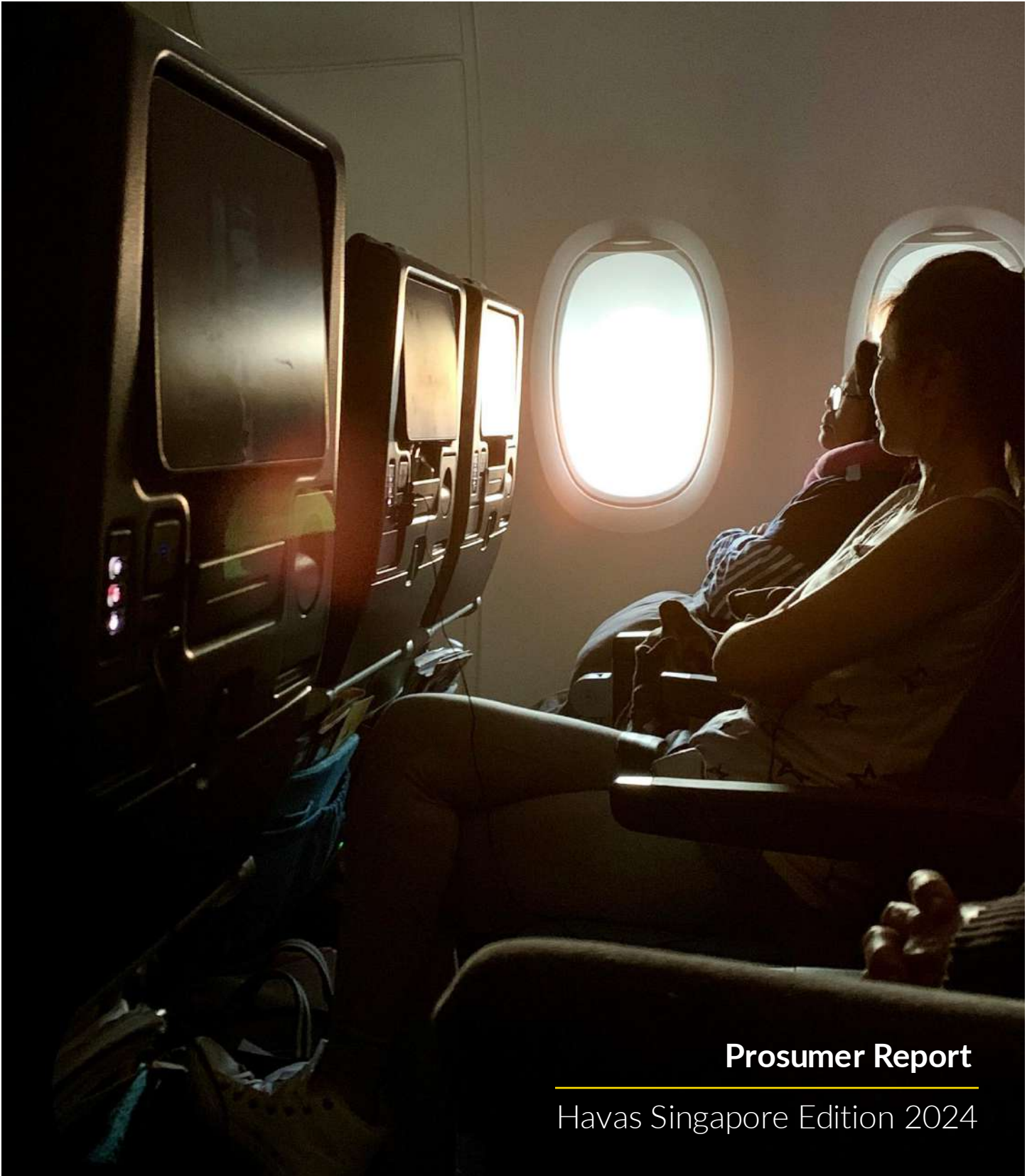


TRAVEL & TOURISM:

Can We Still Roam a World on the Verge of Collapse?



Prosumer Report

Havas Singapore Edition 2024



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

To find out, Havas Group surveyed more than 14,000 respondents in 32 markets worldwide, including 263 individuals in Singapore. Their responses revealed that it will take more than dire forecasts of planetary overheating to pry people—Prosumers especially—out of airplanes and tourist hotspots.



An Unstoppable Force

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

Leisure travel is now so ingrained in human culture that it's easy to overlook that it's a relatively new phenomenon. The concept of tourism wasn't introduced until the late 18th century, and it took many more decades for leisure travel to become popularised. British entrepreneur Thomas Cook gave the industry a boost in 1869 when his travel firm

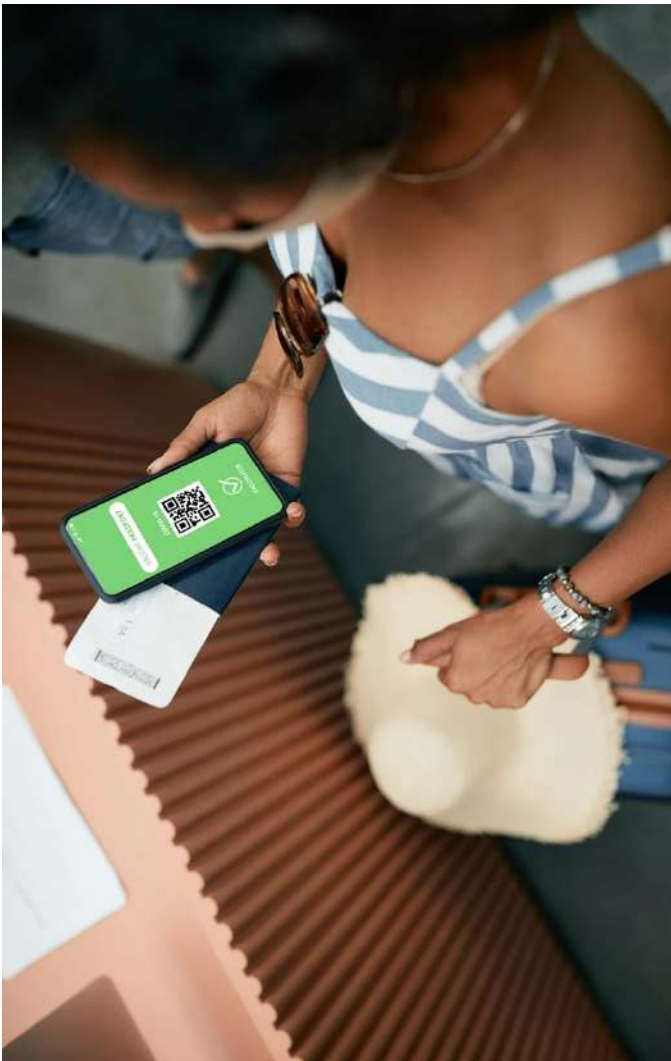
debuted “all-inclusive” packages. Beginning in the 1990s, the rise of low-cost airlines further democratised the industry. Today, despite growing ecological concerns, an overwhelming 85% of Singaporean Prosumers still see travel as essential for relaxation and unwinding amidst their hectic lifestyles.

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

85% PROSUMERS

70% MAINSTREAM



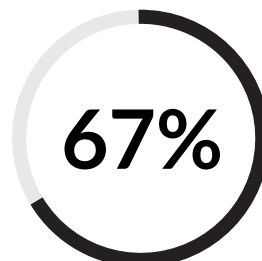


After the COVID-19 pandemic, I want to travel more often and far away to make up for lost time

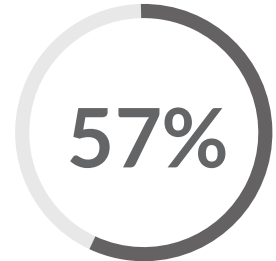
76% PROSUMERS



57% MAINSTREAM



Gen Z

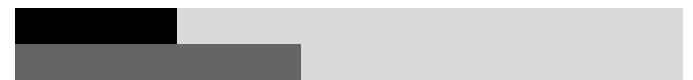


Gen X

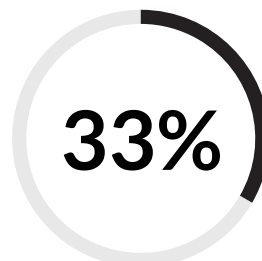


During COVID-19, I discovered that I could travel less far, and I intend to keep this new habit

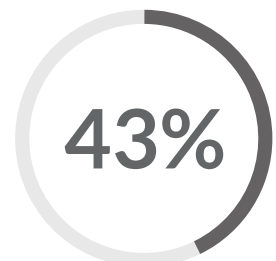
24% PROSUMERS



43% MAINSTREAM



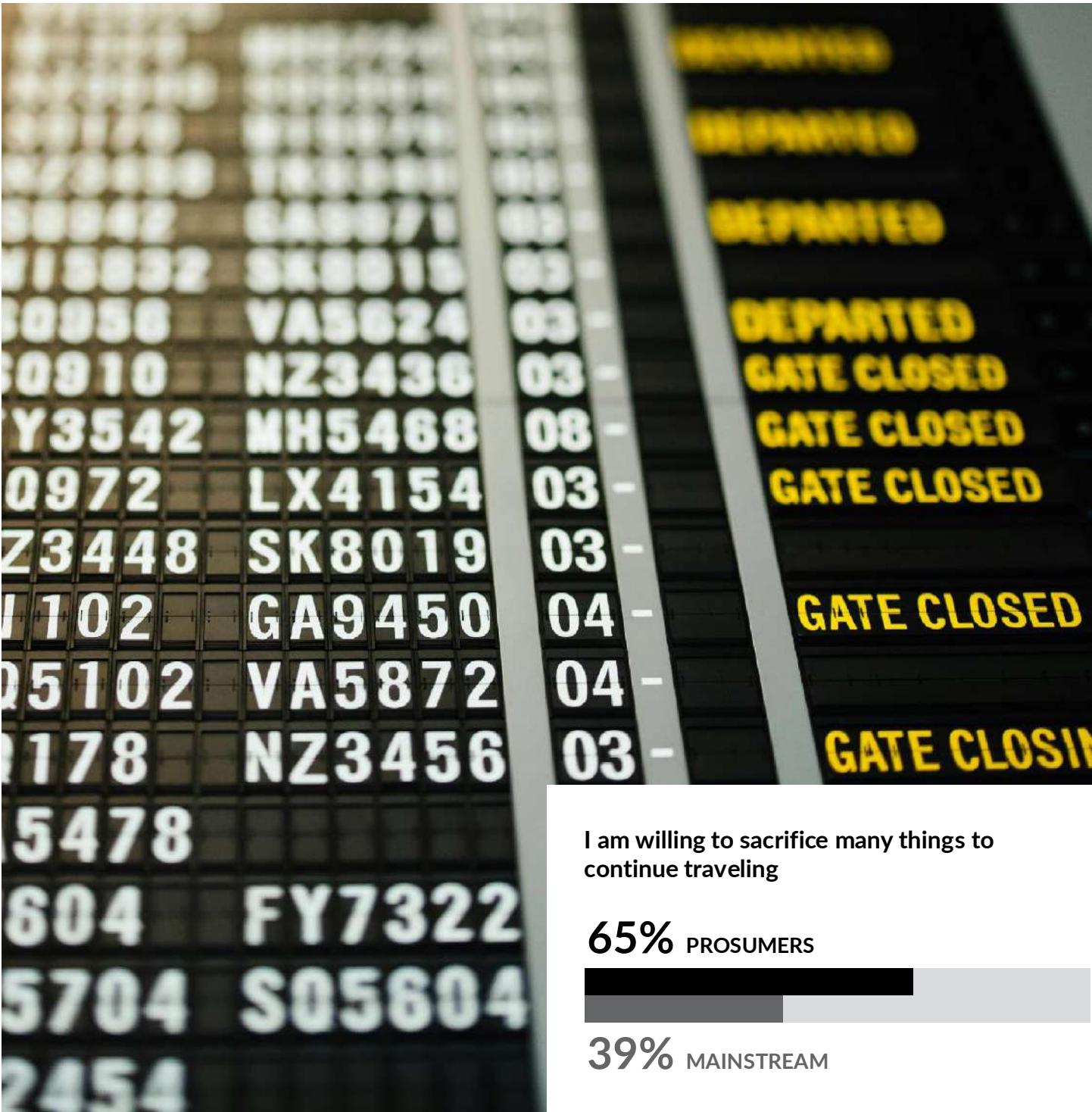
Gen Z



Gen X

BACK WITH A VENGEANCE POST-COVID 19

In 2020, the travel and tourism industry was upended by COVID-19 and the closing of borders to slow the spread of infection. In the face of climate change, that might have represented an inflection point—an opportunity for people to rethink the need to fly. To an extent, that has been the case for [business travel](#), though it is now on the upswing. Not so for leisure travel. When asked whether the pandemic motivated them to travel greater distances post-pandemic to “make up for lost time” or stick closer to home, nearly 4 in 5 Singaporean Prosumers chose the former. It’s a phenomenon that has come to be known as “[revenge travel](#).” Across generations, 67% of Gen Zs and over half of Gen Xs seek to travel long distances.



I am willing to sacrifice many things to continue traveling

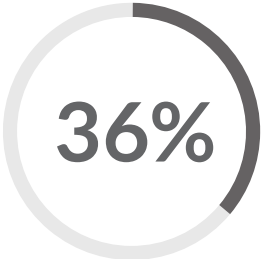
65% PROSUMERS



39% MAINSTREAM



Gen Z



Gen X

(% agreeing strongly/somewhat)

WHATEVER THE COST

Whether it's the financial burden, coping with airline hassles, or surviving overcrowded tourist destinations, the modern traveler is willing to put up with a lot to continue the pursuit. Just in Singapore alone, 65% of Prosumers and almost 3 in 5 Gen Zs are willing to sacrifice many things to continue traveling.



Why Must We Travel?

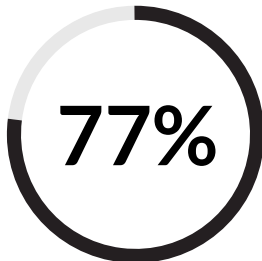
Exploring the world—once a privilege only for the wealthy—has evolved into a 'vital need' for 91% of Singaporean Prosumers, including nearly 4 in 5 Gen Zs and Gen Xs.

For Singaporeans, this isn't just about traveling from one place to another; it's about breaking free from the constraints of everyday life. Travel allows us to experience new perspectives, shapes our identities, and even influences how we are viewed by others.

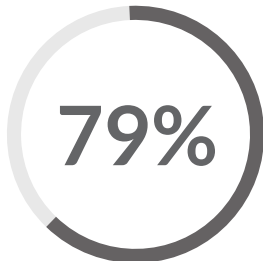
I will never give up flying because discovering the world is too vital for me



74% MAINSTREAM



Gen Z



Gen X

(% agreeing strongly/somewhat)



EXPLORATION

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

Interestingly, despite so much of the planet having been Google-mapped down to the millimeter, more than 9 in 10 Singaporean Prosumers are convinced there are still places that are relatively unexplored. And that’s a big part of the draw. Close to seven in 10 Prosumers point to discovering new places as an important reason to travel, and 46% say traveling is important to them because it opens them up to other cultures. The payoff is personal development—whether through self-discovery or gaining fresh insights into the wider world.

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

(% agreeing strongly/somewhat)

96% PROSUMERS



83% MAINSTREAM

It’s important for me to travel:

To discover new places



Because it opens [me] up to other cultures



For personal development



To change air



■ PROSUMERS ■ MAINSTREAM



RIDING HIGH ON CLOUD NINE

53% of Singaporean Prosumers find travel for pure pleasure irresistible, driven by a desire to escape the daily grind and indulge in unique experiences. The appeal of luxury – whether dining at Michelin – starred restaurants or relaxing at exclusive resorts – offers a much – needed break from the structured, high – pressure life in Singapore. Travel provides a sense of freedom for uninhibited enjoyment, whether it's partying in Bali or lounging in the Maldives.

Amidst life's uncertainties, many adopt a 'live for the now' mentality, eager to seize the moment and embrace life's pleasures. The hedonistic joys of travel – from new adventures to luxurious relaxation – remain a powerful draw, offering an escape that rejuvenates the soul and enriches life.

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

53% PROSUMERS



51% MAINSTREAM





SELF-EXPRESSION

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

TRAVEL IRL TO BOOST URL LIFE

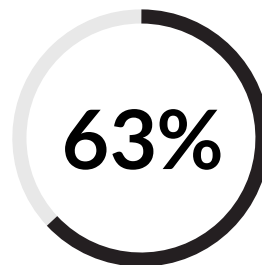
For many travelers, a big part of the payoff comes from social clout. Close to 9 in 10 Singaporean Prosumers and 6 in 10 Gen Zs—versus 43% of Gen Xs — love to share their travel experiences on their social channels.

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

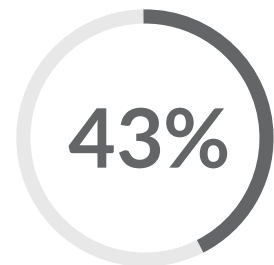
I love to share my travel experiences on social media

88% PROSUMERS

47% MAINSTREAM



Gen Z



Gen X

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

85% PROSUMERS

70% MAINSTREAM

(% agreeing strongly/somewhat)



HELL IS OTHER PEOPLE

One of the pleasures of resuming travel once vaccines allowed borders to reopen was the chance to sightsee free from crowds. That didn't last long. Congestion has become a huge pain point for many people, and they blame it not just on low-budget airlines but on social media luring everyone to the same spots. For 42% of Singaporean Prosumers, the increased

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

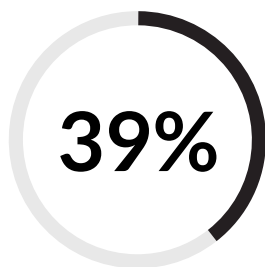
24% PROSUMERS



45% MAINSTREAM



Gen Z



Gen X

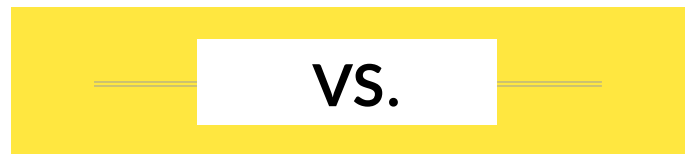
accessibility of travel has led to horrible experiences for all. When global music acts like Coldplay and Taylor Swift perform in Singapore, local fans often express frustration over [competing with foreign tourists for concert tickets](#). Some have even suggested using Singpass accounts to regulate ticket sales and limit the number available to foreigners.

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

74% PROSUMERS



74% MAINSTREAM



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

42% PROSUMERS



49% MAINSTREAM



Guilty? Not Me

We know that travel—especially by air—contributes to climate change. In fact, 51% of Singaporean Prosumers and 44% of the mainstream consider travel and airlines primarily responsible for the warming of our planet. We also know that [most people worry](#) that humankind is headed over an environmental cliff if people don't change their habits quickly. Governments and NGOs are raising the alarm, and we're seeing the birth of anti-flying movements such as Sweden's [Flygskam](#) ("flight shame"). Locally, 43% of Singaporean Prosumers feel guilty about the environmental impact of their travels, reflecting a growing awareness of sustainability.

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

51% PROSUMERS



44% MAINSTREAM

The environmental impact of each trip makes me feel guilty

43% PROSUMERS



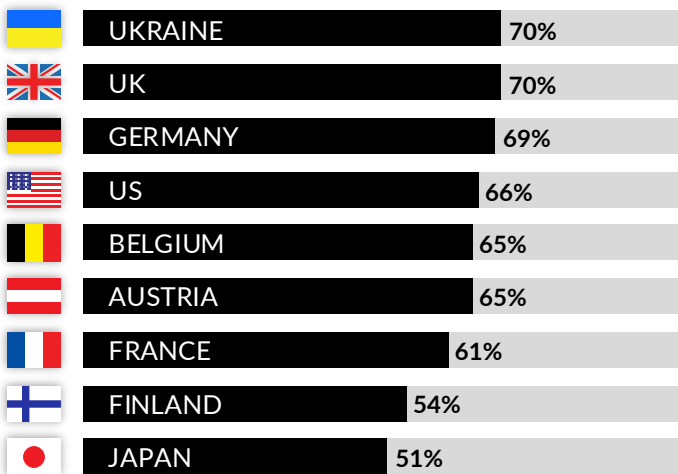
26% MAINSTREAM

(% agreeing strongly/somewhat)

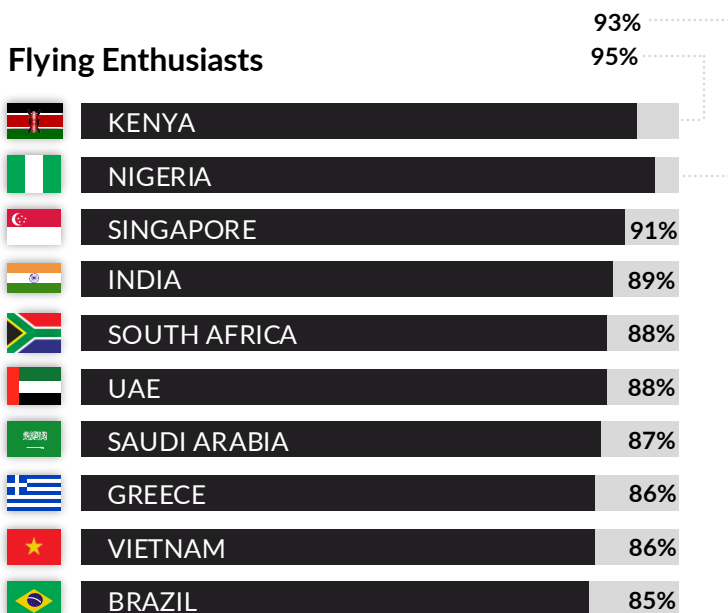
As shown in the graphic, there is a country divide in people's willingness to eliminate air travel. Even with rising eco-consciousness in the country, 9 in 10 Singaporean Prosumers remain enthusiastic flyers, showing little intention of staying grounded.

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

Flygskam Influenced



Flying Enthusiasts



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

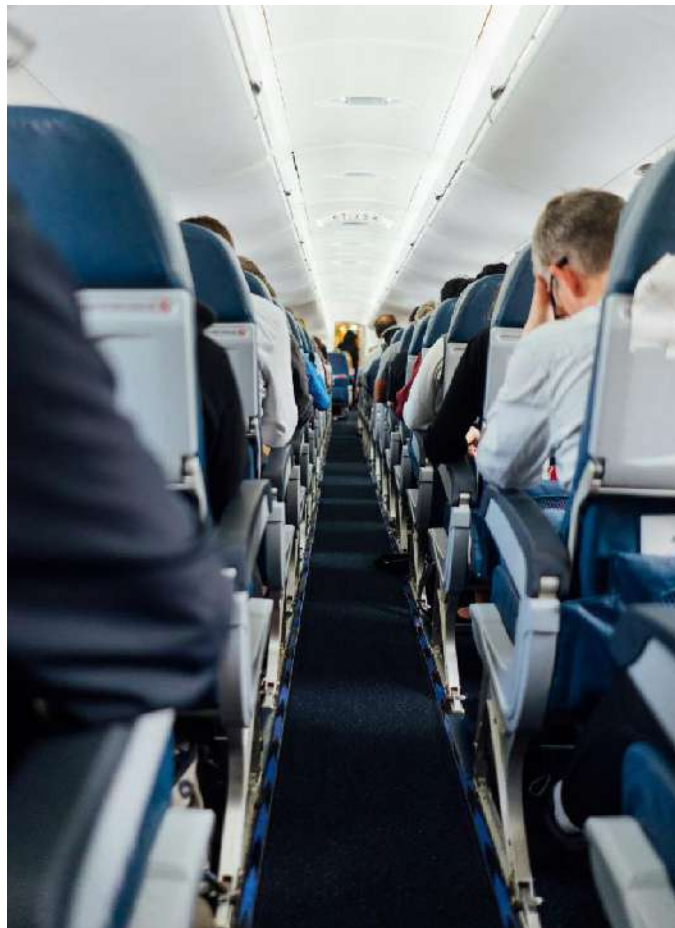
Despite the industry's business model being dependent on human passengers, most people feel comfortable pointing their finger at the airlines for their contribution to global warming, not at the travelers who keep these businesses aloft. Almost half of Singaporean Prosumers don't think airlines do enough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

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

49% PROSUMERS



55% MAINSTREAM



NOTE TO AIRLINES: ADAPT OR PERISH

Rather than fly less, many people are counting on the industry to come up with a technological solution to make flying less of an ecological burden. In fact, 1 in 5 Prosumers believe coming up with such solutions is the primary responsibility of airlines today, even above ensuring affordability and rich experiences. More than half of Prosumers and 35% of Gen Zs expect hydrogen-powered airplanes to save the day.

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

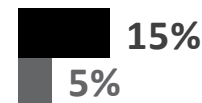
Ensure the safety of my trip



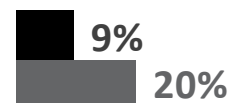
Find eco-friendly solutions to avoid travel limitations



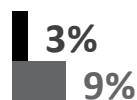
Take care of trip planning and personalized activities for me



Make travel more financially accessible



Make my trip a rich experience



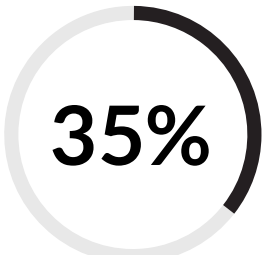
■ PROSUMERS
■ MAINSTREAM

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

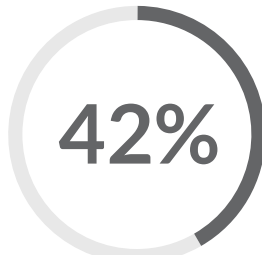
58% PROSUMERS



40% MAINSTREAM



Gen Z



Gen X

(% agreeing strongly/somewhat)



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

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

I find that traveling the world has become too expensive

58% PROSUMERS



80% MAINSTREAM

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

49% PROSUMERS



48% MAINSTREAM



MUST CHANGE BE MANDATED?

With few people willing to take personal responsibility for the eco-costs of travel, legal injunctions may be the only solution. Already, most Prosumers and Gen Zs agree that travel will need to be regulated to limit its environmental impact. This could involve measures such as carbon taxes on flights, stricter controls on over-tourism, or even caps on the number of trips individuals can take annually.

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

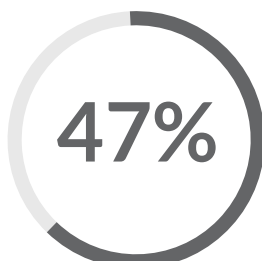
65% PROSUMERS



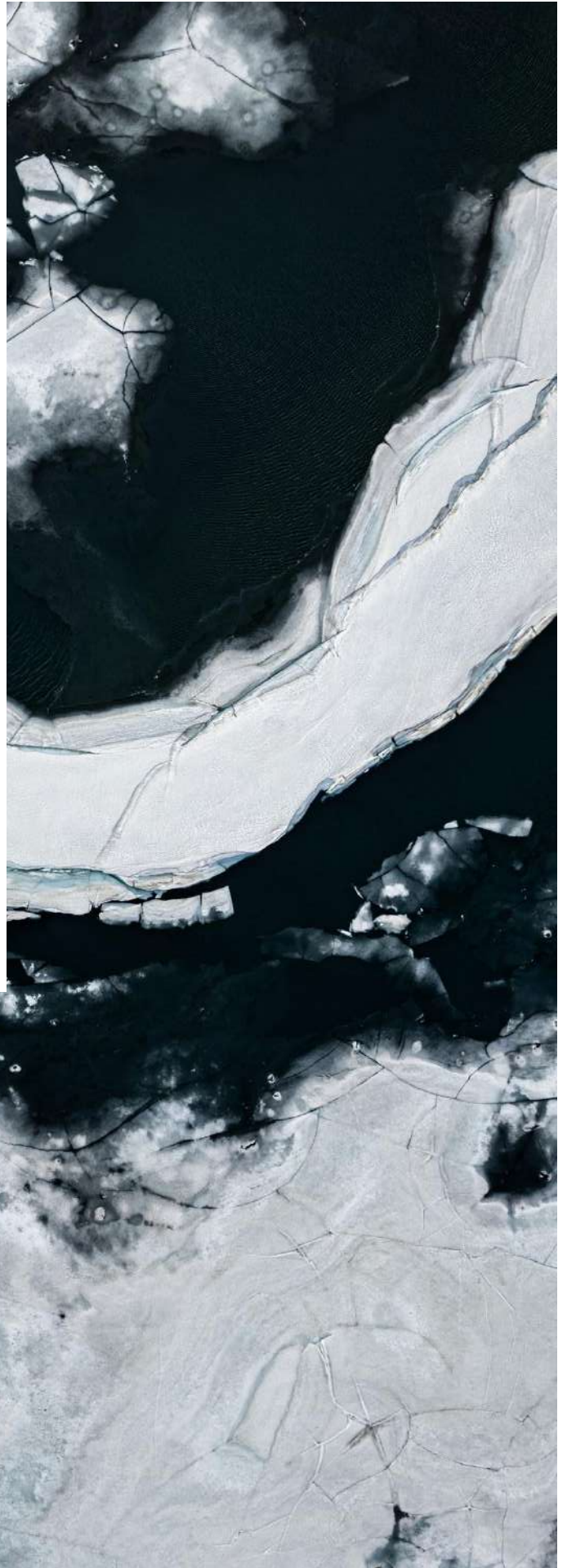
48% MAINSTREAM



Gen Z



Gen X

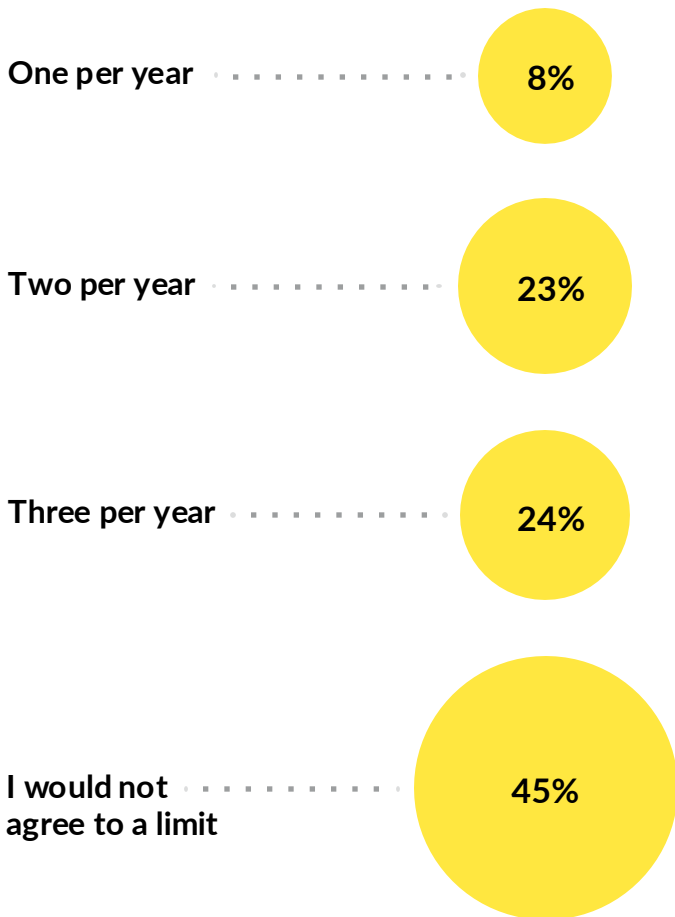


SAVINGS THAT SAVE THE PLANET

On the surface, 45% of Singaporean Prosumers appear willing to limit their long-distance travel to two or three times a year, reflecting a mindful approach to the rising costs of flights. With airfare prices increasing, many Singaporeans are becoming more strategic about when and how often they travel. This mindset is about maximising the value of each trip—choosing quality experiences over quantity, finding the best deals, and ensuring that each journey is worth the investment. For a nation known for its pragmatism, this approach highlights a shift towards more financially considered travel habits.

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

(Showing Prosumers)



WHEN WILL WE BECOME RADICAL?

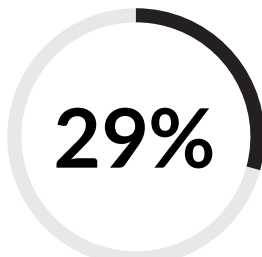
More than a third of Prosumers and 29% of Gen Zs think it's a matter of when, not if, governments will ban plane travel. It seems likely, however, that such an eventuality will come only when matters are so desperate that it's too late to turn things around.

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

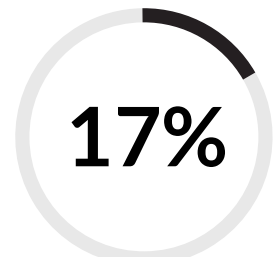
36% PROSUMERS



25% MAINSTREAM



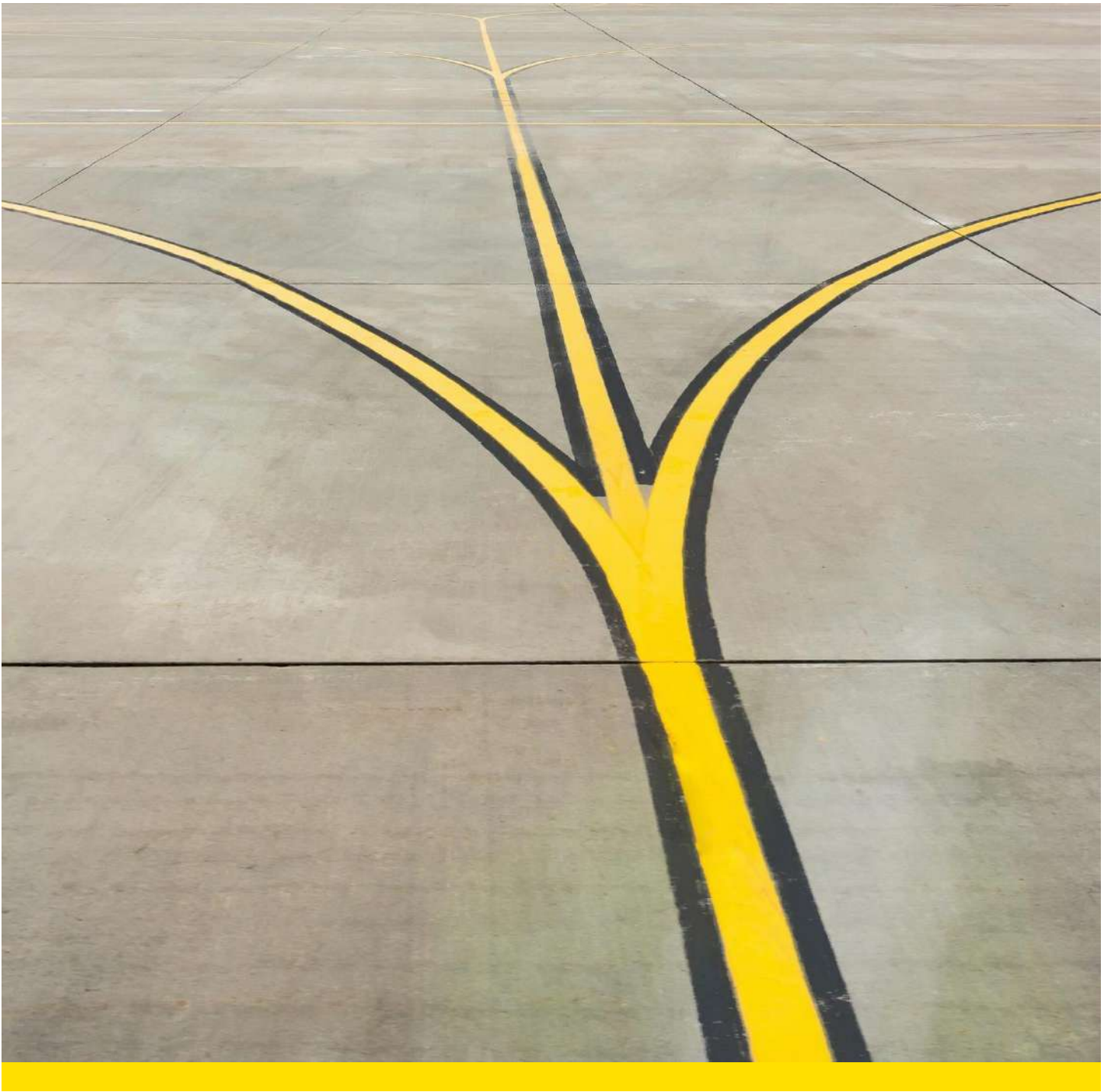
Gen Z



Gen X

(% agreeing strongly/somewhat)





New Itineraries Ahead

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



1. STEERING SOCIAL FEEDS

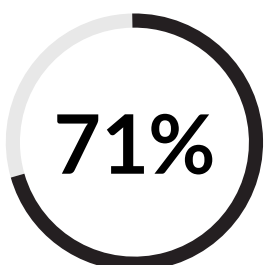
Popular travel content on social media tends to feature the same iconic spots and trendy cafes, turning ‘hidden gems’ into well-trodden, overcrowded paths. With 7 in 10 Singaporean Gen Zs agreeing that social media has standardised travel experiences, it's time to use these platforms to inspire more meaningful, rather than just ‘Instagram-worthy’ journeys.

I believe social media has standardised travel experiences

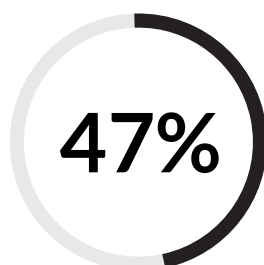
64% PROSUMERS



57% MAINSTREAM



Gen Z



Gen X

PROMOTING ALTERNATIVE TRAVEL NARRATIVES

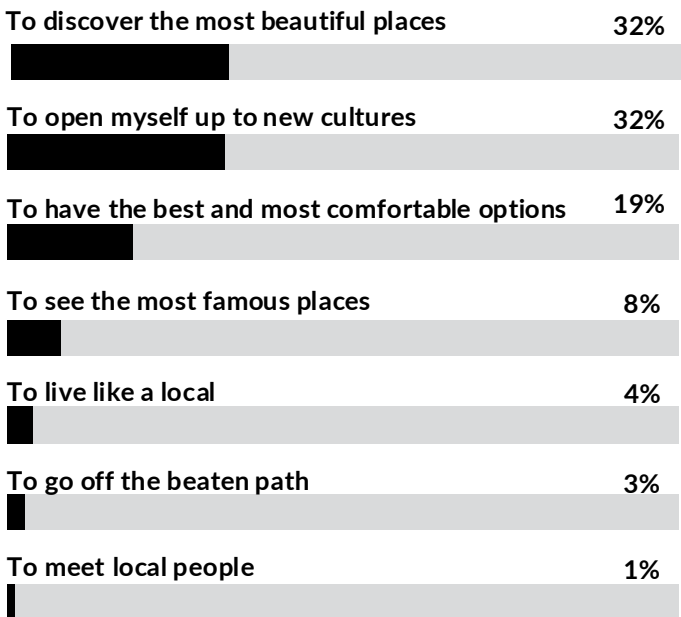
To address these issues, travel content on social media must shift. With nearly 1 in 3 Singaporean Prosumers keen on discovering new places and cultures, brands and content creators can promote lesser-known spots and encourage more responsible travel.

[Klook](#), a leading travel booking platform in Singapore, is actively promoting sustainable travel by offering a dedicated section for eco-friendly activities and tours, such as e-bike tours, wildlife conservation experiences, and low-impact accommodations. To drive awareness, Klook uses social media to highlight these options, sharing visually engaging and educational content that appeals to eco-conscious travelers. They also collaborate with local tour operators and influencers to amplify their message through targeted campaigns on platforms like Instagram and Facebook, encouraging Singaporeans to make more responsible travel choices.

[“The Better Traveller”](#) by the Singapore International Foundation (SIF) is digital storytelling platform designed to promote responsible and sustainable travel habits among Singaporeans and the wider community. The program encourages travellers to be more mindful of their impact on local environments, cultures, and communities when they travel abroad.



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



TEAM WITH INFLUENCERS

With 70% of Singaporean Prosumers enjoying content from brand-partnered influencers, there is a strong opportunity to use this influence to reduce over-tourism and promote sustainable travel. Platforms like [The Smart Local](#), a leading media publisher in Singapore, already inspire with fresh, lesser-known itineraries through their in-house influencer team.

Brands can further this effort by partnering with recognised travel influencers like [@amebeverly](#) and [@beixin](#), who can educate Singaporeans on incorporating sustainability into their travels. From choosing eco-friendly stays to supporting local communities, influencers can reshape travel habits, encouraging more mindful and responsible exploration.

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

70% PROSUMERS



45% MAINSTREAM

(% agreeing strongly/somewhat)



2. CONSERVING COMMUNITIES THROUGH CULTURE IMMERSION

For 74% of Prosumers and 6 in 10 Gen Zs, living as much as possible “like a local” is high up on their travel wish lists. Beyond that, people want to travel according to their values, with over 9 in 10 Prosumers encouraging tourism brands to support and empower local communities.

[Beyond Expeditions](#), a Singapore-based travel brand, specialises in immersive travel experiences that connect travelers with authentic local cultures, particularly in Mongolia and other remote destinations. They offer unique stays such as yurts in the Mongolian wilderness and aim to immerse travelers in local nomadic life.

This model has gained traction among Singaporeans seeking authentic and meaningful travel experiences. By emphasising cultural immersion and sustainability, Beyond Expeditions has created a niche for travelers who want more than just sightseeing.

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

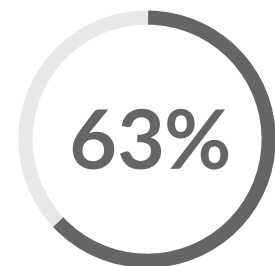
74% PROSUMERS



66% MAINSTREAM



Gen Z



Gen X

I think tourism brands should support and empower local communities

92% PROSUMERS



76% MAINSTREAM

(% agreeing strongly/somewhat)

Sociopolitical values are increasingly shaping travel choices, with over 7 in 10 Prosumers stating they would boycott brands that promote destinations disrespecting human rights, and more than half avoiding those not environmentally or socially conscious. In response, several Singaporean brands are supporting environmental causes and advocating for mindful, responsible travel.

[Banyan Tree Holdings](#), a luxury hospitality brand based in Singapore, is committed to sustainability and socially conscious travel. With properties across Asia, Banyan Tree incorporates environmental conservation and community engagement into its core operations, from coral planting and beach cleanups to protecting endangered species like turtles.

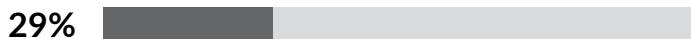
Similarly, ["Women on Mountains"](#) by Ace Adventure Expeditions is an initiative that empowers women through mountaineering. By offering women-only expeditions to destinations like Mount Kilimanjaro and Everest Base Camp, it creates a supportive environment for women to build confidence and resilience, providing comprehensive training, guidance, and a space for personal growth.

I boycott brands that promote destinations that...

...do not respect human rights



...are not environmentally friendly or socially conscious



■ PROSUMERS

■ MAINSTREAM

(% agreeing strongly/somewhat)



3. OFFER NEW WAYS OF TRAVELING

Go back 10 or 15 years, and very few travelers would have given any thought to their carbon footprint. Today, 81% of Singaporean Prosumers want to understand the eco impacts of their travel choices. Moreover, 7 in 10 Prosumers would willingly pay more for lower-impact trips. Across generations, Gen Zs are more inclined to invest more in saving the planet, with 46% of them stating that they are willing to pay more to lower adverse environmental impact during their travels.

Through its ['City in Nature'](#) vision, Singapore aims to seamlessly integrate nature into urban living, enhancing the city's appeal while prioritising the preservation of natural spaces amid ongoing development. As Singaporeans experience their city's beauty intertwined with nature, the availability of well-maintained trails, parks, and recreational routes encourages more people to engage in outdoor activities close to home, reducing the desire to seek similar experiences abroad.

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

81% PROSUMERS



58% MAINSTREAM

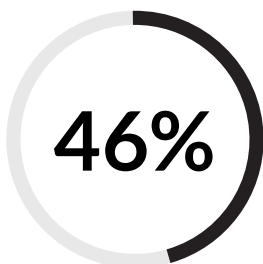


I am willing to pay more for trips that have a lower environmental impact

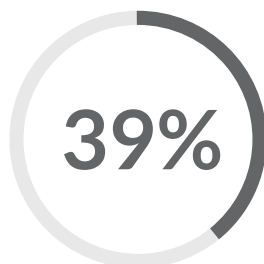
70% PROSUMERS



38% MAINSTREAM



Gen Z



Gen X

(% agreeing strongly/somewhat)

TRAVEL LESS, STAY LONGER

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

Tribe Theory, now [Draper Startup House](#), is a Singapore-founded startup that combines affordable accommodations with coworking spaces for entrepreneurs, digital nomads, and remote workers. By providing cost-effective and conducive spaces for both living and working, it enables Singaporean Gen Zs to embrace long-term travel and remote work, blending the best of coworking and coliving.

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

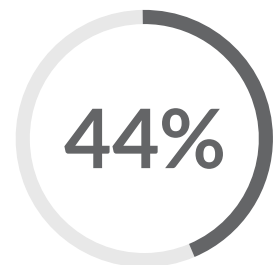
50% PROSUMERS



44% MAINSTREAM



Gen Z



Gen X

(% agreeing strongly/somewhat)





FIND NEW SOLUTIONS

We're also seeing frustration over how expensive it is to travel more sustainably. To mitigate this, Singapore brands have leveraged immersive technologies like virtual reality (VR), augmented reality (AR), and other digital platforms to offer tourists immersive virtual travel experiences.

In partnership with Google, the STB launched "[Merli's Immersive Adventure](#)," an augmented reality (AR) guided tour that allows users to explore Singapore's landmarks and hidden gems. This AR experience is accessible through the Visit Singapore Travel Guide app and includes interactive storytelling elements, such as sending virtual postcards from historical sites.

By promoting virtual exploration of cultural and historical locations, this initiative encourages users to engage with Singapore's heritage without contributing to physical congestion at these sites. The project exemplifies how technology can enhance the travel experience while being environmentally conscious.

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



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



Gen Z



Gen X

(% agreeing strongly/somewhat)



IN A NUTSHELL

1. Despite rising environmental concerns, Singaporeans consider travel an essential part of their lives.

2. Singaporeans enjoy sharing their travel experiences online, indicating that travel is often as much about self-expression and social clout as it is about the journey itself.

3. While Singaporeans acknowledge the ecological impact of travel, only a small percentage feel genuine guilt, indicating a gap between awareness and behavioural change.

4. There's a growing preference for authentic, immersive travel experiences among Singaporeans, with many expressing the desire to live like locals during their travels.

5. With Singaporeans appreciating influencer partnerships more, brands have a strong opportunity to shape more responsible and sustainable travel habits through strategic collaborations.



CHARTING YOUR ROUTE TO MEDIA EFFECTIVENESS

The data presented in this report can help you build a highly detailed and accurate picture of your audience's needs, aspirations and behaviours. Understanding audiences at this level is essential to create campaigns that are trusted and engaging for consumers.

EFFORTLESS AUDIENCE TARGETING FOR INSTANT IMPACT

[Converged](#) is our all-in-one data and tech platform for transparent, cross-platform media planning and campaign performance. It seamlessly integrates first-party data with global partners, enabling direct activation of custom travel audiences through three modes:

- 1) Converged 360:** A secure, private system for integrating first- and second-party data, pushing segments directly to DSP/CRM platforms like DV360 and Salesforce.
- 2) Panel to Activation:** Ingests YouGov Profiles data to create activatable audience segments based on robust demographic insights.
- 3) Audience Studio:** Uses AI to match third-party data (e.g., Eyeota) for cookieless activation across platforms like Meta and Google.

Converged empowers Havas Media and clients to deliver meaningful content at every stage of the customer journey, with comprehensive success measurement across all metrics.

TRANSFORM DATA INTO ACTIONABLE INSIGHTS

Coupling Havas' visualisation solution with our exclusive data partnership with [Eyeota](#), we can gain a nuanced understanding of audience motivations and preferences by analysing consumer intent-based behaviours and travel footprints. This allows us to craft highly relevant content that resonates personally with consumers.

Leveraging privacy-safe data from user cookies and IDs, we ensure that our ads are both impactful and compliant with stringent data privacy standards. This approach enables us to deliver messaging that connects meaningfully with audiences while respecting their privacy, thereby maximising engagement and effectiveness.

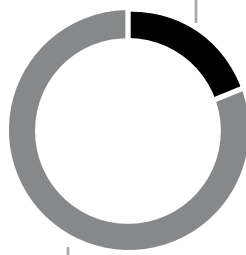
Reach out to Havas Media Singapore to explore how we can elevate your success:

marketing.sg@havas.com

About the Study

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

The survey sample was made up of **25% leading-edge Prosumers**



and **75% mainstream consumers.**

Who Are Prosumers?

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

Find out more about Prosumer Reports



Uncover more Prosumer insights:

<https://dare.havas.com/posts/category/prosumer-reports/>



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Prosumer Reports is a series of thought leadership publications by Havas—part of a global initiative to share information and insights, including our own proprietary research, across the Havas network of agencies and client companies. Havas Group is one of the world's largest global communications groups, bringing together more than 23,000 people in 100 countries. For more information, visit havas.com.

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