

Sustainable travel among international travellers

June 2026

VisitBritain/VisitEngland Research



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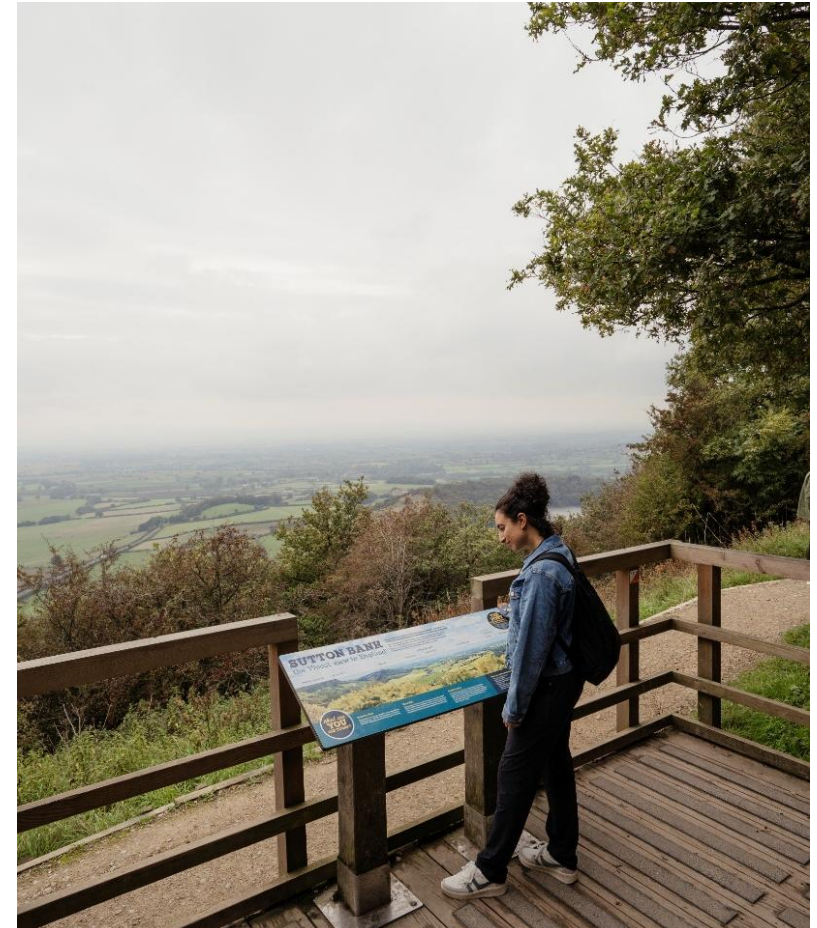
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Background and methodology

This report provides insights into attitudes towards sustainable tourism among prospective visitors to England, Scotland or both, examining demand for sustainable travel experiences and the key motivators and barriers shaping travel decisions.

VisitBritain/VisitEngland have produced this ad hoc report using the findings from MMGY Global's annual survey of overseas travellers. Key questions were extracted from MMGY's data that examined attitudes towards sustainability when travelling, including:

- **Key influences** when prioritising which international destination to visit
- **Impact** of a travel service provider's **focus on sustainability** and environmental considerations **on travel decision-making**
- **Familiarity** with ways to travel more sustainably
- **Perceptions of and participation** in "Responsible Traveller" behaviours
- **Willingness to pay a higher rate** or ticket price to patronise travel service providers (i.e. hotels, airlines), who demonstrate environmental responsibility and/or support the local community



A woman reading an information board looking over the countryside in Sutton Bank, North Yorkshire
©VisitBritain/NYMNPA/Ula Blocksage

Key markets

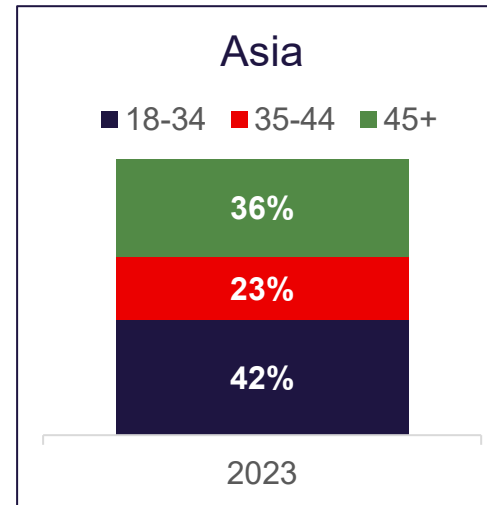
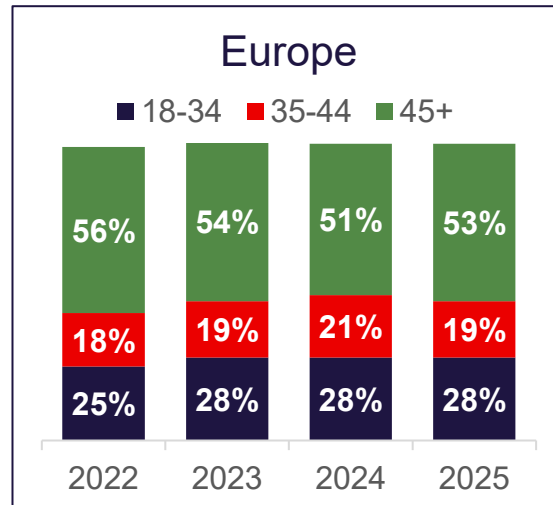
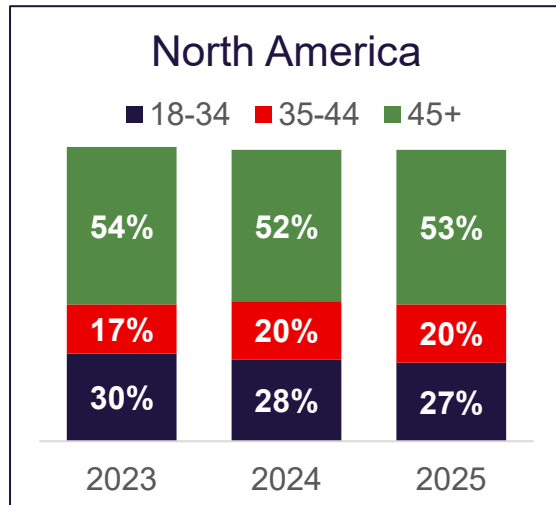
The study covered eleven key markets across three global regions interested in visiting England and Scotland within the next three years.

Trend analysis spans 2022–2025 where data was available for comparison, with data for China, Japan and South Korea available for 2023 only.

- **North America (2023-2025): USA, Canada**
- **Europe (2022-2025): Germany, France, Spain, Italy, UK** (UK data not shown in order to focus on inbound markets)
- **Asia (2023 only): India, China, Japan and South Korea.**

Respondents were screened on their interest in visiting England and Scotland, resulting in some differences between regions in terms of the age ranges of prospective visitors.

Asian travellers were much more likely to be aged 18-34 years, whereas more than half of prospective visitors from Europe and North America were aged 45 and over; this fell to just over a third of Asian travellers.



Note:

International surveys involve a cultural factor in the way respondents express their opinion. This typically applies to attitudinal questions and there are various types of response styles:

- Acquiescence response styles where there is a tendency to agree with statements, regardless of what is asked e.g. in **China, India**.
- Positivity / extreme response styles where there is a tendency to use the extremes of a rating scale (especially positive responses e.g. in **China, India**).
- Middle response styles where there is a tendency to use the mid-responses of a rating scale.

Four key insights

1) Sustainability remains a mainstream factor in travel choice

- Sustainability impacts the decision of around half of international travellers when choosing *travel service providers*, rising to around two-thirds when selecting a *destination*, showing it plays a meaningful role across the customer journey.

2) Growth in sustainability-led choice is driven by North America and younger travellers

- The influence of sustainability on travel choice has increased slightly in North America, while remaining broadly stable across Europe.
- Younger travellers (especially under 45s) and women are consistently more sustainability-led in decision-making, suggesting future demand for sustainable travel has the potential to grow as younger cohorts age into higher-spending life stages.

3) Participation in sustainable behaviours is widespread, with potential to further broaden engagement

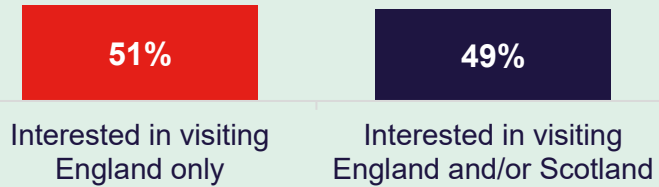
- The vast majority of international travellers report acting sustainably either sometimes or always while on holiday, favouring more accessible holiday behaviours such as buying and eating locally, visiting destinations off-peak to reduce overcrowding and using less single-use plastics.
- Less commonly adopted behaviours require deeper involvement and commitment, such as volunteering, supporting local communities, or carbon offsetting; highlighting opportunities to build awareness, accessibility and confidence in these options.

4) Travellers are open to adapting their behaviours and are willing to pay more, but with limits

- Seven in ten travellers say they are willing to pay more for travel service providers that demonstrate environmental responsibility. However, willingness is typically limited to small price increases (1–5%).
- Travellers are open to adapting how and when they travel (e.g. off-peak, lesser-known places) but are less willing to sacrifice experiences entirely or avoid destinations altogether.
- Most travellers feel familiar with sustainable travel, yet one in four still lack confidence, indicating a clear education gap. Nevertheless, there is a high level of interest in sustainable travel, and a desire to engage with the issue throughout the customer journey.

Sustainable Travel Among International Travellers: Key Metrics

- Around half consider sustainability when choosing travel service providers:



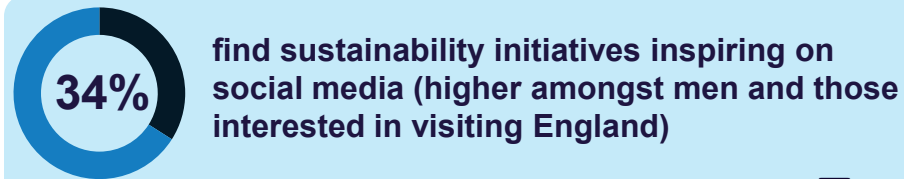
- Around two thirds consider sustainability when choosing their destination:



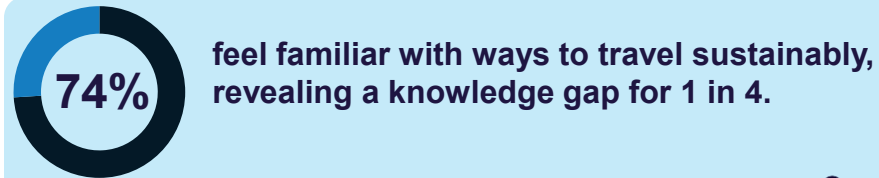
- The influence of sustainability has increased in North America (+3%pts in 2025 vs. 2023 for destinations and +6%pts for travel providers). It is stable in Europe.



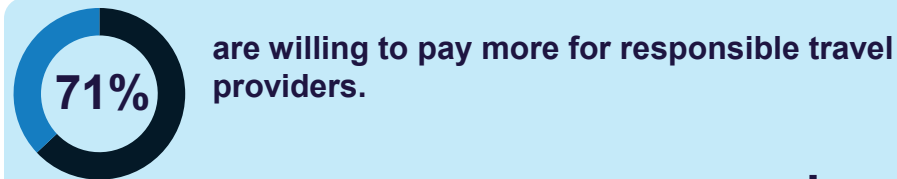
- Women and younger travellers are more sustainability-led in their decision making.



- Authentic traveller content and imagery are considered most inspirational.



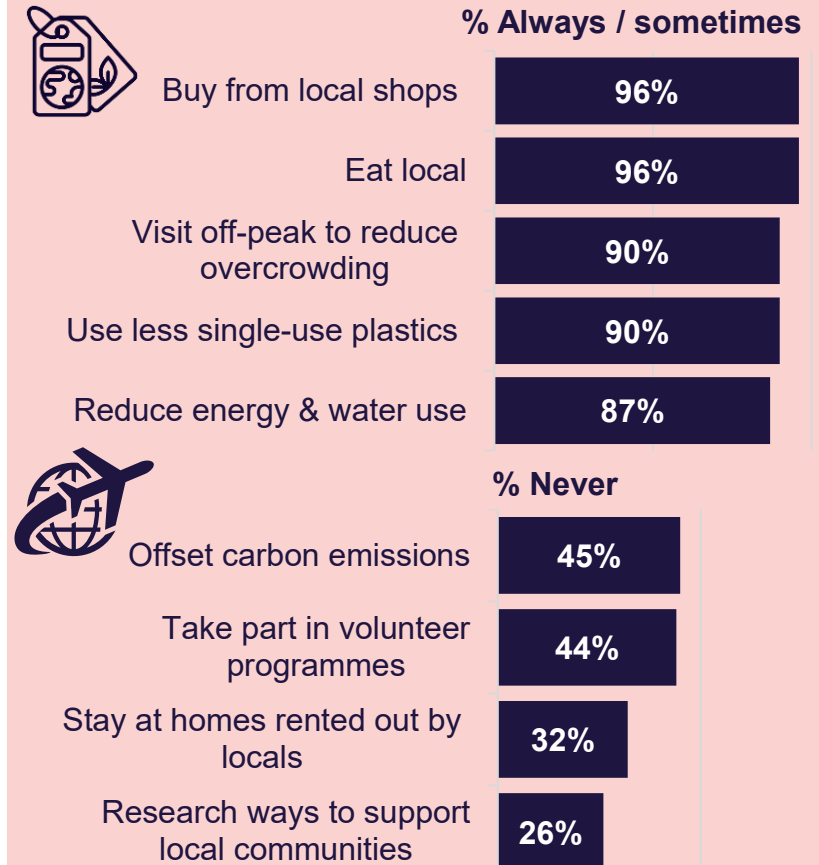
- Japan, France, and Canada are the least confident markets.



- Price tolerance is narrow (1–5% uplift); highest among younger travellers.



Almost all travellers reported participating in at least one sustainable behaviour on holiday, though this may be “sometimes” rather than “always”. More accessible behaviours dominate.





Influence of sustainability reputation on destination choice

A group of people riding horses along a beach, Llangennith, Swansea, Wales ©Crown
Copyright (2024) Cymru Wales

Sustainability is a notable factor influencing destination choice

66%

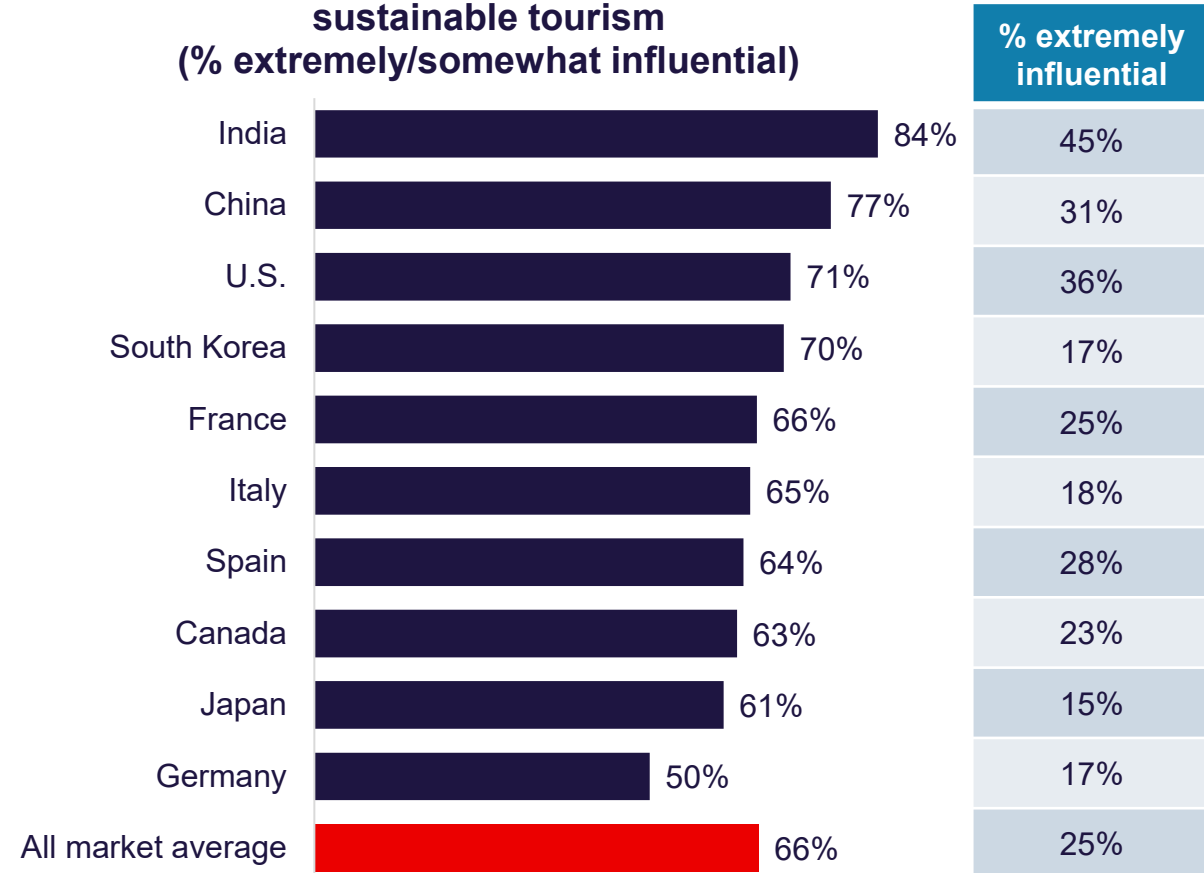
Of travellers are influenced by sustainability when choosing an international destination

70%

Of travellers interested in visiting England are influenced in this way

- 66% of international travellers are influenced by reputation for sustainable tourism when choosing a travel destination, revealing that sustainability is a notable driver in this decision-making process.
- This factor is slightly more influential among those interested in travelling to England (70%), with Asian markets, alongside the US, most influenced by destinations' reputation for sustainability.

Influence of the destination's reputation for sustainable tourism (% extremely/somewhat influential)

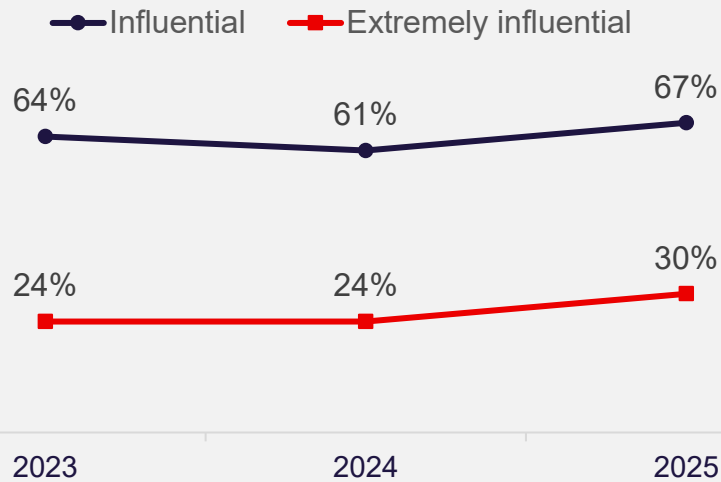


Please note: Data is from 2025 apart from Asian markets which were last surveyed in 2023.

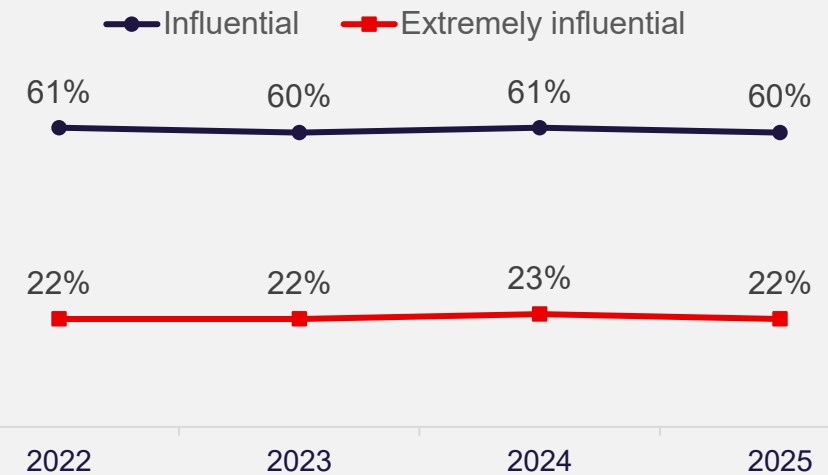
D02.12. How influential are each of the following when prioritizing which international destination to visit next? – The destination's reputation for sustainable tourism.

The influence of sustainability has risen in North America, while remaining stable for European travellers

Influence of sustainability when choosing a destination – North America



Influence of sustainability when choosing a destination – Europe



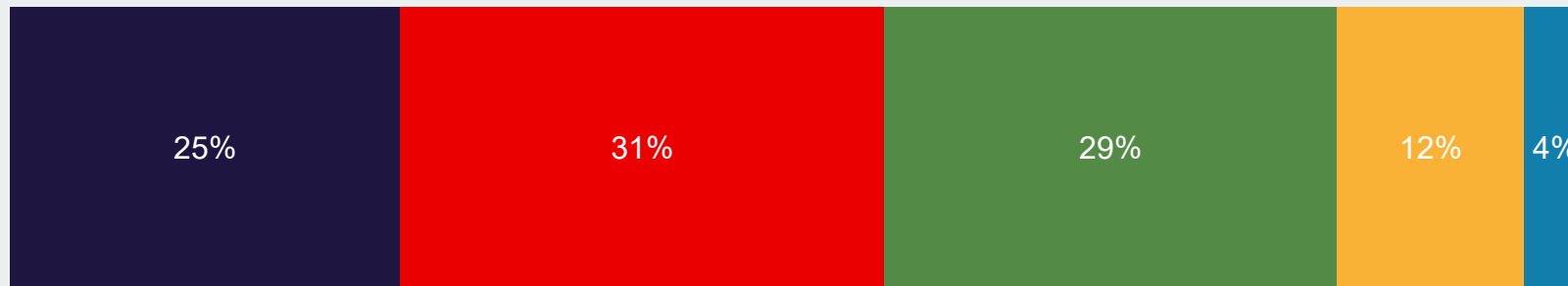
- The influence of sustainability in destination choice grew by 3 percentage points among North American travellers between 2023 and 2025, whereas rates of influence remained stable among European travellers from 2022 to 2025.

Please note: North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asia data not shown as available for 2023 only.

D02.12. How influential are each of the following when prioritizing which international destination to visit next? – The destination's reputation for sustainable tourism.

Asian travellers do consider sustainability, but it is not a main focus in day-to-day life and travel plans

To what extent do you consider sustainability in your day to day life and when planning your travels?*



- Sustainability is a central part of my life and travel plans
- I often consider sustainability, but it's not my main focus
- I occasionally consider sustainability
- Sustainability rarely factors into my daily life or travel plans
- I do not consider sustainability at all in my daily life or when planning travel




84% of Asian travellers do consider sustainability

86% of Asian travellers interested in visiting England consider it

- A question asked in Asian markets only reveals that the majority of international travellers from this region consider sustainability a part of their life and travel plans, with only 4% saying that they never consider it.
- However, only 25% of Asian travellers see sustainability as 'central'. Sustainability is most likely to be considered as a secondary focus, or only occasionally considered.

Please note: Data is from 2023. Asian markets comprise China, India, Japan, and South Korea. This question was not asked in Europe or North America.

N01: To what extent do you consider sustainability in your day-to-day life and when planning your travels? *Only asked of Asian travellers.

A photograph of two pheasants standing on a grassy lawn in front of Blenheim Palace. The palace is a large, classical-style building with many windows and a central portico. A large tree trunk is visible on the left side of the frame. The scene is captured in bright daylight.

**Impact of
sustainability
focus on
choice of
travel service
provider**

Two pheasants on the grass in front of Blenheim Palace, Oxfordshire, England. @VisitBritain/Blenheim Palace/Pete Seaward

Sustainability is an established influence when choosing travel service providers (i.e. hotels, airlines)

49%

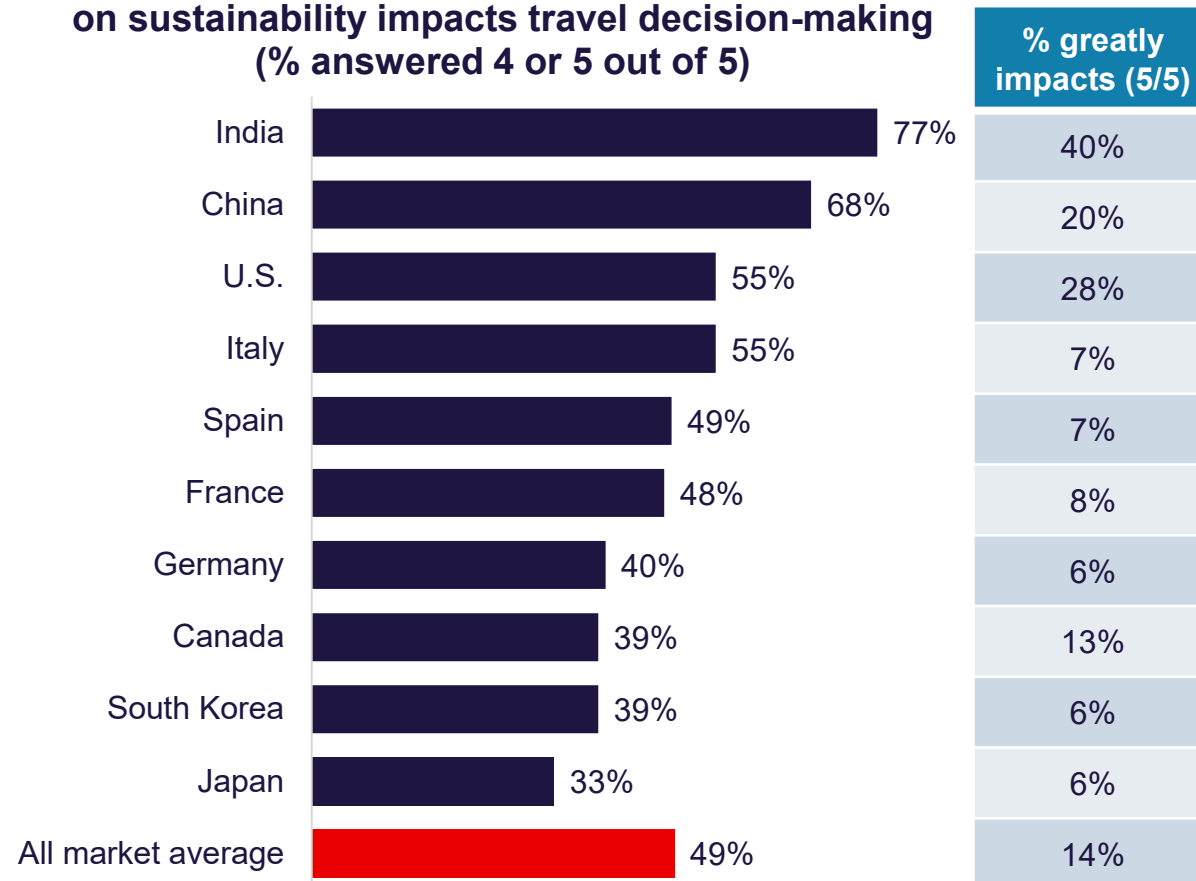
Of travellers say a focus on sustainability considerations influence their choice of travel service provider.

- Sustainability plays a meaningful role in provider choice for half of travellers. Together with its stronger influence at the destination-selection stage, this demonstrates the importance of sustainability throughout the decision-making journey.
- Travellers interested in visiting England are consistently more impacted in their decision making by a travel service provider's focus on sustainability and environmental considerations.
- While travellers from India, China and the US show the strongest influence overall, Italy and Spain emerge among the top influenced European markets at the service-provider stage—highlighting how sustainability resonates differently across markets and decision points.

51%

Of travellers interested in visiting England are influenced in this way

Extent to which a travel service provider's focus on sustainability impacts travel decision-making (% answered 4 or 5 out of 5)

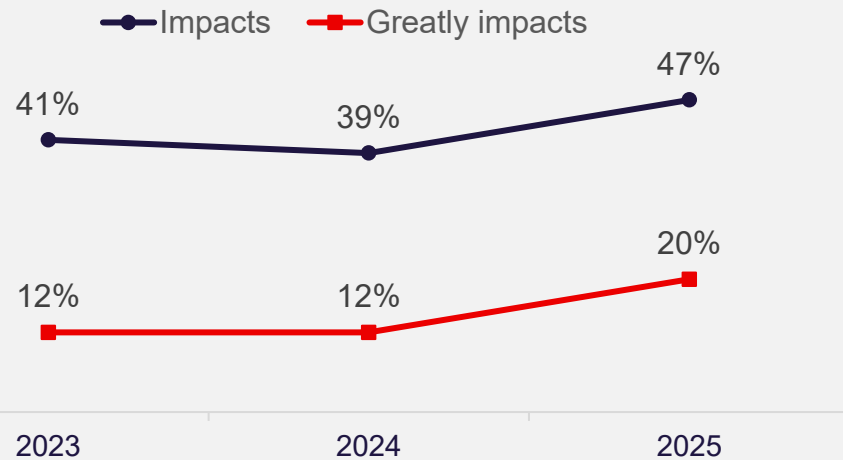


Please note: Data is from 2025, except Asian markets which were surveyed in 2023.

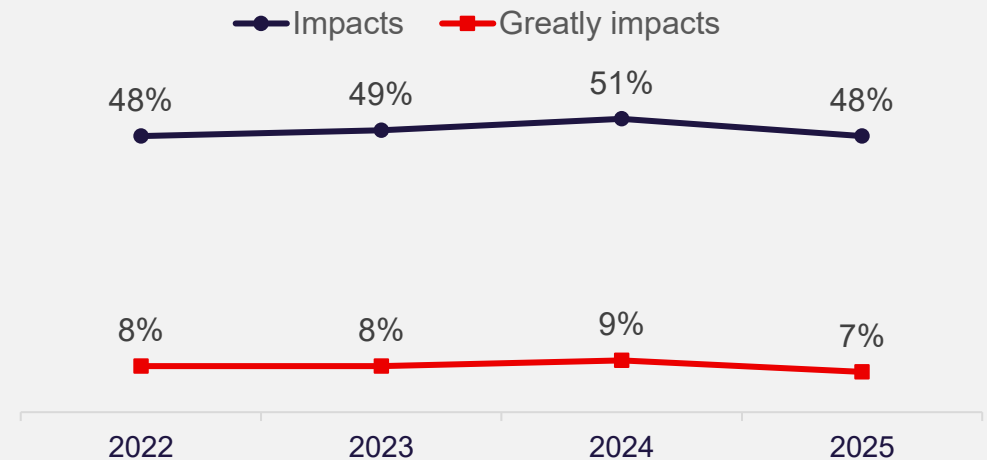
L02. To what extent does a travel service provider's focus on sustainability and environmental considerations impact your travel decision-making?

A sustainability focus has increased in influence when choosing service providers among North Americans; European attitudes are fairly stable

Influence of sustainability on decision when choosing a travel service – North America



Influence of sustainability on decision when choosing a travel service – Europe



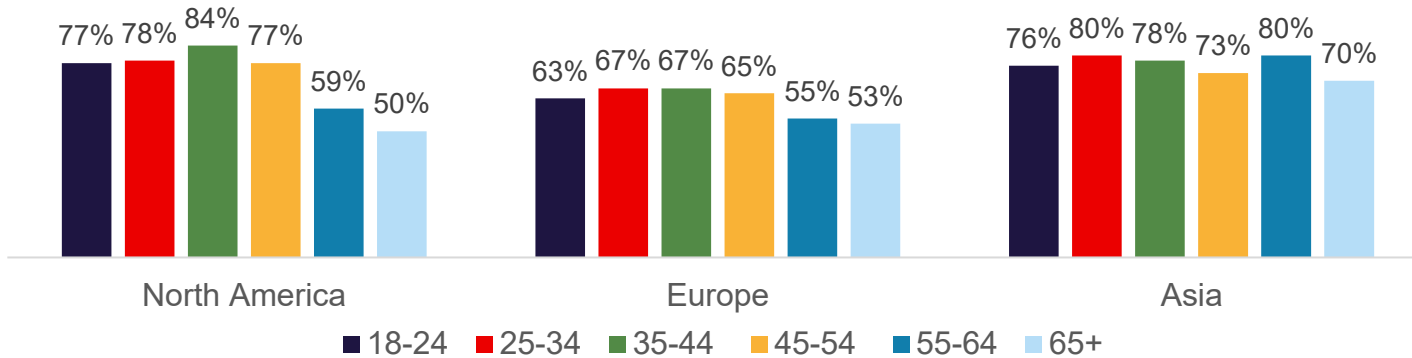
- Similarly to the trend for influence on destination choice, North American travellers appear to be more influenced by sustainability when choosing a travel service provider over time (+6 percentage points between 2023 and 2025).
- Again, European markets remain quite stable when it comes to the degree of influence of sustainability, apart from a peak in 2024 of 51%.

Please note: North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asia data not shown as available for 2023 only.

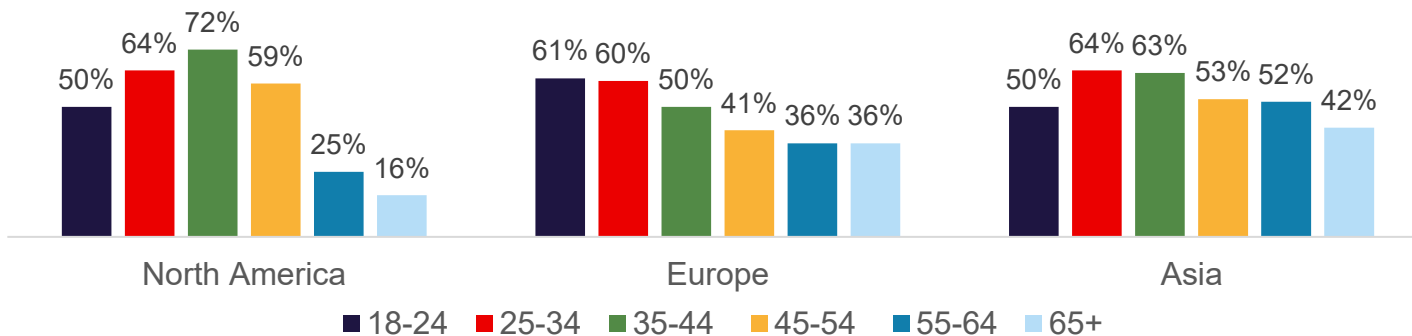
L02. To what extent does a travel service provider's focus on sustainability and environmental considerations impact your travel decision-making?

Travellers aged 18-44 are more likely to be influenced by sustainability. Strongest influence is amongst 35-44s in North America

Influence of sustainability when choosing a destination by age



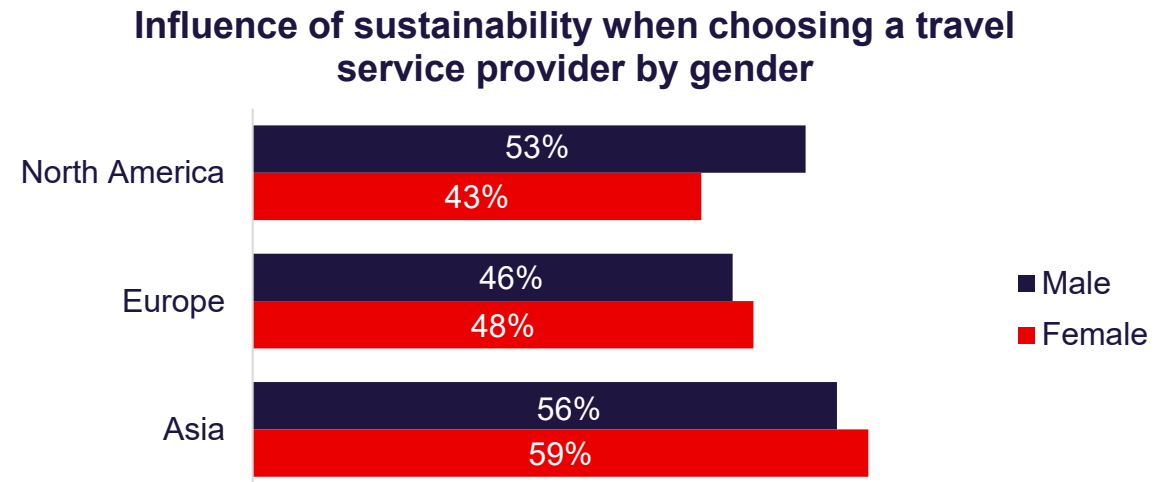
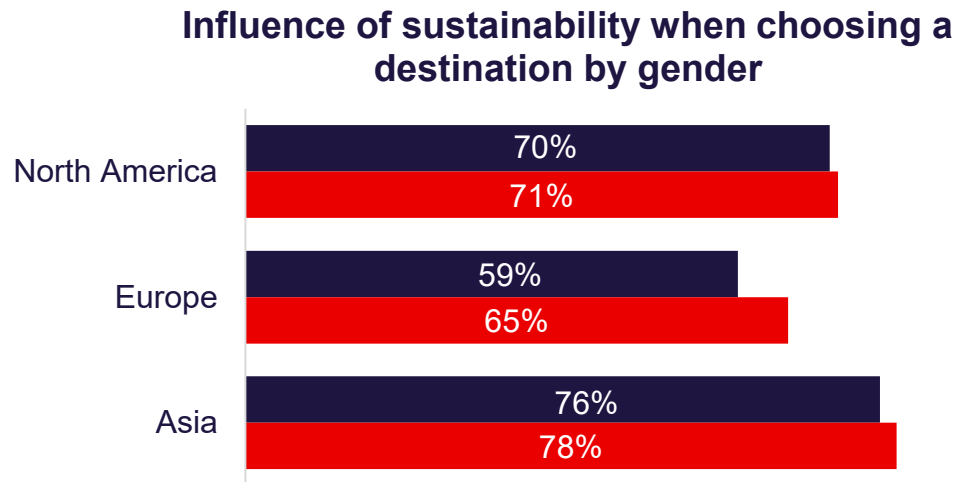
Influence of sustainability when choosing a travel service provider by age



- Examining trends in influence of sustainability by age, North American travellers between the age of 35 and 44 are most influenced when it comes to choice of destination and travel service providers.
- Destination choice is most influenced by sustainability between the ages of 25 and 44, whereas the most influenced age group for travel service providers is younger, from 18 to 34.
- Asian travellers demonstrate a similar pattern for choice of travel service providers, with those aged 24 to 44 most influenced. In contrast, those most influenced by sustainability when it comes to destination choice are equally likely to be 25-34 year olds, and 55-64 year olds.

Please note: data shown is among those interested in **England**. Data is from 2025 apart from Asian markets which were surveyed in 2023. North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asian markets comprise China, India, Japan, and South Korea.

Women are generally more influenced by sustainability, with the exception of North American travellers when choosing travel services



- When it comes to gender differences, women are generally more likely to be influenced by sustainability when choosing a travel destination and a travel service provider. One notable exception is seen in North America, where men are 10 percentage points more likely to be influenced by sustainability when choosing a travel provider.

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Interest in sustainability content on social media

Hiker walking along a path on a mountain ridge at sunrise, Keswick, Cumbria, England ©VisitBritain/John Finney/National Trust

1 in 3 find sustainability content inspiring, with potential to further increase engagement through authentic traveller images and stories

34%

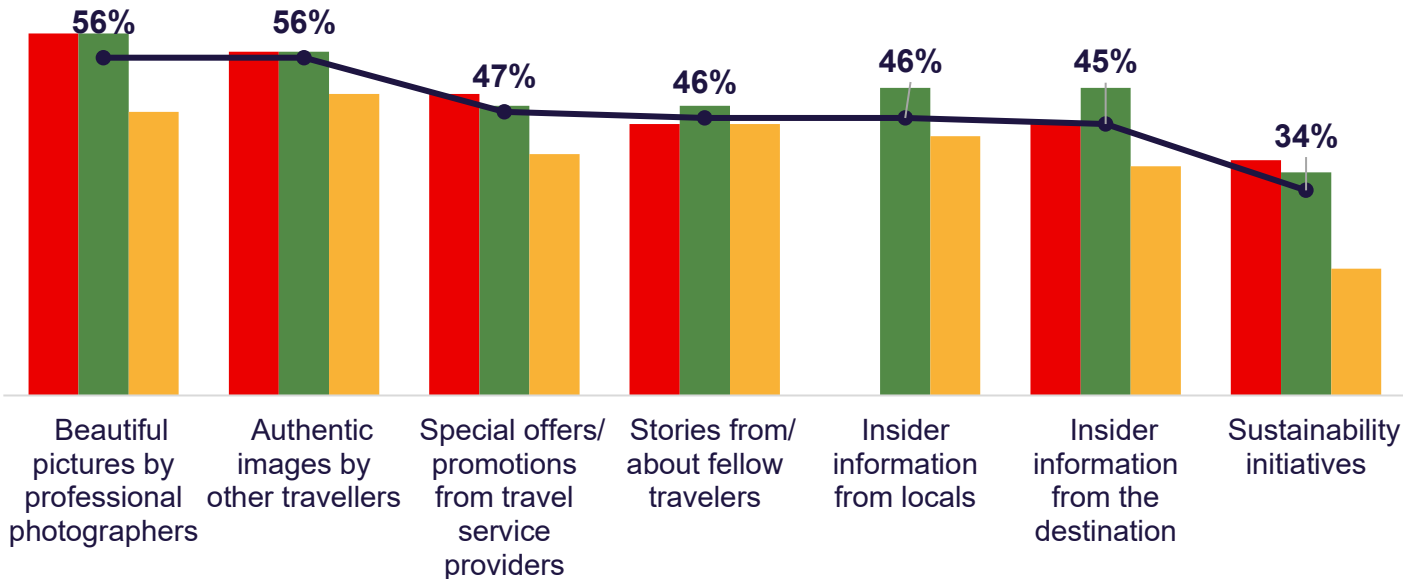
Of travellers find social media content on sustainability initiatives inspirational

36%

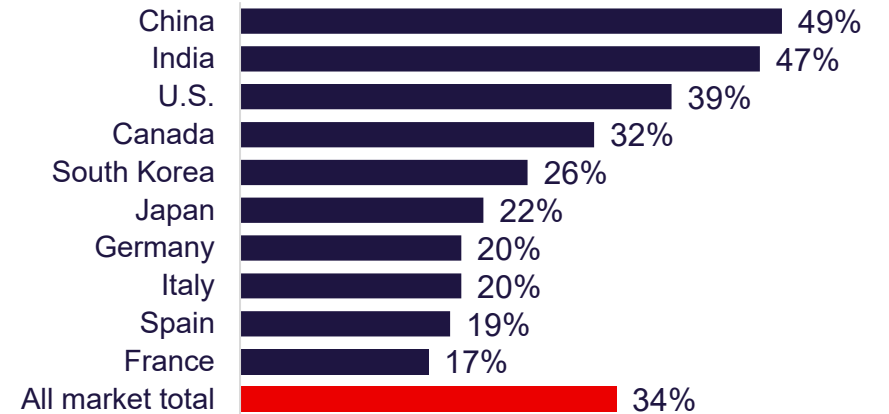
Of travellers interested in visiting England are inspired by this

% value social media content when posted by a destination

Asia North America Europe Total



% value social media content on sustainability initiatives by nationality



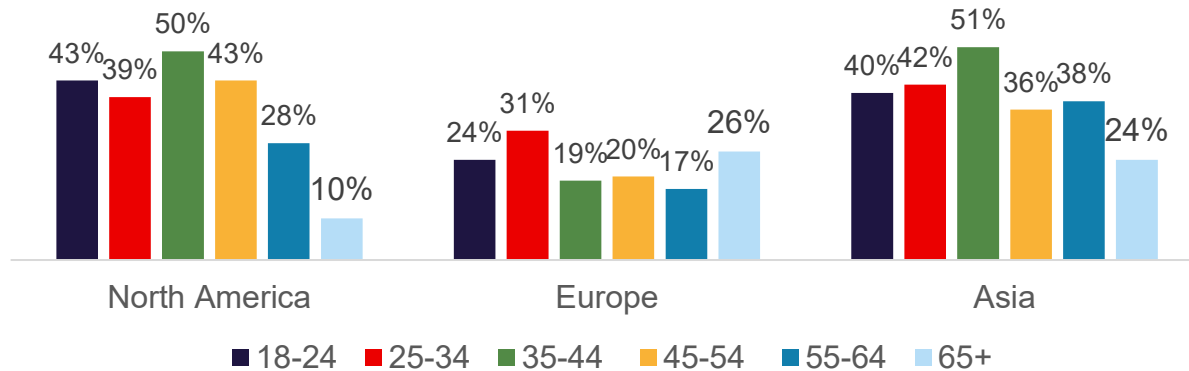
- Around one in three international travellers find social media content on sustainability initiatives inspirational, with similar levels among those interested in visiting England.
- Travellers are most inspired by authentic imagery and stories from real travellers, suggesting that sustainability messages are most effective when woven naturally into real experiences rather than presented as standalone initiatives.

Please note: North American and European markets were surveyed in 2025, Asian markets in 2023. "Insider information from locals" not asked of Asian travellers.

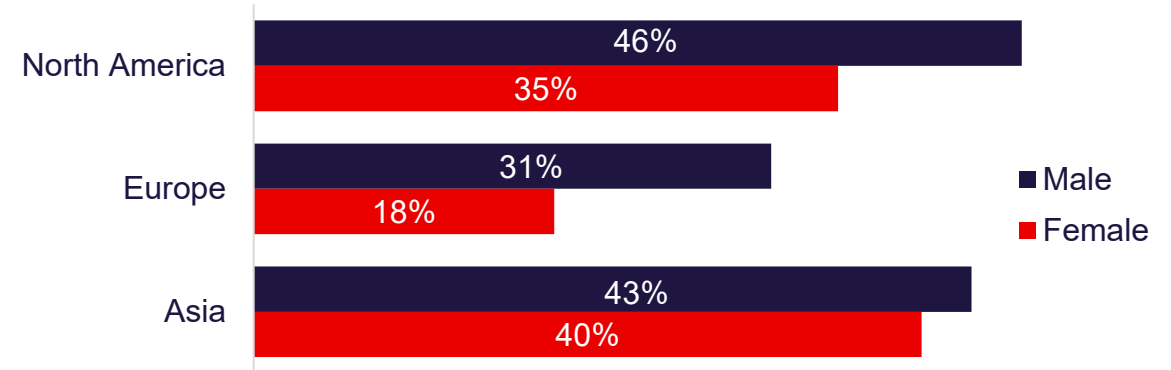
J06. What type of social media content do you find inspirational from a holiday destination? Base: All follow vacation destination on social media

Interest in sustainability content peaks aged 35-44 in Asia & N. America. Women are less inspired than men, preferring other types of content.

Those finding social media content about sustainability initiatives inspirational by age




Those finding social media content about sustainability initiatives inspirational by gender



- Travellers aged 35-44 are most inspired by sustainability initiatives in North America and Asia, whereas interest drops off by this age range among European travellers, only to increase again over 65 (though sample sizes are small).
- Men are more likely than women to be inspired by social media content about sustainability initiatives across all three global regions. Women tend to be more inspired than men by other types of social media content, such as authentic images and insider information in North America, beautiful pictures in Asia and most other types of social media content in Europe.

Please note: data shown is among those interested in **England**. North American and European markets surveyed in 2025, Asian markets in 2023. North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asian markets comprise China, India, Japan, and South Korea. N.B. Small sample sizes for 65+ in some regions.

J06. What type of social media content do you find inspirational from a holiday destination? – Sustainability initiatives. Base: All follow vacation destination on social media

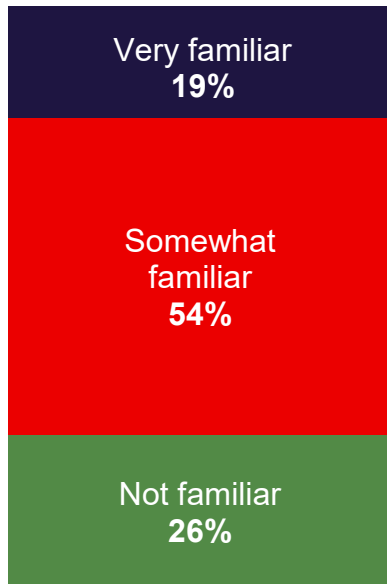


Familiarity with ways to travel more sustainably

A woman sits on a bench on a coastal path with headland and sea beyond, Port Isaac, Cornwall, England. ©VisitBritain/@themissmarple

3 in 4 travellers are familiar with ways to travel sustainably, though knowledge varies by market

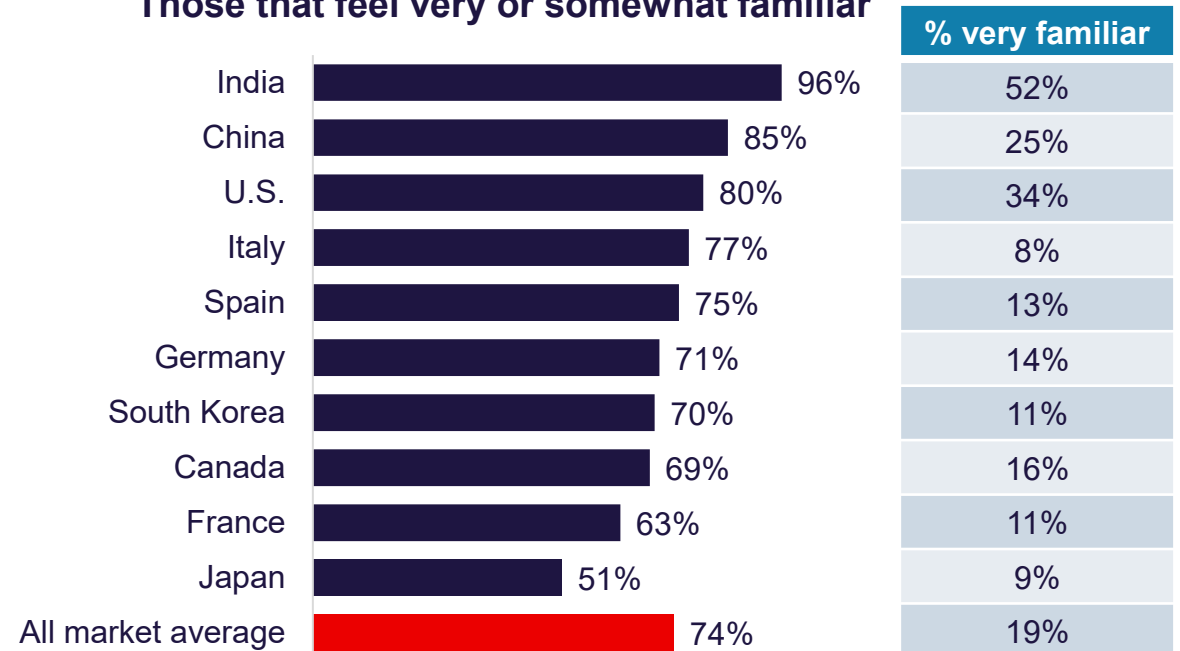
Familiarity with ways to travel sustainably



74% of travellers feel very or somewhat familiar

76% of those interested in visiting England feel this way (22% very familiar)

Those that feel very or somewhat familiar

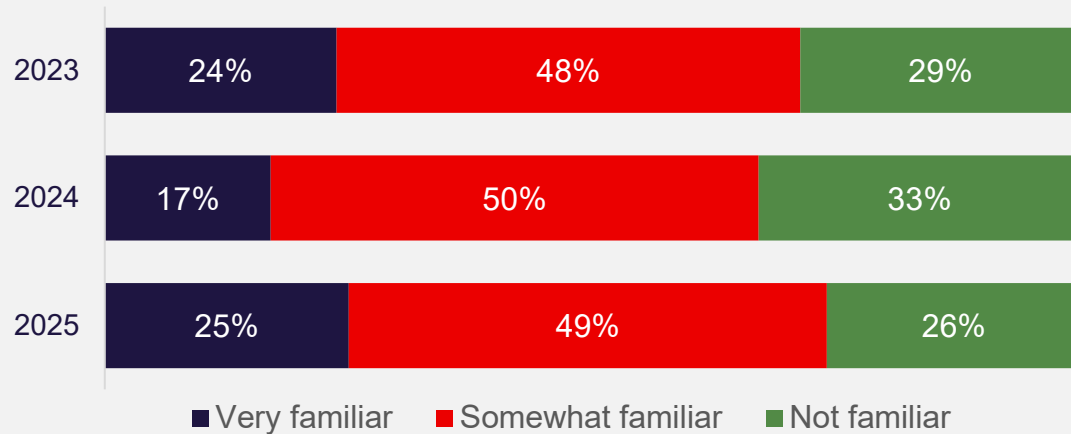


- Around three quarters of international travellers say that they are familiar with ways to travel more sustainably, with travellers most likely to be 'somewhat familiar'. Worth noting is that over a quarter say that they are 'not familiar' with ways to travel more sustainably, suggesting that more education on this topic would be helpful for travellers.
 - Japanese, French, and Canadian travellers are the least confident when it comes to ways to travel more sustainably.

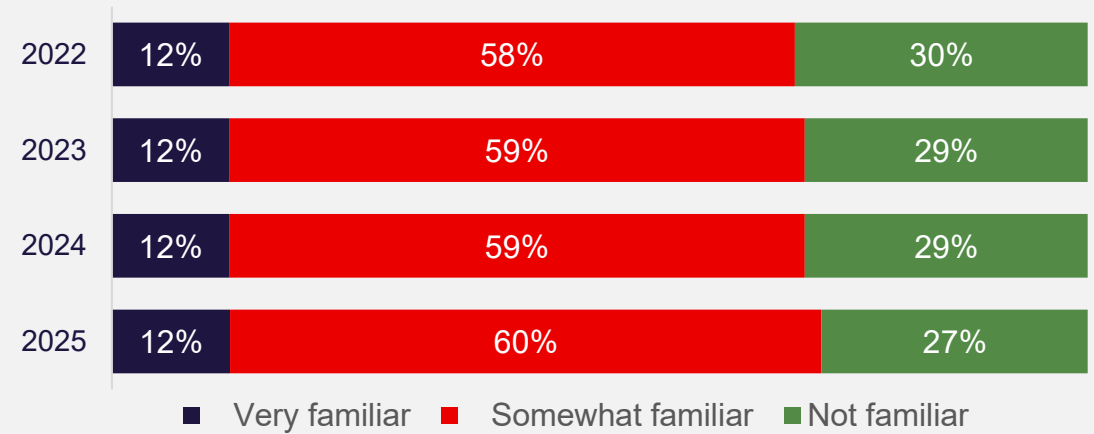
Please note: Data is from 2025 apart from Asian markets which were surveyed in 2023.
L01. How familiar are you with ways in which you can travel more sustainably?

Familiarity with ways to travel sustainably has varied over time among North American travellers, with European rates very stable

Familiarity with ways to travel sustainably – North America



Familiarity with ways to travel sustainably – Europe



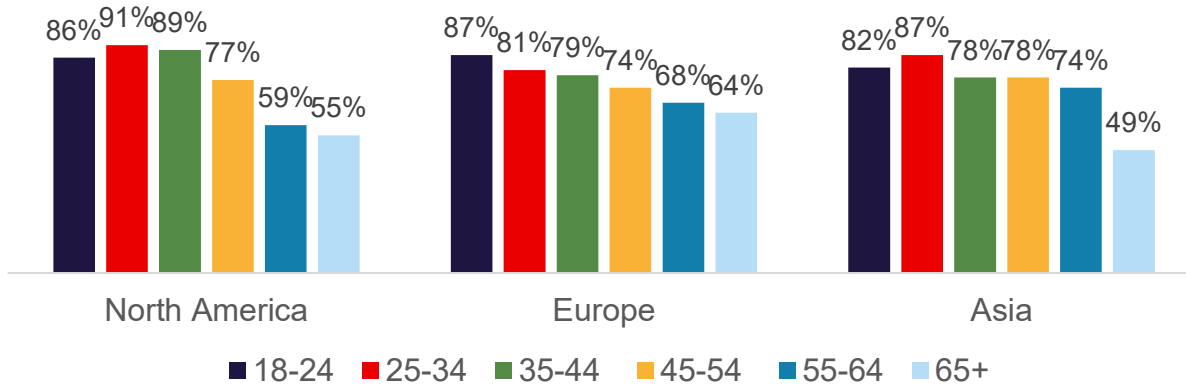
- North American travellers are generally more confident than Europeans in their knowledge of how to travel more sustainably, with peaks in familiarity seen in 2023 and 2025.
 - European travellers demonstrate notably stable rates of familiarity over time, suggesting that there is an opportunity for knowledge on sustainable travel to be further improved.

Please note: North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asia data not shown as available for 2023 only.

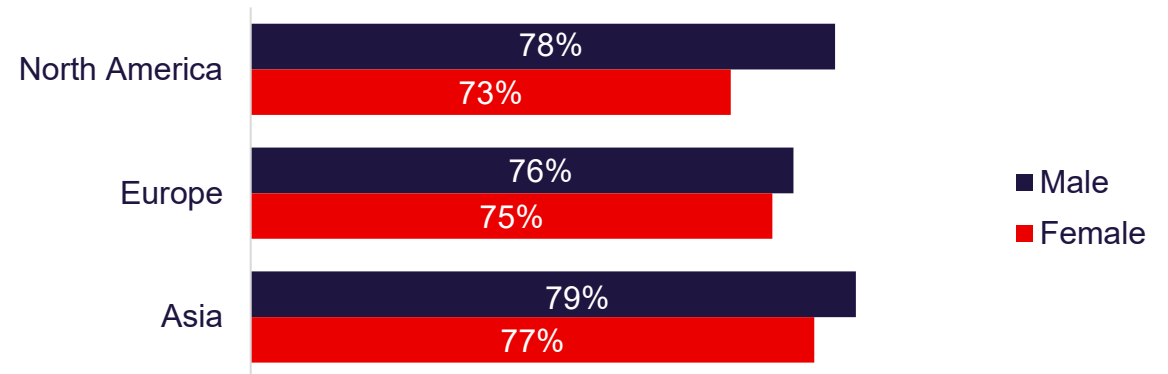
L01. How familiar are you with ways in which you can travel more sustainably?

18–34-year-olds and men feel most familiar with ways to travel more sustainably

Those familiar with ways to travel sustainably by age



Those familiar with ways to travel sustainably by gender



- Younger age groups demonstrate the highest familiarity with ways to travel more sustainably, with those aged from 18-34 most confident across all three global regions. Rates of familiarity drop off significantly in North America for ages 55 and up, with particularly large drops also seen for those aged 65+ in Asia.
- Men are more likely to say they are familiar with ways to travel more sustainably across global regions, however differences are relatively small in Europe and Asia.

Please note: data shown is among those interested in **England**. Data is from 2025 apart from Asian markets which were surveyed in 2023. North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asian markets comprise China, India, Japan, and South Korea.

L01. How familiar are you with ways in which you can travel more sustainably?

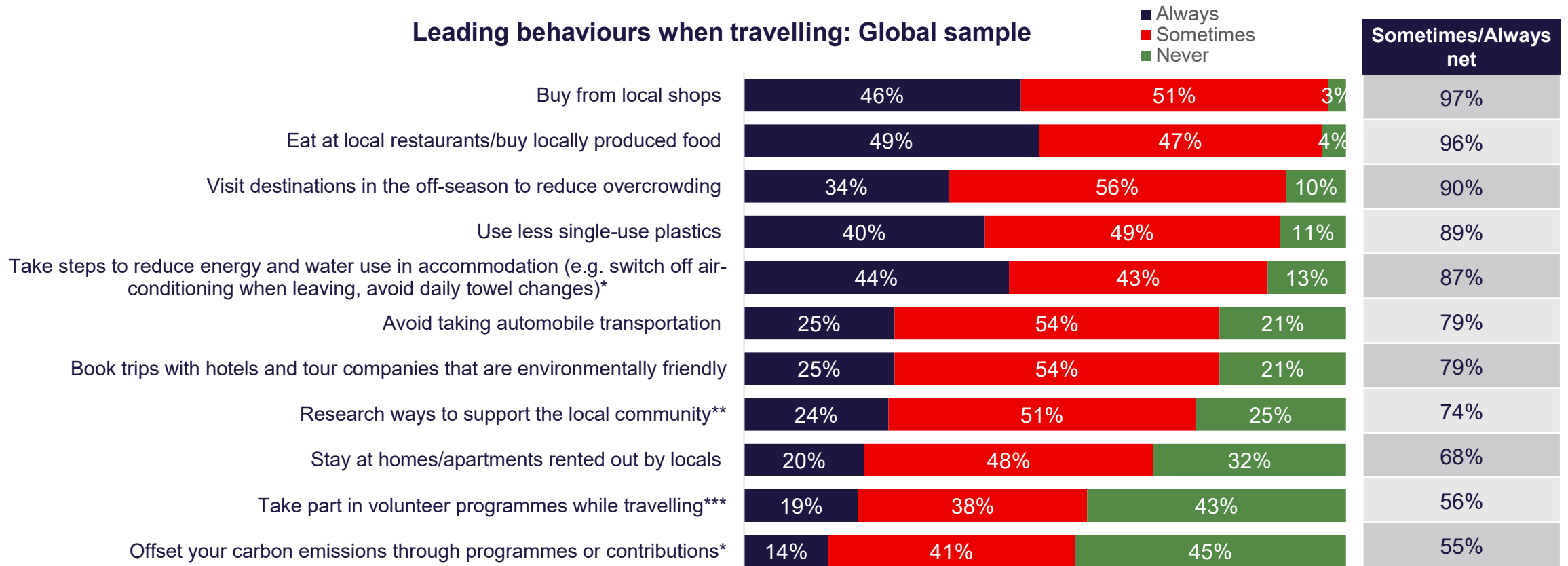
A couple is walking together on a grassy headland. The woman is wearing a bright yellow shawl and a white bag, and the man is wearing a blue and green jacket. In the background, there are white chalk cliffs and a body of water under a blue sky with scattered white clouds.

Sustainable travel behaviours practiced on holiday

A couple walk together on a headland with white chalk cliffs in the background, Seaford, East Sussex, England. ©East Sussex, Brighton & Hove and West Sussex LVEP/James Ratchford

Across all three global regions, almost all report sometimes or always practising at least one sustainable behaviour when travelling

Leading behaviours when travelling: Global sample



- More accessible activities such as buying and eating locally and visiting off-peak have the highest participation rates, while more than two in five report never researching ways to support local communities or taking part in volunteer programmes.
- Offsetting carbon emissions is ranked as the least adopted behaviour, possibly reflecting limited access to schemes and mixed attitudes towards their effectiveness.

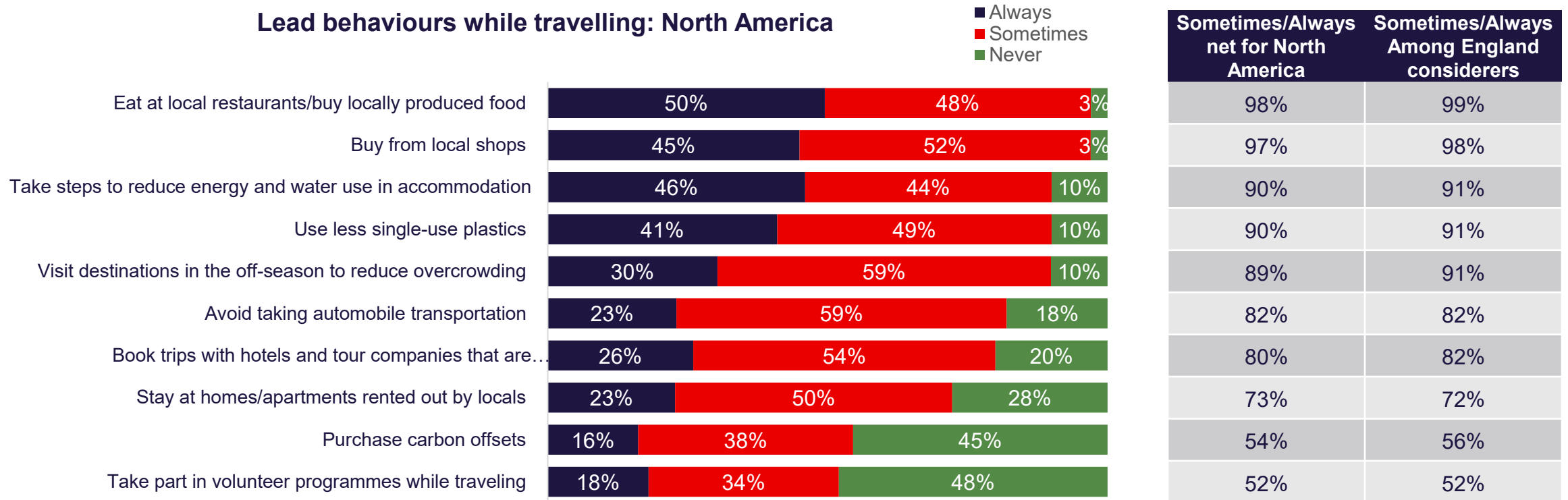
Please note: Data is from 2025 apart from Asian markets which were surveyed in 2023.

*Not asked in Asia. **Not asked in North America ***Not asked in Europe

L05. How often, if at all, do you practice the following behaviours while travelling?

The vast majority of North American travellers consume locally, while 9 in 10 report trying to use less energy, water and single-use plastics

Lead behaviours while travelling: North America



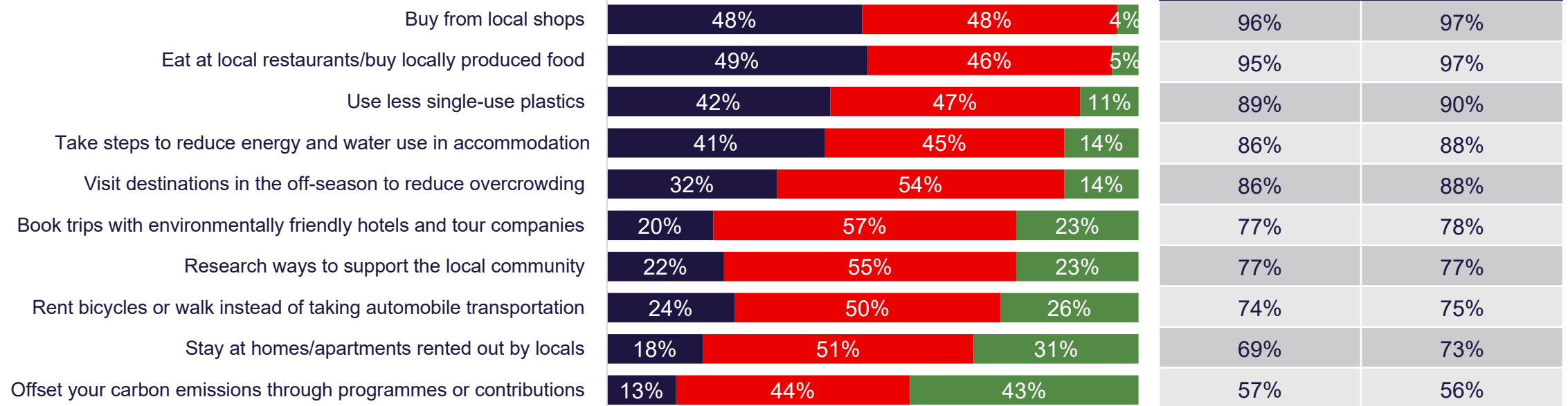
- When it comes to sustainable travel behaviours, North American travellers are most likely to eat at local restaurants/buy locally produced food, buy from local shops, and try to reduce energy and water use during their stays.
- These top behaviours are similarly likely to be done 'always' or 'sometimes', however other perhaps more involved behaviours such as avoiding automobile transport are more likely to be done 'sometimes'. Purchasing carbon offsets and taking part in volunteer programmes are the least popular behaviours; most likely to be done 'never'.

Please note: Data is from 2025. North American markets comprise the US and Canada.
 L05. How often, if at all, do you practice the following behaviours while traveling?

Almost half of European travellers always buy locally, while 2 in 5 report always trying to reduce use of energy, water and single-use plastics

Lead behaviours while travelling: Europe

■ Always
■ Sometimes
■ Never

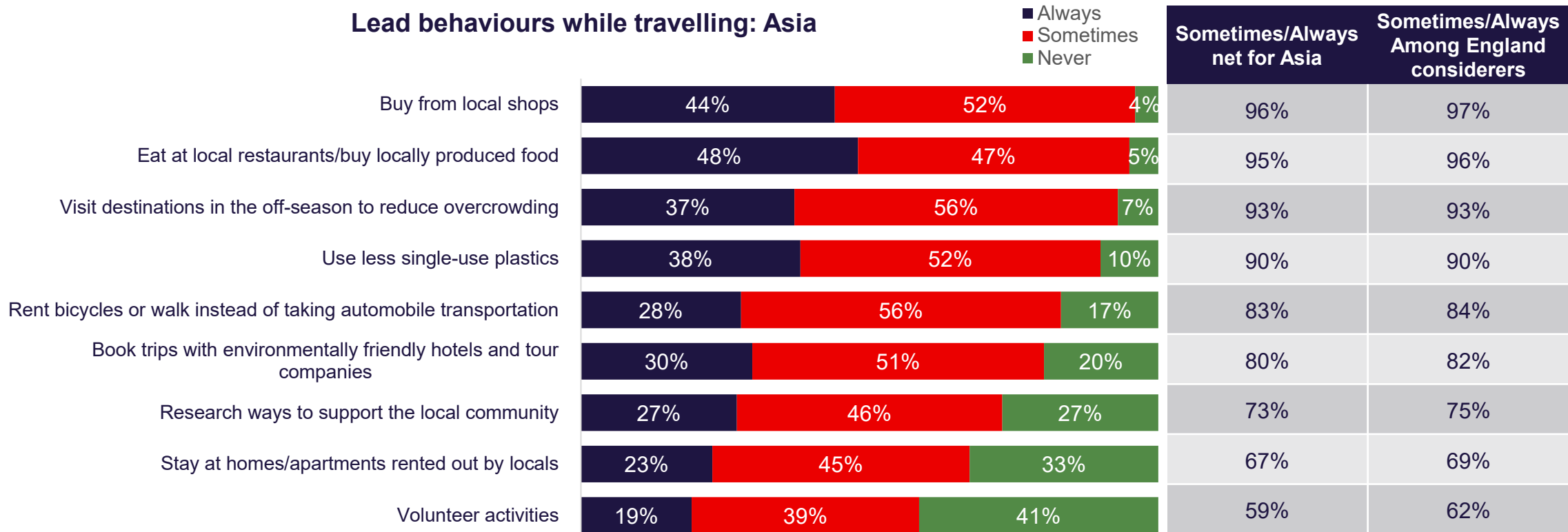


- Similarly to North Americans, European travellers are most likely to buy local when travelling, however they are more likely to reduce their usage of single use plastics. Reducing energy and water use is the fifth most popular behaviour, however a sizeable 41% say that they 'always' do this.
- As it was for North Americans, purchasing carbon offsets is one of the least popular behaviours for Europeans. Instead of 'taking part in volunteering programmes', Europeans were asked whether they 'research ways to support the local community', and this behaviour was 7th most popular, with 77% either sometimes or always doing this.

Please note: Data is from 2025. European markets comprise Germany, France, Spain, Italy, and the UK.
L05. How often, if at all, do you practice the following behaviours while traveling?


Asian travellers are more open to travelling in the off-season compared to the other global regions

Lead behaviours while travelling: Asia



- Like other global regions, Asian travellers are most likely to buy from local shops and eat at local restaurants when it comes to sustainable behaviours while travelling, and, like North Americans, are least likely to take part in volunteering activities; the behaviour probably requiring the most time and effort among those listed.
- Compared to other regions, Asian travellers are more likely to travel in the off-season to avoid overcrowding, with 93% either sometimes or always doing this.

Please note: Data is from 2023. Asian markets comprise China, India, Japan, and South Korea.
 L05. How often, if at all, do you practice the following behaviours while traveling?

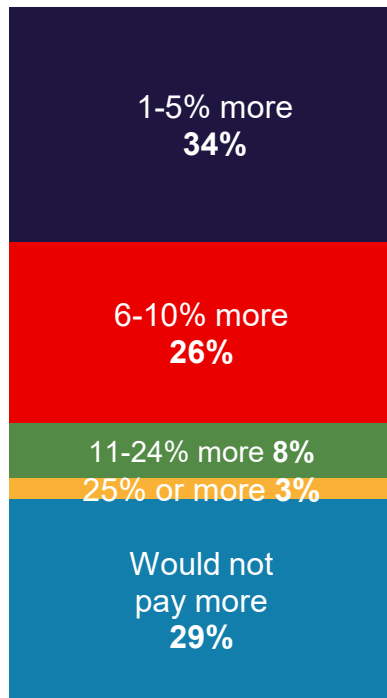


**Willingness
to pay more
for
responsible
service
providers**

Mountain range view in the autumn, by a waterfall, Glencoe, Scotland ©VisitBritain/Maria Grazia Sinatra

International travellers are open to paying more for responsible service providers - within limits

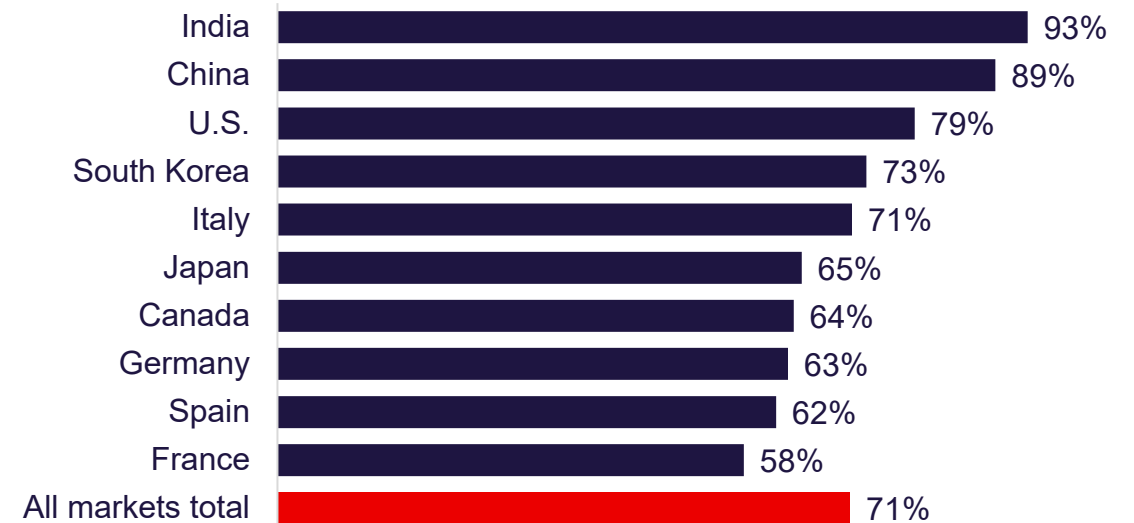
Willingness to pay more for travel service providers that demonstrate environmental responsibility



71% of travellers are willing to pay more

73% of those interested in visiting England are willing to pay more

Those willing to pay more for an environmentally friendly travel service provider



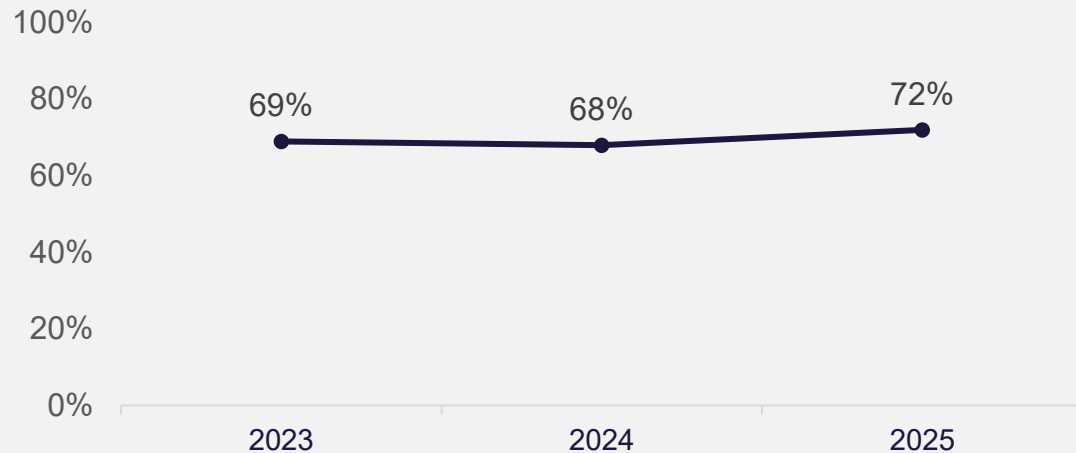
- International travellers generally display openness towards paying more for travel service providers with sustainable credentials, with 71% saying they are willing to do this to some extent (73% among those interested in England).
- However, only small increases in cost may be acceptable – the largest group of those willing to pay more are only open to an up to 5% increase. Only 11% would accept an increase over 10%.
- Asian travellers appear more willing to pay more for sustainable travel services compared to Europeans, with the US also ranking highly.

Please note: Data is from 2025 apart from Asian markets which were surveyed in 2023.

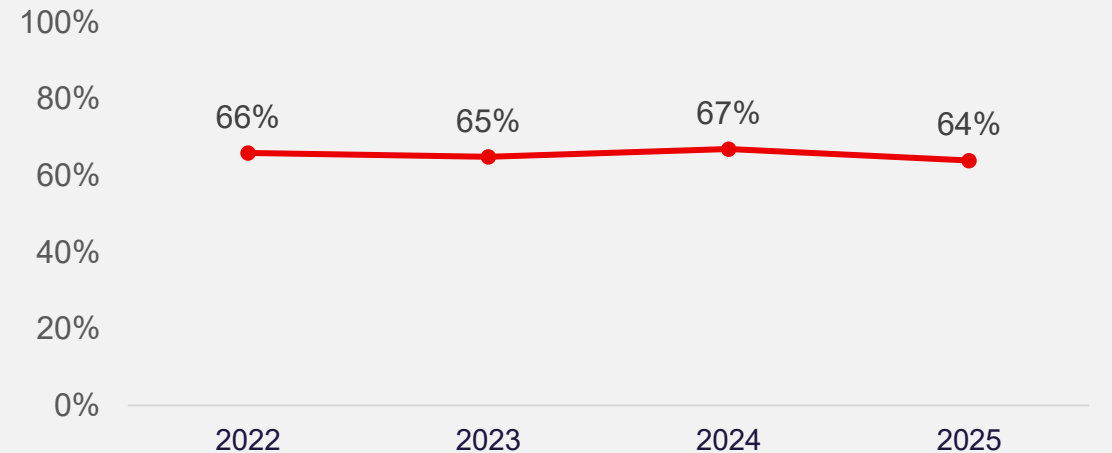
L03. Which of the following options best reflects your willingness to pay a higher rate or ticket price to patronize travel service providers (i.e. hotels, airlines), who demonstrate environmental responsibility?

Willingness to pay more has increased in North America, and only slightly declined in Europe despite global cost-of-living pressures

Those willing to pay more for an environmentally friendly travel service provider – North America



Those willing to pay more for an environmentally friendly travel service provider – Europe



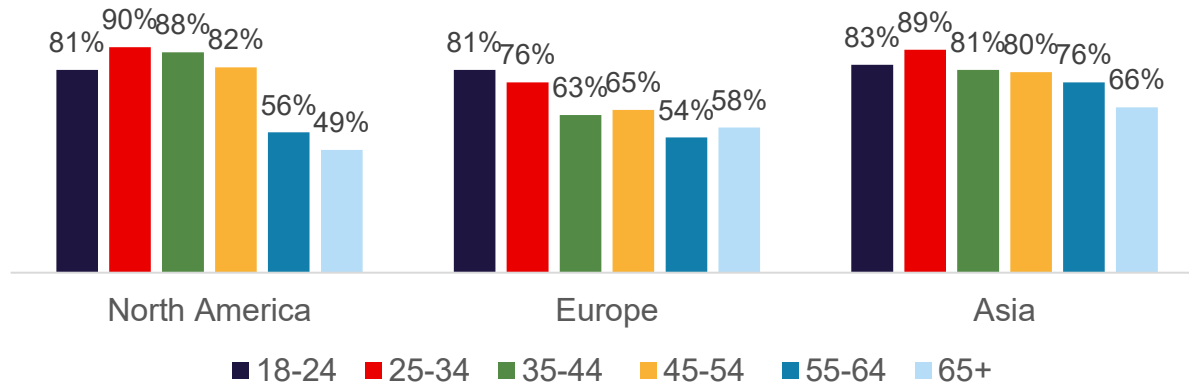
- North American travellers are slightly more willing to pay more for environmentally friendly providers, with willingness increasing by 3 percentage points from 2023 to 2025.
- European travellers display some reduction in willingness to pay more over the last few years; declining by 2 percentage points between 2022 and 2025. However, these relatively small declines may indicate a continued engagement with travelling sustainably despite the pressures of the rising cost-of-living post-COVID.

Please note: North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asia data not shown as available for 2023 only.

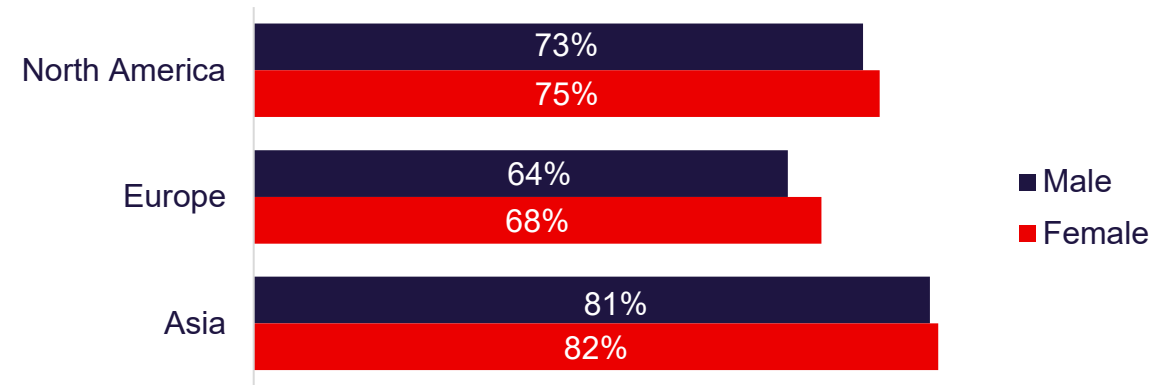
L03. Which of the following options best reflects your willingness to pay a higher rate or ticket price to patronize travel service providers (i.e. hotels, airlines), who demonstrate environmental responsibility?

Despite having lower incomes, younger audiences are more likely to pay more for environmentally friendly services

Those willing to pay more for an environmentally friendly travel service provider




Those willing to pay more for an environmentally friendly travel service provider



- Willingness to pay more for an environmentally friendly travel service provider is highest among younger age groups across global markets. The most willing age groups in Europe and Asia are aged 18 to 34, with North America skewing slightly older from 25 to 44.
- It is notable that despite the younger age groups surveyed being more likely to be found in lower income brackets, they are still willing to pay more, perhaps demonstrating a particular enthusiasm for engaging with sustainability.
- Across global regions, women are slightly more willing to pay more for an environmentally friendly service compared with men.

Please note: data shown is among those interested in **England**. Data is from 2025 apart from Asian markets which were surveyed in 2023. North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. Asian markets comprise China, India, Japan, and South Korea.

L03. Which of the following options best reflects your willingness to pay a higher rate or ticket price to patronize travel service providers (i.e. hotels, airlines), who demonstrate environmental responsibility?



**Willingness
to learn and
adapt
towards
travelling
more
sustainably**

A valley on a bright summer's day, with a couple resting on the grass. A Castle is visible through the trees on the rocky hillside, Castleton, Derbyshire, England. @PeakDistrict.org/Alex Hesp-Gollins

Travellers are open to learning and making more mindful travel choices, but don't want to miss out

Level of agreement with statements on sustainable travel behaviour:

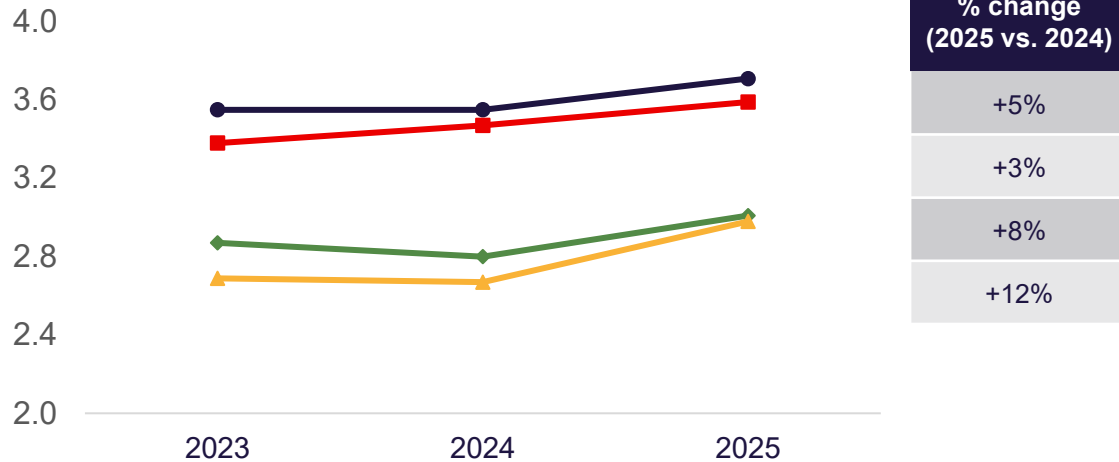
Statement :	Measure	North America		Europe				Asia				Global average	England considerers
		USA	Canada	Germany	France	Spain	Italy	China	India	Japan	S. Korea		
I am interested in learning about ways in which I can travel more sustainably	Mean (out of 5)	3.9	3.6	3.1	3.3	3.4	3.6	4.1	4.3	3.3	3.5	3.6	3.7
	% scored 4 or 5	72%	61%	47%	54%	56%	65%	80%	85%	52%	57%	63%	67%
I visit lesser-known destinations/visit in the off-season to avoid contributing to tourism overcrowding	Mean (out of 5)	3.7	3.5	3.3	3.4	3.4	3.5	4.0	4.0	3.7	3.7	3.6	3.7
	% scored 4 or 5	64%	56%	53%	55%	53%	56%	79%	77%	62%	64%	61%	63%
I would be willing to pay an extra \$100 (N. America) / 100 EUR/GBP (Europe) / unspecified (Asia) for a flight to help reduce my carbon footprint	Mean (out of 5)	3.3	2.7	2.6	2.6	2.7	2.8	3.8	4.0	2.9	3.1	3.0	3.0
	% scored 4 or 5	52%	33%	23%	20%	22%	28%	72%	78%	33%	39%	40%	39%
I have avoided a destination, hotel, or transportation option because I felt it was not committed to sustainable practices	Mean (out of 5)	3.2	2.8	2.3	2.3	2.3	2.7	3.9	3.9	2.9	3.2	2.9	3.0
	% scored 4 or 5	47%	30%	26%	27%	30%	30%	72%	70%	28%	37%	39%	43%

- Travellers are open to learning more about sustainable travel and to modifying their behaviour in ways that may enhance the overall travel experience, such as choosing lesser-known destinations or travelling off-peak. However, they are far less willing to take actions perceived as a compromise, including paying more for a flight or avoiding a destination or travel service because of sustainability concerns.
- Asian markets show stronger agreement across all sustainability statements, including willingness to pay extra for a flight, although the amount was not specified as it was in the North American and European surveys. The very positive responses from India and China are also likely to reflect cultural response bias.

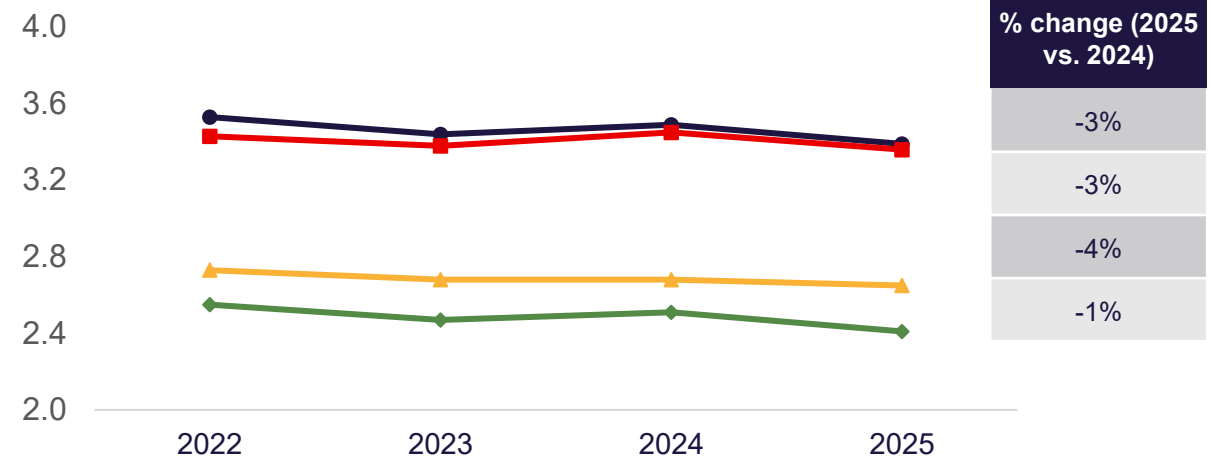
Please note: Data is from 2025 apart from Asian markets which were surveyed in 2023.
 L04.S. Please use the scale below to indicate your level of agreement with each of the following statements.

North American travellers are more likely to agree with sustainability statements over time

Agreement with statements on sustainable travel behaviour (out of 5) – North America



Agreement with statements on sustainable travel behaviour (out of 5) – Europe



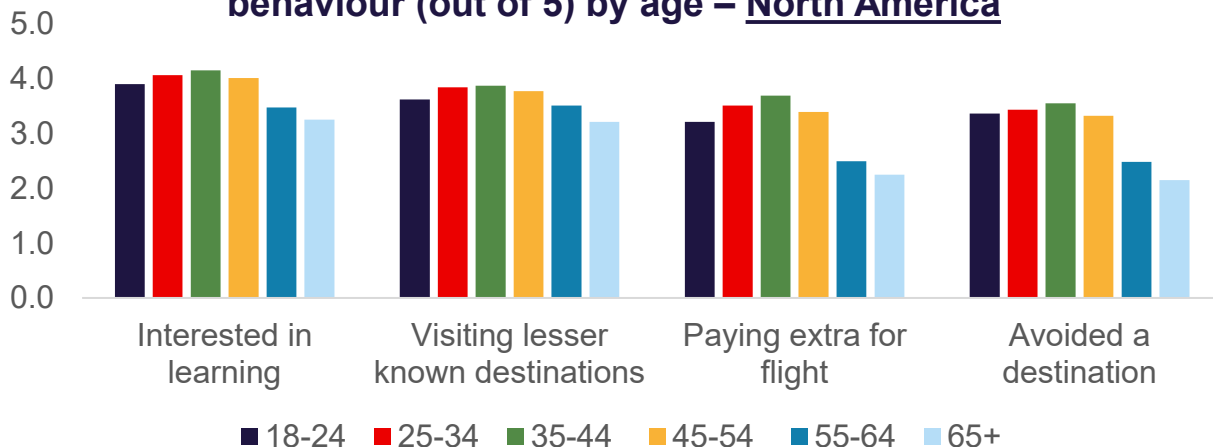
- I am interested in learning about ways in which I can travel more sustainably
- I visit lesser-known destinations/visit in the off-season to avoid contributing to tourism overcrowding
- ◆ I would be willing to pay an extra 100 \$/EUR/GBP for a flight to help reduce my carbon footprint
- ▲ I have avoided a destination, hotel, or transportation option because felt it was not committed to sustainable practices

- Agreement with the statements has grown in the last year among North American travellers, with 'avoiding a destination, hotel or transportation' due to sustainability 12% more likely in 2025 vs. 2023.
- In contrast, European travellers are slightly less in favour of these statements year-on-year, with willingness to pay extra for a flight particularly affected.

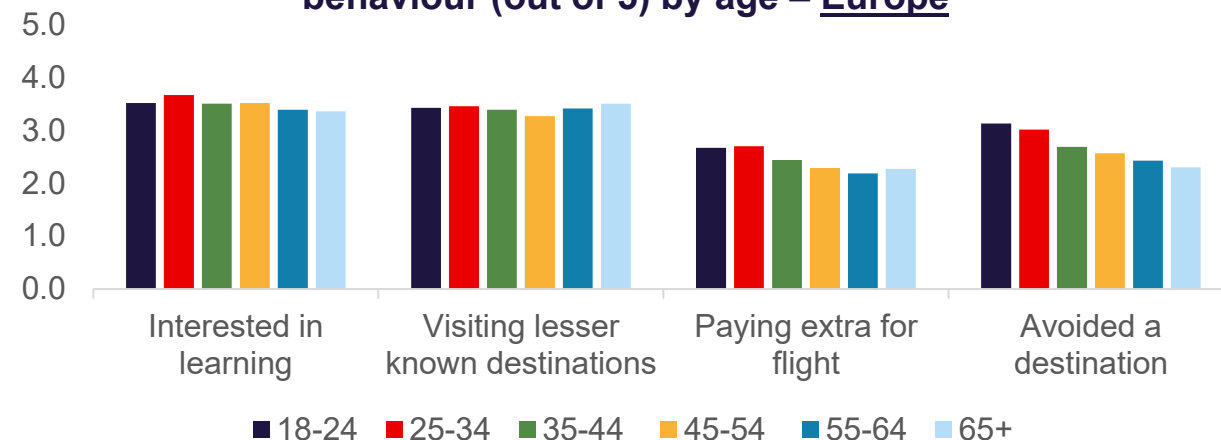
Please note: North American markets comprise the US and Canada. European markets comprise Germany, France, Spain, Italy, and the UK. L04.S. Please use the scale below to indicate your level of agreement with each of the following statements.

Trends in agreement by age vary by global region

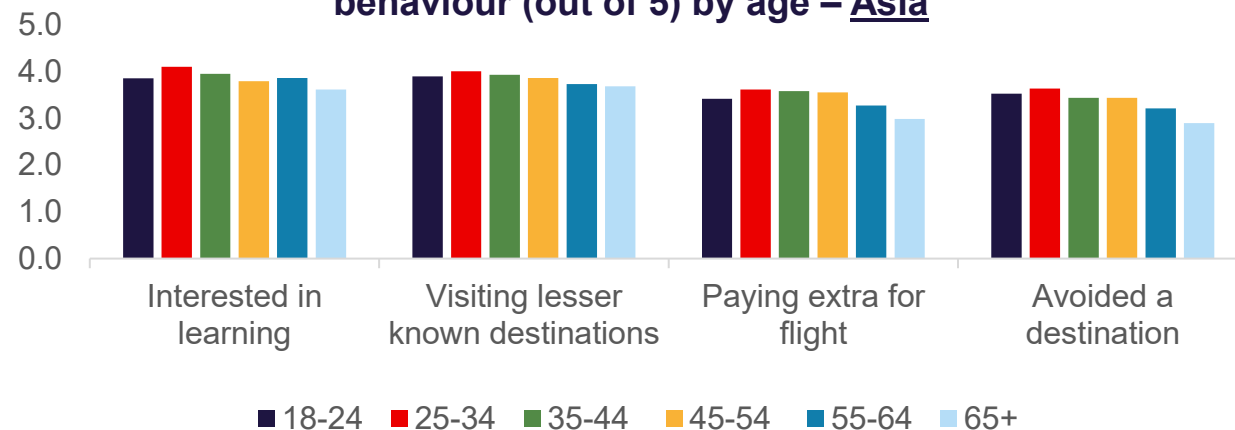
Agreement with statements on sustainable travel behaviour (out of 5) by age – North America



Agreement with statements on sustainable travel behaviour (out of 5) by age – Europe



Agreement with statements on sustainable travel behaviour (out of 5) by age – Asia



- Agreement with the statements tends to be strongest among those aged 35-44 in North America, with 25-34 year olds most prominent in Asia.
- European agreement among age groups demonstrates more variation, with those aged 65+ most open to visiting lesser-known destinations or travelling in the off-season.

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L04.S. Please use the scale below to indicate your level of agreement with each of the following statements.

Sustainable travel among international travellers

Appendix



Panel market sample sizes

Panel	Total Sample size	Total Interested in England
Total Europe (2025)	4,107	1,208
Germany	820	193
France	818	204
Spain	820	246
Italy	820	310
UK (data not shown)	829	255
Total North America (2025)	2,064	916
US	1,046	479
Canada	1,018	437
Total Asia (2023)	4,162	1,230
China	1,015	193
India	1,051	503
Japan	1,054	295
South Korea	1,042	239