

P R O S U M E R 2 0 2 4



TRAVEL & TOURISM

CAN WE STILL TRAVEL A WORLD ON THE VERGE OF COLLAPSE?

HAVAS x BETC

32 MARKETS

African Region • Australia • Austria • Belgium •
Brazil • China • Canada • Chile • Finland • France •
Germany • Greece • India • Ireland • Italy • Ivory
Coast • Japan • Korea • Kenya • Malaysia • Mexico •
Nigeria • Philippines • Saudi Arabia • Singapore •
Spain • Thailand • United States • United Kingdom •
United Arab Emirates • Ukraine • Vietnam

14 000 PEOPLE



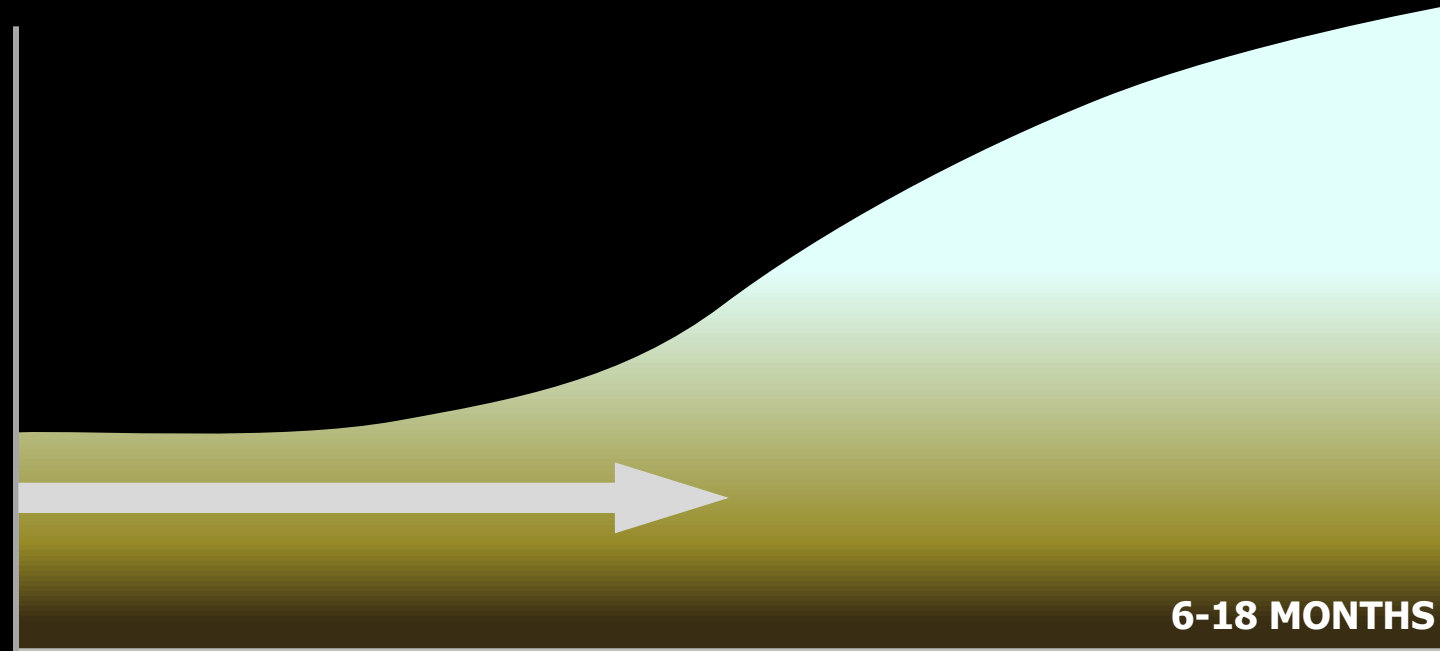
WHO ARE PROSUMERS?

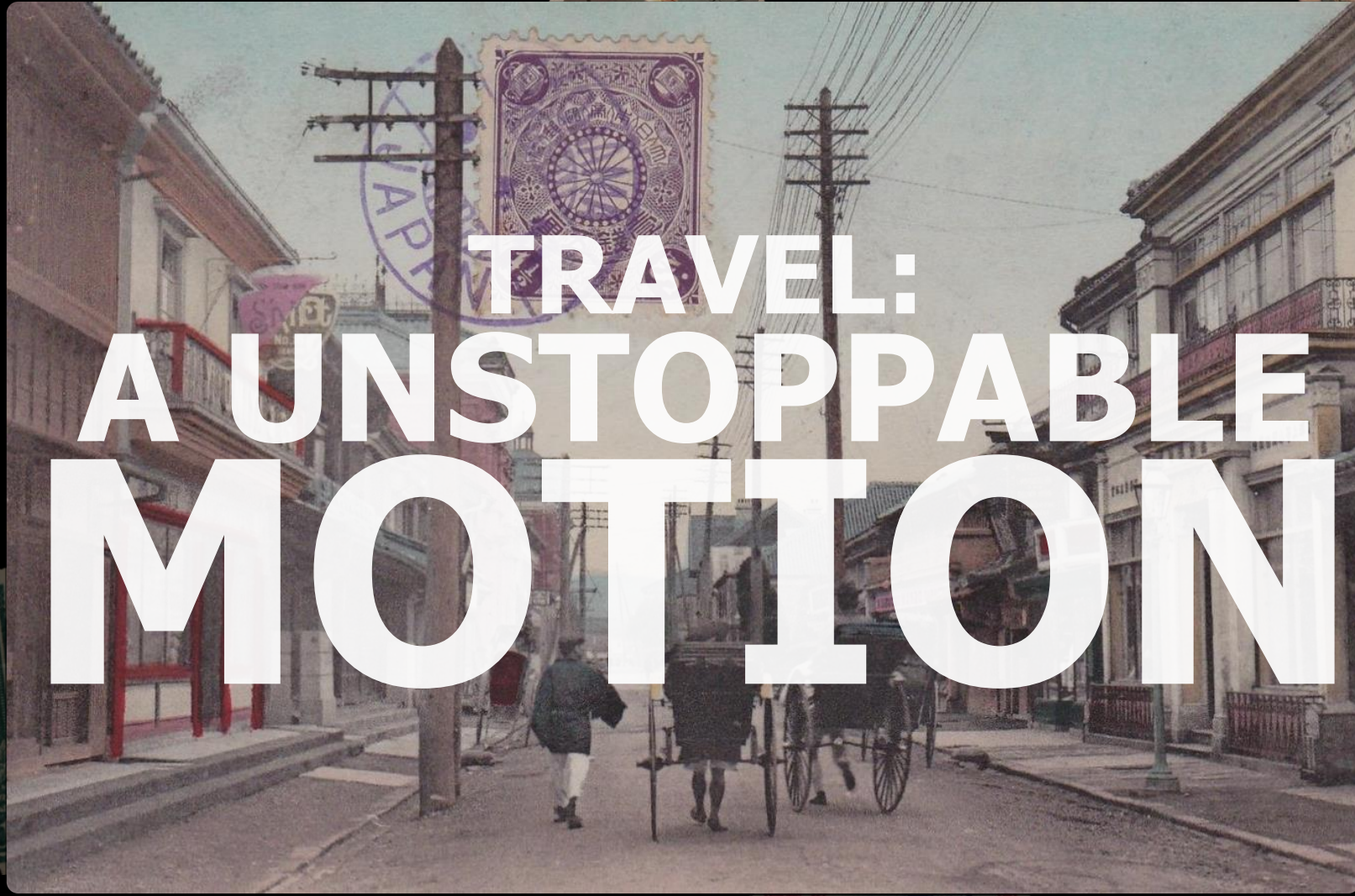
LAGGARDS

MAINSTREAM

**20% - 30%
PROSUMERS**

INSTIGATORS





TRAVEL: A UNSTOPPABLE MOTION

EN ROUTE TOWARDS MASS TOURISM

1780



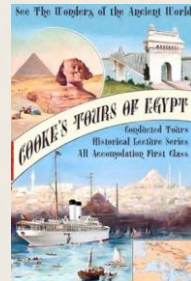
Creation of the concept of "Tourism" in England

1800



Travel takes on a medical dimension with curative destinations.

1869



Thomas Cook invents the "All Inclusive" trip and new means of transportation such as trains develop.

1960



Western society democratizes the first paid vacations and leisure, thereby reducing working hours.

1970



The first globetrotters travel around and set out to explore the world.

1990



The rise of low-cost airlines and travel booking platforms.

TRAVEL DEMOCRATIZATION MADE IT A RIGHT FOR ALL

66%

PROSUMER

58%

MAINSTREAM

It's important for me to travel: For my own pleasure

2020 – COVID-19 CRISIS



**TOURISM COMES
TO A HALT**

GIVING BIRTH TO REVENGE TRAVELING



PROSUMER

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

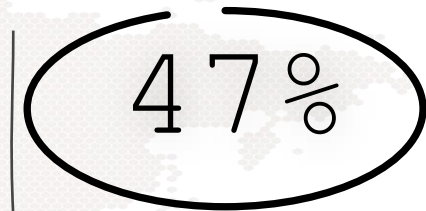


MAINSTREAM



PROSUMER

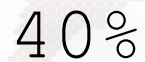
During COVID 19 I discovered that I could travel less far and I intend to keep this new habit.



MAINSTREAM



GENZ



BOOMERS



GENZ



BOOMERS



BREAKING ALL THE RECORDS



International Tourism to Reach Pre-Pandemic Levels in 2024

European tourism expected to hit record numbers this year

Record number of overseas tourists visit Scotland in 2023

Antalya beats new record in tourism

Japan Records 3 Million Tourists for Second Straight Month

Japan is set to post a record year in tourist arrivals. The fall in the yen has made Japan a bargain country for tourists. Tourist inflows in the last two months are record breaking.

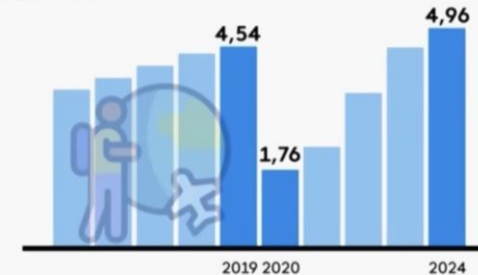
“Revenge Travel” Gives Way to Reprioritization of Travel

LE REGARD DU JOUR

Transport aérien : l'échec du « flygskam »

L'aviation a d'ores et déjà effacé son creux de 2019 (Covid), avec une demande nettement repartie en avant. Les appels à moins voyager pour des raisons climatiques n'ont pas dépassé des cercles très limités.

Évolution du trafic aérien
En milliards de passagers
Source : IATA



REVENGE TRAVELING

WHATEVER THE COSTS



60%

PROSUMER

40%

MAINSTREAM

I am willing to sacrifice many things
to continue travelling



59/42

59/44

61/39

63/53

64/44

68/45

73/66

58/31

45%

GEN Z

32%

BOOMERS

REVENGE TRAVELING



TRAVELLING IS A VITAL NEED



78%

PROSUMER

56%

MAINSTREAM

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

65%

GENZ

45%

BOOMERS

REVENGE TRAVELING



AGENDA

**NEVER NOT
TRAVELLING?**



PART 1

**GUILTY,
NOT ME**



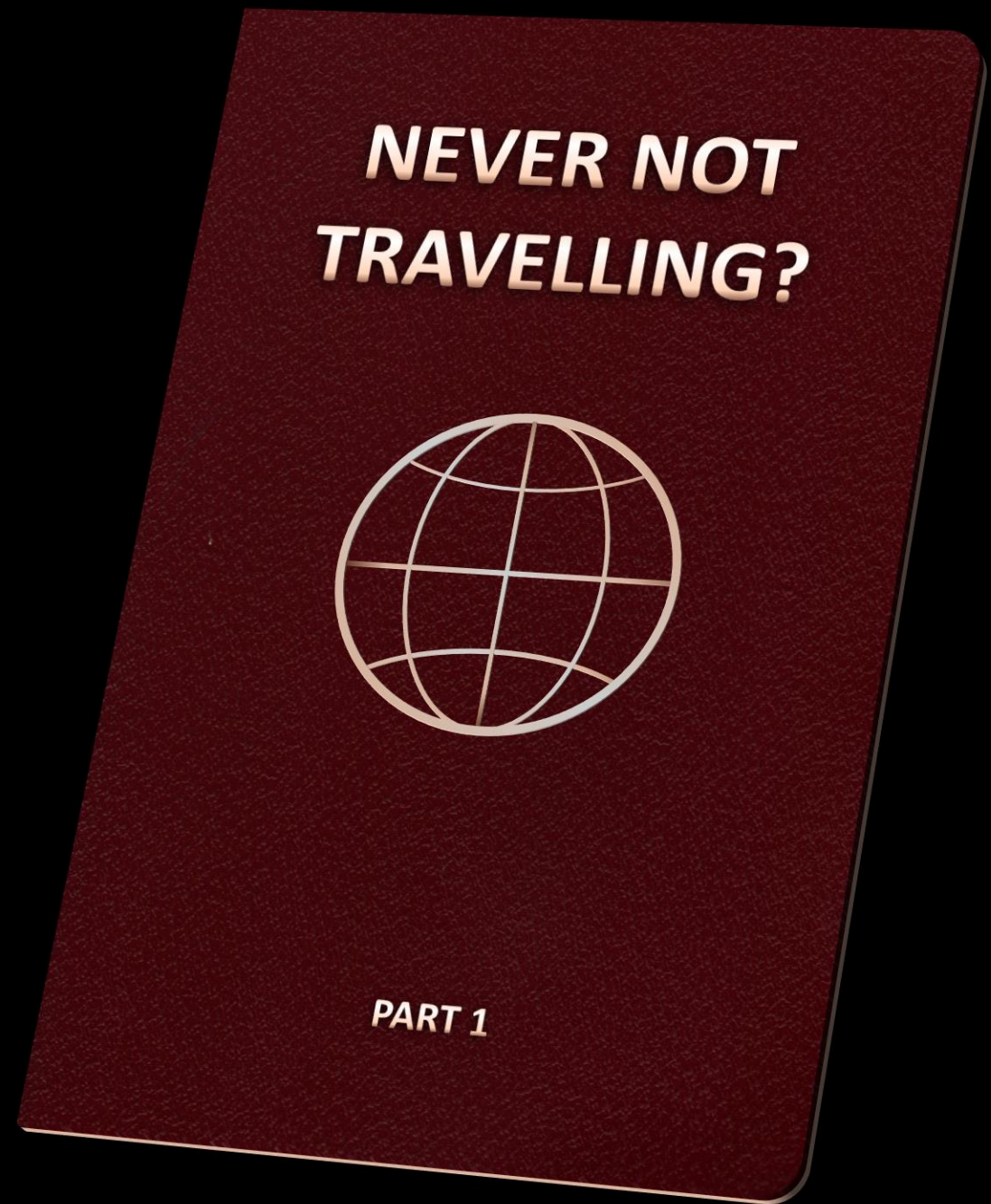
PART 2

**NEW
ITINERARIES
AHEAD**



PART 3

**NEVER
NOT
TRAVELL
ING?**



WHY DO WE TRAVEL?

EXPLORATION

FEELING

**SELF
EXPRESSION**

WHY DO WE TRAVEL?

EXPLORATION

FEELING

**SELF
EXPRESSION**

THE PERMANENT QUEST FOR THE UNKNOWN

DISCOVER THE WORLD



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



SEDVENTURE

DISCOVER YOURSELF



It's important for me to travel:
For personal development



ESCAPE THE MUNDANE

IT'S IMPORTANT FOR ME TO TRAVEL:

To discover new places



Because it opens us to other cultures



To change air



WHY DO WE TRAVEL?

EXPLORATION

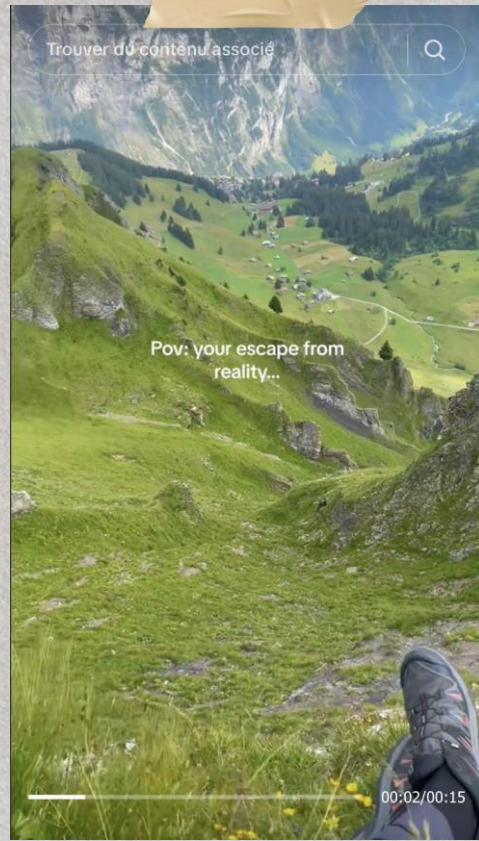
FEELING

SELF
EXPRESSION

TRAVEL TO RECHARGE



@thesunseeker2596



@gradzuuu

77%

PROSUMER

67%

MAINSTREAM

It's important for me to travel:
To relax and unwind



66/57 75/71 76/64 77/59 77/67 83/71 83/79



83/82

69%

GENZ

61%

BOOMERS

WHY DO WE TRAVEL?

EXPLORATION

FEELING

**SELF
EXPRESSION**

I TRAVEL THEREFORE I AM



@rileeismith



@james.middleton

74%

PROSUMER

63%

MAINSTREAM

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



72/69 73/58 74/58 77/58 78/66 82/80 92/66



81/73

66%

GENZ

53%

BOOMERS

TRAVEL IRL TO BOOST URL LIFE

74%

PROSUMER

I love to share my travel experiences on social media.

59%

GEN Z

45%

MAINSTREAM

25%

BOOMERS



@weadoretravel



@peterliappas

THE COLLATERAL DAMAGES OF SOCIAL

Paul Lenda
@PaulLenda · Suivre

This is an entirely unsurprising image of #Instagram hikers waiting in line for 'the shot' at Roy's Peak in Wanaka, New Zealand. Is #socialmedia ruining magic moments humans used to have by faking a "natural looking" and "care free" pose that was nothing of the sort?



Trouver du contenu associé

This is how it looks at 9:00 am ☀️ and it's getting worse...

00:13/00:15

33%

PROSUMER

39%

MAINSTREAM

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



42%
GEN Z

34%
BOOMERS

HELL IS OTHER PEOPLE

80%

PROSUMER

68%

MAINSTREAM

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



67/57 72/64 78/73 79/63 82/62 90/79 93/86



93/81



37%

PROSUMER

37%

MAINSTREAM

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

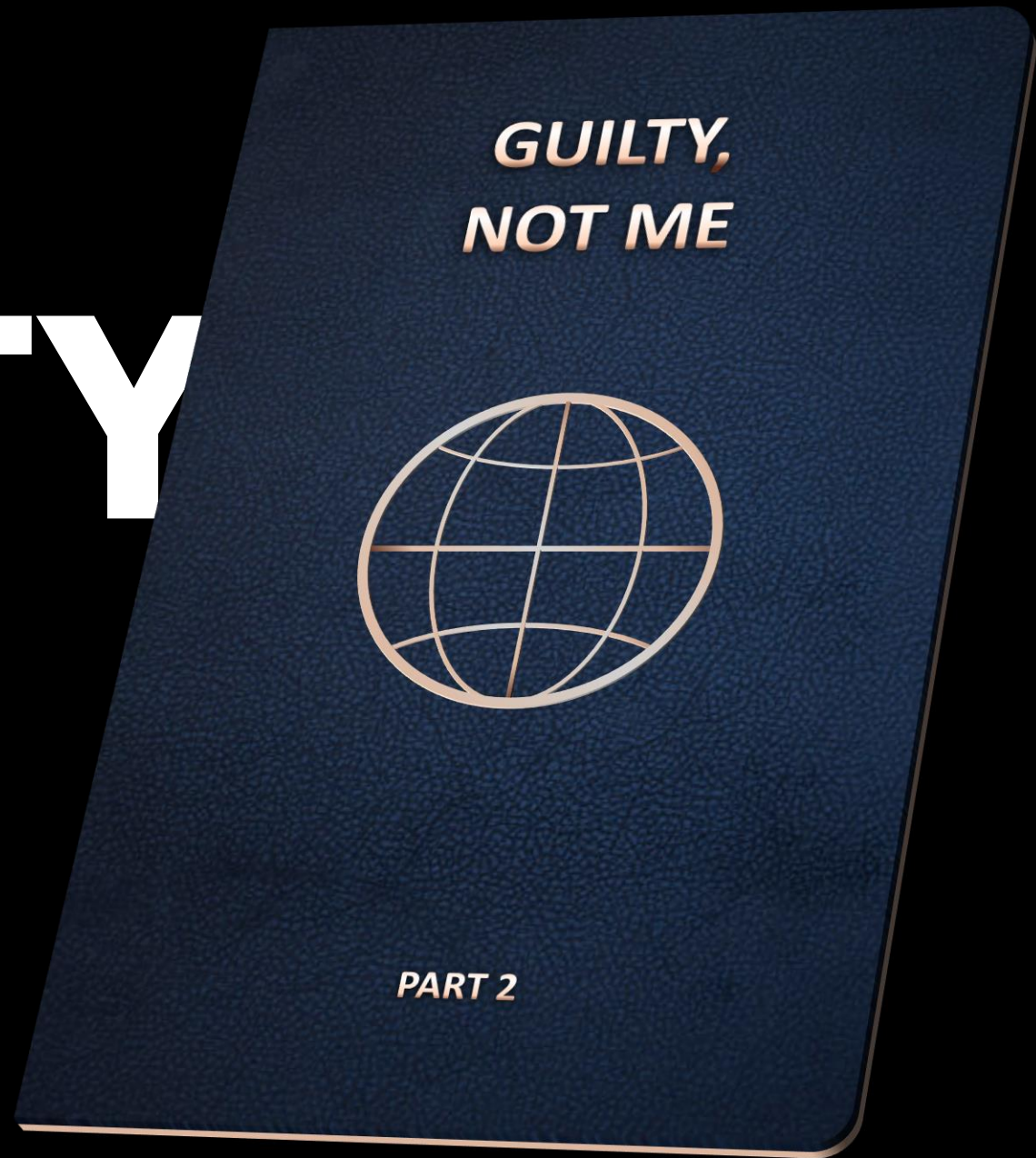


24/25 32/26 32/47 42/43 46/42 54/40 56/66



45/47

**GUILTY
, NOT
ME**



*GUILTY,
NOT ME*



PART 2

IS TRAVELLING OUR BIGGEST SIN?



Tuvalu minister stands in sea to film COP26 speech to show climate change

By Reuters

November 9, 2021 11:25 AM GMT+1 · Updated 3 years ago



32%

PROSUMER

30%

MAINSTREAM

The environmental impact of each trip makes me feel guilty.

35%

GEN Z

28%

BOOMERS

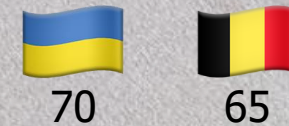
CAN WE KEEP FLYING?

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

FLYING ENTHUSIASTS



FLYGSKAM INFLUENCED



WHO'S TO BLAME? AIRLINES!

43%

PROSUMER

32%

MAINSTREAM

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



60/46

55%

PROSUMER

50%

MAINSTREAM

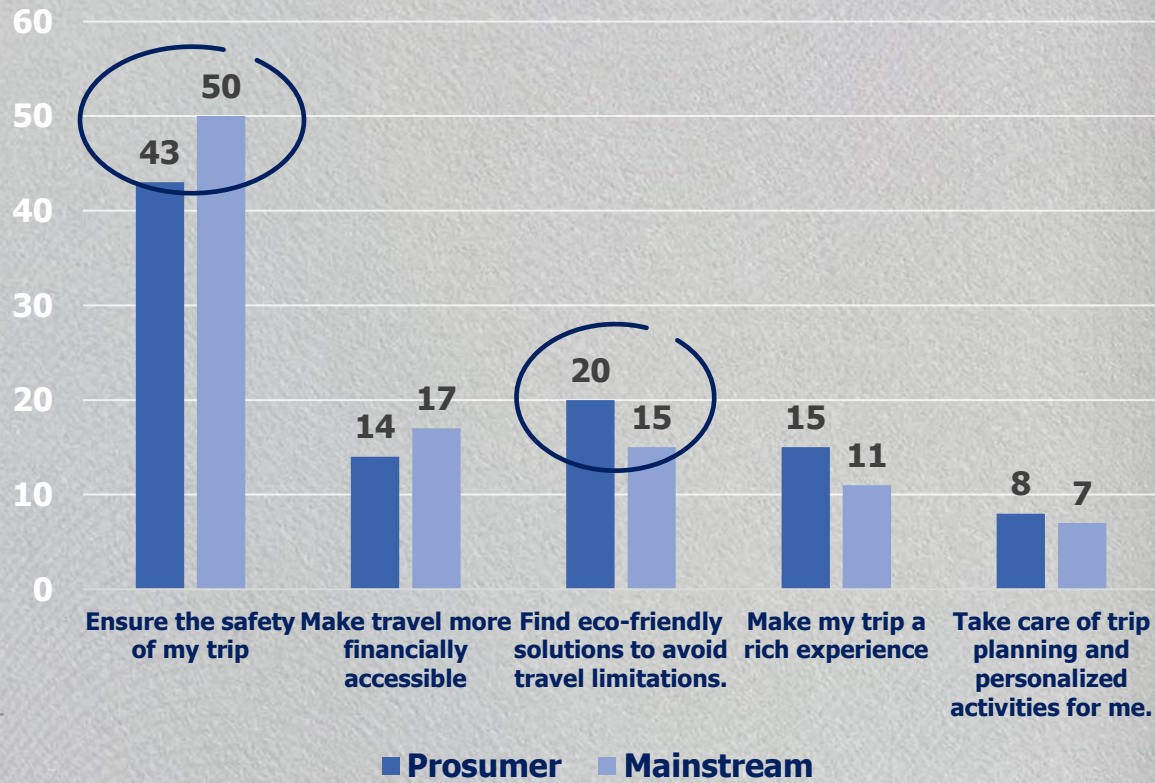
I don't think airlines do enough to compensate the pollution they create.



53/52

AIRLINES: ADAPT OR PERISH

I THINK THE PRIMARY ROLE OF AN AIRLINE COMPANY IS TO:



52%

PROSUMER

38%

MAINSTREAM

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



81/58

42%

GEN Z

31%

BOOMERS

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

PRICE VS DESIRE

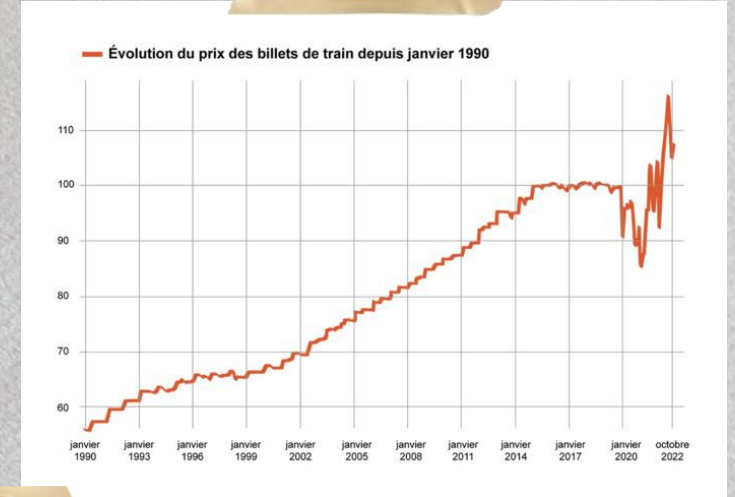
63%

PROSUMER

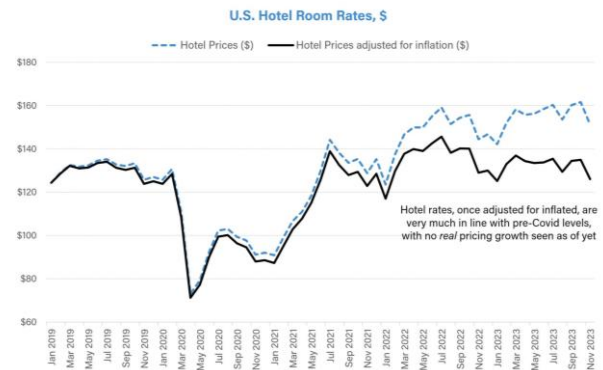
73%

MAINSTREAM

I find that traveling the world has become too expensive.



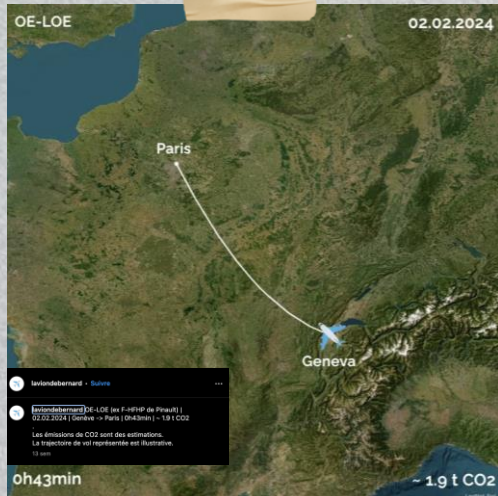
Tourist Attractions and Experiences See Big Price Jumps



AN UNFAIR SHARE

A Teenager Tracked Elon Musk's Jet on Twitter. Then Came the Direct Message.

Jack Sweeney, a freshman at the University of Central Florida, said that Mr. Musk raised privacy and security concerns about his popular Twitter account, @ElonJet.



48%

PROSUMER

47%

MAINSTREAM

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

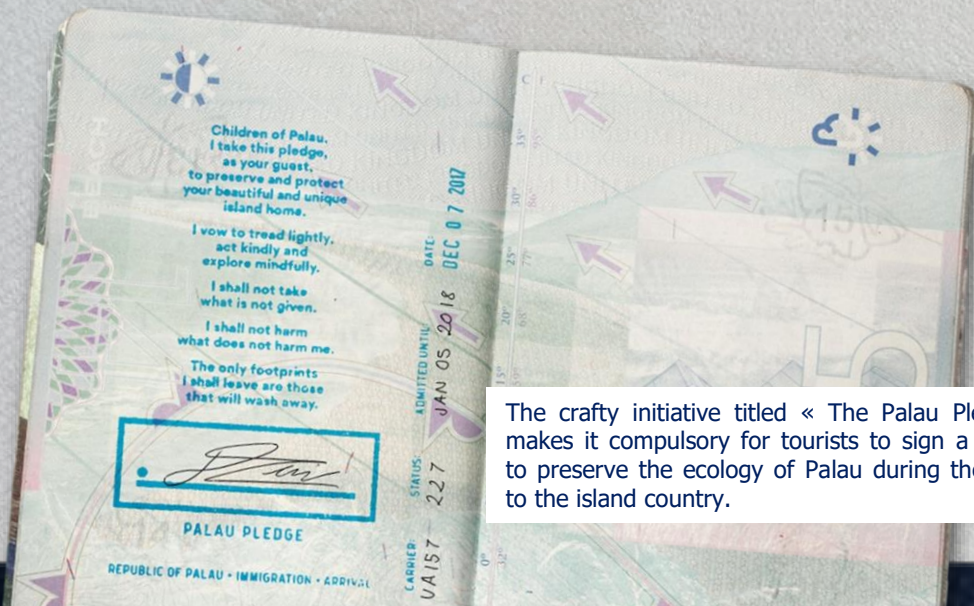


Amsterdam to Cruises: 'Party Time Is Over'

The Dutch capital will stop cruise ships from docking in the city center as part of a campaign to curb pollution and reduce the flow of tourists.

Venice entry fee launches: Day-trippers now have to pay to visit the Italian city at peak times

HERE COMES THE LAW...



The crafty initiative titled « The Palau Pledge » makes it compulsory for tourists to sign a pledge to preserve the ecology of Palau during their visit to the island country.



PROSUMER



MAINSTREAM

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



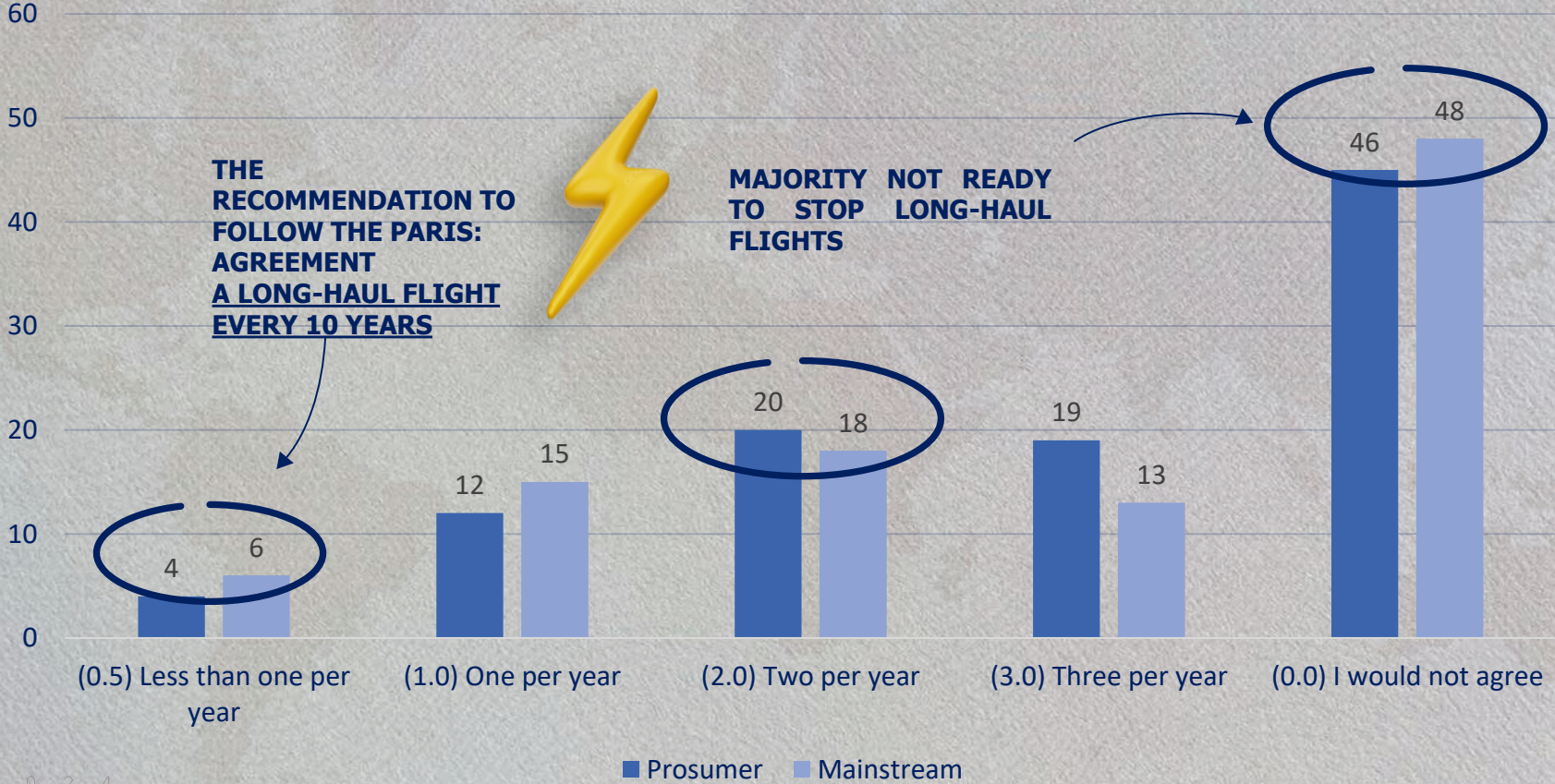
GEN Z



BOOMERS

BUT DO WE AGREE ON THE LIMITS?

I WOULD AGREE IF MY GOVERNMENT WERE TO LIMIT THE NUMBER OF LONG-HAUL FLIGHTS ONE COULD TAKE TO:



WHEN WILL WE BECOME RADICAL?

Spain's plan to ban domestic flights where you can take a train in under two and half hours

Why we should ration the distance each person can fly every year

In the 1940s, during the Emergency, everyone in Ireland had a ration card. Today, we are in a full-blown Climate Emergency. Action is needed that is both drastic and fair. Once again, rationing could be the key

Will fewer flights be available in future? Stark new report lays out reality of decarbonising travel

30%

PROSUMER

28%

MAINSTREAM

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



18/19

18/24

27/28

34/29

40/32

40/49

41/43



45/35

32%

GEN Z

25%

BOOMERS

**NEW
ITINERARIES
AHEAD**



NEW RESPONSIBILITIES FOR BRANDS

REENCHANT TRAVEL

TRAVEL LIKE YOU VOTE

EXPLORE NEW WAYS OF TRAVELING

HOW TO BRING BACK THE MAGIC OF TRAVEL?

Go Inside Airbnb's 'X-Men '97' Mansion: Wolverine's Bedroom, Beast's Lab, Danger Room Training and More

By Jordan Moreau



AIRBNB



PROSUMER 2024

26%

PROSUMER

27%

MAINSTREAM

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



15/35

20/31

22/16

24/25

26/20

28/28

46/52



54/47

31%

GENZ

22%

BOOMERS

GOING OFF THE BEATEN PATH

8%

PROSUMER

The most important thing for me when I travel is to see the most famous places



2/5 4/7 7/9 8/8 8/8 9/9 13/15



15/13

9%

GENZ

9%

MAINSTREAM

8%

BOOMERS



37%

PROSUMER

The most important thing for me when I travel is to discover the most beautiful places



29/29 38/29 38/35 39/41 41/41 43/44 44/39



41/40

40%

GENZ

37%

MAINSTREAM

33%

BOOMERS

THE UNEXPECTED IS AROUND THE CORNER

64%

PROSUMER

43%

MAINSTREAM

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



39/21 58/34 58/40 59/27 80/66 81/46 85/77



84/62

57%

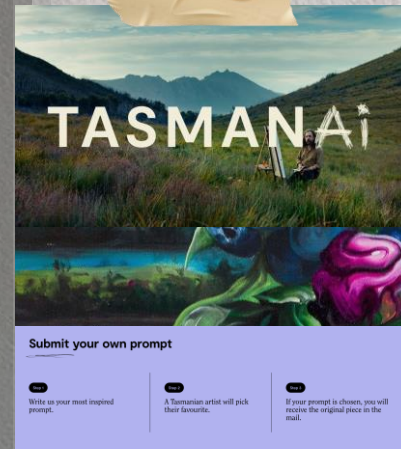
GENZ

28%

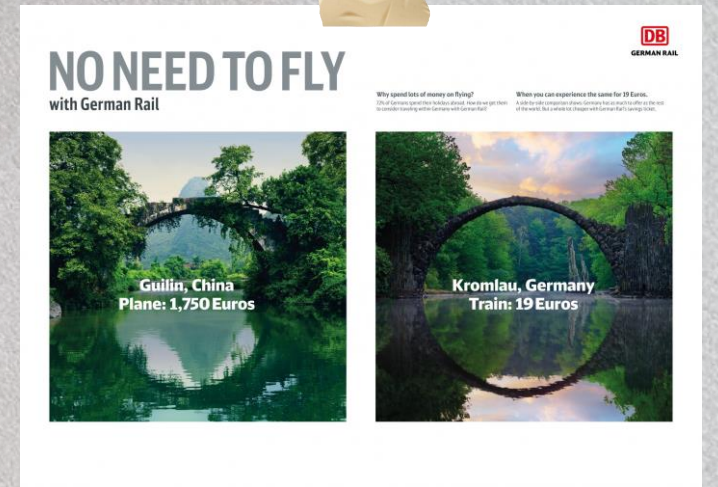
BOOMERS



GOOGLE SHEEP VIEW - FAROE ISLANDS



TASMANAI TOURISM



GERMAN RAIL

NEW RESPONSIBILITIES FOR BRANDS

REENCHANT TRAVEL

TRAVEL LIKE YOU VOTE

EXPLORE NEW WAYS OF TRAVELING

LIVE LIKE A LOCAL, GIVE BACK TO THE LOCALS

71%

PROSUMER

55%

MAINSTREAM

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



44/31 67/67 70/47 76/48 82/60 90/80 93/78



89/67

59%

GEN Z

50%

BOOMERS

83%

PROSUMER

69%

MAINSTREAM

I think tourism brands should support and empower local communities

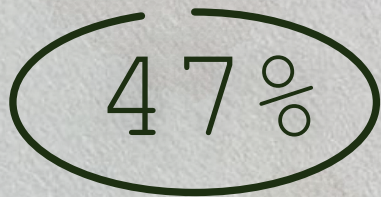


73/60 82/65 84/67 88/62 88/76 92/85 93/85



93/70

NEW PARAMETERS UNLOCKED



PROSUMER



MAINSTREAM

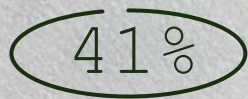
I boycott brands that promote destinations that are not environmentally friendly or socially conscious.



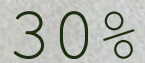
34/25 34/26 35/28 43/37 45/42 71/58 82/62



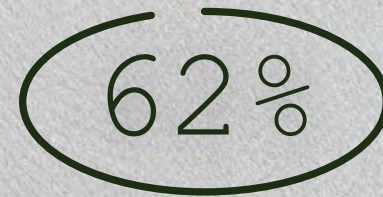
75/60



GENZ



BOOMERS



PROSUMER



MAINSTREAM

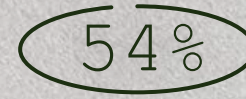
I boycott brands that promote destinations which do not respect human rights



51/45 53/35 53/48 63/57 65/39 81/66 86/69



82/62



GENZ



BOOMERS

NEW RESPONSIBILITIES FOR BRANDS

REENCHANT TRAVEL

TRAVEL LIKE YOU VOTE

EXPLORE NEW WAYS OF TRAVELING

WE ALL NEED GUIDANCE

74%

PROSUMER

58%

MAINSTREAM

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



68/47 69/48 73/63 76/59 80/74 88/66 92/78



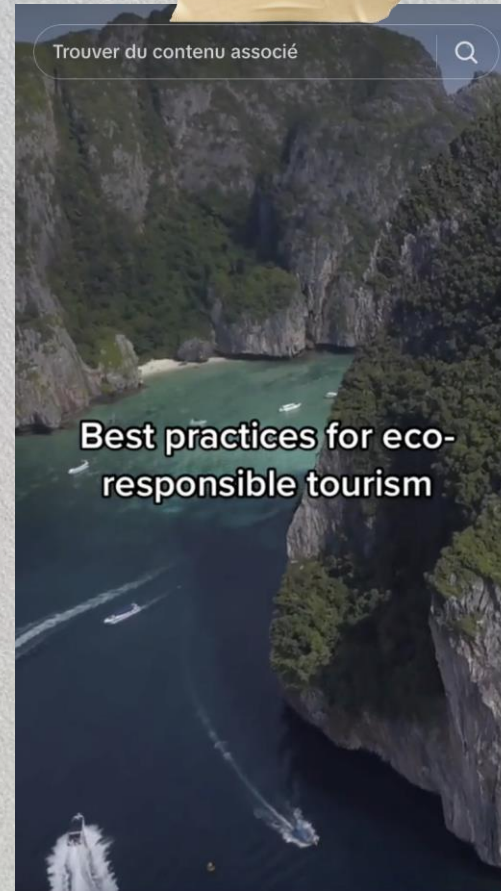
91/78

65%

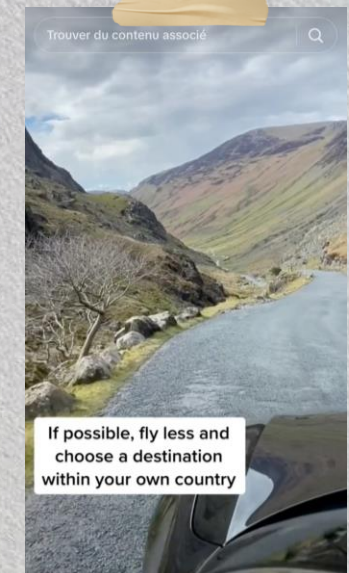
GEN Z

51%

BOOMERS



@baggagegirls



@emmareed_writes

TRAVEL LESS, TRAVEL BETTER

GLAMPING



ECOTOURISM

Exploring Dorado Beach, Puerto Rico's Paradise For Luxury Ecotourism



63%

PROSUMER

41%

MAINSTREAM

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



55/34 59/38 60/33 63/55 73/49 83/53 83/75



88/65

53%

GEN Z

31%

BOOMERS

TRAVEL LESS, TRAVEL LONGER

47%

PROSUMER

37%

MAINSTREAM

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



41/33



44/30



46/38



51/50



52/39



52/47



65/61



70/57

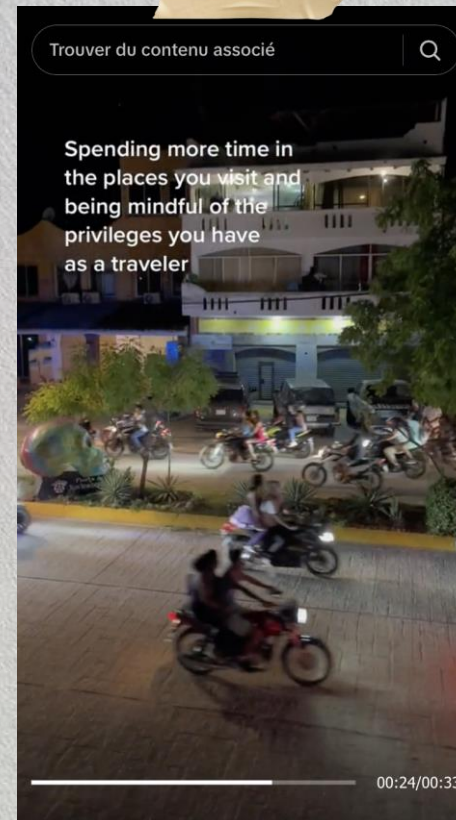
46%

GEN Z

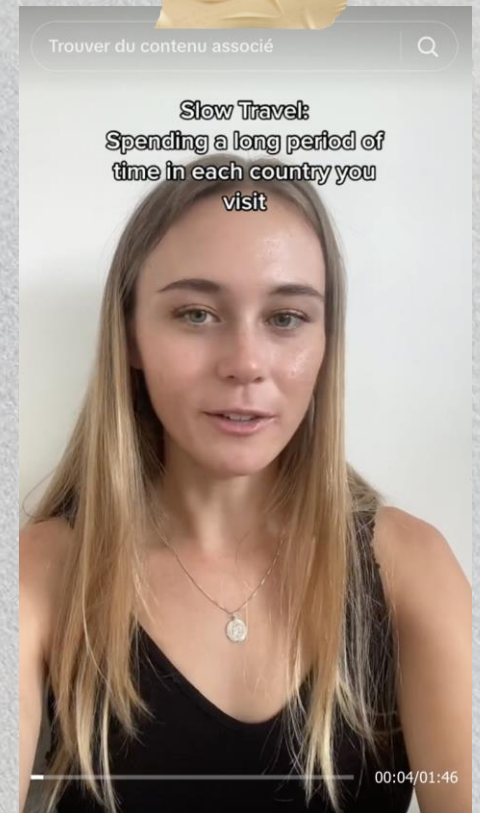
30%

BOOMERS

SLOW TRAVEL




@ichbin_aska



@elizacroft_

FINDING NEW SOLUTIONS

 **BON PLAN** | En juillet et en août, pour 49 euros par mois, les jeunes âgés de 16 à 27 ans pourront voyager en illimité en Intercités, TER et trains de nuit grâce au Pass Rail, annonce Emmanuel Macron. (AFP)



51%

PROSUMER

53%

MAINSTREAM

I'm fed up that the most sustainable ways to travel (like the train for instance) are often more expensive options



DIGITAL JOURNEYS ARE REAL JOURNEYS

60%

PROSUMER

47%

MAINSTREAM

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



48/32 60/36 64/43 67/50 68/51 70/63 73/68



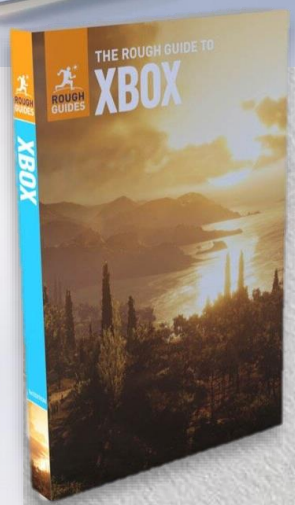
82/64

51%

GEN Z

42%

BOOMERS



IN A NUTSHELL

- Covid-19 didn't make us question our love for travel; it fueled revenge traveling
- Travel is a vital need, and we're willing to make many sacrifices for it
- Globalization brought new challenges: overtourism and climate change, highlighting the need to change our behaviors
- When it comes to blame, airlines and the wealthy people are often the target
- Since nobody wants to feel guilty or change their habits, only legislation can make a difference
- This creates new challenges and responsibility for brand:
 - by encouraging good behaviors and helping tourists to plan more ecologically and socially responsible destinations
 - by reenchanting travel and creating immersive experiences

P R O S U M E R 2 0 2 4



TRAVEL & TOURISM

**CAN WE STILL TRAVEL A WORLD ON THE VERGE OF
COLLAPSE?**

HAVAS x BETC