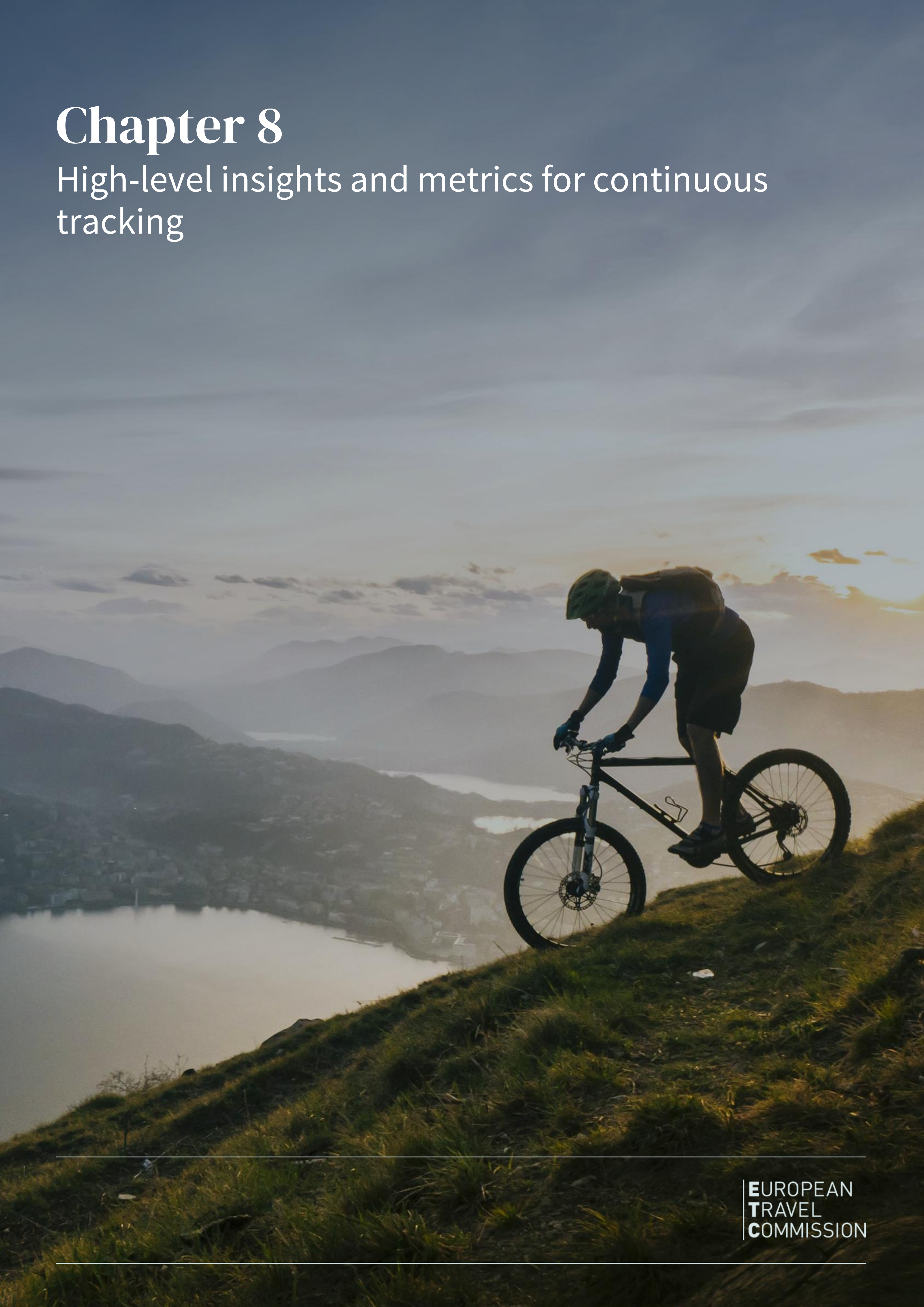


Key insights – *travel green*

- **Long-haul travellers to Europe report markedly greener travelling** in 2025 compared to in 2024.
- Looking ahead, **plans for long-haul travelling are notably greener** than the conducted travelling is. Facts on the ground, including the increasing shares of electric cars worldwide, point in the direction of greener travel in the future. There is no longer an intention–behaviour gap for travel green.
- **There are, however, some obstacles to travelling green.** Planning and **booking train itineraries** around Europe as an overseas visitor can feel more complicated than booking flights. Driving an electric car during your vacation requires **more planning and effort** than driving a car driven by fossil fuels, due to a charging infrastructure that, for now, remains fragmented and incomplete in many parts of Europe. This is likely to improve with time.
- **Online narratives often display an element of transport romanticism**, with the journey itself framed as a meaningful experience. This is typically stronger for green options.

Chapter 8

High-level insights and metrics for continuous tracking



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High-level insights and metrics for continuous tracking

High-level insights

The findings point to several opportunities for the travel sector to further enable responsible behaviour. Across the four monitored behaviours, travellers increasingly say they want to travel more responsibly. Practical constraints, however, still shape what they actually do.

First, the sector can ride the sustainable transport tailwind. The shift towards trains, public transport, human-powered mobility and electric vehicles is already under way and should be positioned not only as a climate imperative, but as a qualitative evolution of the European travel experience. Scenic rail journeys, slower itineraries and experience-driven mobility resonate strongly with travellers' aspirations and online narratives. Framing green transport as an enhancement of travel – rather than a compromise – aligns with how many travellers already talk about it.

Second, the findings highlight the importance of removing practical barriers to responsible choices. Complexity is an inhibitor of behaviour change. Fragmented rail booking systems, uncertainty around seasonality, and operational friction around electric vehicles make some travellers opt for easier choices. Clearer guidance, more integrated planning tools and simpler EV rental and charging procedures would make it easier for travellers to make more responsible choices.

Third, price sensitivity can be leveraged as a driver rather than an obstacle. Many responsible behaviours – off-season travel, off-track destinations, local consumption – are often more affordable, not more expensive. Explicitly communicating economic benefits can help reposition responsible travel as a rational, value-oriented choice rather than a moral or idealistic one.

Fourth, the sector has an opportunity to leverage the slow travel ideal that is visible in digital discourse. Slow travel is a unifying narrative across *travel green*, *love local*, and *go off the beaten track*. As a framing, slow travel helps bundle longer stays, regional focus and lower-emission transport into travel propositions that align with how many already want to travel.

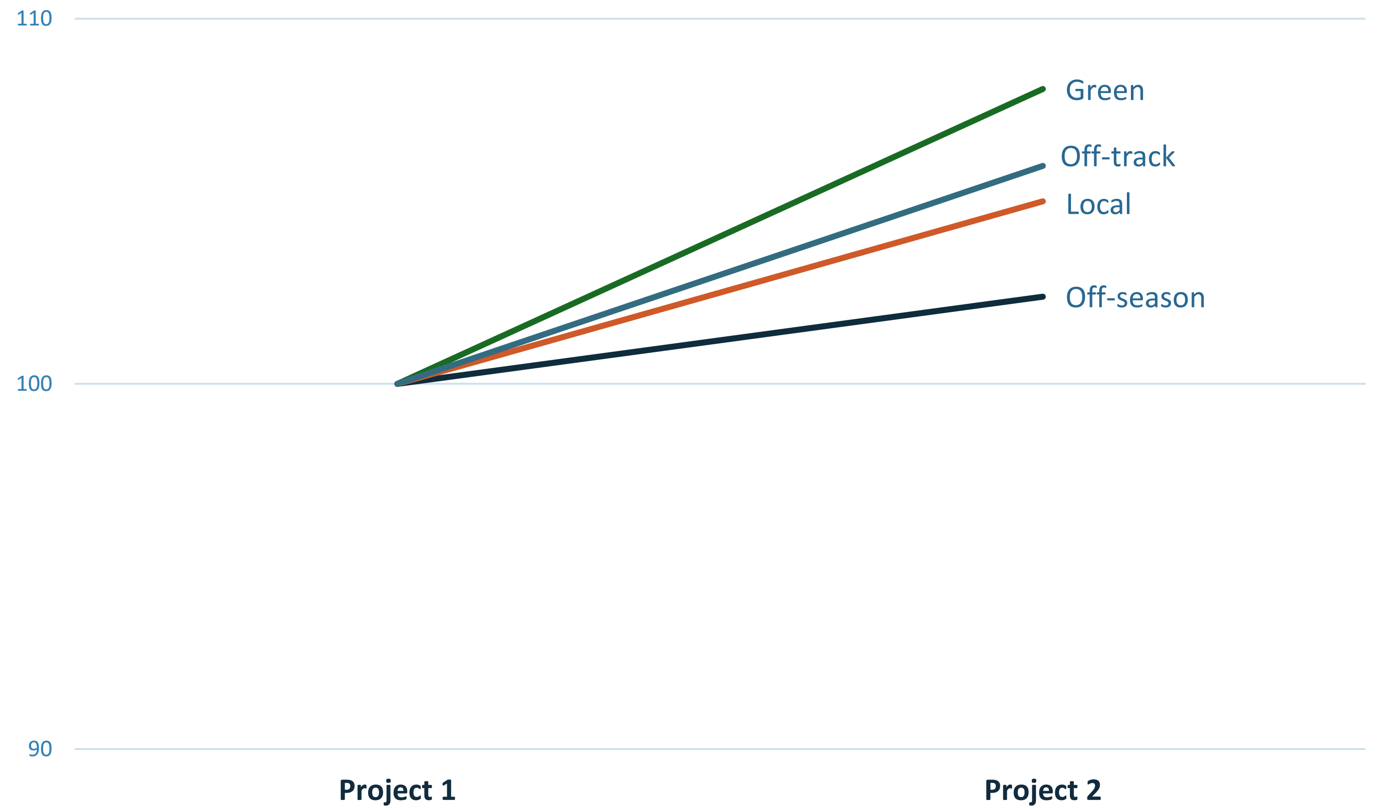
Finally, the findings point to opportunities to balance off-season and off-track choices. Off-season travel offers a way for travellers who want to experience a popular destination to do so without the crowds, while going off-track provides a crowd-free alternative for those who can only travel during peak periods. Both opportunities can be actively communicated to help travellers make more responsible choices.

Metrics: development of responsible travel behaviours, 2024–2025

To provide a concise, comparable overview of how responsible travel behaviours are evolving, four indices have been constructed based on survey data. Each index is calculated using the same method and weighted as in the first project and is indexed to 100 in 2024, which serves as the baseline year. (Values above 100 indicate an increase relative to 2024.)

When looking at the survey data across markets, all four behaviours show improvement from 2024 to 2025. The strongest increase is observed for *travel green* (108), followed by *go off the beaten track* (106) and *love local* (105). *Travel off-season also increases*, though more modestly (102). Taken together, the metrics indicate a gradual but broad movement towards more responsible travel patterns, rather than isolated change within a single behavioural dimension.

Figure 20. Development of responsible travel behaviour metrics, 2024–2025 (indexed to 100 in the baseline year 2024).



Differences between markets

Behind the aggregated development lie notable differences between markets. Table 2 presents the 2025 index values for each behaviour by market. While all markets contribute to the overall positive development, the relative strength of each behaviour varies. Index values should be read as indicators of direction and relative change within each market, not as absolute measures of responsibility.

Table 2. Responsible travel behaviour metrics by market and across markets, 2025. All metrics are indexed using the index value of 100 in 2024. (Values above 100 in 2025 indicate improvement and vice versa.)

BEHAVIOURAL METRICS				
	TRAVEL OFF-SEASON	LOVE LOCAL	GO OFF THE BEATEN TRACK	TRAVEL GREEN
ACROSS MARKETS	102	105	106	108
AUSTRALIA	101	106	107	110
BRAZIL	100	108	101	102
CANADA	109	107	111	112
CHINA	107	97	98	113
JAPAN	102	111	113	110
USA	99	102	102	101

Media visibility of responsible travel behaviours

In parallel with the survey-based indices, media metrics have been calculated in the form of the shares of analysed media content that relates to each of the four behaviours. These metrics do not measure behaviour, but rather the prominence of responsible travel themes in public discourse, providing an indication of the context in which more or less responsible travel decisions are made. They are presented in Table 3. Note that there is a strong overlap between the behaviours, with many analysed articles referring to more than one behaviour.

Table 3. Share of analysed media content related to responsible travel behaviours (media metrics). All metrics are indexed using the index value of 100 in 2024. (Values above 100 in 2025 indicate a larger share of the analysed media content being related to a responsible behaviour and vice versa.)

MEDIA METRICS				
	TRAVEL OFF-SEASON	LOVE LOCAL	GO OFF THE BEATEN TRACK	TRAVEL GREEN
ACROSS MARKETS	39	106	111	177
AUSTRALIA	45	116	151	132
BRAZIL	31	89	101	162
CANADA	44	113	124	196
CHINA	29	104	100	153
JAPAN	38	98	124	235
USA	50	122	124	169

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Appendix

Appendix

Survey

Questionnaire

Below is the English version of the questionnaire in the form that was used in Canada. Adjustments were made in the different markets regarding the values and currency in question 7. Adjustments from the questionnaire used in Project 1 are marked with *italic*.

SCANNING QUESTIONS

Q1. Could you please indicate how old you are (last birthday)?

17 or under (screenout)

18-25

26-34

35-44

45-54

55-64

65-74

75 or over (screenout)

Q2. In the last 10 years, have you been on a leisure trip to Europe where you or anyone you travelled with participated in planning the trip?

Yes

No

Q3. What year did you travel to Europe? If you have travelled to Europe several times, please choose the latest of your trips.

2025

2024

2023

2022

2021

2020

2019

2018

2017

2016

2015

Q4. Do you plan to travel to Europe in the next 5 years for leisure purposes?

Very likely

Likely

Neither likely nor unlikely (screenout if “No” on Q2)

Unlikely (screenout if “No” on Q2)

Very unlikely (screenout if “No” on Q2)

Q5. What year do you think that you will travel to Europe? If you plan to travel to Europe several times, please choose the earliest of your planned trips.
2025
2026
2027
2028
2029
2030

BACKGROUND QUESTIONS

Q6. What is your gender?
Female
Male
Non-binary/Other

Q7. Which of these annual average net income ranges does your household fit into?
Less than $25,000
$25,000 - $49,999
$50,000 - $74,999
$75,000 - $99,999
$100,000 or more
Don’t know / prefer not to state

Q8. What is your highest level of education completed?
Not completed elementary school
Elementary school or equivalent
Secondary school or equivalent
University (bachelor’s degree or higher)

PASSION POINTS AND SOCIAL DESIRABILITY

Q9. To what extent do you agree with the following statement: “I always help others, even when it’s inconvenient for me”
Strongly agree
Agree
Neutral
Disagree
Strongly disagree

Q10. Which of the following statements describes your travel preferences best?
I value contemporary arts, creative industries (architecture, fashion, design, and crafts), a vibrant urban lifestyle, and a vivid cultural scene.
I value aspects relating to the cultural heritage, historical ties and ethnic identity of the destinations
I value nature and immersive journeys through wild places, to connect with the outdoors, the local culture, food and people
None of the above

REPORTED RESPONSIBLE TRAVEL BEHAVIOUR – THOSE WHO HAVE TRAVELLED TO EUROPE

In the following questions, please tell us about your last trip to Europe for leisure purposes.

Q11. Where did you go and what did you experience? Describe in a few sentences.
Free text question

Q12. When did you visit Europe? You can select more than one month.
January
February
March
April
May
June
July
August
September
October
November
December

Q13. When would you say your trip took place? Please indicate on the scale below.
1. During peak travel times – periods with major holidays, school vacations, or popular summer or winter months.
2
3
4
5. During off-peak travel times – avoiding major holidays, school vacations, and popular summer or winter months.

Q14. Which countries did you visit?

Albania	Finland	Malta	Serbia
Austria	France	Moldova	Slovakia
Belarus	Germany	Monaco	Slovenia
Belgium	Greece	Montenegro	Spain
Bosnia-Herzegovina	Hungary	Netherlands	Sweden
Bulgaria	Iceland	North Macedonia	Switzerland
Croatia	Ireland	Norway	Turkey
Cyprus	Italy	Poland	United Kingdom
Czech Republic	Latvia	Portugal	Ukraine
Denmark	Lithuania	Romania	None of the above
Estonia	Luxembourg	San Marino	

Q15. Can you specify further which destinations (regions and places, cities, towns, villages etc.) you visited? Please write as many destinations and places as you can remember.
Free text question

Q16. Did you…
Go outside of the capital of any of the countries you visited? (Yes/No)
Go outside of the main tourist destinations of the countries you visited? (Yes/No)

Q17. During your trip, would you say your destinations were…

1. Mostly popular or well-known locations – areas frequently visited by tourists, including major landmarks and attractions.
2
3
4
5. Mostly less-visited or lesser-known locations – areas that are not as commonly visited by tourists, often outside main tourist routes.

Q18. What were your main means of transport to move within and between cities and countries?

Free text question

Q19. To what extent did you use the following means of transport, when travelling within and between cities and countries? (1 = To a very low extent – 5 = To a very high extent)

Car driven by electricity or renewable fuels (including plug-in hybrid cars)
Car driven by fossil fuels (e.g. petrol, diesel)
Taxi
Bicycle
Train
Airplane
Boat/Ferry
Bus
Motorcycle
Subway/Tram

Q20. During your trip, would you say your primary modes of transportation, when travelling within and between cities and countries, were…

1. Mostly fossil fuel-based options – e.g. airplanes, private vehicles, or similar forms of transport.
2
3
4
5. Mostly human-based or electric options – e.g. public transit, walking, cycling, or electric-powered vehicles.

Q21. Please describe the contact and engagement in the local cultures you experienced.

Free text question

Q22. How would you describe your travel experience?

During your trip, to what extent did you...
(1 = To a very low extent – 5 = To a very high extent)

...engage with the local culture (e.g. interacting with locals, attending local events, visiting local markets)?
...buy local products or services?
…stay in locally owned or independent accommodation (e.g. guesthouse, B&B, small hotel or hostel)?

Q23. During your trip, how would you describe the type of experiences you had?

1. Mostly familiar or widely available options – e.g. chain restaurants, popular attractions, or organised tours.
2
3
4
5. Mostly location-specific or unique options – e.g. local eateries, independent shops, or activities specific to the region.

INTENDED RESPONSIBLE TRAVEL BEHAVIOUR – THOSE WHO PLAN TO TRAVEL TO EUROPE

In the following questions, please tell us about your next planned trip to Europe for leisure purposes.

Q24. Where do you plan to go and what do you want to experience? Describe in a few sentences.
Free text question

Q25. When do you plan to visit Europe? If you cannot say exactly, please estimate. You can select more than one month.
January
February
March
April
May
June
July
August
September
October
November
December

Q26. When do you plan to visit Europe? Please indicate on the scale below.
1. During peak travel times – periods with major holidays, school vacations, or popular summer or winter months.
2
3
4
5. During off-peak travel times – avoiding major holidays, school vacations, and popular summer or winter months.

Q27. Which countries or areas do you plan to visit?

Albania	Finland	Malta	Serbia
Austria	France	Moldova	Slovakia
Belarus	Germany	Monaco	Slovenia
Belgium	Greece	Montenegro	Spain
Bosnia-Herzegovina	Hungary	Netherlands	Sweden
Bulgaria	Iceland	North Macedonia	Switzerland
Croatia	Ireland	Norway	Turkey
Cyprus	Italy	Poland	United Kingdom
Czech Republic	Latvia	Portugal	Ukraine
Denmark	Lithuania	Romania	None of the above
Estonia	Luxembourg	San Marino	

Q28. Can you specify further which destinations (regions and places, cities, towns, villages etc.) you plan to visit? Please write all destinations and places you can think of.
Free text question

Q29. Do you plan to…
Go outside the capital of any of the countries you visit? (Yes/No)

Go outside the main tourist destinations of the countries you visit? (Yes/No)

Q30. Do you plan to visit destinations that are…

1. Mostly popular or well-known locations – areas frequently visited by tourists, including major landmarks and attractions.
2
3
4
5. Mostly less-visited or lesser-known locations – areas that are not as commonly visited by tourists, often outside main tourist routes.

Q31. What will be your main means of transport to move within and between cities and countries?

Free text question

Q32. To what extent do you plan to use the following means of transport, when travelling within and between cities and countries? (1 = To a very low extent – 5 = To a very high extent)

Car driven by electricity or renewable fuels (including plug-in hybrid cars)
Car driven by fossil fuels (e.g. petrol, diesel)
Taxi
Bicycle
Train
Airplane
Boat/Ferry
Bus
Motorcycle
Subway/Tram

Q33. Would you say your primary modes of transportation, when travelling within and between cities and countries, are…

1. Mostly fossil fuel-based options – e.g. airplanes, private vehicles, or similar forms of transport.
2
3
4
5. Mostly human-based or electric options – e.g. public transit, walking, cycling, or electric-powered vehicles.

Q34. Please describe the contact and engagement in the local cultures that you plan to experience.

Free text question

Q35. How would you describe your upcoming travel experience?

During your planned trip, to what extent do you expect to… (1 = To a very low extent – 5 = To a very high extent)

…engage with the local culture (e.g. interact with locals, attend local events, visit local markets)?
…buy local products and services?
…stay in locally owned or independent accommodation (e.g. guesthouse, B&B, small hotel or hostel)?

Q36. How would you describe your planned travel experiences?

1. Mostly familiar or widely available options – e.g. chain restaurants, popular attractions, or organised tours.
2
3
4

5. Mostly location-specific or unique options – e.g. local eateries, independent shops, or activities specific to the region.

SUMMARISING STATEMENTS

Q37. The last time you travelled to Europe for leisure purposes, to what extent would you say that you… (1 = To a very low extent – 5 = To a very high extent)
Avoided peak travel times, encountered fewer crowds, and travelled in a climate that was more temperate.
Visited areas less frequented by tourists, explored less common destinations, and encountered lesser-known aspects of the destinations.
Used public, electric, or human-powered transportation. Explored various areas by moving through them more like locals might.
Chose local accommodations, shops, and businesses, engaging with local cultures and communities.

Q38. The last time you travelled to Europe for leisure purposes, as far as you can remember, to what extent would you say that you INTENDED to… (1 = To a very low extent – 5 = To a very high extent)
Avoid peak travel times, encounter fewer crowds, and travel in a climate that is more temperate.
Visit areas less frequented by tourists, explore less common destinations, and encounter lesser-known aspects of the locations.
Use public, electric, or human-powered transportation. Explore various areas by moving through them more like locals do.
Choose local accommodations, shops, and businesses, engaging with local cultures and communities.

Q39. The next time you plan to travel to Europe for leisure purposes, to what extent do you plan to… (1 = To a very low extent – 5 = To a very high extent)
Avoid peak travel times, encounter fewer crowds, and travel in a climate that is more temperate.
Visit areas less frequented by tourists, explore less common destinations, and encounter lesser-known aspects of the locations.
Use public, electric, or human-powered transportation. Explore various areas by moving through them more like locals do.
Choose local accommodations, shops, and businesses, engaging with local cultures and communities.

FINAL QUESTION FOR KNOWING WHETHER THE RESPONDENT IS A RETURN VISITOR

Q40. How many times have you visited Europe for leisure purposes in the last 10 years?
(Conditional question asked to respondents who have selected 'Yes' in Q2)
1 time
2 times
3 times
4 times
5 times
6 times
7 times
8 times
9 times
10 times or more

Netnography

Channels used as sources in the research

4travel.jp (Japan-specific)

5ch.net (Japan-specific)

Douyin (China-specific)

Dubbi (Brazil-specific)

Girls Channel (Japan-specific)

Google (relevant across markets)

Instagram (relevant across markets)

Mafengwo (China-specific)

Mochileiros (Brazil-specific)

Qyer (China-specific)

Reddit: r/travel (relevant across markets)

Reddit: r/viagens (relevant for Brazil)

TikTok (relevant across markets)

Tripadvisor (relevant across markets)

Weibo (China-specific)

Xiaohongshu/Rednote (China-specific)

YouTube (relevant across markets)

Media analysis

Search phrases used in the article collection

The below table shows the criteria used in the article collection. Each row can be understood as a separate search. The principle was that article texts, to match, had to contain at least one of the keywords in the first set *and* at least one of the keywords in the second set. The rightmost column shows the maximum number of words that were allowed to be in between the words from the two different sets.

	Keyword set 1	Keyword set 2	Span
Australia and USA	travel, travelling, traveling, travelled, traveled, tourism, vacation, trip, trips	Europe, Albania, Andorra, Austria, Belarus, Belgium, Bosnia-Herzegovina, Bosnia, Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, North Macedonia, Macedonia, Norway, Poland, Portugal, Romania, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Türkiye, Ukraine, United Kingdom, Britain, England, Wales, Scotland, Holland	10
Australia and USA	visit, visits, visited, visiting	Europe, Albania, Andorra, Austria, Belarus, Belgium, Bosnia-Herzegovina, Bosnia, Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, North Macedonia, Macedonia, Norway, Poland, Portugal, Romania, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Türkiye, Ukraine, United Kingdom, Britain, England, Wales, Scotland, Holland	3
Brazil	viagem, viagens, viaja, viajado, viajai, viajais, viajam, viajamos, viajando, viajar, viajara, viajará, viajaram, viajáramos, viajarão, viajaras, viajarás, viajardes, viajarei, viajareis, viajáreis, viajarem, viajaremos, viajares, viajaria, viajariam, viajaríamos, viajarias, viajaríeis, viajarmos, viajas, viajasse, viajásseis, viajassem, viajássemos, viajasses, viajaste, viajastes, viajava, viajavam, viajávamos, viajavas, viajáveis, viaje, viajei, viajeis, viajeis, viajem, viajemos, viajes, viajo, viajou, turismo, férias	Europa, Albânia, Andorra, Áustria, Bielorrússia, Bélgica, Bósnia-Herzegovina, Bósnia, Herzegovina, Bulgária, Croácia, Chipre, República Tcheca, Chéquia, Tchéquia, República Checa, Dinamarca, Estônia, Finlândia, França, Alemanha, Grécia, Hungria, Islândia, Irlanda, Itália, Letônia, Liechtenstein, Lituânia, Luxemburgo, Malta, Moldávia, Mônaco, Montenegro, Países Baixos, Macedônia do Norte, Macedônia, Noruega, Polônia, Portugal, Romênia, San Marino, Sérvia, Eslováquia, Eslovênia, Espanha, Suécia, Suíça, Turquia, Ucrânia, Reino Unido, Grã-Bretanha, Bretanha, Inglaterra, Gales, Escócia, Holanda	10
Brazil	visita, visitado, visitai, visitais, visitam, visitamos, visitando, visitar, visitara, visitará, visitaram, visitáramos, visitarão, visitaras, visitarás, visitardes, visitarei, visitareis, visitáreis, visitarem, visitaremos, visitares, visitaria, visitariam, visitaríamos, visitarias, visitaríeis, visitarmos, visitas, visitasse, visitásseis, visitassem, visitássemos, visitasses, visitaste, visitastes, visitava, visitavam, visitávamos, visitavas, visitáveis, visite, visitei, visiteis, visitem, visitemos, visites, visito, visitou	Europa, Albânia, Andorra, Áustria, Bielorrússia, Bélgica, Bósnia-Herzegovina, Bósnia, Herzegovina, Bulgária, Croácia, Chipre, República Tcheca, Chéquia, Tchéquia, República Checa, Dinamarca, Estônia, Finlândia, França, Alemanha, Grécia, Hungria, Islândia, Irlanda, Itália, Letônia, Liechtenstein, Lituânia, Luxemburgo, Malta, Moldávia, Mônaco, Montenegro, Países Baixos, Macedônia do Norte, Macedônia, Noruega, Polônia, Portugal, Romênia, San Marino, Sérvia, Eslováquia, Eslovênia, Espanha, Suécia, Suíça, Turquia, Ucrânia, Reino Unido, Grã-Bretanha, Bretanha, Inglaterra, Gales, Escócia, Holanda	3

Canada	travel, travelling, traveling, travelled, traveled, tourism, vacation, trip, trips	Europe, Albania, Andorra, Austria, Belarus, Belgium, Bosnia-Herzegovina, Bosnia, Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, North Macedonia, Macedonia, Norway, Poland, Portugal, Romania, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Türkiye, Ukraine, United Kingdom, Britain, England, Wales, Scotland, Holland	10
	visit, visits, visited, visiting	Europe, Albania, Andorra, Austria, Belarus, Belgium, Bosnia-Herzegovina, Bosnia, Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, North Macedonia, Macedonia, Norway, Poland, Portugal, Romania, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Türkiye, Ukraine, United Kingdom, Britain, England, Wales, Scotland, Holland	3
	voyage, voyagé, voyagea, voyageai, voyageaient, voyageais, voyageait, voyageâmes, voyageant, voyageas, voyageasse, voyageassent, voyageasses, voyageassiez, voyageassions, voyageât, voyageâtes, voyagent, voyageons, voyageons, voyagera, voyagerai, voyageraient, voyagerais, voyagerait, voyageras, voyagèrent, voyagerez, voyageriez, voyagerions, voyagerons, voyageront, voyages, voyagez, voyagiez, voyagions, tourisme, vacances	Europe, Albanie, Andorre, Autriche, Biélorussie, Belgique, Bosnie-Herzégovine, Bosnie-Herzégovine, Bulgarie, Croatie, Chypre, République tchèque, Tchéquie, Danemark, Estonie, Finlande, France, Allemagne, Grèce, Hongrie, Islande, Irlande, Italie, Lettonie, Liechtenstein, Lituanie, Luxembourg, Malte, Moldavie, Monaco, Monténégro, Pays-Bas, Macédoine du Nord, Macédoine, Norvège, Pologne, Portugal, Roumanie, Saint-Marin, Serbie, Slovaquie, Slovénie, Espagne, Suède, Suisse, Turquie, Ukraine, Royaume-Uni, Grande-Bretagne, Angleterre, Pays de Galles, Écosse, Pays-Bas	10
	visita, visitai, visitaient, visitais, visitait, visitâmes, visitant, visitas, visitasse, visitassent, visitasses, visitassiez, visitassions, visitât, visitâtes, visite, visité, visitent, visitera, visiterai, visiteraient, visiterais, visiterait, visiteras, visitèrent, visiterez, visiteriez, visiterions, visiterons, visiteront, visites, visitez, visitiez, visitions, visitons	Europe, Albanie, Andorre, Autriche, Biélorussie, Belgique, Bosnie-Herzégovine, Bosnie-Herzégovine, Bulgarie, Croatie, Chypre, République tchèque, Tchéquie, Danemark, Estonie, Finlande, France, Allemagne, Grèce, Hongrie, Islande, Irlande, Italie, Lettonie, Liechtenstein, Lituanie, Luxembourg, Malte, Moldavie, Monaco, Monténégro, Pays-Bas, Macédoine du Nord, Macédoine, Norvège, Pologne, Portugal, Roumanie, Saint-Marin, Serbie, Slovaquie, Slovénie, Espagne, Suède, Suisse, Turquie, Ukraine, Royaume-Uni, Grande-Bretagne, Angleterre, Pays de Galles, Écosse, Pays-Bas	3
China	旅行, 旅游, 假期	欧洲, 南欧, 北欧, 西欧, 东欧, 阿尔巴尼亚, 安道尔, 奥地利, 白俄罗斯, 比利时, 波斯尼亚和黑塞哥维那, 波斯尼亚, 黑塞哥维那, 保加利亚, 克罗地亚, 塞浦路斯, 捷克共和国, 捷克, 丹麦, 爱沙尼亚, 芬兰, 法国, 德国, 希腊, 匈牙利, 冰岛, 爱尔兰, 意大利, 拉脱维亚, 列支敦士登, 立陶宛, 卢森堡, 马耳他, 摩尔多瓦, 摩纳哥, 黑山, 荷兰, 北马其顿, 马其顿, 挪威, 波兰, 葡萄牙, 罗马尼亚, 圣马力诺, 塞尔维亚, 斯洛伐克, 斯洛文尼亚, 西班牙, 瑞典, 瑞士, 土耳其, 乌克兰, 英国, 英国, 英格兰, 威尔士, 苏格兰, 荷兰	10
	游览	欧洲, 南欧, 北欧, 西欧, 东欧, 阿尔巴尼亚, 安道尔, 奥地利, 白俄罗斯, 比利时, 波斯尼亚和黑塞哥维那, 波斯尼亚, 黑塞哥维那, 保加利亚, 克罗地亚, 塞浦路斯, 捷克共和国, 捷克, 丹麦, 爱沙尼亚, 芬兰, 法国, 德国, 希腊, 匈牙利, 冰岛, 爱尔兰, 意大利, 拉脱维亚, 列支敦士登, 立陶宛, 卢森堡, 马耳他, 摩尔多瓦, 摩纳哥, 黑山, 荷兰, 北马其顿, 马其顿, 挪威, 波兰, 葡萄牙, 罗马尼亚, 圣马力诺, 塞尔维亚, 斯洛伐克, 斯洛文尼亚, 西班牙, 瑞典, 瑞士, 土耳其, 乌克兰, 英国, 英国, 英格兰, 威尔士, 苏格兰, 荷兰	3

Japan	旅行, 観光, 休暇, バカンス, 休み	ヨーロッパ, 欧州, 北欧, 南欧, 西欧, 東欧, アルバニア, アンドラ, オーストリア, ベラルーシ, ベルギー, ボスニア・ヘルツェゴビナ, ボスニア, ヘルツェゴビナ, ブルガリア, クロアチア, キプロス, チェコ共和国, チェコ, デンマーク, エストニア, フィンランド, フランス, ドイツ, ギリシャ, ハンガリー, アイスランド, アイルランド, イタリア, ラトビア, リヒテンシュタイン, リトアニア, ルクセンブルク, マルタ, モルドバ, モナコ, モンテネグロ, オランダ, 北マケドニア, マケドニア, ノルウェー, ポーランド, ポルトガル, ルーマニア, サンマリノ, セルビア, スロバキア, スロベニア, スペイン, スウェーデン, スイス, トルコ, ウクライナ, イギリス, 英国, イングランド, ウェールズ, スコットランド, オランダ	10
	訪問	ヨーロッパ, 欧州, 北欧, 南欧, 西欧, 東欧, アルバニア, アンドラ, オーストリア, ベラルーシ, ベルギー, ボスニア・ヘルツェゴビナ, ボスニア, ヘルツェゴビナ, ブルガリア, クロアチア, キプロス, チェコ共和国, チェコ, デンマーク, エストニア, フィンランド, フランス, ドイツ, ギリシャ, ハンガリー, アイスランド, アイルランド, イタリア, ラトビア, リヒテンシュタイン, リトアニア, ルクセンブルク, マルタ, モルドバ, モナコ, モンテネグロ, オランダ, 北マケドニア, マケドニア, ノルウェー, ポーランド, ポルトガル, ルーマニア, サンマリノ, セルビア, スロバキア, スロベニア, スペイン, スウェーデン, スイス, トルコ, ウクライナ, イギリス, 英国, イングランド, ウェールズ, スコットランド, オランダ	3

Metrics calculation

Overview of components of the behavioural metrics

Metric	Core scale question	Component 2	Component 3	Component 4
Travel off-season	*'When would you say your trip took place?'* (50%)	How evenly reported trips are distributed among different months (50%)		
Love local	*'To what extent would you say that you were engaged in local culture?'* (50%)	Respondents' average self-assessment of their trips on a scale between primarily familiar options and primarily location-specific or unique options (35%)	Average AI-assessment of the degree to which each text response to the question '*Please describe the contact and engagement in the local cultures you experienced*' reflects immersion in local culture (15%)	
Go off the beaten track	*'During your trip, would you say your destinations were…?'* (50%)	Share of travellers who have travelled outside of the capital of a visited country (17%)	Share of travellers who have travelled outside of the main tourism hotspots of a visited country (17%)	Average AI-assessment of whether itineraries described in free-text responses are on the beaten track, off the beaten track, or in between (16%)
Travel green	*'Would you say your primary modes of transportation, when travelling within and between cities and countries, were…?'* (50%)	Difference between the average extent to which respondents report that they have used trains and the extent to which they report that they have used planes. (25%)	Difference between reported use of trains and planes as main means of transport, based on free-text responses. (25%)	

Calculation of behavioural metrics

Each of the behavioural metrics consists to 50% of the average response to one of the self-assessment scale questions specified in Section 9.1. The average response to the core scale questions, which contribute to 50% of each metric, is normalised to a 0-100 scale (with 100 being the best possible theoretical value and 0 being the worst possible) using the formula *100*(x-1)/4*. The purpose of this normalisation is to make it easier to follow how the metrics' different components have been weighted together.

The remaining 50% of each metric consists of the following:

Travel off-season

Metric component 2 of 2: How evenly reported trips are distributed among different months (50% of the metric)

Based on respondents' reports of when their latest trip took place, the sum of the deviations (in percentage points) of each month's percentage of all trips from the average month's percentage of all trips is used. This gives a value between 0% (if all months see exactly the same number of trips, which is the best possible theoretical case) and 183.33% (if all trips take place in the same month, which is the worst possible case). That value is normalised to a 0-100 scale, in which 0 is the worst possible value and 100 is the best possible value, using the formula *100*(x-183.33%)/-183.33%*.

Love local

Metric component 2 of 3: Respondents' average self-assessment of their experiences during their trips on a scale between primarily familiar options and primarily location-specific or unique options (35% of the metric)

A normalised value between 0 and 100 is calculated in the same way as for the core scale questions. (See above.)

Metric component 3 of 3: Average AI-assessment of the degree to which each text response to the question 'Please describe the contact and engagement in the local cultures you experienced' reflects immersion in local culture (15% of the metric)

Each text has been given a value between 0 and 100 by a large language model, with a higher value representing deeper immersion. The average assessed value is used. Note that some text responses turned out to contain too little information to be assessed; those responses are left out from this analysis.

Go off the beaten track

Metric component 2 of 4: Share of travellers who have travelled outside of the capital of a visited country (17% of the metric)

This share is multiplied by 100.

Metric component 3 of 4: Share of travellers who have travelled outside of the main tourism hotspots of a visited country (17% of the metric)

This share is multiplied by 100.

Metric component 4 of 4: Average AI-assessment of whether itineraries described in free-text responses are on the beaten track, off the beaten track, or in between (16% of the metric)

The average assessed value (among the responses in which enough information is given) is used after giving each a value of 0 to trips assessed as being on the beaten track, 100 to those assessed as being off the beaten track, and 50 to those in between. Responses containing too little information to be assessed are left out from this analysis.

Travel green

Metric component 2 of 3: Difference between the average extent to which respondents report that they have used trains and the extent to which they report that they have used planes (25% of the metric)

The scale question 'To what extent did you use the following means of transport, when travelling within and between cities and countries?' was asked about eight different transport categories (including aeroplane and train). It presented respondents with a 1–5 scale, with 5 as the highest extent. The difference between the average response for train and the average response for aeroplane (the former minus the latter) are used here. This gives us a figure between -4 and +4. +4 is the best possible outcome, in the theoretical situation in which all respondents say they have used trains to the highest extent and planes to the lowest extent. -4 represents the opposite, worst possible, situation. The figure is then normalised to a 0–100 scale using the formula *100*(x+4)/8*.

Metric component 3 of 3: Difference between reported use of trains and planes as main means of transport, based on free-text responses.

The difference between the share of responses that indicate train as the main means of transport and the share of responses that indicate plane as the main means of transport (the former minus the latter) is used. This gives us a figure between -100% and +100%, which is normalised to a 0–100 scale using the formula *100*(x+100%)/200%*. Responses that did not mention a mode of transport are left out of this analysis.

Nominal metrics in the second project and scale factors used for indexation

The metrics calculation described in the preceding section has resulted in a set of nominal metrics. The nominal metrics can be found below, each together with a scale factor that has been used for indexation. The scale factors were calculated during the first project and serve to set the index to 100 at 2024 (which is the base year in which the data was collected in the first project).

		TOTAL	Australia	Brazil	Canada	China	Japan	USA
Travel off-season	**Nominal metric**	**65**	**63**	**64**	**64**	**69**	**66**	**61**
	Scale factor	*1.5659*	*1.6002*	*1.5662*	*1.7044*	*1.5517*	*1.5350*	*1.6273*
	Indexed metric	102	101	100	109	107	102	99
Love local	**Nominal metric**	**59**	**62**	**61**	**60**	**55**	**52**	**61**
	Scale factor	*1.7824*	*1.6911*	*1.7606*	*1.7653*	*1.7597*	*2.1230*	*1.6604*
	Indexed metric	105	106	108	107	97	111	102
Go off the beaten track	**Nominal metric**	**45**	**49**	**42**	**46**	**44**	**44**	**44**
	Scale factor	*2.3463*	*2.1783*	*2.3968*	*2.3936*	*2.2551*	*2.5751*	*2.3427*
	Indexed metric	106	107	101	111	98	113	102
Travel green	**Nominal metric**	**47**	**48**	**46**	**48**	**48**	**49**	**46**
	Scale factor	*2.2774*	*2.3063*	*2.2180*	*2.3241*	*2.3429*	*2.2534*	*2.2146*
	Indexed metric	108	110	102	112	113	110	101

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