
Understanding European Conscious Traveller Segments





PROJECT BACKGROUND AND SCOPE

- As tourism continues to evolve, European destinations are being increasingly called upon to address changing traveller values, particularly when it comes to issues like sustainability, authenticity, seasonality, crowding and mobility. This reflects a broader shift in attitudes within society, including heightened awareness of climate change, a desire to reduce environmental impact and an emphasis on quality over quantity in consumption and travel. At the same time, destinations are increasingly seeking to develop tourism grounded in meaningful exchanges between residents and travellers, ensuring that tourism delivers mutual benefits for both host communities and visitors. In light of this, the European Travel Commission (ETC) aims to support NTOs in understanding and engaging with the segment of European travellers seeking more responsible and meaningful travel experiences.
- The project '**Understanding Europe's Conscious Traveller Segments**', develops a set of traveller profiles capturing the different attitudes, preferences, concerns and behaviours within the responsible traveller segment. These insights should support NTOs to fine-tune their marketing strategies and the products they offer to match the evolving perceptions and expectations of European travellers, and support the development of more competitive and sustainable destinations.
- The analysis is based on existing data from the ETC's Monitoring Sentiment for Intra-European Travel (MSIET) survey. Included are Europeans who had taken more than one overnight trip in the past three years at the time of surveying. A two-step Cluster Analysis model was applied to identify correlations between attitudes, behaviours and concerns, and to compile different conscious traveller profiles. On top of this, descriptive statistical analysis was carried out on each cluster to shed more light on their respective 'Personas', tackling questions like how, when, with whom, for how long and to which destinations they travel.

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A scenic landscape of a mountain valley with a lake and snow-covered peaks. The mountains are rugged and covered in snow, with a dense forest of evergreen trees at their base. The lake is calm and reflects the surrounding scenery. The sky is overcast and grey.

Executive Summary

Conscious traveller highlights

64% of the almost 24.000 Europeans surveyed fit at least one of the responsible traveller behaviour descriptors and were therefore considered a conscious traveller throughout this project.

These travellers are emerging as a high-value and resilient market segment, combining strong travel intent with more deliberate, responsible choices.

Their preferences signal opportunities to rebalance demand through closer-to-home travel, longer stays, more flexible timing and increased engagement with less mainstream destinations.

High intent, thoughtful choices

Conscious European travellers stand out for both their strong intention to travel and the way they choose to do so. Around **80% expressed an intention to take an overnight trip within Europe in the next six months**, frequently opting for **proximity and lower-impact journeys**: 34% opt for domestic travel, and 44% choose neighbouring countries, reflecting a preference for shorter distances and potentially lower reliance on flights.

Longer stays and smarter timing

Their trips tend to be longer and more considered, with **one in two favouring stays of seven nights or more**, and **29% budgeting €1,500–2,500 for their next journey**. Rather than concentrating demand in peak periods, conscious travellers help spread tourism flows, with **41% travelling during the shoulder months** and **26% in the low season**.

Motivations shaped by responsibility

Interest in responsible travel is closely **linked to practical concerns**, particularly costs and personal finances (75%), alongside **overcrowding** (25%) and **extreme weather events** (21%). At the same time, **core destination criteria remain consistent**: destination safety (45%), stable weather (35%), attractive deals (30%) and welcoming locals (28%).

Beyond the mainstream

What truly differentiates conscious travellers is their openness to less conventional destination choices. **Over half (51%) favour less popular destinations**, while **10% go further still**, deliberately choosing remote locations.

Conscious traveller segments

Current analysis has revealed five (5) high-value conscious European traveller segments.

Collectively, these segments illustrate how responsibility in travel translates into diverse demand patterns shaped by different motivations, behaviours and travel styles. Each of them highlights strategic opportunities to rebalance tourism flows, enhance resilience and diversify destination offers across Europe.

Off-beat Destination Seekers

Highly sensitive to overcrowding, these rather mature travellers (aged 45+) actively avoid peak periods and gravitate towards **less popular European destinations**, favouring **domestic trips** and **outdoor experiences** with a strong focus on **affordability** and **value for money**.

Gen Z Remote Adventurers

Blending travel with work or study, this youthful (mainly aged 18-24) segment favours **remote and lesser-known coastal destinations**, travels predominantly during **low seasons**, stays longer, and values **meaningful interaction with local communities**.

Hassle-free Holidaymakers

Seeking comfort and simplicity, these travellers favour **family trips** to **established coastal and beach destinations** but prefer the **shoulder season** and typically **stay longer** than the average, helping to smooth demand without sacrificing familiarity and comfort.

Impact-aware Travellers

This group of younger-aged Europeans (18-34) travels during the **low season**, makes conscious use of **public transport** and is motivated by concerns around **overcrowding and environmental footprint**; they mainly take **shorter trips** and favour **city, culture and heritage experiences**.

Eco-responsible Explorers

The most sustainability-driven segment, eco-responsible explorers prioritise **non-crowded, remote destinations** for **longer nature-based trips**, rely on public transport, and show consistently **high concern for environmental and social impacts**.

A scenic landscape of a mountain valley with a lake and snow-covered trees. The mountains are rugged and covered in snow, with a dense forest of evergreen trees in the foreground. The lake is calm and reflects the surrounding scenery. The sky is overcast and grey.

Setting the context



What is a conscious traveller?

DEFINING CONSCIOUS AND SUSTAINABLE TRAVEL TODAY

- Defining conscious, sustainable tourism is quite a tall order due to its multi-dimensional nature. Initially focused on preserving natural ecosystems through concepts like ecotourism (Fennell, 1999) the dialogue has expanded to include social, economic and environmental impact. Frameworks such as the [Cape Town Declaration](#) emphasise the role of all stakeholders in ensuring that tourism benefits both people and the environment.
- Despite guidelines, a universally accepted definition remains elusive, and practical application varies across destinations and contexts. Similarly, identifying a single, clearly defined sustainable traveller remains challenging, as behaviours, motivations and priorities differ widely and are further shaped by external influences, including social norms and crises such as the COVID-19 pandemic (Zenker & Kock, 2020).
- 81% of travellers state that sustainable options influence their decision-making (Accor, 2025). Longitudinal evidence also points to growing awareness and evolving expectations regarding travel's positive contribution to local communities and ecosystems (Booking.com, 2025). However, in practice, an intention-behaviour gap is often evident: sustainability is the primary consideration for only a small minority of travellers (7%–11%). Even among environmentally conscious groups, cost and quality continue to outweigh sustainability in travel decisions (WTTC, 2025).
- For the purpose of this study, the concepts of conscious travel and responsible travel are used interchangeably.

Key trends in conscious travel: What we know so far

LESSER-KNOWN VS CROWDED DESTINATIONS

- **Policy and destination strategies:** Governments and destination-management organisations are actively promoting the diversification of tourism flows as part of sustainability strategies aimed at reducing environmental pressure and strengthening community wellbeing (ETC, 2024; UNWTO, 2023).
- **Evolving traveller demand:** Travellers are gradually moving away from overcrowded hotspots in favour of lesser-known destinations that offer more authentic, comfortable and environmentally conscious experiences. Indicatively, 39% of travellers seek advice on travel at other times of the year (Booking.com, 2025), while 63% of consumers say they are likely to visit a detour destination on their next trip (Expedia, 2025).

SEASONALITY AND CHANGING DYNAMICS OF TRAVEL DEMAND

- **Policy relevance and scale:** Seasonality is a key tourism policy issue, since over-concentration in certain time periods affects most EU destinations; according to Eurostat (2025), July and August accounted for 31% of all annual nights spent in EU tourist accommodation in 2024.
- **Environmental and socio-economic impacts:** Seasonal concentration places pressure on the environment (e.g. waste generation, water and energy use) and affects labour market conditions, service quality, and levels of community support for tourism (European Commission, 2024; Eurostat, 2024).
- **Shifting traveller behaviour:** Travellers currently seek more comfortable weather, fewer crowds and better value for money, driving demand away from traditional peak months; according to ETC (2025), 28% of travellers from key source markets (Canada, the US, France, Germany, Italy, the UK, Australia, and China) plan to change the months in which they travel.

Key trends in conscious travel: What we know so far

TRANSPORTATION ON THE SPOTLIGHT

- **Mobility shifts, across Europe:** In 2024, 443 billion passenger-kilometres (pkm) were performed by rail in the EU, up from 419 billion in 2023 (+5.8%), and the highest number reported since 2004 (Eurostat, 2025). This trend is also confirmed by Travellyze (2024), reporting increased use of trains and buses instead of planes, by +66.77%, from 2021 to 2024.
- **Younger generations lead the way:** 86% of travellers aged 25–34 express a preference for eco-friendly travel options (World Economic Forum, 2025).
- **Transportation as part of the travel experience:** According to Accor (2024), 16% of Europeans expressed intentions to travel by rail more in 2025, and another 9% to opt for a bus or coach. Simultaneously, 10% would travel more slowly and make the journey part of the experience, and 8% would take more cycling trips, indicating that transportation options are more highly considered as part of the overall travel experience.

MORE AUTHENTIC TRAVEL EXPERIENCES

- **Experiential travel surges:** There is a global increase in experiential travel, and less conventional travel motivations, with an 8% increase from 2019 to 2023. This is particularly marked in Europe, where activity-orientated holidays in natural environments are very much desired (Mabrian, 2024). At the same time, research by Mastercard in 2025 reveals that two-thirds (70%) of respondents state that checking off bucket-list activities is a top travel priority.
- **Wellness and authenticity are top-of-the list:** Holidays related to wellness and authentic cultural experiences remain popular among travellers, as well as activities focused on the natural environment (WTM, 2025).
- **Slow Tourism:** The trend of slow tourism, defined as ‘taking time to explore local history and culture while supporting the environment’ is gaining significant traction, with 69% of Europeans expressing their likelihood to try it, and 21% indicating they are very likely to do so. This trend is particularly strong in France, Portugal, Poland, and Italy, where between 24% to 27% of respondents express being ‘very likely’ to embrace slow tourism (Europ Assistance, 2024).

A scenic landscape of a mountain valley. In the foreground, a calm lake reflects the surrounding environment. The middle ground is filled with dense evergreen trees, many of which are covered in a layer of snow. In the background, rugged, rocky mountains rise, their peaks also dusted with snow. The sky is a pale, overcast grey. The overall mood is serene and quiet.

Main Findings



The methodology of primary data analysis

Primary research data sources

- The primary data analysis is based on data stemming from the last 4 waves of the ETC Monitoring Sentiment for Intra-European Travel (MSIET) study.
- Data collection periods:

Wave 23	6 - 26 September 2025
Wave 22	27 May - 10 June 2025
Wave 21	3 - 17 March 2025
Wave 20	7 - 23 September 2024

- The travel period covered in these 4 waves is from October 2024 to March 2026.
- The ETC Monitoring Sentiment for Intra-European Travel study addresses European citizens from 10 high-value travel markets: Germany, the United Kingdom, France, the Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria. Analysis is based on respondents who have taken more than one overnight trip in the past three years.

Type of analysis

For this analysis, the following steps were followed:

Step 1: The dimensions / factors to determine conscious travellers were selected with ETC, then fine-tuned and validated through factor analysis.

Step 2*: The analysed sample was extracted from the total base of respondents based on the seven (7) factors that were determined during Step 1.

Step 3: The five (5) segments of Europeans with conscious travel behaviours were determined via a two-step cluster analysis.

Step 4: All data from the four (4) last waves of Monitoring Sentiment for Intra-European Travel research project were analysed per segment.

Analysed samples

- Total sample: 23,939
- Respondents with at least one type of responsible travel behaviour: 15,297
- Respondents with at least one type of responsible travel behaviour planning a trip internationally within Europe: 12,442

* Income levels are determined automatically by the data collection platform, and are categorised based on median values. To define high, medium and low travel seasons, the internationally established methodology of calculation of a Seasonality Index was applied.

01

Types of conscious behaviours among European travellers

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Objectives of this section

This section of the report depicts travel habits and attitudes of **Europeans who adopt at least one of the selected behaviours characterised as ‘conscious’** (see ‘The descriptors of the analysis’).

The aim of this section is to present **key trends and preferences** of this group of travellers, providing background information to better understand the conscious traveller snapshots in the next sections.

Analytical approach

The analysis is based on **7 dimensions (descriptors)**, which were initially selected in cooperation with the ETC, and verified for adequacy, validity, correlation and strength by means of factor analysis.

The aim of exploratory factor analysis (EFA) is to identify the **important factors that may describe ‘conscious’ travellers**, and the underlying dimensions that describe respondents’ travel attitudes and behaviours, so that these can subsequently be used in cluster analysis.

The extraction method used was Principal Component Analysis, and the rotation was performed using Oblimin, since the attitudes were expected to exhibit some degree of correlation with one another.

NOTE: the selected behaviours are included in the questionnaire of the ETC Monitoring Sentiment for Intra-European Travel study. The analysed data come from the 4 most recent waves of this study.

The descriptors of the analysis

The set of behaviours (descriptors), characterised as ‘conscious’, include:

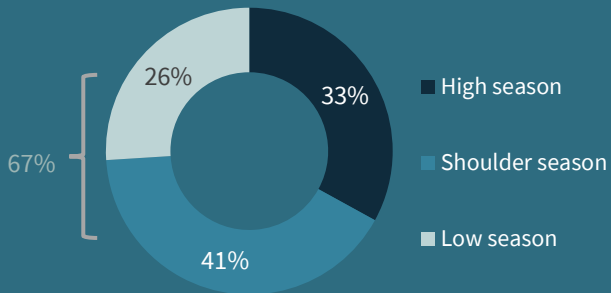
-  Travel in shoulder or low season
-  Opt for above average length of stays
-  Use public transport for the trip (bus, train)
-  Favour lesser known destinations
-  Concerns for the environmental footprint of the trip
-  Concerns about overcrowding
-  Select non-crowded destinations

Out of a total of 23,939 Europeans, who participated in the ETC Monitoring Sentiment for Intra-European Travel study from October 2024 to March 2026, **15,297 (64% of the total sample) exhibited at least one of the above-mentioned behaviours.**

All results in this report are based on the 15,297 respondents who adopt at least one of the selected behaviours characterised as ‘conscious’.

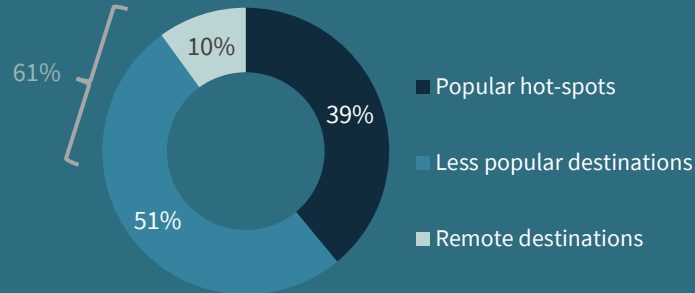
Travel patterns of the conscious travellers

67% FAVOUR SHOULDER AND LOW SEASON TRIPS



SHOULDER & LOW SEASON TRAVEL AMONG TOTAL EUROPEANS: 59%

61% OPT FOR LESSER-KNOWN OR REMOTE DESTINATIONS



PREFERENCE FOR LESS CROWDED DESTINATIONS AMONG TOTAL EUROPEANS: 51%



ONE IN FOUR PAYS EMPHASIS ON OVERCROWDING AT THE DESTINATION

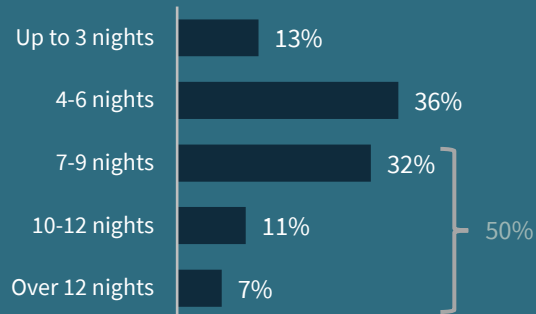
25%
Are concerned about too many tourists at the destination

AMONG TOTAL EUROPEANS: 10%

26%
Select destinations that are not crowded

AMONG TOTAL EUROPEANS: 10%

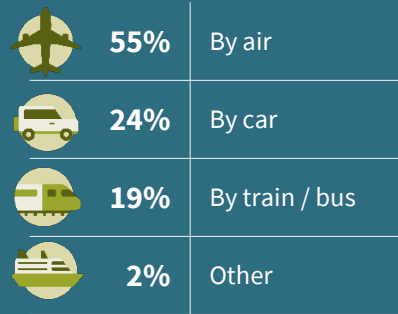
50% PREFER STAYS LONGER THAN 7 NIGHTS



7+ NIGHTS STAYS AMONG TOTAL EUROPEANS: 46%



19% CHOOSE TO TRAVEL BY PUBLIC TRANSPORT



PREFERENCE FOR PUBLIC TRANSPORT OPTIONS AMONG TOTAL EUROPEANS: 15%



15% WORRY ABOUT THEIR TRAVEL FOOTPRINT

15%
Are concerned about the environmental footprint of their trip

AMONG TOTAL EUROPEANS: 5%

Europeans with conscious travel behaviours share a high intention to travel, high spending readiness, and a clear preference for European destinations

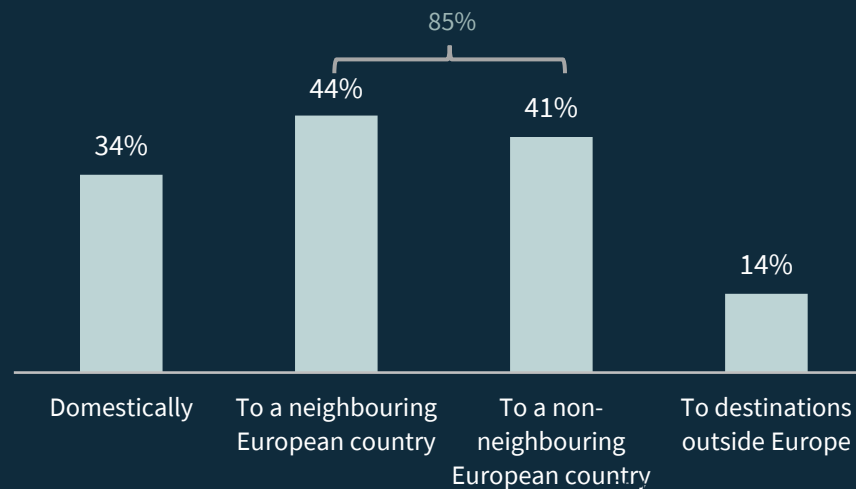
Desire for imminent travel

80%

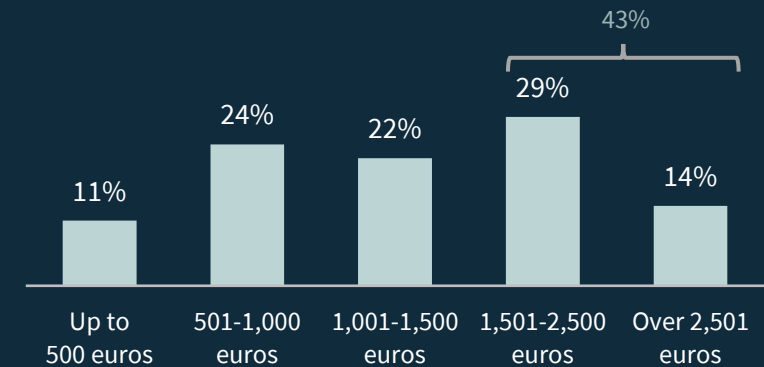
Travel propensity within Europe

Reference travel period: Oct '24 to March '26

Travel location



Travel budget



Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

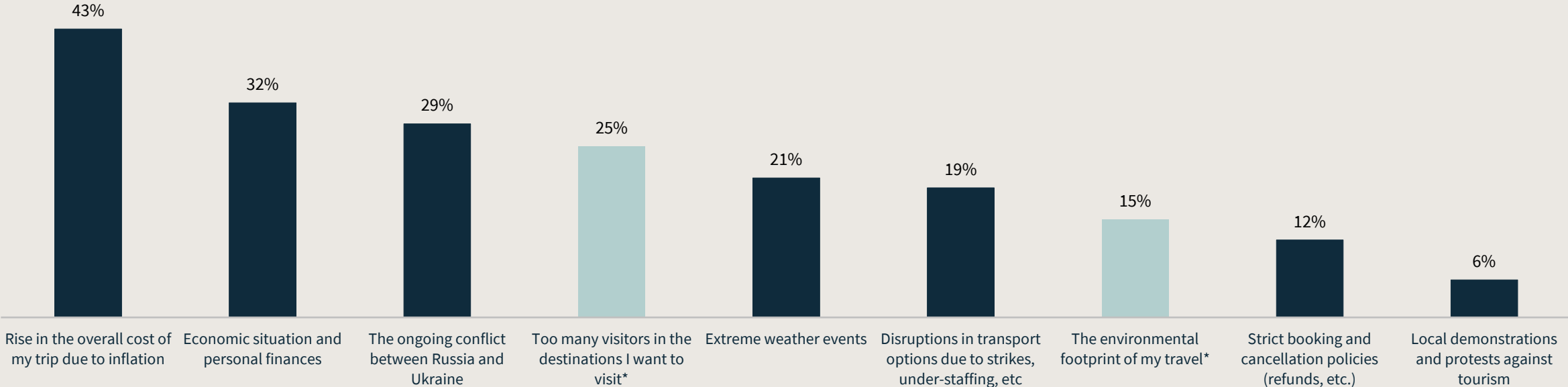
Where do you plan to travel in the next 6 months?

How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 15,297

Costs, crowds and calamitous weather top the concerns of Europeans with at least one conscious behaviour

Key concerns



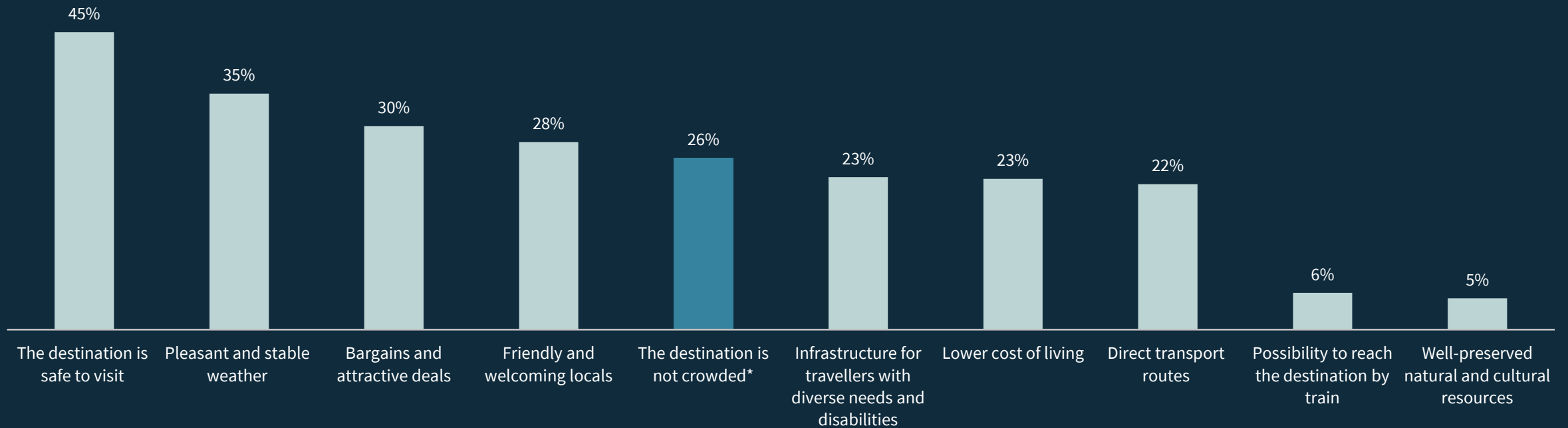
* Dimensions (descriptors) used to identify the sample of travellers with at least one type of responsible behaviour
What currently concerns you the most about travelling within Europe?

* These concerns were included in the list of descriptors that define conscious travellers

No. of respondents: 15,297

Safe, friendly and reasonably priced destinations with predictable weather are the order of the day

Destination criteria



* Dimensions (descriptors) used to identify the sample of travellers with at least one type of responsible behaviour
What criteria will play the most important role in choosing your next holiday destination?

* This criterion was included in the list of descriptors that define conscious travellers

Full spectrum choices for travellers with conscious behaviours, spanning Sun & Beach, City Breaks, Culture & Heritage and Wellness & Relaxation

Popular types of holidays

22%

Sun & Beach



15%

City Break



15%

Culture & Heritage



15%

Nature & Outdoors



10%

Wellness & Relaxation



02

Snapshots of conscious European travellers

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Analytical approach

To identify the **five (5) conscious European traveller profiles**, a two-step segmentation analysis was applied. A series of experiments was conducted, based on the dimensions (descriptors) defined through factor analysis, to finally reach the five (5) conscious travel segments, determined by differential behaviours, patterns, preferences and concerns.

The analysis was applied on the **15,297 respondents (64% of total sample) who confirmed at least one of the above-mentioned behaviours**. The descriptors used for the analysis were the ones that factor analysis identified as strong enough to determine differentiations.

Significant differences between each profile and the total sample are with a 2% threshold and are indicated as follows:

Significantly higher than total sample 
Significantly lower than total sample 






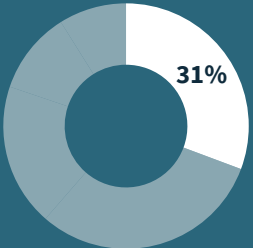
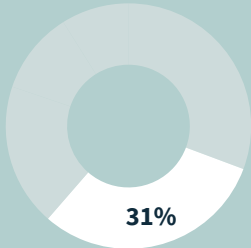
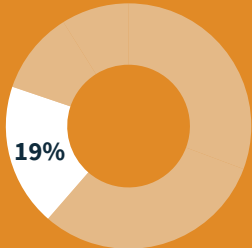
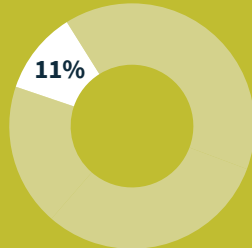
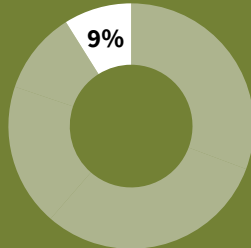
Objectives of this section

Not all travellers with some manner of conscious behaviour are the same. To identify and illustrate the different segments of conscious European travellers, this section describes main **motivations, preferences and habits of five (5) conscious traveller profiles**.

This section not only identifies **relations** between attitudes, behaviours, concerns, etc. of the different responsible traveller profiles, but it also **elaborates ‘Segments’** of each one of them, related to how, when, with whom, for how long, to which destinations, etc. they travel. In this way, stakeholders can address each profile separately, and provide products and services tailored to their needs.

NOTE: the selected behaviours are included in the questionnaire of the ETC Monitoring Sentiment for Intra-European Travel study. The analysed data come from the 4 most recent waves of this study, covering the travel period from October 2024 to March 2026 | Wave 20: 07-23 September 2024, sample = 6,001 / Wave 21: 3-17 March 2025; sample = 5,974 / Wave 22: 27 May-10 June 2025, sample = 6,001 / Wave 23: 06-26 September 2025, sample = 5,963

The conscious European traveller segments

The off-beat destination seeker	The GenZ remote adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
				
<p>Main focus: Avoiding large crowds and tourist hot spots</p>	<p>Main focus: Low season adventure trips to remote destinations</p>	<p>Main focus: Longer stays at popular destinations during the shoulder season</p>	<p>Main focus: Conscious of the impact of their trip regarding choice of transport and season</p>	<p>Main focus: Responsible travel and minimal negative impact at the core of all choices</p>
<p>N=4,677</p> 	<p>N=4,740</p> 	<p>N=2,881</p> 	<p>N=1,638</p> 	<p>N=1,361</p> 

Overview of the conscious European traveller segments



The off-beat destination seeker

- Older South and Central European travellers of moderate income and spending power
- Sensitive to overcrowding and deliberately avoiding peak periods
- Tendency for shorter trips to less popular European destinations, seeking peaceful City Breaks and Nature & Outdoor experiences at reasonable prices



The GenZ remote adventurer

- Younger GenZ travellers from Western Europe
- Attracted to coastal destinations that are less popular, or off the beaten track
- Favouring longer stays at the destination during the low season, and seeking interaction with locals



The hassle-free holidaymaker

- Middle-aged travellers from Western Europe, of higher income
- Tendency for longer stays at coastal & beach destinations during peak and shoulder seasons
- Seeking comfort and ease



The impact-aware traveller

- Younger travellers (aged 18-34) from Southern Europe, of higher income
- Favouring off-peak City Breaks and Culture & Heritage trips
- Utilising public transport, with concerns over their environmental footprint and overcrowding








The eco-responsible explorer

- Eco-sensitive Western Europeans of all ages and mid-to-higher income
- Preference for uncrowded, less popular destinations, and for Nature & Outdoor trips lasting over seven nights
- Utilising public transport, with acute concerns about the environment and overcrowding

Travel preferences and concerns of conscious traveller segments

Segment breakdown based on selected factors / descriptors






	The off-beat destination seeker	The GenZ remote adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
	 4,677 31%	 4,740 31%	 2,881 19%	 1,638 11%	 1,361 9%
Most preferred travel period	Shoulder season (49%)	Low season (46%)	Shoulder season (54%) Peak season (42%)	Low season (44%)	Shoulder season (44%) Peak season (34%)
Most popular travel months	October	November	October & July	November & March	June to October
Length of trip	Less than 7 nights (80%)	7+ nights (68%)	7+ nights (84%)	Less than 7 nights (84%)	7+ nights (82%)
Use of transportation to reach destination	By car (38%) By bus or train (10%)	By air (66%) By bus or train (16%)	By air (62%) By bus or train (17%)	By air (59%) By bus or train (39%)	By bus or train (44%)
Type of destination to be visited	Less popular (77%)	Less popular (59%) Remote (14%)	Popular (85%)	Popular (55%) Remote (16%)	Less popular (62%) Remote (25%)
Concerns about over-crowding at the destination	28%	14%	17%	29%	64%
Fewer crowds as a criterion of destination selection	42%	12%	11%	7%	73%
Concerns over the environmental footprint of the trip	10%	10%	13%	24%	38%

The segment breakdown information presented here is based on significant differences of the responses by segment towards each selected behaviour. These reflect the strongest presence per behaviour, without excluding or limiting other travel choices, not indicated here.

No. of respondents: 15,297

Demographics of conscious traveller segments

Demographic breakdown of segments

	The off-beat destination seeker	The GenZ remote adventurers	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
	 4,677 31%	 4,740 31%	 2,881 19%	 1,638 11%	 1,361 9%
Age groups	45+	Mainly 18-24	35-54	18-34	all
Gender	Men & women	Mainly women	Men & women	Slightly more women	Men & women
Income levels <small>(€=low €€=medium €€€=high)</small>	€	€€	€€€	€€€	€€
Key source markets	Italy Spain France Poland	UK Germany Austria France	UK Germany France Netherlands	France Italy UK Spain	France Germany Switzerland Belgium Austria Netherlands

The demographic information presented here indicates which age groups, gender, income levels, and source markets are most represented within each segment. These reflect the strongest presence within each segment and should not be interpreted as defining or limiting the segment exclusively to those groups.

No. of respondents: 15,297

03















Profiling conscious European travellers

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Hassle-free holidaymakers most likely to travel abroad, while off-beat destination seekers look for hidden gems closer to home






















Travel intentions by segment

	The off-beat destination seeker	The GenZ remote adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
	 4,677 31%	 4,740 31%	 2,881 19%	 1,638 11%	 1,361 9%
Propensity to travel <i>(likely / very likely)</i>	82% 	77%	84% 	81%	78%
Domestically	38% 	31% 	32%	34%	34%
A neighbouring European country	47% 	39% 	46%	52% 	41%
A non-neighbouring European country	36% 	42%	46% 	39%	43%

Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?
Where do you plan to travel in the next six months?

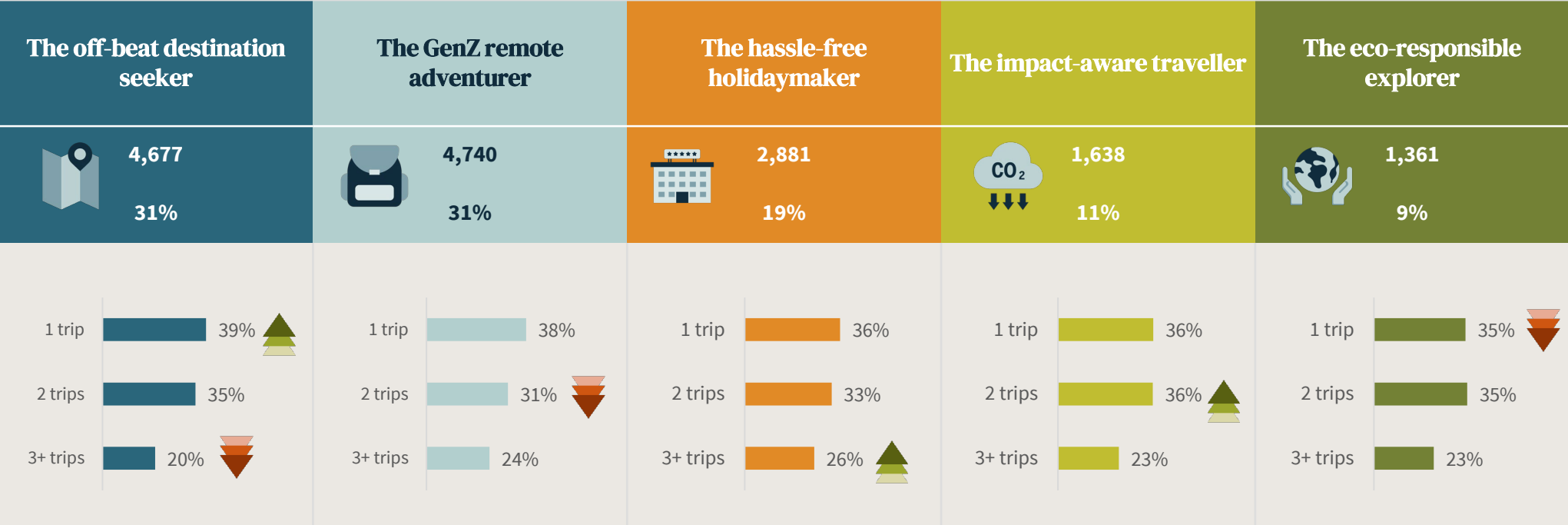
European favourite destinations hold sway among conscious travellers, but preferences vary according to the segment

Preferred intra-European destinations by segment

The off-beat destination seeker 	The GenZ remote adventurer 	The hassle-free holidaymaker 	The impact-aware traveller 	The eco-responsible explorer 
 13% France	 17% Spain	 18% Spain	13% Spain	12% Italy
13% Spain	10% Italy	11% Italy	 13% France	12% France
 13% Italy	9% Greece	 11% Greece	12% Italy	 11% Spain
9% Germany	 9% France	 10% Türkiye	 9% UK	9% Germany
7% Portugal	7% Germany	 9% France	8% Austria	 8% Croatia
7% Croatia	7% Portugal	 9% Austria	8% Germany	7% Portugal
7% Austria	6% Türkiye	7% UK	7% Greece	7% Greece
6% Greece	5% UK	 6% Germany	7% Portugal	6% Austria
5% Belgium	5% Croatia	6% Portugal	6% Croatia	 5% UK
5% UK	 5% Austria	6% Croatia	6% Belgium	4% Türkiye

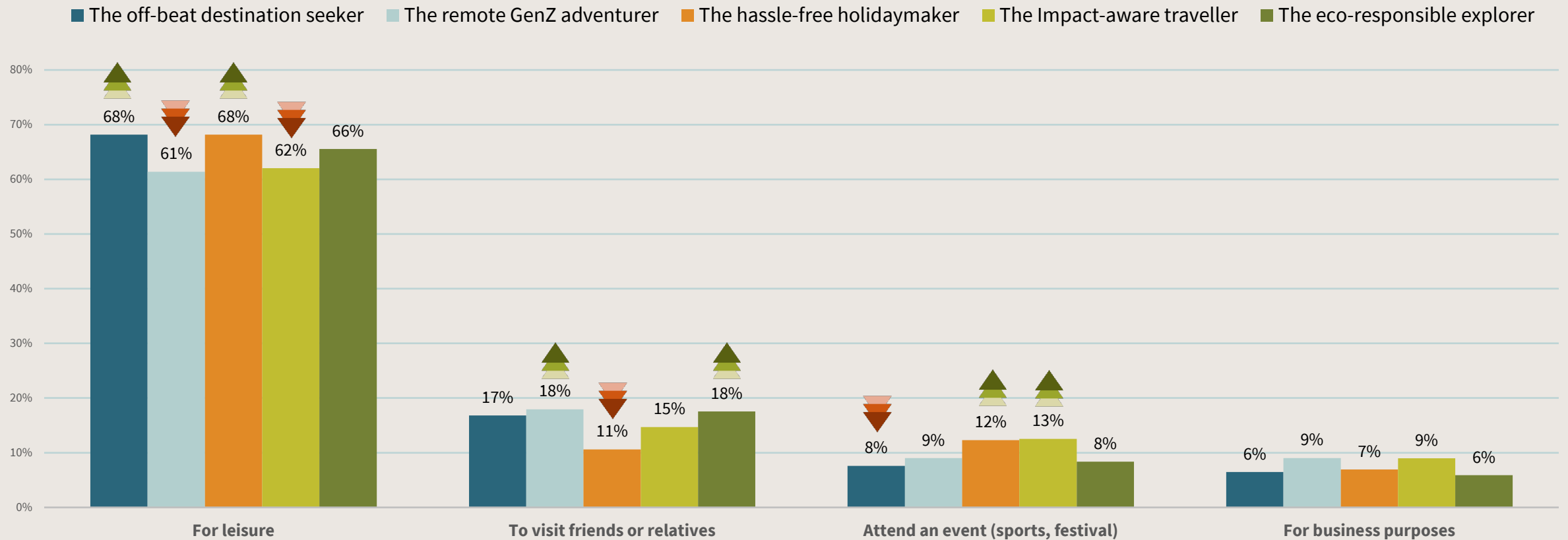
The off-beat destination seekers favour a single trip; the hassle-free holidaymakers and the impact-aware travellers are most likely to take multiple trips

Number of trips by segment
(in a 6-month period)



























Leisure trips rule supreme for the hassle-free holidaymakers and the off-beat destination seekers

Purpose of travel by segment



Eco-responsible explorers and impact-aware travellers emerge as primary adopters of rail and bus travel






































Further travel specifics by segment

		The off-beat destination seeker	The GenZ remote adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
		 4,677 31%	 4,740 31%	 2,881 19%	 1,638 11%	 1,361 9%
Mode of transport	By air	45% 	66% 	62% 	59% 	31% 
	By car	37% 	8% 	18%	2% 	17%
	By train or bus	10% 	16% 	17%	39% 	45% 
Travel companion	Family	36%	33%	39% 	33%	30% 
	Partner	38% 	35%	36%	32% 	36% 
	Solo	13%	14%	9% 	14%	15%
	With friends	10%	12%	11%	16% 	13%

Which of the following modes of transport would you most consider using during your next trip within Europe?
With whom are you most likely to travel during your next trip within Europe?

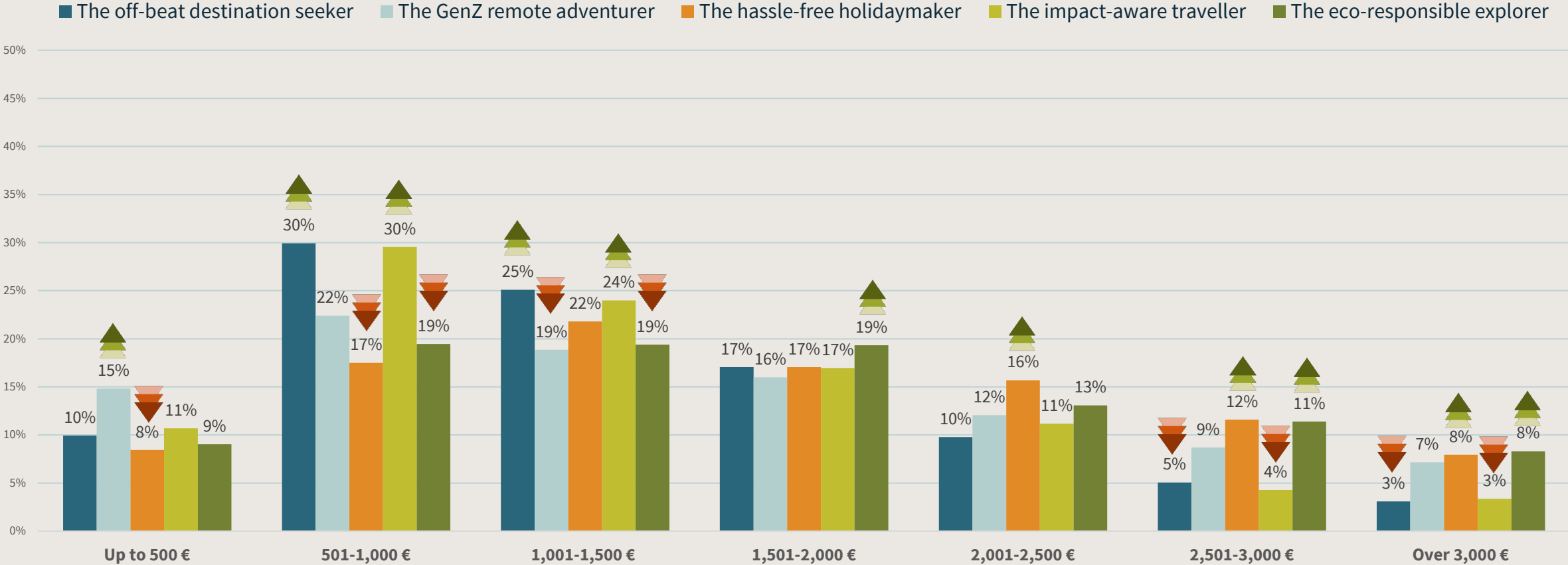
Eco-responsible explorers and off-beat destination seekers heed the call of the great outdoors

Top-5 types of leisure trips by segment

The off-beat destination seeker	The GenZ remote adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
 19% Nature & Outdoors 	 23% Sun & Beach	 32% Sun & Beach 	 24% City break 	 21% Nature & Outdoors 
 18% Sun & Beach 	 14% City break	 14% Culture & Heritage	 21% Culture & Heritage 	 18% Sun & Beach 
 16% City break	 14% Culture & Heritage	 11% City break 	 12% Sun & Beach 	 15% Culture & Heritage
 15% Culture & Heritage	 13% Nature & Outdoors	 11% Nature & Outdoors 	 10% Nature & Outdoors 	 10% Wellness & Relaxation
 10% Wellness & Relaxation	 9% Wellness & Relaxation	 10% Wellness & Relaxation	 10% Wellness & Relaxation	 10% City break 

Around a third of both hassle-free holidaymakers and eco-responsible explorers top €2,000 on their trip budget

Total budget per person by segment
























How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 15,297
























Off-beat destination seekers choosing lesser-known places tend to prioritise affordability

Europeans' key travel concerns by segment

The off-beat destination seeker 	The GenZ remote adventurer 	The hassle-free holidaymaker 	The impact-aware traveller 	The eco-responsible explorer 
 46% Rise in the overall cost of trip due to inflation	44% Rise in the overall cost of trip due to inflation	 41% Rise in the overall cost of trip due to inflation	43% Rise in the overall cost of trip due to inflation	 34% Rise in the overall cost of trip due to inflation
 34% Economic situation and personal finances	 33% Economic situation and personal finances	31% Economic situation and personal finances	32% Economic situation and personal finances	 22% Economic situation and personal finances
30% The ongoing conflict between Russia and Ukraine	30% The ongoing conflict between Russia and Ukraine	29% The ongoing conflict between Russia and Ukraine	30% The ongoing conflict between Russia and Ukraine	20% Extreme weather events
 22% Extreme weather events	20% Disruptions in transport due to strikes, understaffing, etc.	 23% Extreme weather events	20% Disruptions in transport due to strikes, understaffing, etc.	 19% The ongoing conflict between Russia and Ukraine
18% Disruptions in transport due to strikes, understaffing, etc.	20% Extreme weather events	 22% Disruptions in transport due to strikes, understaffing, etc.	 18% Extreme weather events	 13% Disruptions in transport due to strikes, understaffing, etc.
11% Strict booking and cancellation policies	11% Strict booking and cancellation policies	 14% Strict booking and cancellation policies	 13% Strict booking and cancellation policies	 7% Strict booking and cancellation policies
5% Local demonstrations and protests against tourism	6% Local demonstrations and protests against tourism	 8% Local demonstrations and protests against tourism	6% Local demonstrations and protests against tourism	3% Local demonstrations and protests against tourism

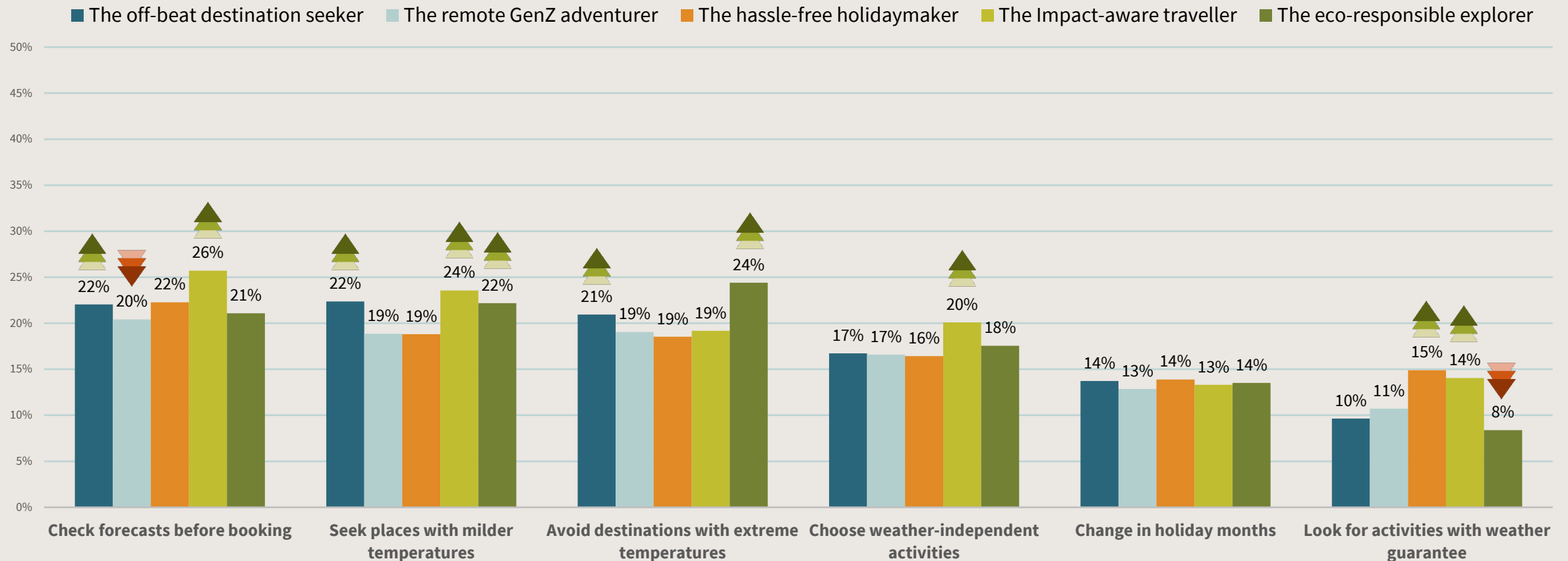
Desire for mild, predictable weather sees hassle-free holidaymakers breeze into shoulder season travel

Europeans' criteria in choosing a travel destination by segment

The off-beat destination seekers 	The remote GenZ adventurers 	The hassle-free holidaymakers 	The impact-aware travellers 	The eco-responsible explorers 
44% The destination is safe to visit	45% The destination is safe to visit	 47% The destination is safe to visit	 48% The destination is safe to visit	 37% The destination is safe to visit
34% Pleasant and stable weather	35% Pleasant and stable weather	 40% Pleasant and stable weather	37% Pleasant and stable weather	 29% Pleasant and stable weather
31% Bargains and attractive deals	30% Bargains and attractive deals	33% Bargains and attractive deals	 34% Bargains and attractive deals	27% Friendly and welcoming locals
27% Friendly and welcoming locals	29% Friendly and welcoming locals	30% Friendly and welcoming locals	 31% Infrastructure for travellers with diverse needs and disabilities	 20% Bargains and attractive deals
 19% Infrastructure for travellers with diverse needs and disabilities	23% Lower cost of living	 29% Infrastructure for travellers with diverse needs and disabilities	28% Friendly and welcoming locals	 18% Lower cost of living
23% Lower cost of living	22% Infrastructure for travellers with diverse needs and disabilities	 24% Direct transport routes	 26% Lower cost of living	 16% Direct transport routes
21% Direct transport routes	21% Direct transport routes	22% Lower cost of living	 25% Direct transport routes	16% Infrastructure for travellers with diverse needs and disabilities
4% Possibility to reach the destination by train	 6% Well-preserved natural and cultural heritage	6% Possibility to reach the destination by train	 8% Possibility to reach the destination by train	6% Possibility to reach the destination by train
4% Well-preserved natural and cultural resources	5% Possibility to reach the destination by train	3% Well-preserved natural and cultural heritage	 7% Well-preserved natural and cultural heritage	4% Well-preserved natural and cultural heritage

Making for milder temperature destinations and avoiding extreme weather reveals modified traveller mindset on climate change

Most popular changes in travel habits due to climate change by segment



04

**A synopsis of conscious
European traveller
segments**

**EUROPEAN
TRAVEL
COMMISSION**





The off-beat destination seeker

“Show me somewhere different — and let me feel like I’ve discovered it myself.”

Segment snapshot

Looking to escape the predictable.

Drawn to quieter places, emerging regions and alternatives to mass tourism, mainly within their country, or to neighbouring European destinations.

Conscious travel resonates with them not as an ideology, but as a pathway to authenticity, affordability and calmer experiences.

Key facts

- **High propensity** to travel
- Usually travelling in **the shoulder season**
- Preference for nearby **emerging** or **alternative** destinations –mainly domestic or in neighbouring countries
- High **sensitivity to economic concerns**
- Strong interest in **Nature & Outdoor** leisure trips
- Comfortable with **some planning effort** if it means fewer crowds
- Seeking **flexible, good-value** accommodation and activities
- Sustainability is incidental **rather than ideological**
- Environmental awareness is present but **not always incisive**

Needs and expectations

- **Avoiding crowds** and overtourism
- Experiencing destinations in a more **genuine way**
- Getting better **value for money**

Tensions and barriers

- Rising travel costs and economic uncertainty
- Limited visibility of lesser-known destinations
- Risk of reduced services outside peak season

How to reach them

- Lead with **discovery, calm** and **uniqueness**
- Position conscious travel as a **smarter way to avoid crowds**
- Use **storytelling, visuals** and **local voices** rather than formal messaging

Appealing products & services

- Emerging destinations and secondary regions
- Community-based tourism and local guides
- Local storytelling and visual inspiration
- Flexible, modular itineraries

Travel journey hooks

- **Inspiration:** Hidden gems, peer recommendations
- **Planning:** Experiences characterised by uniqueness and affordability
- **Booking:** Alternatives that offer flexibility and value
- **In-destination experience:** Immersion and serenity



The GenZ remote adventurer

“If I can travel anywhere, anytime, I want it to mean something for me.”

Segment snapshot

Younger persons blending travel, work and lifestyle.

Digitally fluent, socially aware and open to longer stays away from home.

Conscious travel matters to them, but it must fit into a flexible, experience-rich and affordable way of living.

Key facts

- Predominantly **younger age group**
- Combining **work** (or studies), **travel** and leisure
- Keen on **alternative -less popular or remote- travel destinations** and habits
- Preference for **low-season trips**, to coastal places
- Preference for **longer stays** in fewer places
- **High adaptability** in response to climate and cost pressures
- Looking for **experiences** over traditional tourism
- Choosing **digital platforms** for planning, booking and sharing

Needs and expectations

- Living and travelling in a way that aligns with **personal values and desires**
- Reducing impact while maintaining **freedom** and **flexibility**
- Connecting with **local communities**

Tensions and barriers

- Budget constraints and cost sensitivity
- Need for reliable digital and transport infrastructure
- Limited availability of long-stay offers aligned with responsible travel
- Need for varying activities to remain engaged during longer stays

How to reach them

- Speak **authentically** and peer-to-peer
- Highlight **flexibility, community** and **lifestyle** benefits
- Use **digital-first, social** and **creator-led** channels

Appealing products & services

- Long-stay and slow-travel accommodation
- Co-living and co-working spaces
- Rail passes and flexible transport options
- Off-peak seaside activities and experiences

Travel journey hooks

- **Inspiration:** Social platforms, creators, peers
- **Planning:** Long-stay combos, balancing cost, connectivity and values
- **Booking:** Flexible, platform-based solutions
- **In-destination experience:** Blending work or education, exploration and interaction with local community



The hassle-free holidaymaker

“I want a holiday that works — smoothly, comfortably, without surprises.”

Segment snapshot

Travelling to switch off from everyday routine.

Valuing reliability, comfort and good organisation.

Conscious travel is appealing when it enhances stability and reduces risk, not when it involves complicated decisions.

Key facts

- Among the **most likely to travel**
- Keen to take **multiple trips**, during **shoulder summer months**
- Preference for **Sun & Beach** holidays, in popular destinations
- Over one third plan to spend more than **€2,000 per trip**
- Strong tendency to **travel with the family**
- High preference for **pleasant** and **predictable weather**
- Seeking **reliability, comfort** and clear **organisation**
- Preference for **mainstream destinations** and **trusted brands**
- Frequently opting for **shoulder season travel** when comfort is guaranteed

Needs and expectations

- **Peace of mind** and seamless travel experiences
- Enjoying **stress-free** and well-managed holidays
- Choosing destinations with **stable weather** and robust infrastructure

Tensions and barriers

- Concerned by prospect of extreme weather events
- Low tolerance for disruption or uncertainty
- Overload of information or choice
- Perceived inconvenience of “sustainable” options

How to reach them

- Lead with **reassurance** and **simplicity**
- Frame sustainability as **resilience and quality**
- Use clear labels and **turnkey solutions**
- Highlight **comfort, safety** and **reliability**

Appealing products & services

- Comfortable, certified accommodation
- Low-impact transport bundles
- Climate-resilient destinations and shoulder-season offers
- Easy-to-reach experiences with weather guarantee

Travel journey hooks

- **Inspiration:** Familiar destinations, reliable weather
- **Planning:** Clarity and ease for all components (transport, accommodation, experiences)
- **Booking:** Simple, certified and ready-made packages from trusted providers
- **In-destination experience:** Comfort and smooth operations



The impact-aware traveller

“Every trip has an impact — I want mine to be positive.”

Segment snapshot

Sensitive to the environmental and social footprint left by their trips.

Valuing destinations that take climate and community seriously.

Actively adjusting trip timing and behaviour to minimise negative impact and contribute positively to destinations visited.

Key facts

- Fairly **young off-peak travellers**
- Preference for **lower-impact transport**, and **low season** trips
- Interest in **shorter** trips, of cultural or city-life focus
- Favour both **popular** and **remote** destinations
- Strong **concern about effects of climate change**
- Open to **adaptation** in destination choice and seasonality
- Engagement in **learning-orientated** or **community-based** activities
- Willing to **trade** some comfort or convenience, if needed

Needs and expectations

- **Minimising** negative environmental and social impact
- **Supporting** destinations adapting to climate change
- Opportunities for **meaningful engagement** with local culture
- Making **informed, ethical choices**

Tensions and barriers

- Difficulty in assessing real impact
- Balancing ethical concerns with enjoyment
- Limited visibility of destination resilience

How to reach them

- Provide **transparent data** and context
- **Empower** rather than persuade
- Strong focus on **local communities** and cultures
- Avoid both **oversimplification** and **reticence**

Appealing products & services

- Multimodal trips combining air and rail
- Climate-resilient destinations and experiences
- Educational or goal-driven, thematic travel
- Low-impact combos offering value for money, especially city breaks
- Engaging activities enhancing adaptation and resilience

Travel journey hooks

- **Inspiration:** Responsible travel content, thoughtful motivation and innovation
- **Planning:** Alternatives that promote positive impact and resilience
- **Booking:** Value-for-money options from reliable providers
- **In-destination experience:** Opportunities for learning and contribution to locale



The eco-responsible explorer

“I want to explore Europe— but I want to do it the right way.”

Segment snapshot

Committed nature lovers, highly motivated by environmental concerns. Sustainability is a core personal value, and is reflected across all travel stages and behaviours. Responsible travel is seen as an opportunity to protect what they love while still enjoying rich experiences.

Key facts & figures

- Most likely to choose **train or bus**
- Strong **emotional connection to nature** and interest in **outdoor** and **nature-based experiences**
- High preference in **remote, off-the-beaten-path destinations**
- Willingness to **spend more for value-aligned options**
- Marked propensity to **adapt travel habits in line with climate change**
- Active effort to **reduce environmental footprint**
- Acute **sensitivity to environmental degradation** and overcrowding
- **Careful choice** of accommodation and activities

Needs and expectations

- **Reducing environmental footprint**, especially transport-related
- Spending time in **natural environments** and **supporting sustainable destinations**
- Visible eco-friendly, **low impact practices** and **certifications**

Tensions and barriers

- Limited low-impact transport coverage
- Trade-offs between convenience and responsibility
- Difficulty quantifying and comparing sustainability performance

How to reach them

- Highlight **nature-based destinations** and activities
- Use **nature-led storytelling** and imagery
- Communicate **concrete, credible** actions
- Promote **regeneration** and **stewardship**
- Be **transparent, specific** and **empathetic**

Appealing products & services

- Nature-focused, active holiday experiences
- Eco-certified accommodation and activities
- Rail passes and slow-travel itineraries
- Emerging destinations with strong natural resources

Travel journey hooks

- **Inspiration:** Landscapes, nature, climate narratives
- **Planning:** Transport and accommodation options of low impact
- **Booking:** Tailored, value-aligned options, on a peer-to-peer basis
- **In-destination experience:** Activities that promote deep engagement with destination and its nature



Key Recommendations

Reframing and reshaping destinations

- As more travellers steer clear of busy tourism hot spots, they increasingly encounter **welcoming local communities** and **less crowded towns**. To attract European visitors to such locations, destinations can **develop local experiences** that reflect the character, heritage, and culture of the destination, while avoiding mass-produced or artificial attractions that distort or misrepresent its local identity. This way, they can **enable visitors to discover hidden gems** and engage with local culture.
- Even among conscious travellers, concerns about the environmental footprint remain subordinate to other factors such as pricing and safety. Destinations should thus continue to lead with **high-impact decision drivers** —attractive prices, welcoming locals and less crowded settings—, in line with ETC’s “Unlock an Unexpected Upgrade” campaign narrative, while progressively **integrating sustainability considerations and eco-conscious experiences** into their communication.
- Alongside value-led messaging, conscious travel decisions are also shaped by **risk avoidance and comfort considerations**, particularly in relation to extreme weather, suggesting that destinations should actively **position shoulder-season travel as a more comfortable alternative** to peak-season conditions.
- Stable and pleasant weather is a key destination choice factor for 35% of conscious travellers. As the effects of climate change intensify, **remote destinations offering milder temperatures gain a strategic advantage**, creating opportunities to reposition themselves within the European travel market as viable and climate-resilient alternatives. To further enhance their offering, such destinations can develop **tailored tourist experiences** (e.g. thematic trails) that are attractive to visitors and easy to enjoy even during off-peak periods.
- For travellers who appreciate experiences linked to nature and the outdoors, destinations can develop **cross-sector initiatives that connect tourism with other sectors** (e.g. agriculture). Such initiatives not only highlight the destination’s unique selling points, but also create further value for the local community and economy, while enhancing the visitor experience and fostering long-term loyalty.

Turning longer stays, shoulder seasons and car-free travel into business value through off-peak, low-impact offers






- Half of conscious travellers favour trips of seven nights or more, creating opportunities for local businesses to **develop deep-dive experiences for visitors who enjoy lengthier stays**, such as multi-day wellness programmes, culture and heritage journeys and cuisine and crafts workshops.
- Shoulder-season travel is the preferred choice for 41% of conscious travellers, encouraging tourism businesses to **extend their season beyond peak months**. This involves adapting operations and staffing models, as well as coming up with products more in line with weather conditions in spring and autumn.
- As with all types of European holidaymakers, economic concerns loom large in the minds of conscious travellers, suggesting that marketing for shoulder- and low-season packages should clearly emphasise **value for money**, attractive deals, and **pricing advantages** compared to peak-season travel and peak-season prices.
- 45% of eco-responsible explorers and 39% of impact-aware travellers plan on using public transport, creating opportunities for accommodation providers near train stations to **develop and promote car-free holidays by bundling accommodation with nature & outdoors and culture & heritage experiences that are easily accessible by public transport**. Additionally, to foster trust to these traveller profiles, tourism businesses should develop clear sustainability strategies and long-term programmes, with specific objectives and **measurable actions that generate positive impacts** on the environment, the local economy, and the community.
- As sustainability and responsibility are becoming more important in travellers' decision-making journey, tourism businesses should establish **clear policies, criteria and standards on sustainable practices**, requiring their suppliers to also adopt. At the same time, businesses can also **raise awareness and provide training to their staff** on sustainability issues, enabling them to effectively implement the company's sustainability policies and to communicate responsible practices to visitors. In this way, a sustainable supply chain can be created, generating multiplier benefits for businesses, local communities, and the environment.

Connecting with conscious travellers

- Destinations can attract **off-the-beaten-track destination seekers** by actively promoting second-tier cities and lesser-known regions, with a particular focus on European travellers aged 45 and over. Such offerings should highlight crowd-free cultural, nature, and outdoor experiences, especially during the shoulder months.
- To engage with **remote Gen Z adventurers**, destinations can develop long-stay coastal offers in less crowded seaside areas, particularly during the low season. Appropriate products and services include affordable accommodation for extended stays and community-based activities that facilitate interaction with local communities.
- **Hassle-free holidaymakers** can embrace conscious travel options if these enhance stability and comfort and reduce risk. Low-impact transport and accommodation bundles and shoulder-season offers at climate-resilient, coastal destinations can attract this segment.
- City-break destinations can appeal to **impact-aware travellers** by promoting low-season bundles that include public transport and accommodation with lower environmental impact, while emphasising responsible actions, affordable costs and comfortable weather.
- **Eco-responsible explorers** can be attracted through longer, immersive nature-based products in remote, non-crowded destinations, such as multi-day hiking or slow-travel outdoor experiences lasting over seven nights.

Cross-segment activation matrix

Core themes and products by segment

	The off-beat destination seeker	The remote GenZ adventurer	The hassle-free holidaymaker	The impact-aware traveller	The eco-responsible explorer
	 4,677 31%	 4,740 31%	 2,881 19%	 1,638 11%	 1,361 9%
Secondary destinations	○	●		○	●
Shoulder & low season trips	○	●	○	○	●
Rail & low-impact travel				○	●
Long-stay & slow-tourism		●	○		
Climate-resilient offers			○	○	
Impact transparency				○	●

The dots in this matrix indicate which themes, products and services best resonate with each conscious European traveller segment.

A scenic landscape of a mountain valley. In the foreground, a calm lake reflects the surrounding environment. The middle ground is filled with dense evergreen trees, many of which are covered in a light layer of snow. In the background, rugged, rocky mountains rise, their peaks also dusted with snow. The sky is a pale, overcast grey. The overall mood is serene and quiet.

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Understanding European Conscious Traveller Segments

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MINDHAUS
Tourism Marketing Strategy

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

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