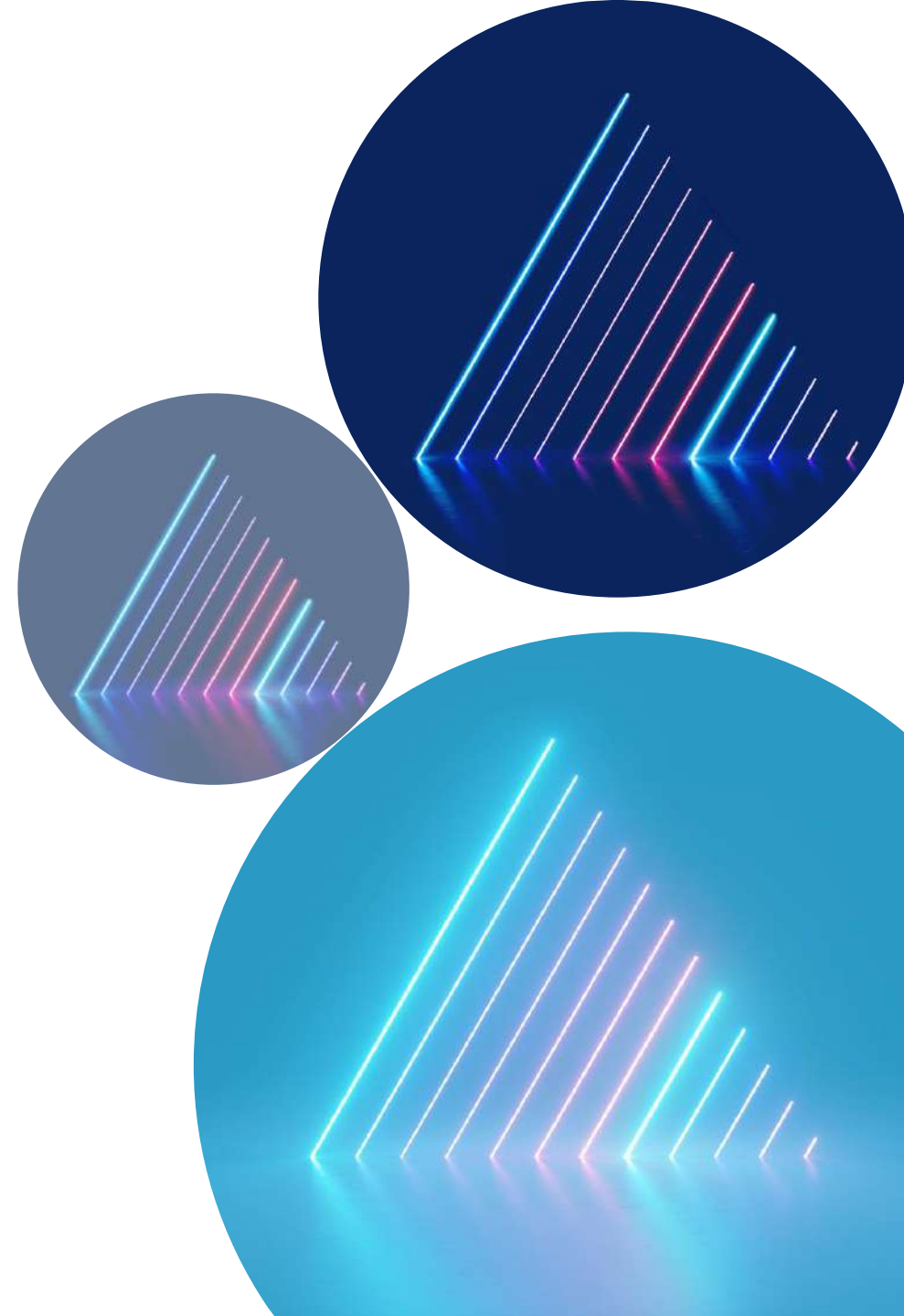


METRON ANALYSIS

# Nationwide Public Opinion Survey on Tourism Behaviour and Sustainability

October 2024



# Research Identity

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<b>Company:</b>	Metron Analysis (NCRTV Registration Number 4, General Commercial Registry Number 002305501000)
<b>Commissioned by:</b>	Hellenic Society for the Protection of Nature
<b>Survey Type:</b>	Public opinion survey - Web Interviews
<b>Survey Area:</b>	Nationwide
<b>Sampling Method:</b>	Quota-based random selection from an online panel
<b>Time period:</b>	Fieldwork was conducted between 13-26/9/2024
<b>Sample Size:</b>	1.000 individuals aged 17-70. Maximum sampling error $\pm 3,1\%$
<b>Weightings:</b>	The sample was post-weighted regarding gender, age and region of residence
<b>Field staff/Checks:</b>	100% of interviews were checked electronically
<b>Comments:</b>	In the tables that follow, data is only indicative when bases are smaller than 60 respondents
<b>Note:</b>	Due to rounding some distributions may not add up to 100%

METRON ANALYSIS is a member of the European Society for Opinion and Marketing Research (ESOMAR) and the Association of Greek Market and Opinion Research Companies (AGMORC) and abides by their codes and principles of professional practice.

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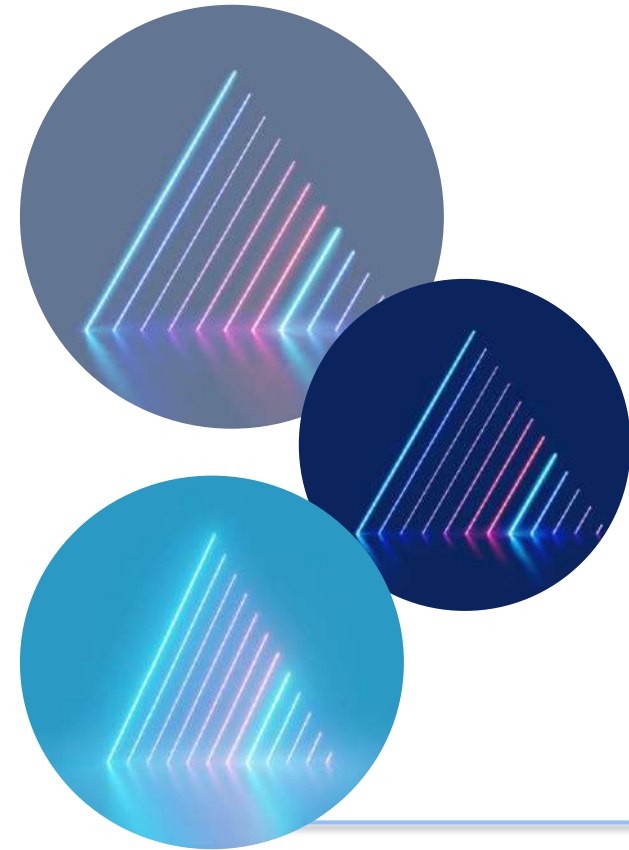
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Respondents' socio-  
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# Perceived Problems & The Issue of Climate Change

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# Perceived Problems I

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- ▶ At the heart of this survey is the question of whether, how much, and in what way the parameter of sustainability can affect our travel choices. Today, more than ever, we seem to believe that environmental degradation and climate change have dire consequences for life on the planet. However, does this belief alter our behaviour? And if so, to what extent?
- ▶ In order to explore specific aspects of tourism behaviour through the lens of sustainability, we first attempted to identify the broader mental context in which environmental sensitivities are also included.
- ▶ Starting with the perceived problems today, a "familiar" pattern emerges. When the question concerns the most important problems for the planet, an "environmental" trio tops the list of spontaneous responses: climate change (17%), extreme weather phenomena (15%), and the destruction of the natural environment (14%) — with women showing greater sensitivity than men. Next come materialist concerns (poverty and inequality: 10%, high cost of living: 9%) and geopolitical challenges (armed conflicts and migratory/refugee flows: 9%).

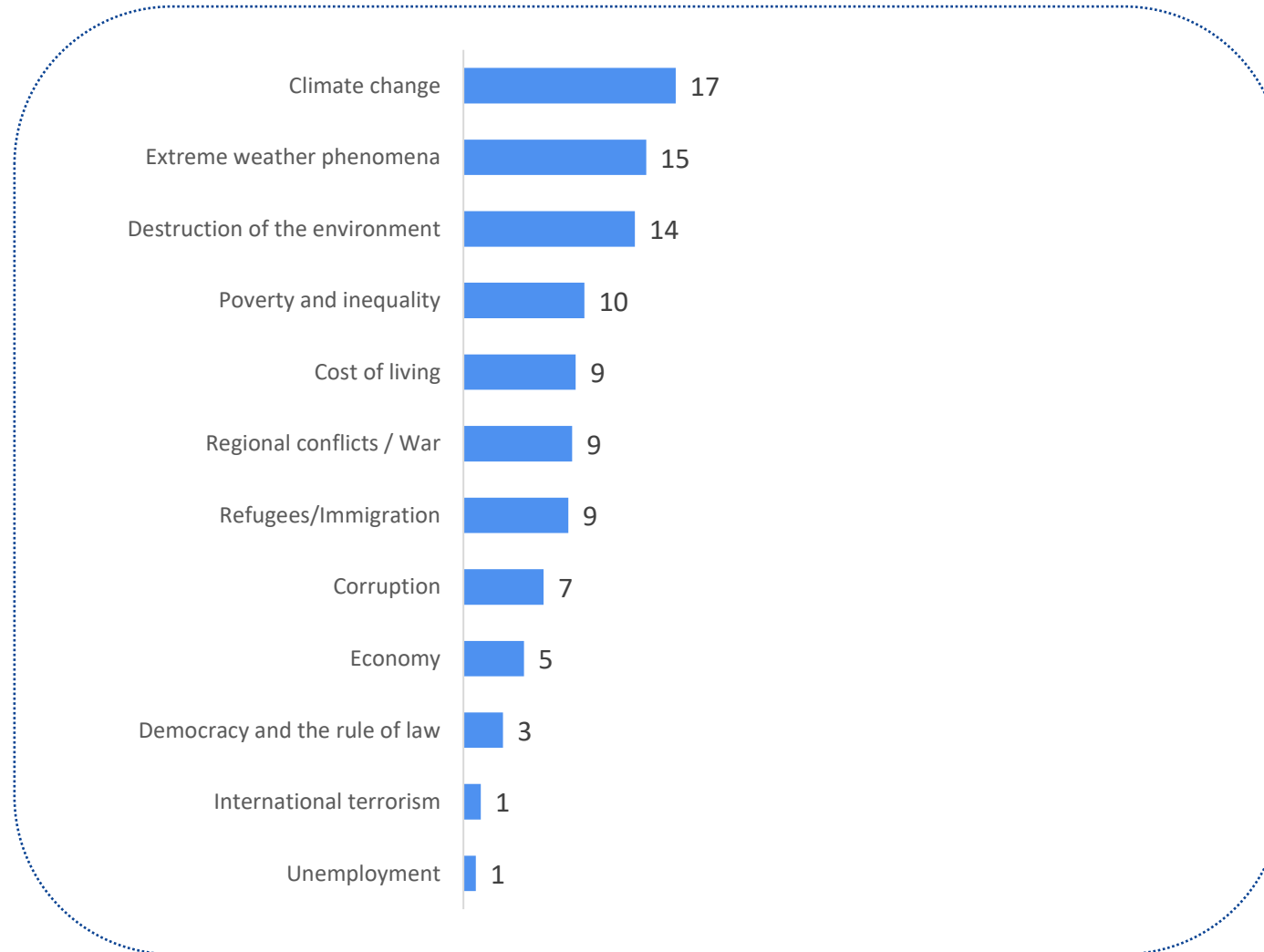
## Perceived Problems II

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- ▶ However, when we move to the national-local level, materialist concerns related to the economy and everyday life are by far the most mentioned, summarized in the cost of living, cited by 56% of respondents as the country's most significant problem — especially among younger ages (cost of living is at 64% among ages 35-44 y.o.; but also, in ages 17-24 y.o. the economy is at 20%, and unemployment at 15%, compared to only 4% overall). In contrast, the trio of environmental concerns ranks at the bottom.
- ▶ This confirms the observation that while environmental threats are now considered major when thinking on a global level, this does not translate into an equally entrenched sensitivity when talking about living conditions in our own country and everyday life.
- ▶ Thus, this mental gap already indicates that greater effort is needed to turn environmental sensitivity into action, practices, and criteria for behaviour in daily life.

# Environmental issues are ranked as the most important problems that the planet is facing today

“What do you think is the most important problem that the planet is currently facing?”



# Planet's most important problem

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
Climate change	17	17	16	16	26	12	18
Extreme weather phenomena	15	13	15	12	18	26	10
Destruction of the environment	14	13	16	13	14	12	15
Poverty and inequality	10	20	9	11	6	5	8
Cost of living	9	12	11	11	5	6	9
Regional conflicts / War	9	5	8	11	11	8	10
Refugees/Immigration	9	2	5	12	13	17	5
Corruption	7	5	12	4	1	4	11
Economy	5	5	5	4	1	6	8
Democracy and the rule of law	3	6	4	2	1	2	4
International terrorism	1	1	1	3	3	1	1
Unemployment	1	3	*	2	2	1	1
Other	*	*	*	1	*	1	*
None	*	*	*	*	1	1	1



# Planet's most important problem

by gender and age

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.
Climate change	17	15	19	18	12	25	16	15
Extreme weather phenomena	15	14	16	9	12	13	17	18
Destruction of the environment	14	11	17	15	13	14	14	14
Poverty and inequality	10	12	7	7	11	10	12	9
Cost of living	9	10	9	8	17	11	6	7
Regional conflicts / War	9	10	7	14	11	6	11	6
Refugees/Immigration	9	11	6	4	6	8	11	10
Corruption	7	6	7	7	6	4	3	11
Economy	5	5	5	9	3	5	3	5
Democracy and the rule of law	3	4	2	4	6	1	3	3
International terrorism	1	1	2	1	1	2	2	1
Unemployment	1	1	2	3	2	1	1	*
Other	*	1	*	1	*	*	*	*
None	*	*	*	*	*	*	1	*

%

# Planet's most important problem

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers /Working class	Lower-to-middle class	Middle class	Upper class
Climate change	17	21	17	15	9	15	14	21	21
Extreme weather phenomena	15	16	14	18	8	10	14	16	21
Destruction of the environment	14	16	11	13	16	17	14	14	13
Poverty and inequality	10	10	11	10	9	17	14	6	7
Cost of living	9	9	11	6	9	14	8	8	8
Regional conflicts / War	9	8	9	9	10	4	11	8	9
Refugees/Immigration	9	6	9	10	10	6	8	9	8
Corruption	7	4	5	8	15	8	6	6	3
Economy	5	5	5	4	7	4	5	5	5
Democracy and the rule of law	3	2	3	4	4	4	3	3	4
International terrorism	1	2	1	1	3	*	2	2	*
Unemployment	1	1	3	2	*	1	1	1	3
Other	*	*	*	*	1	1	*	*	*
None	*	*	*	1	*	1	*	*	*

%

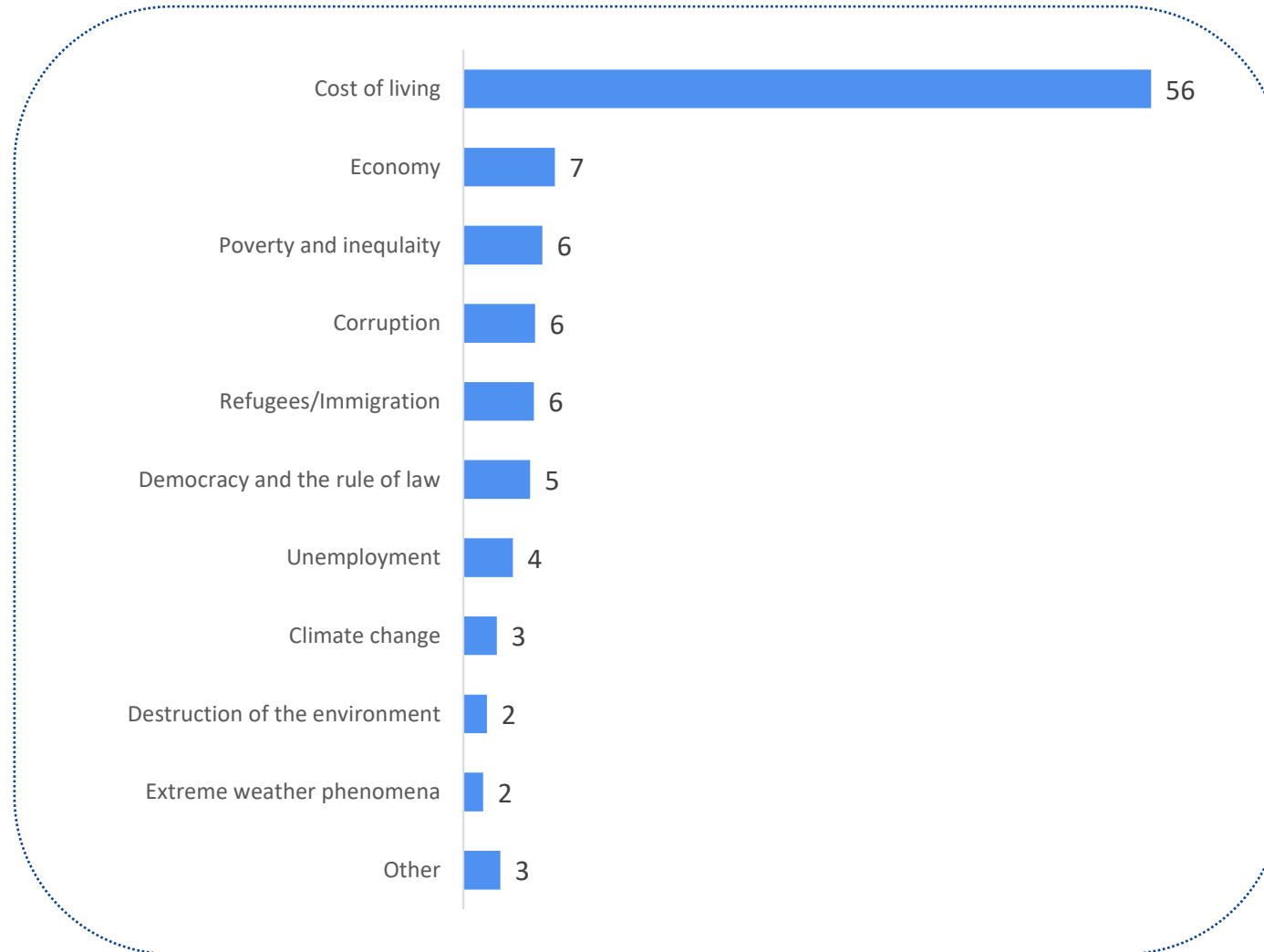
# Planet's most important problem

by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
Climate change	17	12	16	20	18	17	15	18	16	14	19
Extreme weather phenomena	15	17	11	13	14	12	23	17	17	16	14
Destruction of the environment	14	11	17	14	12	21	13	12	6	14	14
Poverty and inequality	10	11	11	12	6	8	8	4	10	9	11
Cost of living	9	8	9	9	9	6	9	12	14	9	9
Regional conflicts / War	9	11	11	9	9	16	6	4	2	8	9
Refugees/Immigration	9	14	10	7	5	3	9	11	14	9	8
Corruption	7	4	5	5	16	6	8	14	7	7	6
Economy	5	8	2	5	3	4	9	2	2	6	4
Democracy and the rule of law	3	1	5	3	5	6	1	5	2	3	3
International terrorism	1	3	2	2	*	1	*	2	*	1	2
Unemployment	1	*	1	1	4	*	1	*	7	2	1
Other	*	*	*	*	*	2	*	*	3	1	*
None	*	1	*	1	*	*	*	*	*	1	*

In contrast, when it comes to the country's most important problem, economic issues top the list, while environmental issues rank the lowest

“And what do you think is the most important problem that our country is currently facing?”



# Country's most important problem

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
Cost of living	56	56	51	60	62	49	56
Economy	7	4	10	7	3	8	10
Poverty and inequality	6	9	9	5	3	3	7
Corruption	6	7	8	4	7	6	4
Refugees/Immigration	6	1	1	5	8	18	5
Democracy and the rule of law	5	6	8	5	3	3	7
Unemployment	4	6	2	2	6	5	5
Climate change	3	2	5	2	2	1	2
Destruction of the environment	2	4	2	1	1	3	1
Extreme weather phenomena	2	4	1	2	1	2	1
Other	3	1	3	5	4	2	2
None	*	*	*	*	*	*	1

# Country's most important problem

by gender and age

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.
Cost of living	56	54	58	43	60	64	53	55
Economy	7	6	9	20	9	5	4	6
Poverty and inequality	6	5	7	6	5	6	7	7
Corruption	6	6	6	3	7	5	7	6
Refugees/Immigration	6	8	4	2	3	4	10	7
Democracy and the rule of law	5	8	4	7	4	6	6	5
Unemployment	4	4	4	15	6	3	3	*
Climate change	3	2	3	*	1	5	3	3
Destruction of the environment	2	2	2	1	*	1	2	3
Extreme weather phenomena	2	2	1	1	3	1	1	1
Other	3	4	3	1	3	1	3	6
None	*	*	*	*	*	*	1	*

# Country's most important problem

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Cost of living	56	60	53	55	50	61	53	59	51
Economy	7	8	8	8	5	5	8	8	9
Poverty and inequality	6	6	6	6	11	10	7	3	8
Corruption	6	5	7	6	8	4	7	6	5
Refugees/Immigration	6	5	6	4	9	4	5	7	5
Democracy and the rule of law	5	5	5	7	5	5	7	5	4
Unemployment	4	2	8	3	2	4	2	4	9
Climate change	3	2	4	2	3	2	3	3	1
Destruction of the environment	2	1	1	4	3	1	1	3	1
Extreme weather phenomena	2	2	2	2	2	1	2	1	3
Other	3	5	1	2	3	2	4	3	6
None	*	*	*	*	*	1	*	*	*

# Country's most important problem

by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
Cost of living	56	52	60	60	50	43	55	59	45	53	58
Economy	7	8	5	8	4	18	6	9	6	9	7
Poverty and inequality	6	5	7	5	12	12	7	6	2	5	7
Corruption	6	6	6	8	4	6	2	2	3	7	5
Refugees/Immigration	6	6	7	5	3	*	7	10	7	5	6
Democracy and the rule of law	5	9	5	5	13	8	3	*	*	4	6
Unemployment	4	3	5	3	6	8	*	2	18	6	2
Climate change	3	2	2	2	4	*	6	6	3	3	3
Destruction of the environment	2	3	1	1	2	2	4	*	4	3	1
Extreme weather phenomena	2	3	*	1	*	*	4	4	5	2	1
Other	3	3	3	2	1	4	7	2	7	2	4



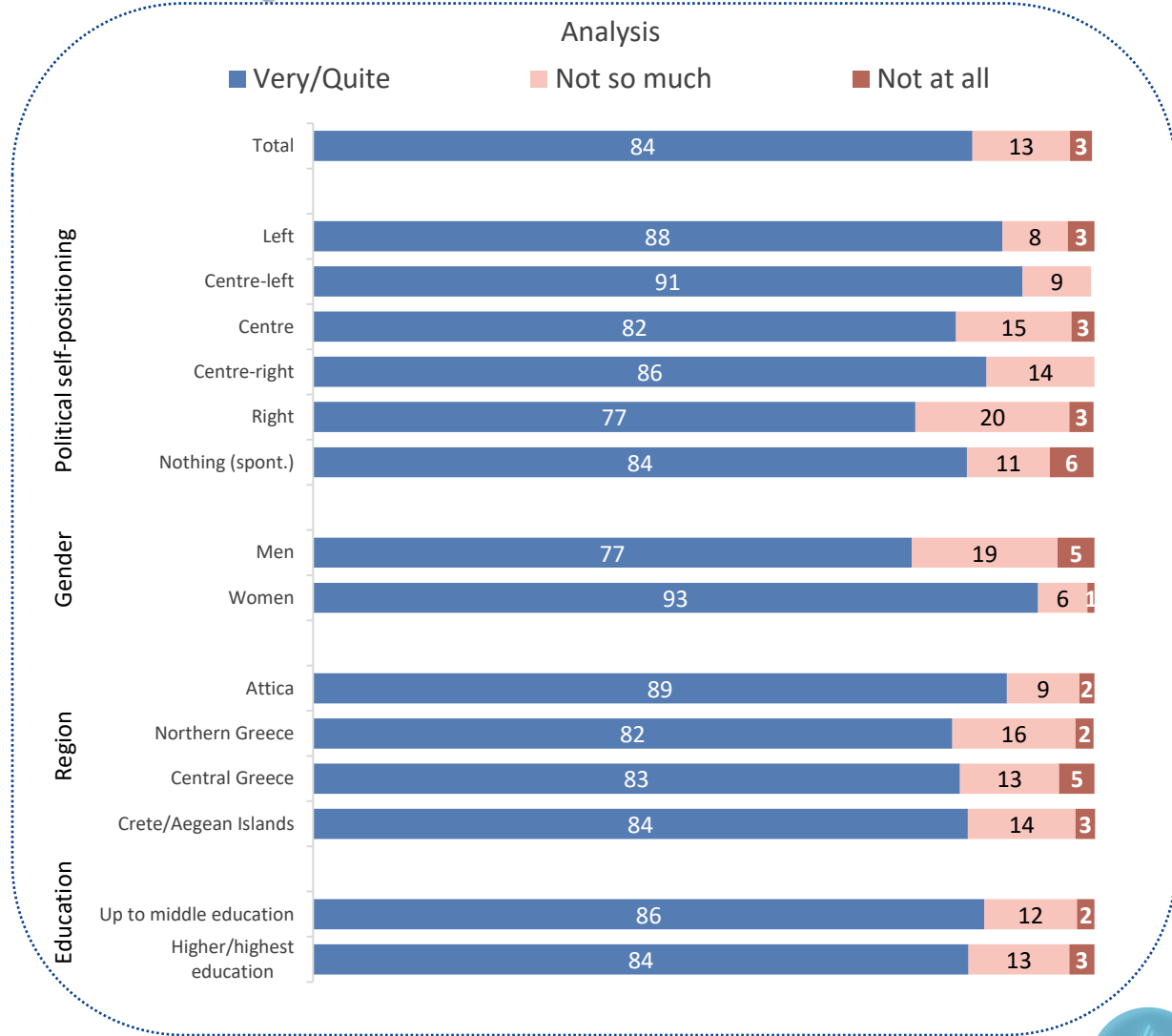
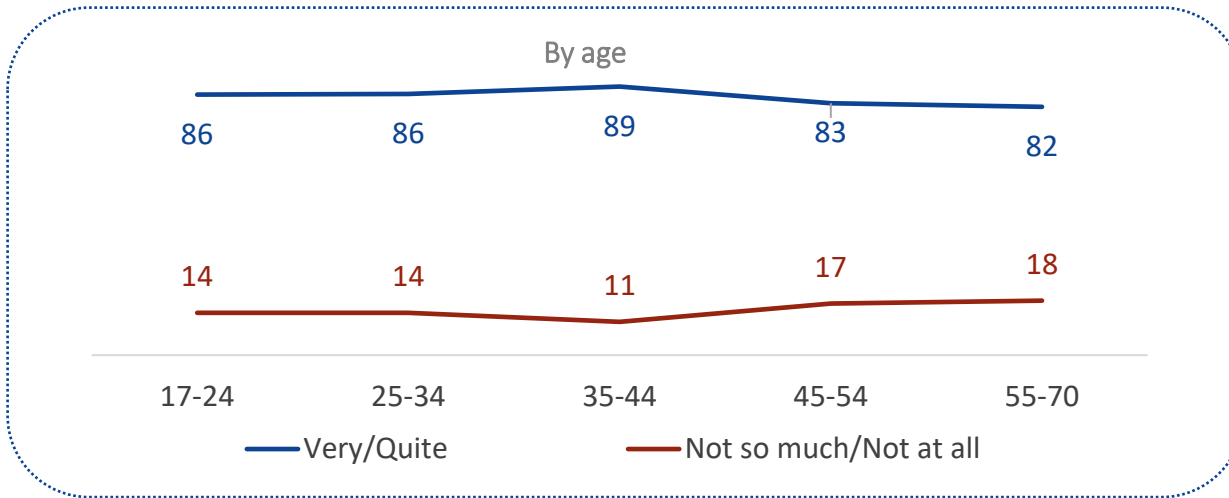
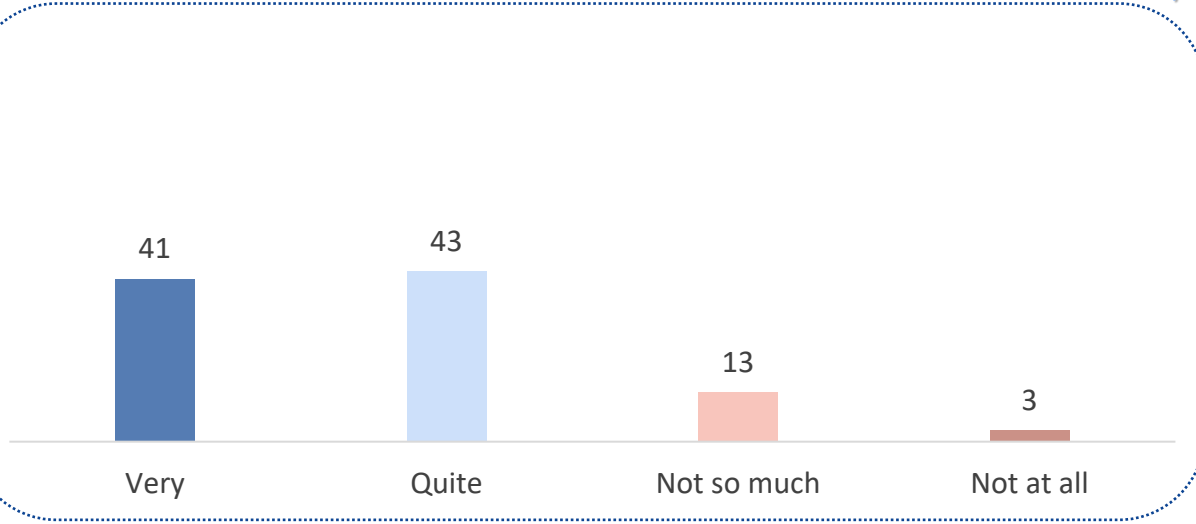
## Climate change

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- ▶ As we saw, climate change is considered to be the most critical problem that the planet is facing today. It indeed causes intense feelings of concern (so-called climate anxiety), with 84% stating they are very or quite concerned about the issue.
- ▶ The level of concern is consistently high, with no significant variations by age, political self-positioning, region of residence, or education level. However, there is a clear difference in intensity between women (93% are very/quite concerned) and men (77%), confirming the increased sensitivity of women to environmental problems on a global scale, as mentioned earlier.
- ▶ Additionally, more than 7 out of 10 respondents (72%) believe that the problem of climate change is getting worse over time, while 1 in 4 believe it remains the same. The sense of worsening is clearly linked to the level of concern about climate change, as among those who are very/quite concerned, the perception that the problem is getting worse rises to 80%, while among those who are not concerned, it drops to just 26%.
- ▶ There are no significant demographic differences here either, except for the gender parameter, as women again seem to be more pessimistic than men (80% believe the problem of climate change is getting worse, compared to 65% of men).

# Across all demographic groups the majority is concerned about climate change, with more intense concern among women than men

“How concerned are you about climate change?”



%

# Level of concern about climate change

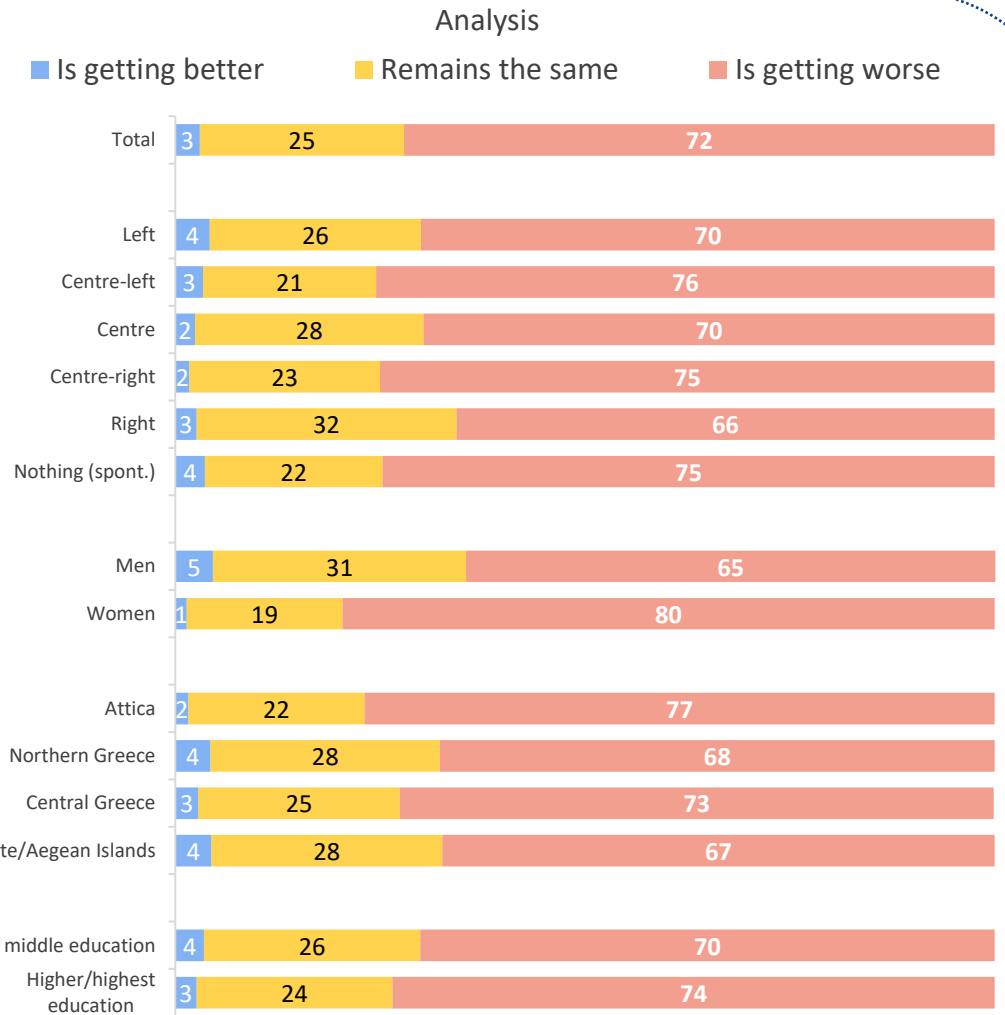
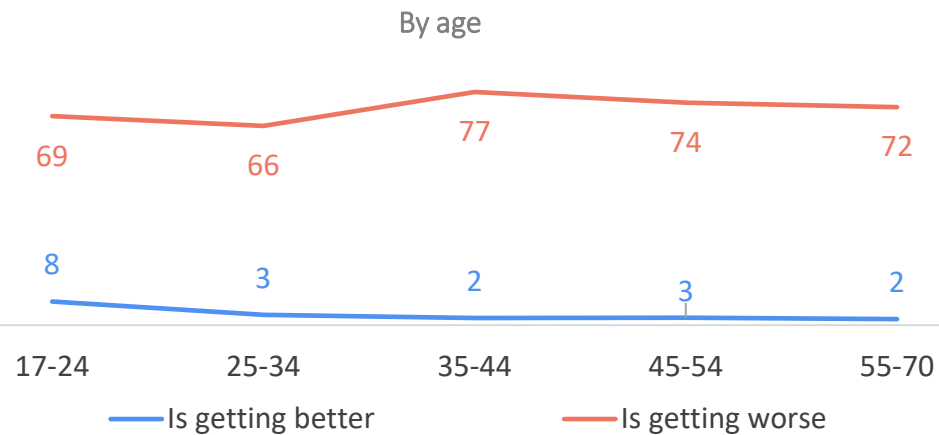
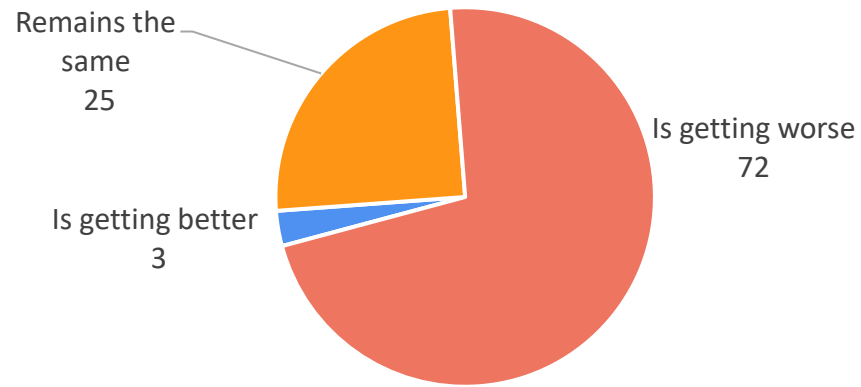
by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Very/Quite	84	80	84	86	90	89	87	80	81	89	79	89	85
Not so much	13	18	15	11	8	9	10	20	15	9	18	8	15
Not at all	3	3	2	4	2	2	4	*	4	3	3	2	*

%

# More than 7 out of 10 believe the problem of climate change is getting worse over time, while 1 in 4 believe it remains the same

“And would you say that over time the problem of climate change...?”



# Climate change over time

by level of concern about climate change



# Climate change over time

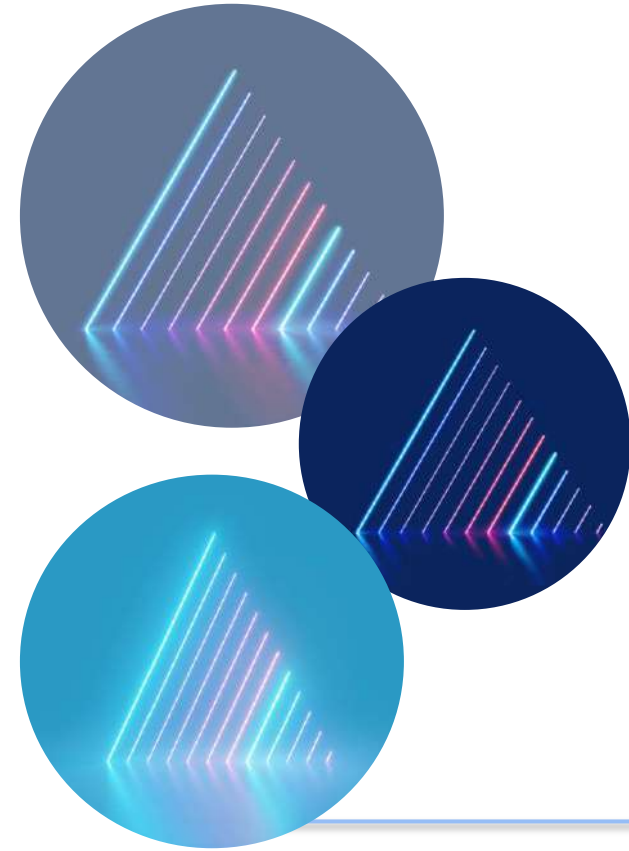
by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Is getting better	3	4	4	3	1	2	3	2	5	3	2	3	5
Remains the same	25	34	23	24	6	23	26	28	43	29	27	23	23
Is getting worse	72	62	73	73	93	75	72	70	52	68	71	74	72

%

\* Percentage <0.5%

\*\* Base smaller than 60 individuals



## Travel and Accommodation: Selection Criteria, Sustainable Practices, Information

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## Travel and Accommodation I

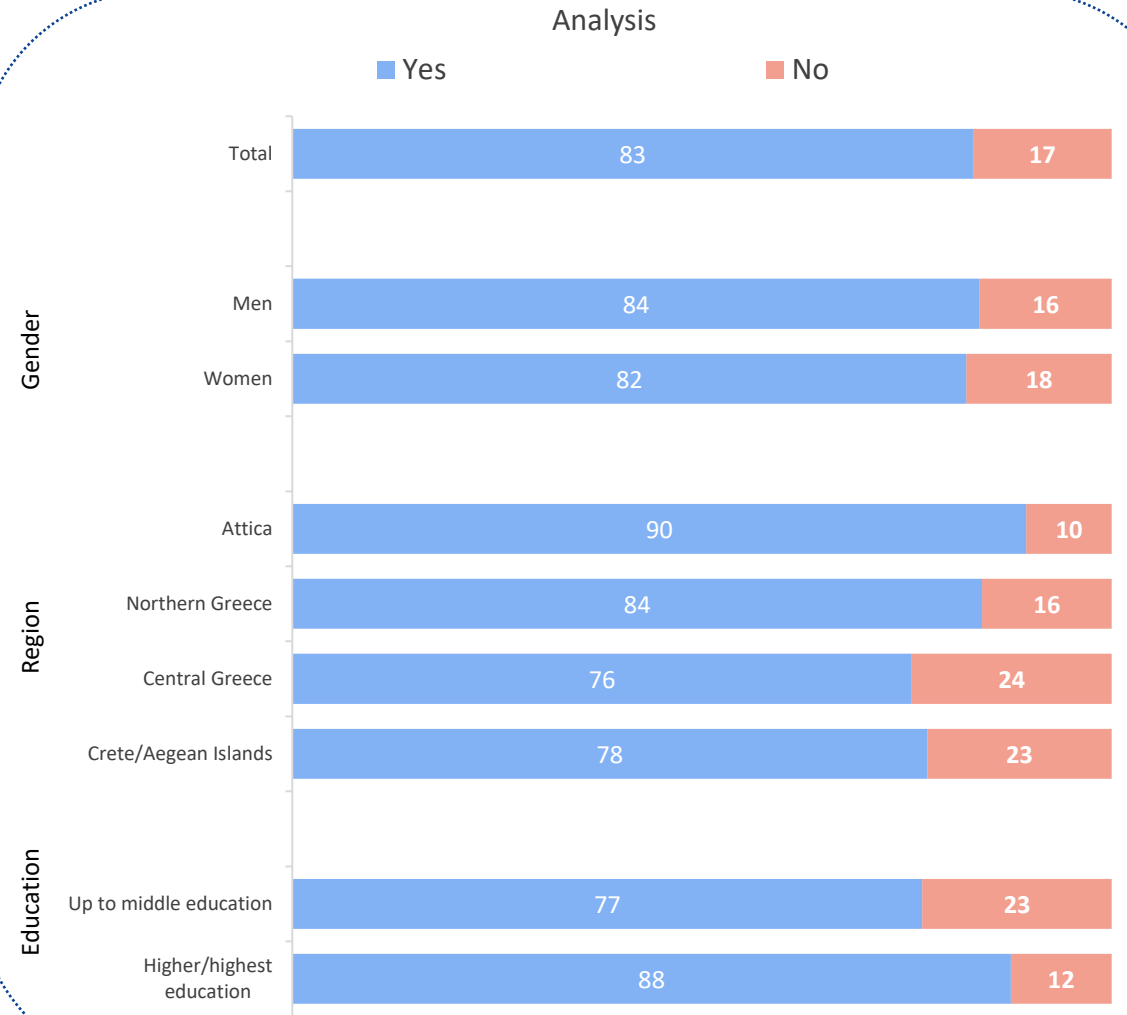
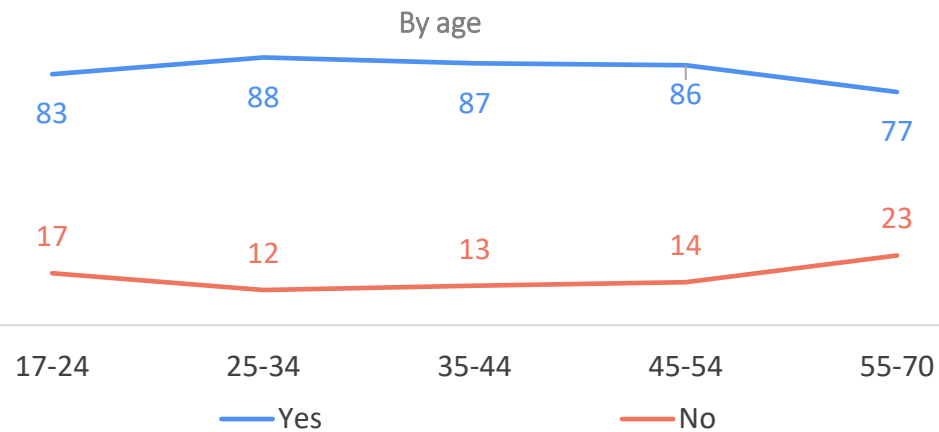
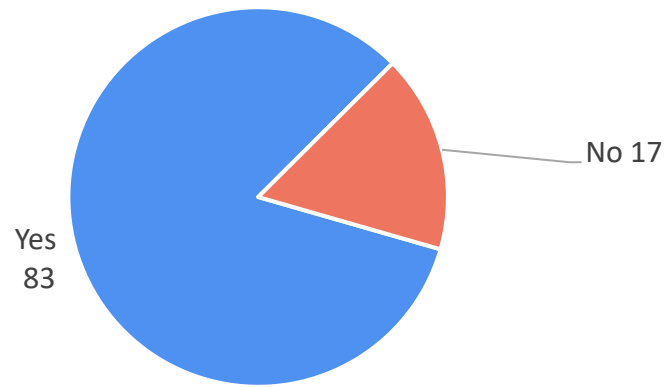
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- ▶ Within this broader context, aspects of respondents' travel behavior were examined through the prism of sustainability criteria and practices. An initial "filter" was the question of whether, in the past three years, they had gone on vacation or traveled by renting accommodation, to which 83% answered positively, while 17% answered negatively. This percentage decreases somewhat in older ages (77% among those aged 55-70), in rural areas, among lower education levels (77% for up to middle education), the unemployed (61%), and lower self-reported socio-economic class (74% in farmers/working class, compared to 89% in the middle class and 95% in the upper class).
- ▶ Subsequently, this 83% of the total sample who had some experience of renting accommodation for a vacation or trip in the past three years was further examined. What were the criteria for choosing accommodation? In the relevant question, with the option to give up to three answers, the price criterion clearly dominated, selected by 84%, compared to only 28% for the quality criterion. The impact of the materialist concerns and insecurity of our times is evident in this case.
- ▶ Other factors include cleanliness (44% — especially among women: 51%, compared to 36% among men), reviews on travel platforms, which now seem to be a key filter for our travel choices, particularly among younger age groups (37% overall but 44% among those aged 35-44), as well as proximity to points of interest (28%). On the other hand, care for the protection of the environment as a parameter of potential accommodation seems to play a minor role in principle, with only 6% of responses (mainly from those very/quite concerned about climate change).



# More than 8 out of 10 have rented accommodation during a vacation or trip in the past three years

“ In the last three years have you, personally, happened to go on vacation or a trip and rent accommodation?”



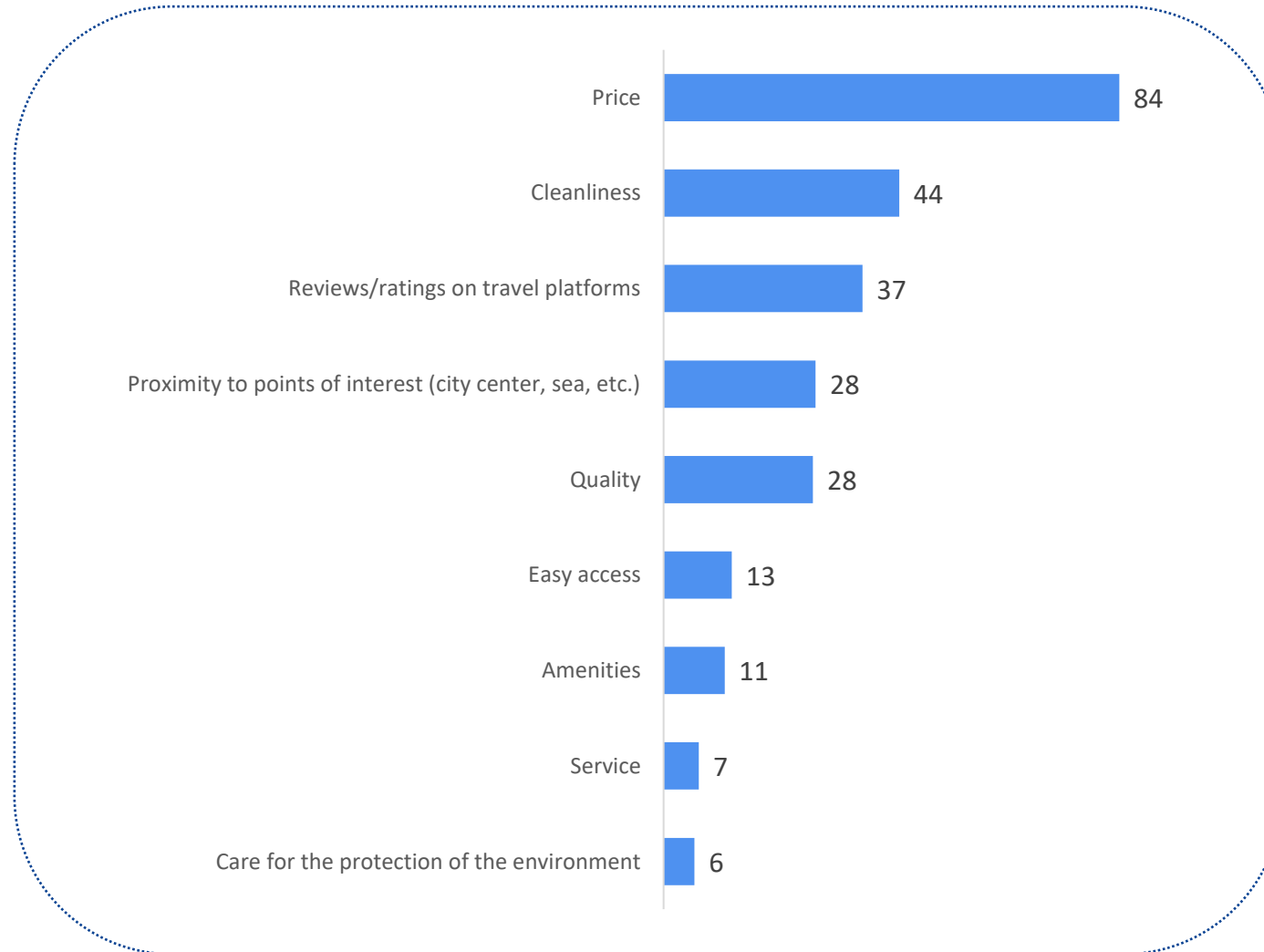
# Accommodation rental on a trip

by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to- middle class	Middle class	Upper class
Yes	83	89	92	87	61	79	76	76	75	74	80	89	95
No	17	11	9	13	39	21	24	24	25	26	21	11	6

# Price is by far the most important criterion for choosing accommodation for those who have rented in the past three years, while environmental criteria are at the bottom

“What are your key criteria when selecting accommodation for your trip or vacation?” (Up to 3 answers)



%

Base: 83% of respondents who have rented accommodation in the past three years

# Key criteria for selecting accommodation

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
Price	84	86	86	83	79	79	90
Cleanliness	44	42	42	38	43	45	51
Reviews/ratings on travel platforms	37	30	43	33	42	28	43
Proximity to points of interest (city center, sea, etc.)	28	22	35	31	29	19	28
Quality	28	26	25	31	28	39	20
Easy access	13	14	9	13	13	12	15
Amenities	11	9	6	13	16	16	9
Service	7	8	7	4	8	7	6
Care for the protection of the environment	6	7	6	8	7	7	2

%

Base: 83% of respondents who have rented accommodation in the past three years

# Key criteria for selecting accommodation

by gender and age and level of concern about climate change

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.	Very/Quite	Not so much/Not at all
Price	84	84	84	86	86	88	83	81	85	80
Cleanliness	44	36	51	48	42	45	48	39	45	34
Reviews/ratings on travel platforms	37	39	35	38	43	44	37	27	38	30
Proximity to points of interest (city center, sea, etc.)	28	24	32	27	27	23	26	34	27	36
Quality	28	34	21	29	29	25	27	29	27	31
Easy access	13	12	13	7	11	12	13	16	12	15
Amenities	11	11	12	9	9	8	14	13	10	17
Service	7	9	4	5	5	7	7	7	6	9
Care for the protection of the environment	6	6	6	4	8	5	5	7	7	1

%

Base: 83% of respondents who have rented accommodation in the past three years

# Key criteria for selecting accommodation

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Price	84	85	87	81	83	84	87	86	72
Cleanliness	44	40	46	46	44	50	48	40	34
Reviews/ratings on travel platforms	37	40	38	39	18	29	39	38	39
Proximity to points of interest (city center, sea, etc.)	28	33	21	24	39	15	30	28	26
Quality	28	26	26	32	26	27	21	31	38
Easy access	13	14	12	10	15	11	16	12	7
Amenities	11	11	10	10	17	8	10	12	16
Service	7	7	6	9	4	9	7	6	7
Care for the protection of the environment	6	6	7	5	5	5	6	6	4

%

Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Key criteria for selecting accommodation

by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
Price	84	79	85	85	91	89	79	95	78	85	84
Cleanliness	44	37	44	45	53	51	38	60	31	47	41
Reviews/ratings on travel platforms	37	32	38	44	35	47	23	12	34	31	40
Proximity to points of interest (city center, sea, etc.)	28	30	29	25	31	27	36	27	26	23	31
Quality	28	30	28	27	20	26	27	28	43	27	28
Easy access	13	11	15	12	29	9	11	3	9	12	13
Amenities	11	12	11	12	11	6	8	21	16	13	10
Service	7	10	5	7	8	2	8	5	4	9	5
Care for the protection of the environment	6	3	4	8	*	4	7	5	7	6	6

## Travel and Accommodation II

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- ▶ The survey then asked two more specific questions related to sustainability practices.
- ▶ The first concerned individual travel behavior. More than 8 out of 10 respondents said they indeed implement practices to reduce their environmental footprint while traveling or on vacation, such as energy saving in their room (93%), recycling (92%), and reusing personal hygiene items like towels (83%). Other practices seem less widespread, such as avoiding car use (66%), using water containers instead of plastic bottles (61%), and preferring organic and local products (57%—especially among older age groups: 69% among those 55-70 years old).
- ▶ Once again, in nearly all these practices, except for avoiding car use, women report implementing them more frequently than men. The extent to which these practices are implemented also clearly correlates with the level of concern about climate change, as those who are very/quite concerned implement them much more than those who are not so much or not at all concerned.



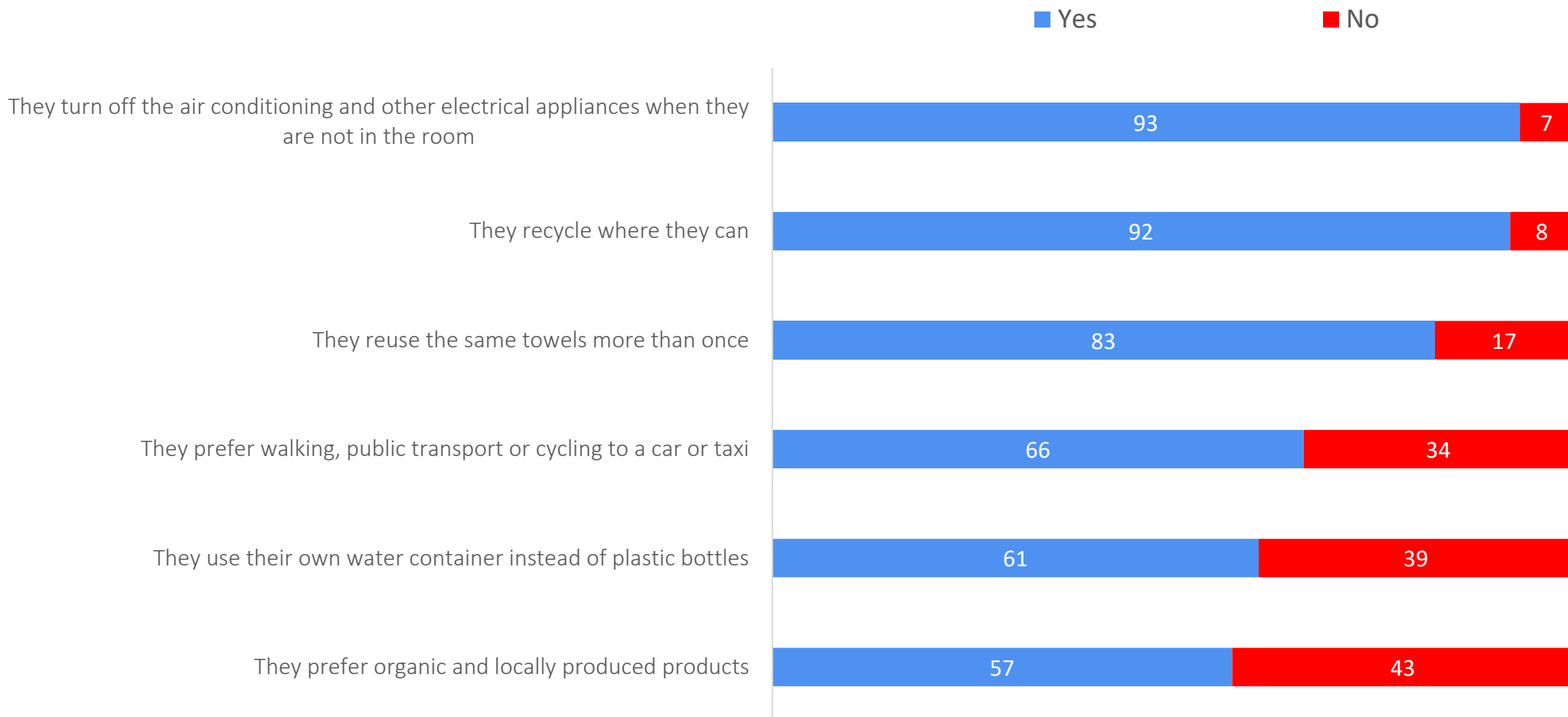
## Travel and Accommodation III

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- ▶ The second question concerned environmentally sustainable practices that an accommodation might implement, such as reducing energy/water consumption, recycling, waste management, or using local products. To what extent would these influence travelers' choices?
- ▶ It appears that over 1 in 2 (55%) would be influenced by the implementation of environmentally sustainable practices when choosing accommodation—without significant demographic differences, although women are once again more positive than men (59% vs. 52%). The level of concern about climate change again clearly matters, with those very/quite concerned being more likely to be influenced by sustainable practices (60%), while those less concerned stated that they would likely not be influenced (33% compared to 29% amongst them who stated that they would likely be influenced).
- ▶ Simultaneously, however, 1 out of 2 (51%) of those who had rented accommodation in the past three years believes that the implementation of such sustainable practices would make the accommodation more expensive — without significant variations based on concern for environmental issues and climate change.

# In the individual travel behaviour of those who have rented accommodation in the past three years, environmental protection practices such as energy saving, recycling and reusing personal hygiene items are implemented more

“There are several individual practices to reduce the burden on the environment. Do you implement any of these while traveling or on vacation?”



%

Base: 83% of respondents who have rented accommodation in the past three years

# Individual travel practices to reduce environmental impact

by self-positioning on the Left-Right scale

Yes	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
They turn off the air conditioning and other electrical appliances when they are not in the room	93	87	97	96	93	91	93
They recycle where they can	92	90	91	94	96	85	95
They reuse the same towels more than once	83	83	83	85	82	77	85
They prefer walking, public transport or cycling to a car or taxi	66	76	63	73	68	62	60
They use their own water container instead of plastic bottles	61	61	54	66	58	65	61
They prefer organic and locally produced products	57	58	65	57	55	48	59

%

Base: 83% of respondents who have rented accommodation in the past three years

# Individual travel practices to reduce environmental impact

by gender and age and level of concern about climate change

Yes	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.	Very/Quite	Not so much/Not at all
They turn off the air conditioning and other electrical appliances when they are not in the room	93	91	96	88	89	95	92	98	95	83
They recycle where they can	92	92	93	85	92	93	94	93	93	84
They reuse the same towels more than once	83	81	84	75	85	86	80	85	84	74
They prefer walking, public transport or cycling to a car or taxi	66	68	65	70	67	66	64	66	68	58
They use their own water container instead of plastic bottles	61	57	64	57	70	66	59	55	62	52
They prefer organic and locally produced products	57	54	61	53	52	48	57	69	58	52

%

Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Individual travel practices to reduce environmental impact

by region of residence and self-reported socio-economic class

Yes	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
They turn off the air conditioning and other electrical appliances when they are not in the room	93	94	90	95	96	87	93	96	92
They recycle where they can	92	91	92	94	94	88	91	94	91
They reuse the same towels more than once	83	84	83	81	83	74	83	87	78
They prefer walking, public transport or cycling to a car or taxi	66	67	66	66	67	69	65	69	56
They use their own water container instead of plastic bottles	61	64	64	52	60	59	59	61	67
They prefer organic and locally produced products	57	51	59	60	69	59	53	57	68

%

Base: 83% of respondents who have rented accommodation in the past three years

METRON ANALYSIS

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Individual travel practices to reduce environmental impact

by employment status and education level

Yes	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
They turn off the air conditioning and other electrical appliances when they are not in the room	93	90	93	93	92	96	99	96	89	91	95
They recycle where they can	92	88	91	95	97	90	92	78	87	90	93
They reuse the same towels more than once	83	80	81	83	71	93	91	75	84	81	84
They prefer walking, public transport or cycling to a car or taxi	66	66	70	66	58	71	64	55	75	62	69
They use their own water container instead of plastic bottles	61	61	61	62	63	49	57	55	75	59	62
They prefer organic and locally produced products	57	60	50	53	60	50	76	77	58	62	54

%

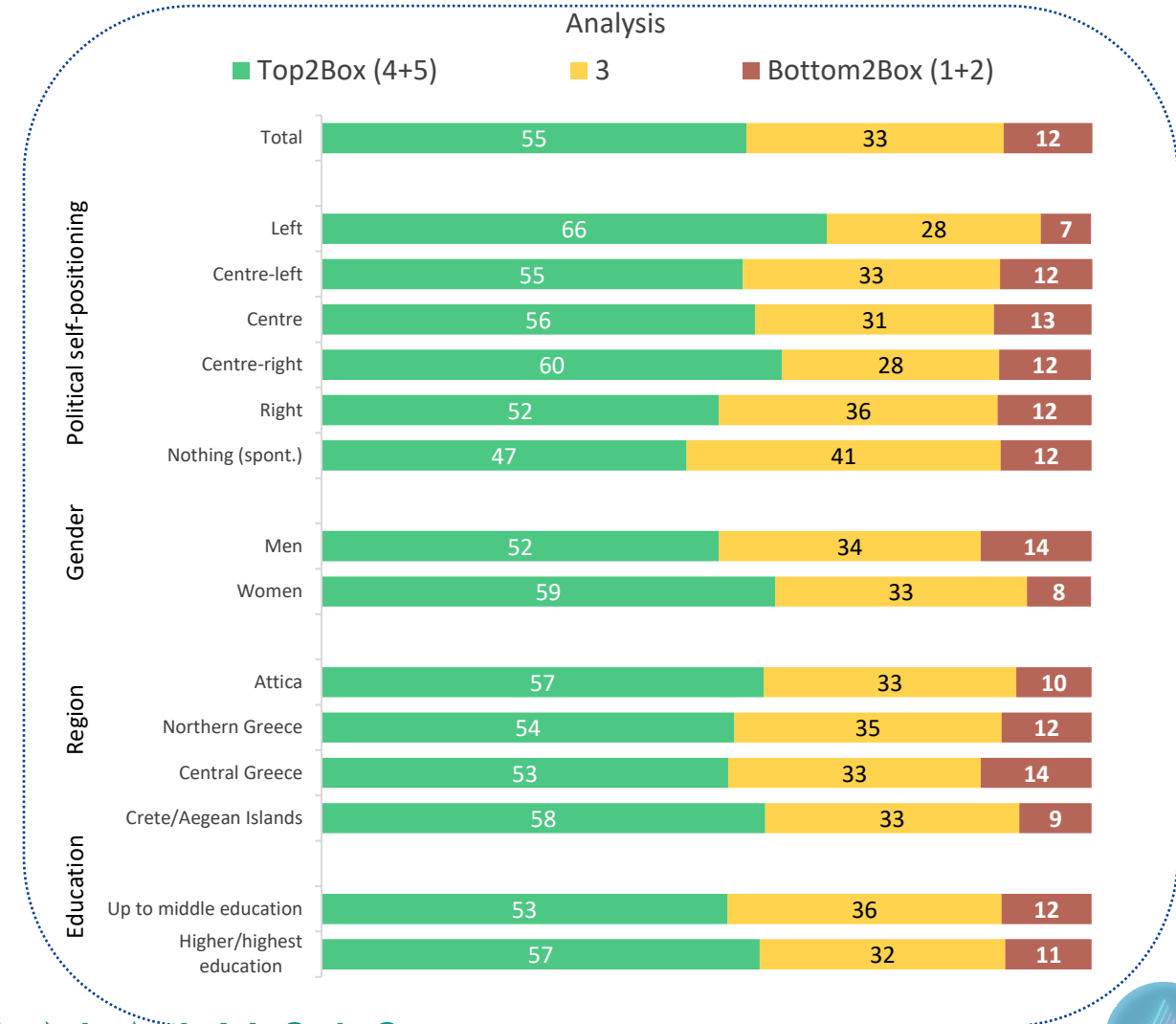
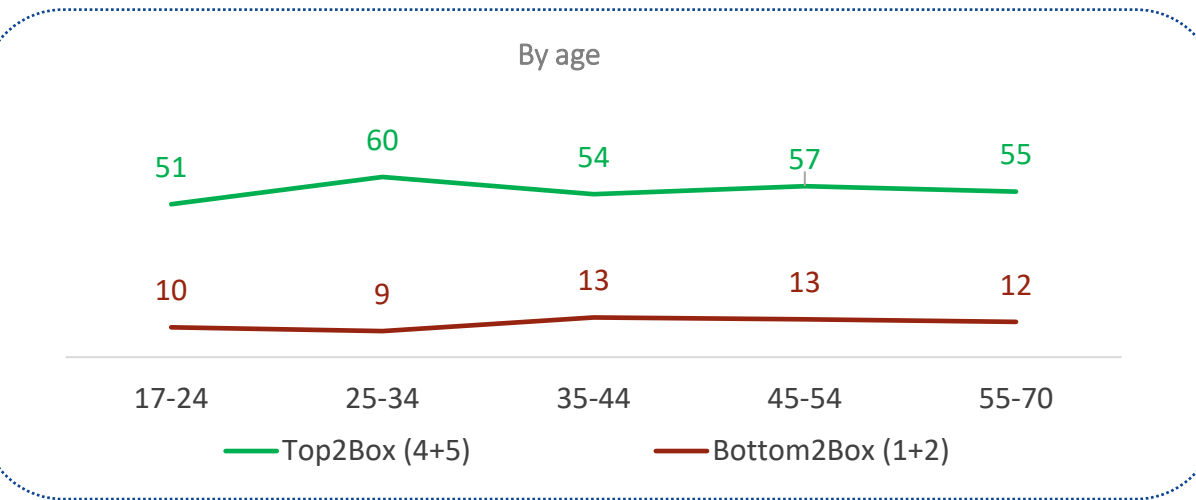
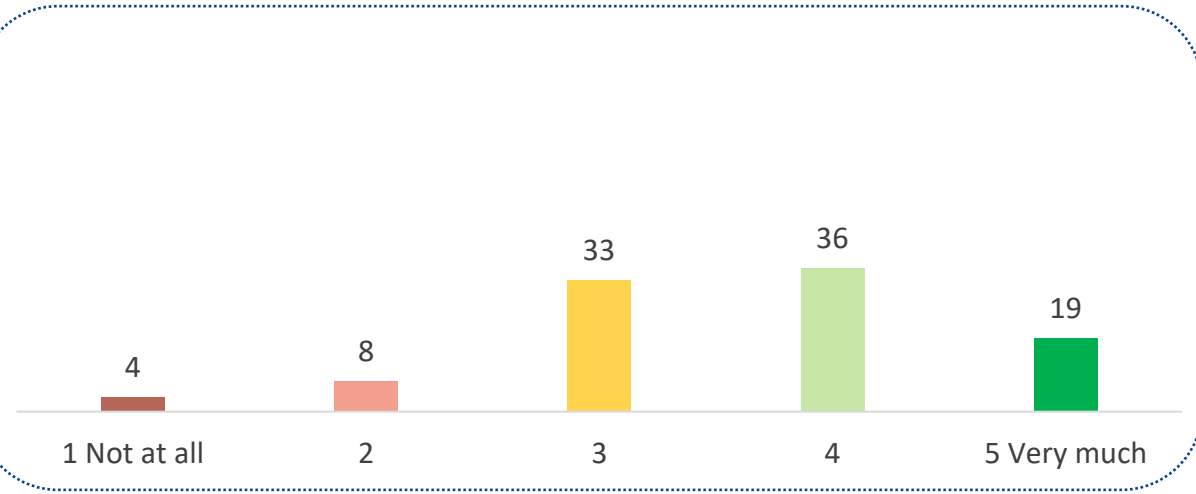
Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# More than one in two who have rented in the past three years say they would be influenced in their choice of tourist accommodation if it implemented environmentally sustainable practices

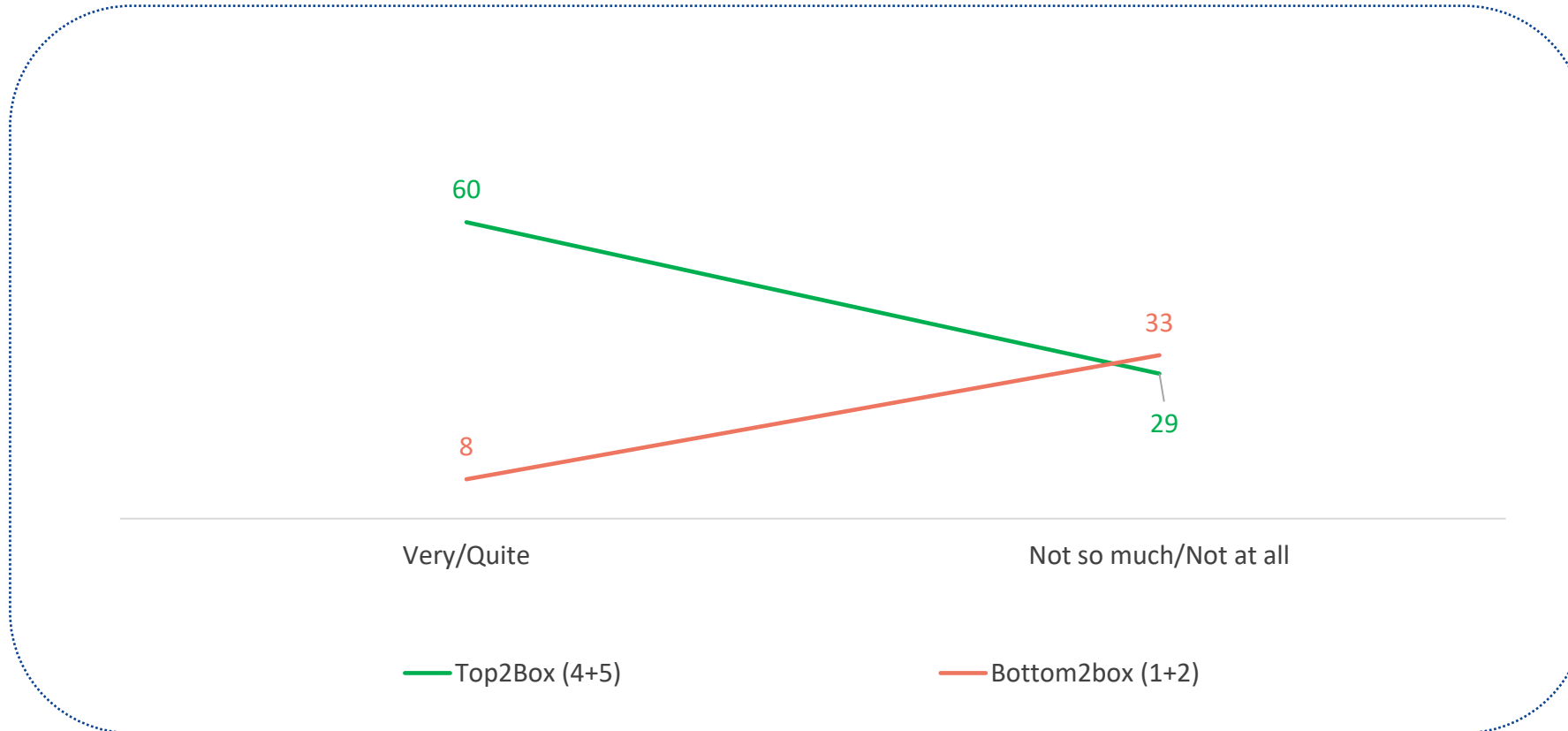
“There are also several environmentally sustainable practices that a tourist accommodation can implement. How much would this, if you knew about it, affect your choice of accommodation for your trips and holidays? Please use a scale from 1 to 5 where 1 means not at all and 5 means very much.”



% Base: 83% of respondents who have rented accommodation in the past three years

# Impact of environmentally sustainable practices on accommodation choice

by level of concern about climate change





# Impact of environmentally sustainable practices on accommodation choice

by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Top2box (4+5)	55	53	53	58	57	44	60	46	60	53	49	59	64
3	33	29	38	32	38	44	32	27	29	34	38	32	23
Bottom2box (1+2)	12	18	10	10	6	13	9	27	11	13	13	9	12

%

Base: 83% of respondents who have rented accommodation in the past three years

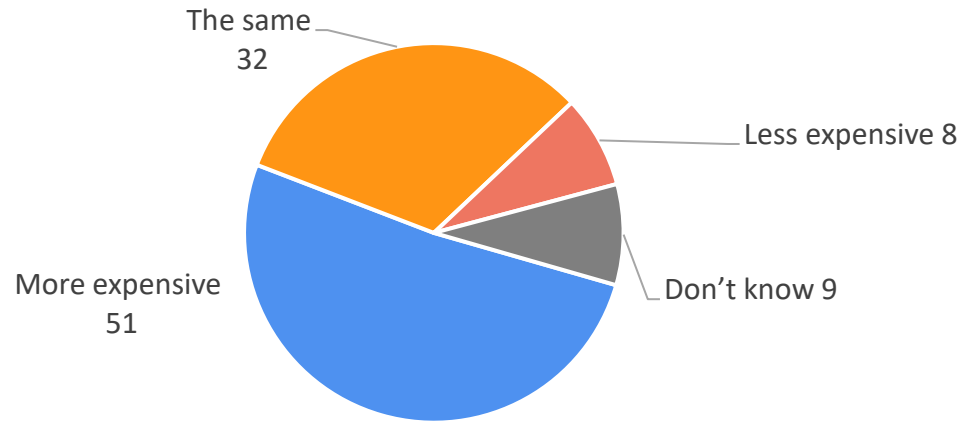
METRON ANALYSIS

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

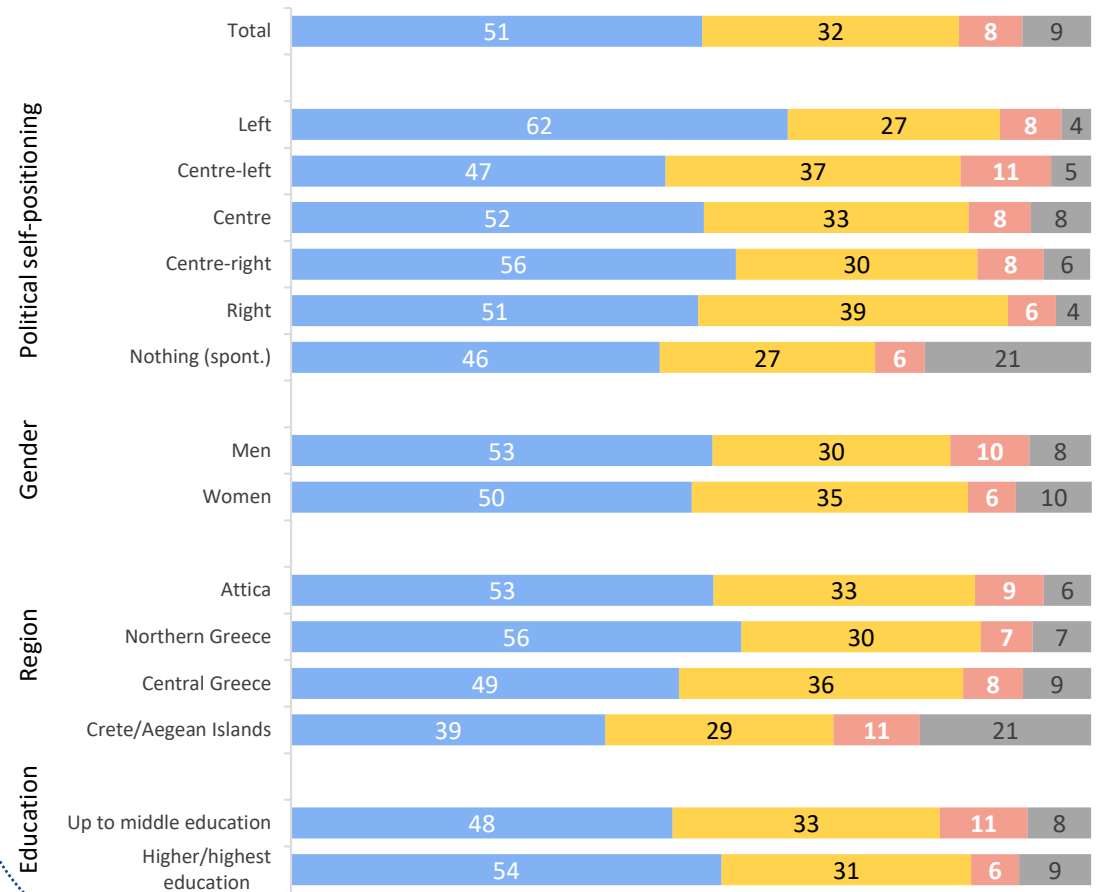
# But one in two believe that implementing environmentally sustainable practices in a tourist accommodation makes it more expensive, while 3 out of 10 think it is the same

“Would you say that the implementation of environmentally sustainable practices in an accommodation usually makes it more expensive, less expensive or the same, compared to an accommodation that does not implement them?”



Analysis

■ More expensive ■ The same ■ Less expensive ■ Don't know



	Total	Age					Level of concern about climate change	
		17-24	25-34	35-44	45-54	55-70	Very/Quite	Not so much/Not at all
More expensive	51	49	49	55	57	47	51	57
The same	32	31	38	31	22	37	33	28
Less expensive	8	11	2	10	9	8	8	8
Don't know	9	9	11	4	12	8	9	7

%

Base: 83% of respondents who have rented accommodation in the past three years

# Cost of an accommodation with environmentally sustainable practices

by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
More expensive	51	45	58	56	49	54	31	48	55	48	60	48	50
The same	32	41	28	30	18	23	49	40	22	35	28	35	36
Less expensive	8	9	4	7	8	11	15	5	18	9	6	8	10
Don't know	9	5	10	7	26	12	6	8	5	8	6	10	5

%

Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

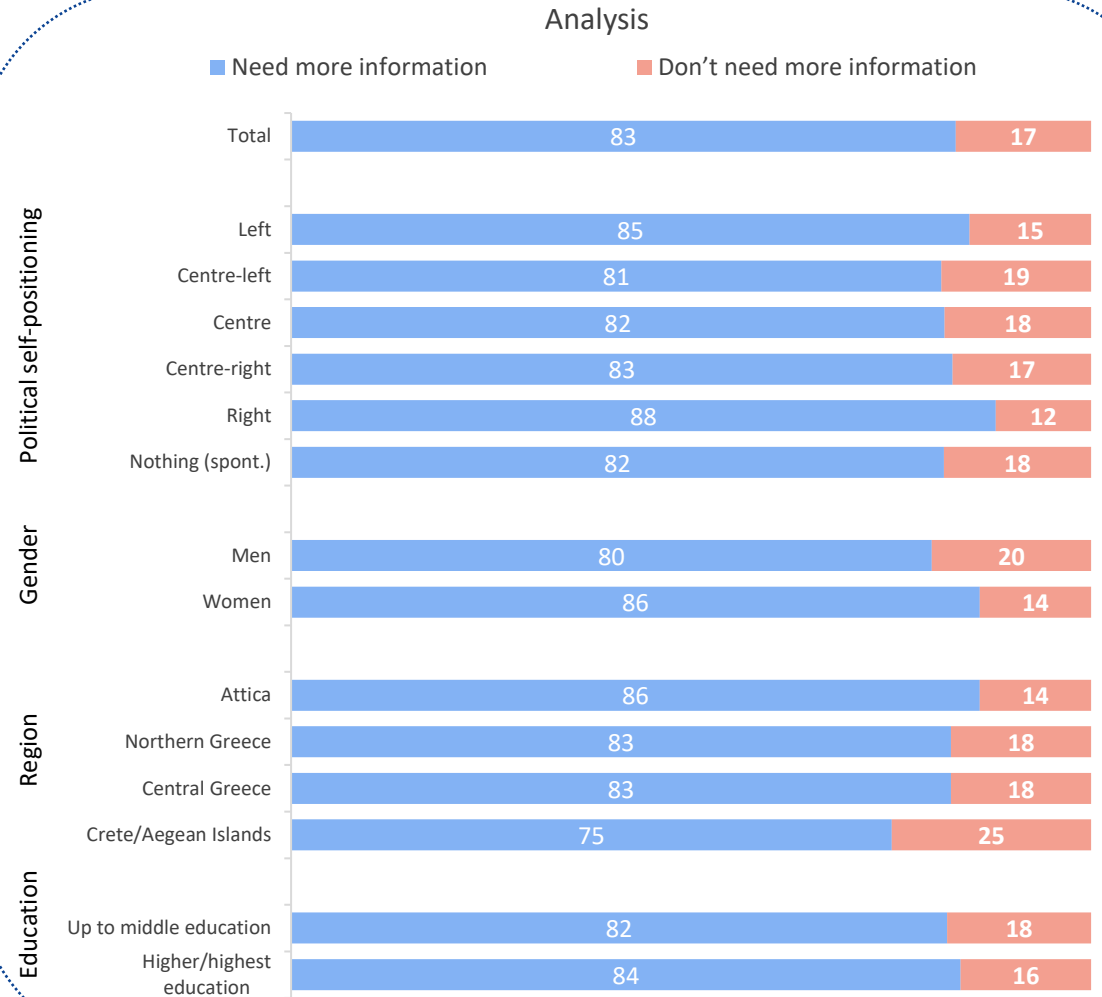
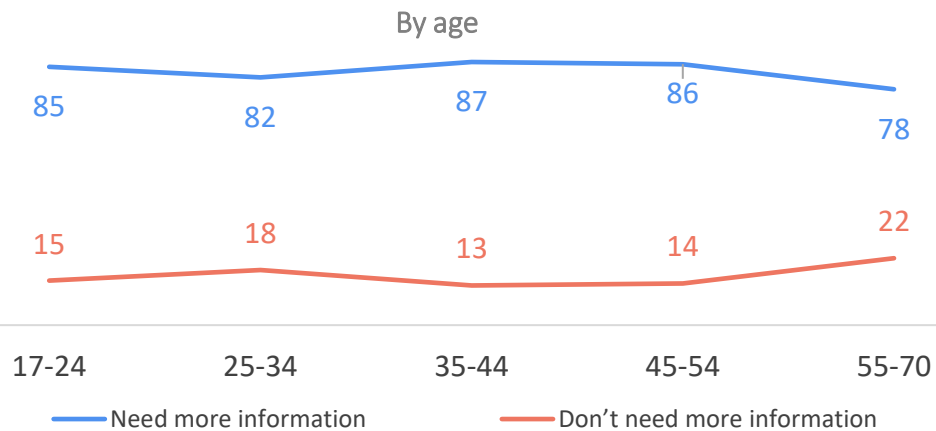
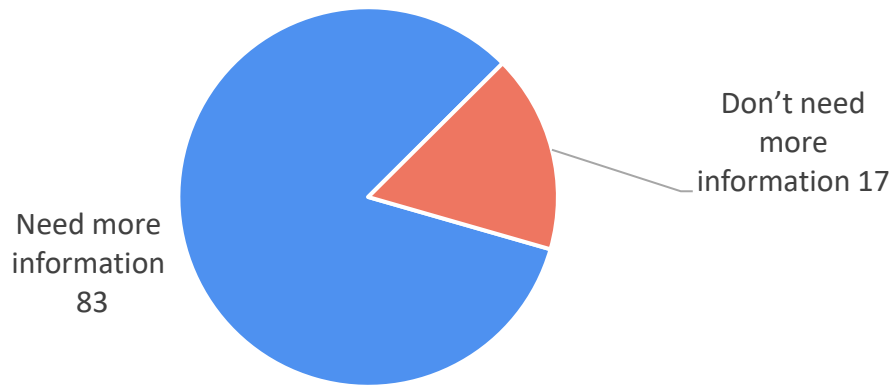
## Travel and Accommodation IV

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- ▶ Moving from criteria and practices to information, it appears that the majority of those who have rented accommodation in the past three years desire more information on environmentally sustainable accommodation options (83%), across all demographic groups, with no significant differences.
- ▶ The key distinction that emerges again relates to the level of concern about climate change: those who are very/quite concerned have an even stronger desire for more information (87%), while those less concerned seem more satisfied with the information they already have (40% say they don't need more, compared to 17% overall).
- ▶ What sources would they prefer for this specialized information? Among the multiple available options, the internet clearly dominates (88% overall, across all age groups), followed by social media (50%, especially among those under 44 and students) and travel platforms (47%, especially among those over 45). In addition, more “traditional” media follow, such as TV, radio, and newspapers (particularly among those 55+), as well as environmental organizations (with 21%, and significantly more among women).

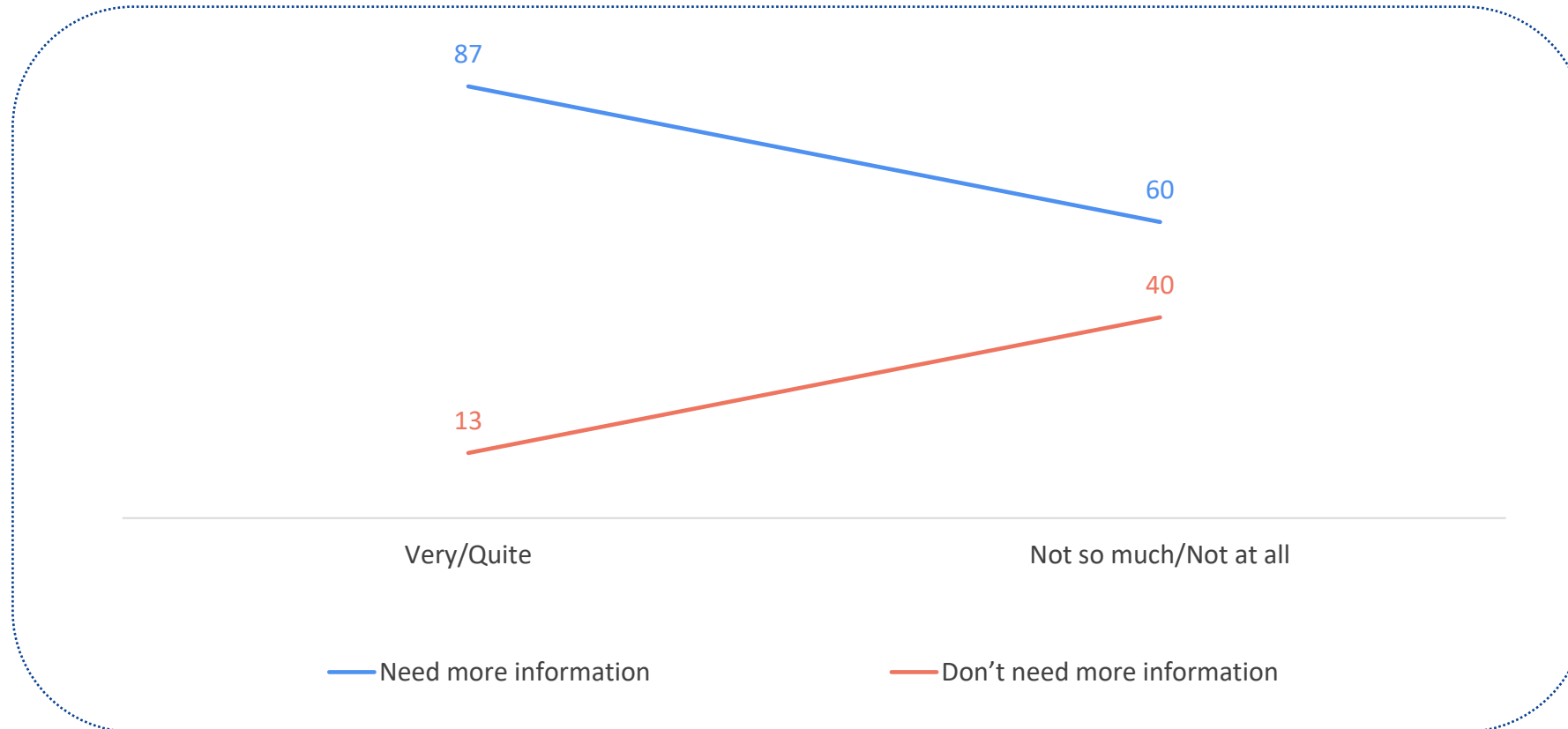
# A clear majority of respondents express a demand for more information on environmentally sustainable accommodation options, across all demographic groups

“More generally, when it comes to being informed about environmentally sustainable accommodation options for your trip or vacation, would you say you need more information or not?”



# Need for more information on environmentally sustainable accommodation options

by level of concern about climate change



# Need for more information on environmentally sustainable accommodation options

by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Need more information	83	84	88	83	84	84	80	74	70	86	75	89	83
Don't need more information	17	16	12	17	16	16	21	26	30	14	25	11	17

%

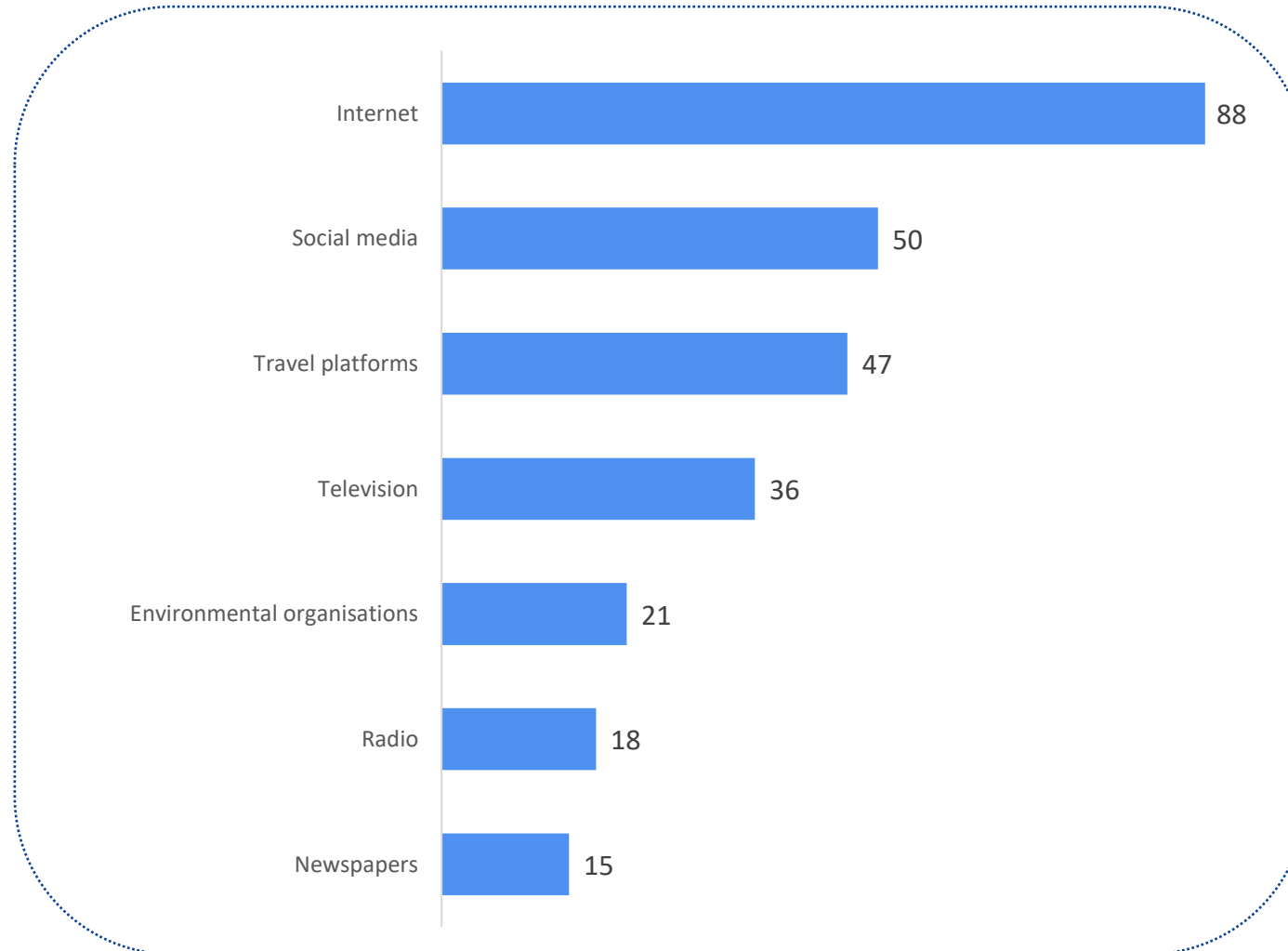
Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# The preferred source of information on environmentally sustainable accommodation options is overwhelmingly the internet

'And in particular, where would you like to get information from, about such options?' (multiple responses)



Base: 69% of respondents who have rented accommodation in the past three years and need more information on environmentally sustainable accommodation options

%



# Preferred sources of information

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
Internet	88	86	85	88	87	86	92
Social media	50	47	58	51	58	34	50
Travel platforms	47	37	50	56	52	33	46
Television	36	32	33	38	44	35	34
Environmental organizations	21	27	26	19	20	22	17
Radio	18	17	15	18	28	12	17
Newspapers	15	17	10	18	18	13	14
Other	*	*	*	*	*	1	1

Base: 69% of respondents who have rented accommodation in the past three years and need more information on environmentally sustainable accommodation options

# Preferred sources of information

by gender and age and level of concern about climate change

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.	Very/Quite	Not so much/Not at all
Internet	88	88	87	81	92	88	86	89	88	86
Social media	50	46	54	58	53	52	47	46	52	32
Travel platforms	47	42	51	35	42	40	52	54	47	42
Television	36	34	38	30	34	36	34	42	36	33
Environmental organizations	21	16	26	26	14	19	18	28	22	13
Radio	18	17	19	11	14	15	15	26	18	11
Newspapers	15	14	15	9	12	10	14	23	16	7
Other	*	*	*	*	*	1	*	*	*	*

Base: 69% of respondents who have rented accommodation in the past three years and need more information on environmentally sustainable accommodation options

# Preferred sources of information

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Internet	88	90	85	85	93	89	88	88	79
Social media	50	58	47	46	40	53	44	53	56
Travel platforms	47	45	43	52	49	37	47	49	43
Television	36	36	36	36	35	31	36	37	36
Environmental organizations	21	24	18	26	10	13	24	23	21
Radio	18	20	12	19	20	21	16	16	20
Newspapers	15	18	9	14	19	12	15	13	19
Other	*	*	*	*	*	*	*	*	1

Base: 69% of respondents who have rented accommodation in the past three years and need more information on environmentally sustainable accommodation options

# Preferred sources of information

by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners**	Housewives**	Other**	Up to middle education	Higher/highest education
Internet	88	87	86	86	92	89	95	86	74	85	89
Social media	50	42	52	52	55	61	43	51	46	50	50
Travel platforms	47	42	45	50	44	35	50	46	45	42	50
Television	36	33	33	38	47	32	31	44	39	39	34
Environmental organizations	21	17	19	23	13	24	32	19	12	21	21
Radio	18	16	18	18	22	11	18	26	17	19	17
Newspapers	15	20	20	11	20	3	11	19	20	14	15
Other	*	*	*	*	*	*	*	*	3	*	*

Base: 69% of respondents who have rented accommodation in the past three years and need more information on environmentally sustainable accommodation options



# Eco-Labels in the Tourism Sector

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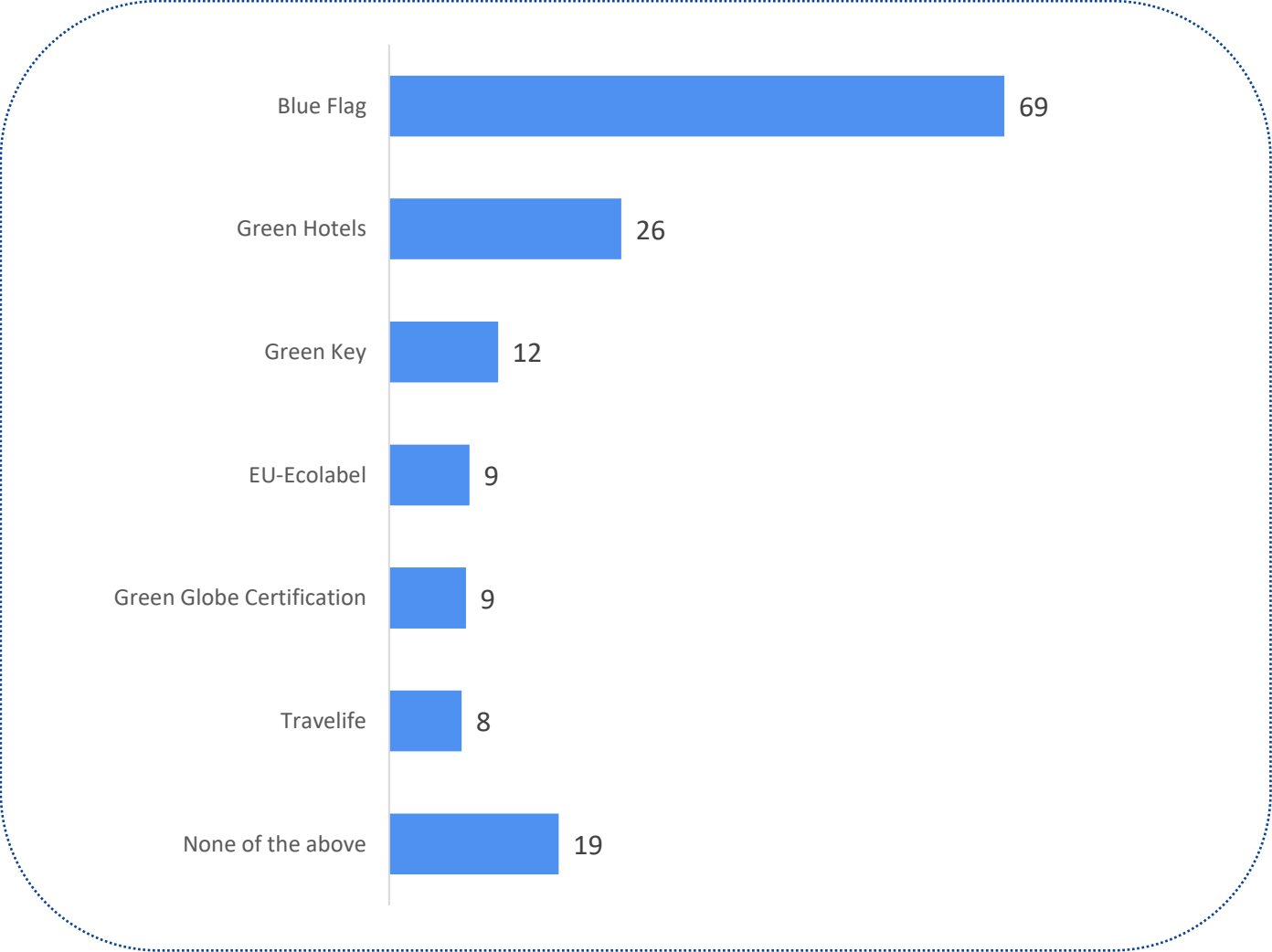
## Eco-Labels

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- ▶ In the final section of the survey, the awareness of eco-labels and their influence on travelers' accommodation choices were explored.
- ▶ The eco-label with the highest awareness appears to be the Blue Flag, mentioned by nearly 7 out of 10 respondents who have rented accommodation in the past three years (69%). Its awareness is lower among younger age groups (43% among those aged 17-24 and 59% among those aged 25-34) and among students (43%). Following the Blue Flag, 26% of respondents are aware of the Green Hotels eco-label, which increases among younger ages (33% among those aged 17-24), in Attica (32%), and among the upper class (46%). In the third place is Green Key with 12% overall awareness. Notably, almost 1 in 5 respondents were not aware of any of the mentioned eco-labels (19%).
- ▶ Specifically, regarding the Blue Flag, those who are aware of it (57% of the total survey sample) mainly associate it with the quality of waters at the beach (62%), followed by proper environmental management of the beach (20%), and beach safety (19%).
- ▶ It's worth noting that approximately 1 in 3 (31%) answered that the Blue Flag scheme indeed covers all the aspects mentioned in the relevant question.

# The Blue Flag is the eco-label with the highest awareness in the tourism sector, followed at a distance by Green Hotels

“Do you know, or have you ever heard of any of the following eco-labels in the tourism sector?” (multiple responses)



%

Base: 83% of respondents who have rented accommodation in the past three years

# Awareness of eco-labels in the tourism sector

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
Blue Flag	69	67	75	69	76	66	62
Green Hotels	26	27	27	25	29	33	19
Green Key	12	12	13	11	14	12	12
EU-Ecolabel	9	13	7	8	10	11	7
Green Globe Certification	9	14	8	7	7	13	6
Travelife	8	13	5	8	10	12	4
None of the above	19	13	15	20	14	19	28

%

Base: 83% of respondents who have rented accommodation in the past three years



# Awareness of eco-labels in the tourism sector

by gender and age and level of concern about climate change

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.	Very/Quite	Not so much/Not at all
Blue Flag	69	68	70	43	59	69	77	78	69	71
Green Hotels	26	26	26	33	24	30	24	24	27	18
Green Key	12	13	11	14	13	9	12	13	13	9
EU-Ecolabel	9	10	8	15	12	8	5	9	10	3
Green Globe Certification	9	7	10	17	9	7	6	8	10	3
Travelife	8	8	8	18	12	9	5	4	9	3
None of the above	19	17	21	25	22	19	16	17	18	22

%

Base: 83% of respondents who have rented accommodation in the past three years

# Awareness of eco-labels in the tourism sector

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Blue Flag	69	69	65	75	67	69	70	70	62
Green Hotels	26	32	21	24	23	26	23	26	46
Green Key	12	13	13	6	18	17	9	13	20
EU-Ecolabel	9	7	11	10	8	10	7	9	16
Green Globe Certification	9	10	8	6	11	16	6	9	10
Travelife	8	8	8	6	13	20	6	6	13
None of the above	19	21	18	17	20	12	21	21	10

%

Base: 83% of respondents who have rented accommodation in the past three years

METRON ANALYSIS

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Awareness of eco-labels in the tourism sector

by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
Blue Flag	69	65	72	68	73	43	83	82	59	65	71
Green Hotels	26	29	27	28	14	20	21	25	33	23	28
Green Key	12	14	7	11	2	10	21	22	32	13	12
EU-Ecolabel	9	3	11	7	8	19	8	17	23	10	8
Green Globe Certification	9	12	5	9	2	11	6	17	24	11	7
Travelife	8	11	7	10	4	10	2	3	21	11	6
None of the above	19	17	19	19	24	34	15	11	13	17	21

%

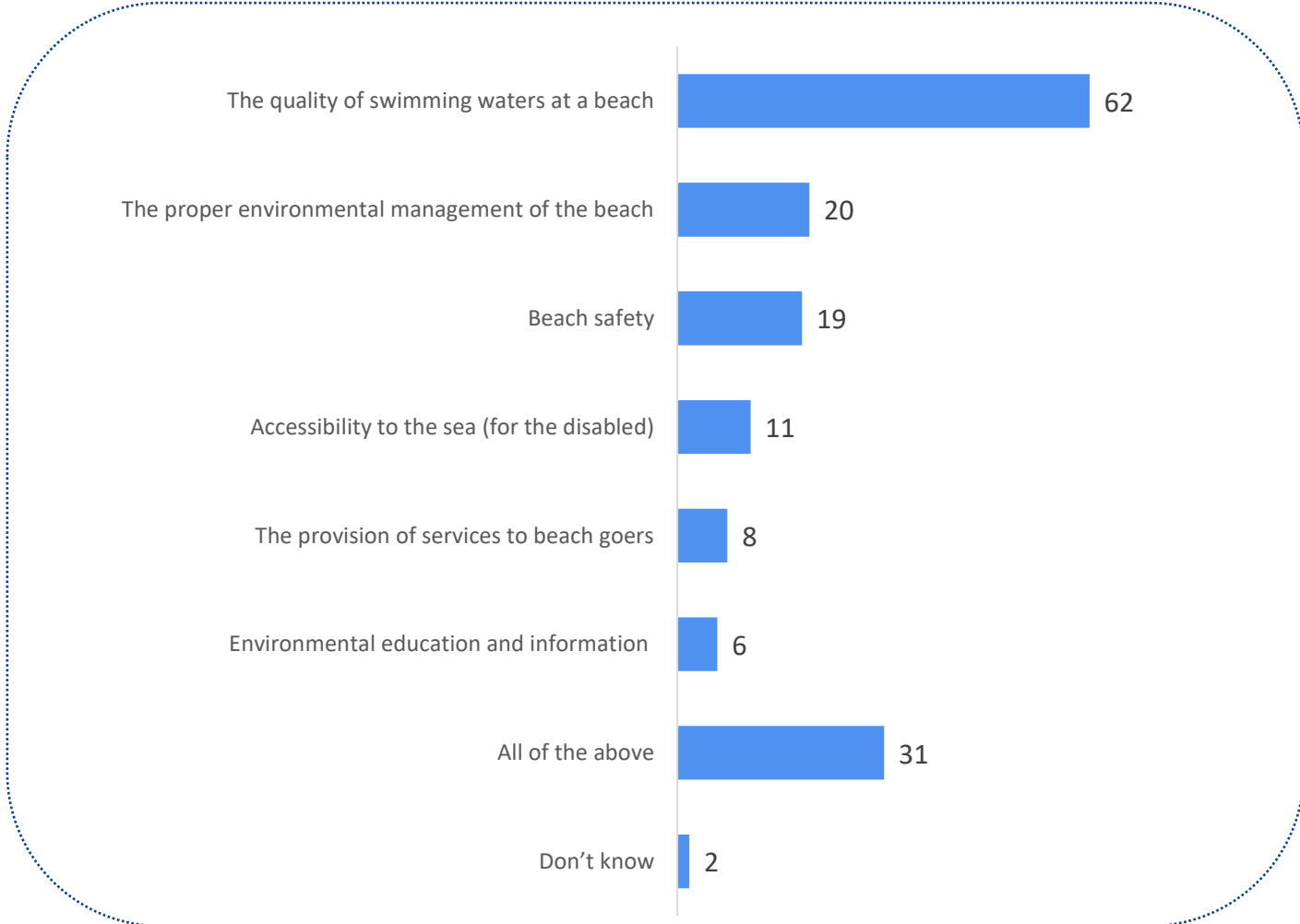
Base: 83% of respondents who have rented accommodation in the past three years

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Over 6 out of 10 respondents who have rented accommodation in the past three years and have heard of the Blue Flag associate it with swimming waters quality at a beach. Proper environmental management of the beach and beach safety follow at a distance

“And from what you know or have heard, what is the Blue Flag scheme all about?” (multiple responses)



Base: 57% of respondents who have rented accommodation in the past three years and have heard of the Blue Flag

%

# Knowledge of what the Blue Flag scheme is about

by self-positioning on the Left-Right scale

	Total	Left	Centre-left	Centre	Centre-right	Right	Nothing (spont.)
The quality of swimming waters at a beach	62	58	67	63	64	54	62
The proper environmental management of the beach	20	26	20	20	17	21	16
Beach safety	19	15	20	19	16	27	15
Accessibility to the sea (for the disabled)	11	9	15	10	11	9	10
The provision of services to beach goers	8	5	14	7	3	14	2
Environmental education and information	6	12	6	4	6	5	5
All of the above	31	34	30	33	33	29	28
Don't know	2	2	1	1	*	2	6

Base: 57% of respondents who have rented accommodation in the past three years and have heard of the Blue Flag

# Knowledge of what the Blue Flag scheme is about

by gender and age and level of concern about climate change

	Total	Men	Women	17-24 y.o.**	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.	Very/Quite	Not so much/Not at all
The quality of swimming waters at a beach	62	64	59	56	66	66	64	58	62	63
The proper environmental management of the beach	20	19	20	21	20	16	16	25	20	19
Beach safety	19	22	15	17	24	16	16	20	18	25
Accessibility to the sea (for the disabled)	11	14	9	12	9	12	11	11	11	10
The provision of services to beach goers	8	9	6	9	5	4	3	13	8	7
Environmental education and information	6	6	6	12	10	6	4	5	6	4
All of the above	31	29	33	20	20	31	31	38	32	27
Don't know	2	2	2	11	6	*	1	*	2	3

Base: 57% of respondents who have rented accommodation in the past three years and have heard of the Blue Flag

\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Knowledge of what the Blue Flag scheme is about

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands**	Up to middle education	Higher/highest education
The quality of swimming waters at a beach	62	61	62	67	52	68	58
The proper environmental management of the beach	20	20	17	22	19	26	16
Beach safety	19	22	19	15	16	20	18
Accessibility to the sea (for the disabled)	11	13	9	10	11	11	11
The provision of services to beach goers	8	8	5	8	12	10	6
Environmental education and information	6	5	4	10	6	6	6
All of the above	31	31	29	30	37	20	37
Don't know	2	3	1	1	3	3	1

Base: 57% of respondents who have rented accommodation in the past three years and have heard of the Blue Flag

# Eco-Labels and Accommodation Choices I

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- ▶ But how exactly are eco-labels connected to accommodation choices?
- ▶ Firstly, more than 1 in 2 (52%) consider it important for accommodations to have an eco-label, compared to only 13% who do not consider it important. The most significant differentiation here is the level of concern about climate change, with those who are very/quite concerned tending to evaluate an eco-label on an accommodation as important, while those who are not concerned tend to see it as rather unimportant.
- ▶ Next, the relationship between eco-labels and the price of accommodation was examined. To begin with, it appears that the majority (almost 2 out of 3: 64%) spend up to 80 euros on average per day for accommodation during vacations or trips — with higher percentages among those who self-report as farmers/working class (77%) and as middle class (71%).



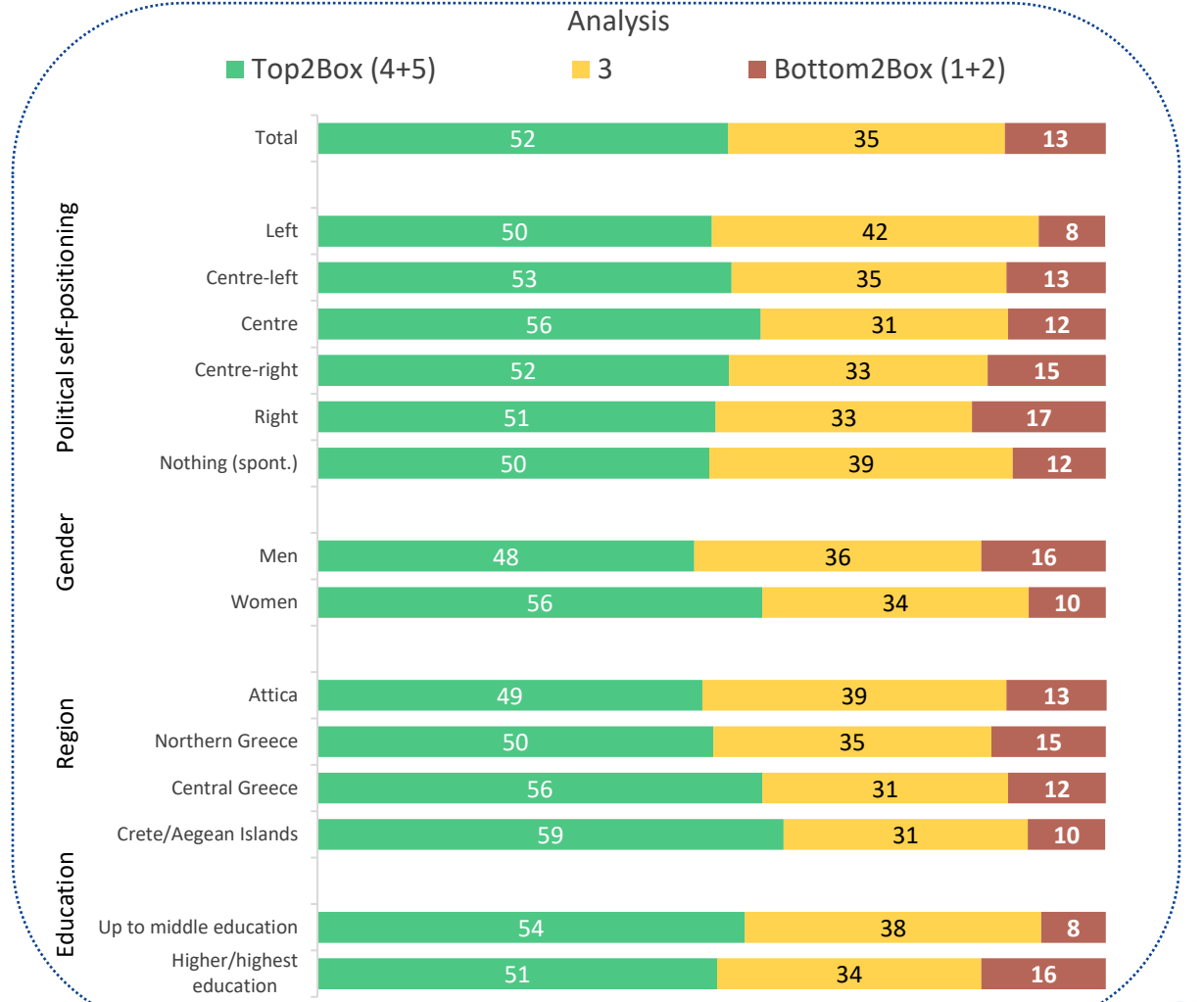
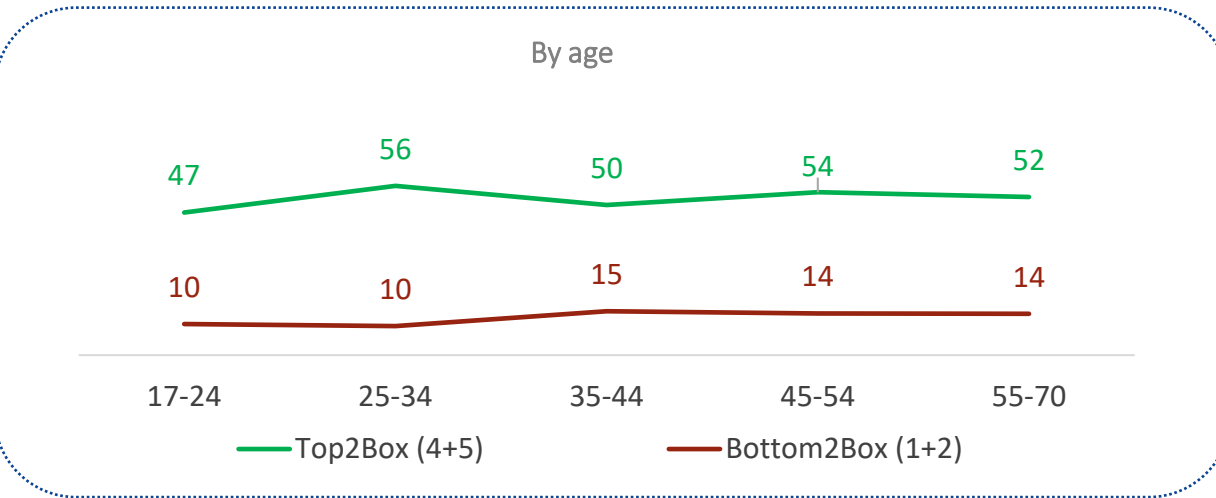
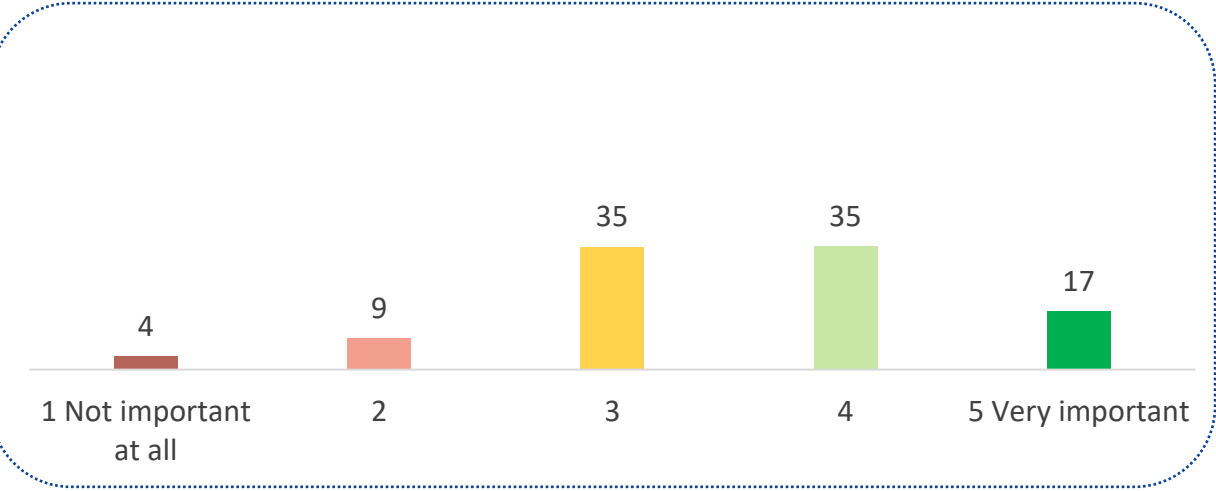
## Eco-Labels and Accommodation Choices II

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- ▶ While 52% of those who have rented accommodation in the past three years consider it important for an accommodation to have an eco-label, only 38% say they would be willing to pay more for such accommodation, compared to 42% who would not.
- ▶ The only age group where the willingness to pay extra exceeds is those aged 17-24, where 43% say they would be willing to pay more — though this is often a group that still relies financially on their parents. Even among those who are very/quite concerned about climate change, the willingness to pay extra is only marginally higher (41% compared to 38%), while among those who are not concerned, the lack of willingness to pay extra rises to 69%.
- ▶ Finally, of those who have rented accommodation in the past three years and would also be willing to pay more for accommodation with an eco-label (32% of the total sample), 53% would be willing to pay 5% to 10% more, 43% would pay up to 5% more, and only 4% would pay over 10% more.
- ▶ This seems to be related to the available budget for accommodation, as those with an average daily budget of up to 60 euros are more likely to say they would pay up to 5% more for accommodation with an eco-label, while those with a budget of over 60 euros would be willing to pay an extra 5%-10% for a tourist accommodation with these features.

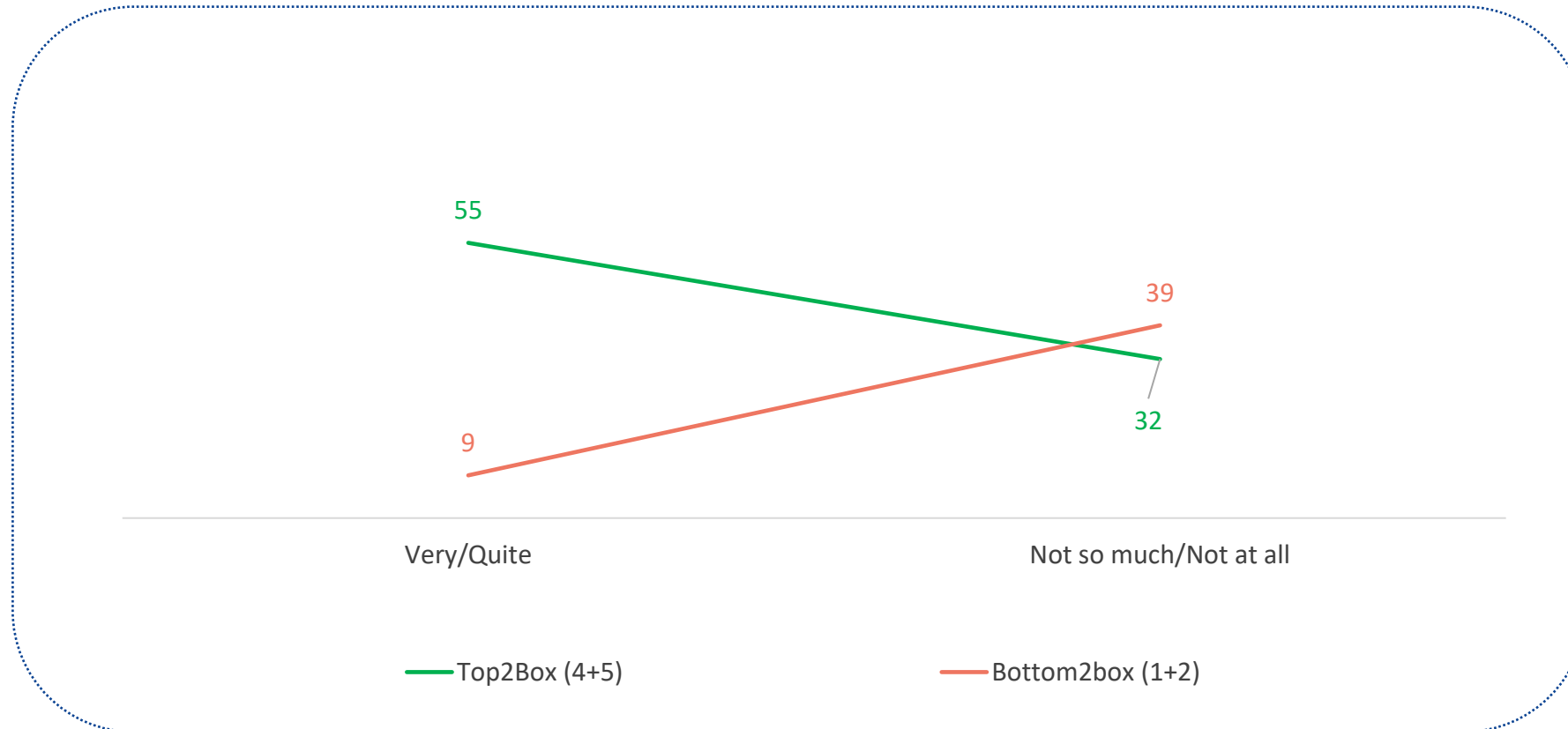
# More than one in two considers it important for a tourist accommodation to have an eco-label/environmental certification

“How important is it for you that a tourist accommodation have an eco-label/environmental certification, so that you choose it for your stay? Please use a scale from 1 to 5, in which 1 means not important at all and 5 means very important.”



% Base: 83% of respondents who have rented accommodation in the past three years

# Importance of a tourist accommodation having an eco-label/environmental certification by level of concern about climate change



# Importance of a tourist accommodation having an eco-label/environmental certification

by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Top2box (4+5)	52	50	47	54	67	41	52	53	65	59	45	55	55
3	35	38	40	32	28	48	40	21	22	29	40	34	33
Bottom2box (1+2)	13	13	14	14	5	12	8	26	13	12	15	11	12

%

Base: 83% of respondents who have rented accommodation in the past three years

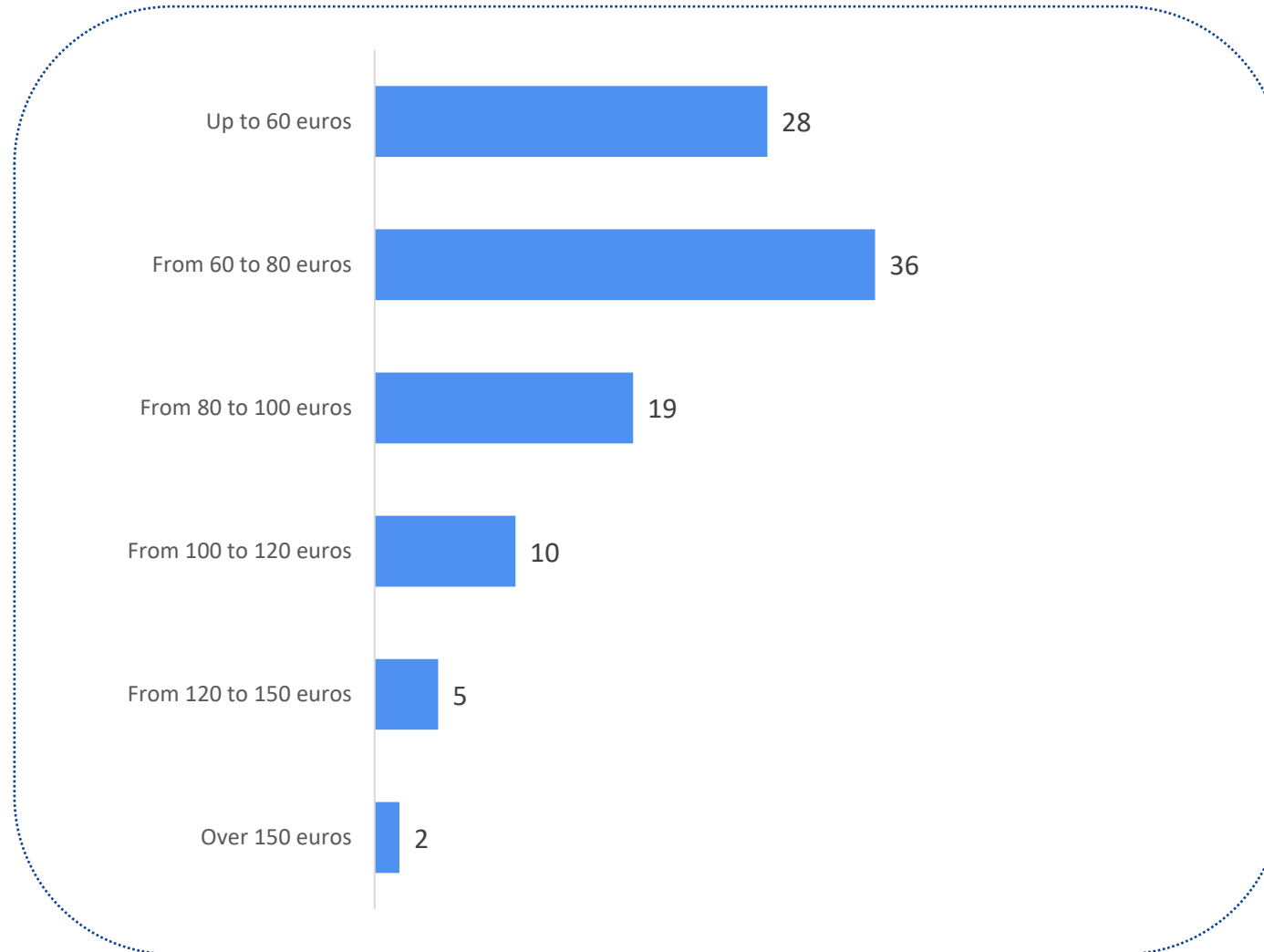
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\* Percentage <0.5%

\*\* Base smaller than 60 individuals

# Almost 2 out of 3 spend up to 80 euros on average per day when renting accommodation during vacations or trips

“When you go on vacation or a trip and rent accommodation, how much do you spend on average per day for your stay?”



%

Base: 83% of respondents who have rented accommodation in the past three years

## Average daily accommodation spending by gender and age

	Total	Men	Women	17-24 y.o.	25-34 y.o.	35-44 y.o.	45-54 y.o.	55-70 y.o.
Up to 60 euros	28	27	30	31	28	28	25	30
From 60 to 80 euros	36	37	36	29	39	39	35	37
From 80 to 100 euros	19	22	16	17	18	19	22	18
From 100 to 120 euros	10	7	13	9	6	9	14	11
From 120 to 150 euros	5	5	4	9	5	5	5	2
Over 150 euros	2	3	*	5	4	1	1	1

%

Base: 83% of respondents who have rented accommodation in the past three years

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\* Percentage <0.5%

\*\* Base smaller than 60 individuals

## Average daily accommodation spending

by region of residence and self-reported socio-economic class

	Total	Attica	Northern Greece	Central Greece	Crete/Aegean Islands	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Up to 60 euros	28	21	30	34	39	47	34	23	11
From 60 to 80 euros	36	36	35	37	39	30	37	41	21
From 80 to 100 euros	19	18	23	19	9	8	21	18	22
From 100 to 120 euros	10	15	8	6	10	3	7	12	23
From 120 to 150 euros	5	7	4	3	2	6	1	4	16
Over 150 euros	2	3	1	2	2	6	*	1	7

%

Base: 83% of respondents who have rented accommodation in the past three years

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\* Percentage <0.5%

\*\* Base smaller than 60 individuals

## Average daily accommodation spending by employment status and education level

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Up to middle education	Higher/highest education
Up to 60 euros	28	22	26	25	64	42	27	35	22	33	26
From 60 to 80 euros	36	37	38	36	26	27	41	36	43	40	34
From 80 to 100 euros	19	17	22	21	7	18	18	8	17	15	22
From 100 to 120 euros	10	10	9	11	2	8	14	21	3	9	11
From 120 to 150 euros	5	11	3	6	*	3	*	*	11	4	5
Over 150 euros	2	4	2	1	2	3	*	*	4	1	2

%

Base: 83% of respondents who have rented accommodation in the past three years

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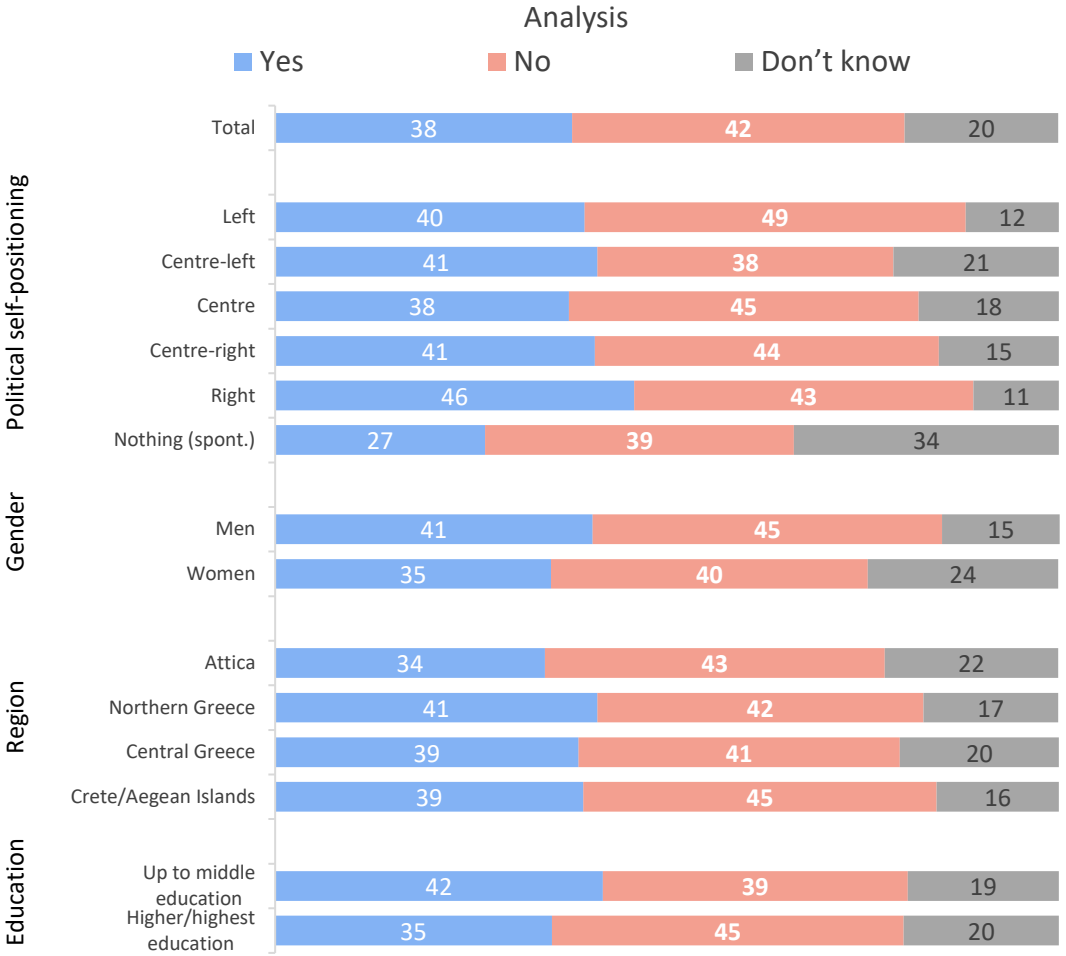
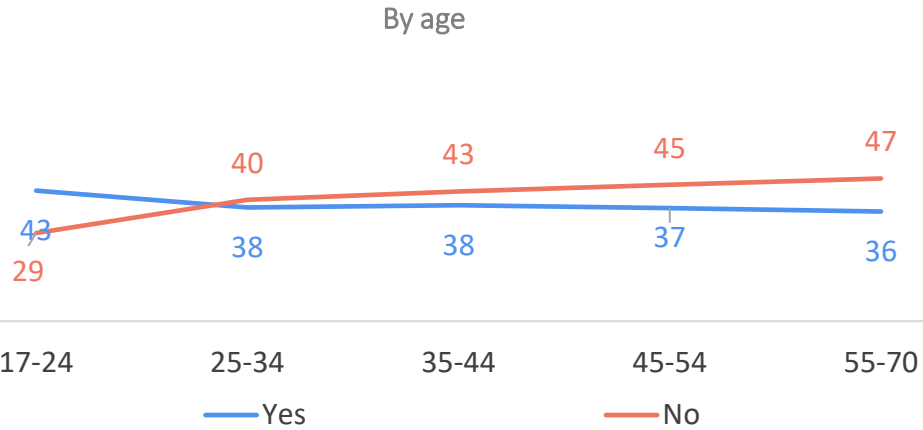
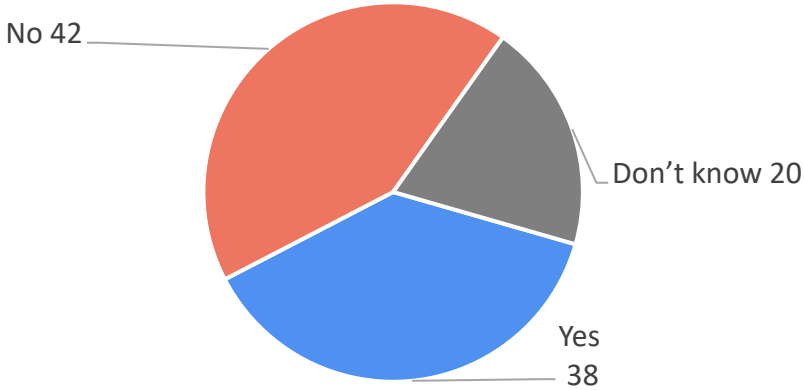
\* Percentage <0.5%

\*\* Base smaller than 60 individuals



# 38% of those who have rented accommodation in the past three years say they would be willing to pay more for accommodation with an eco-label, while 42% would not be willing

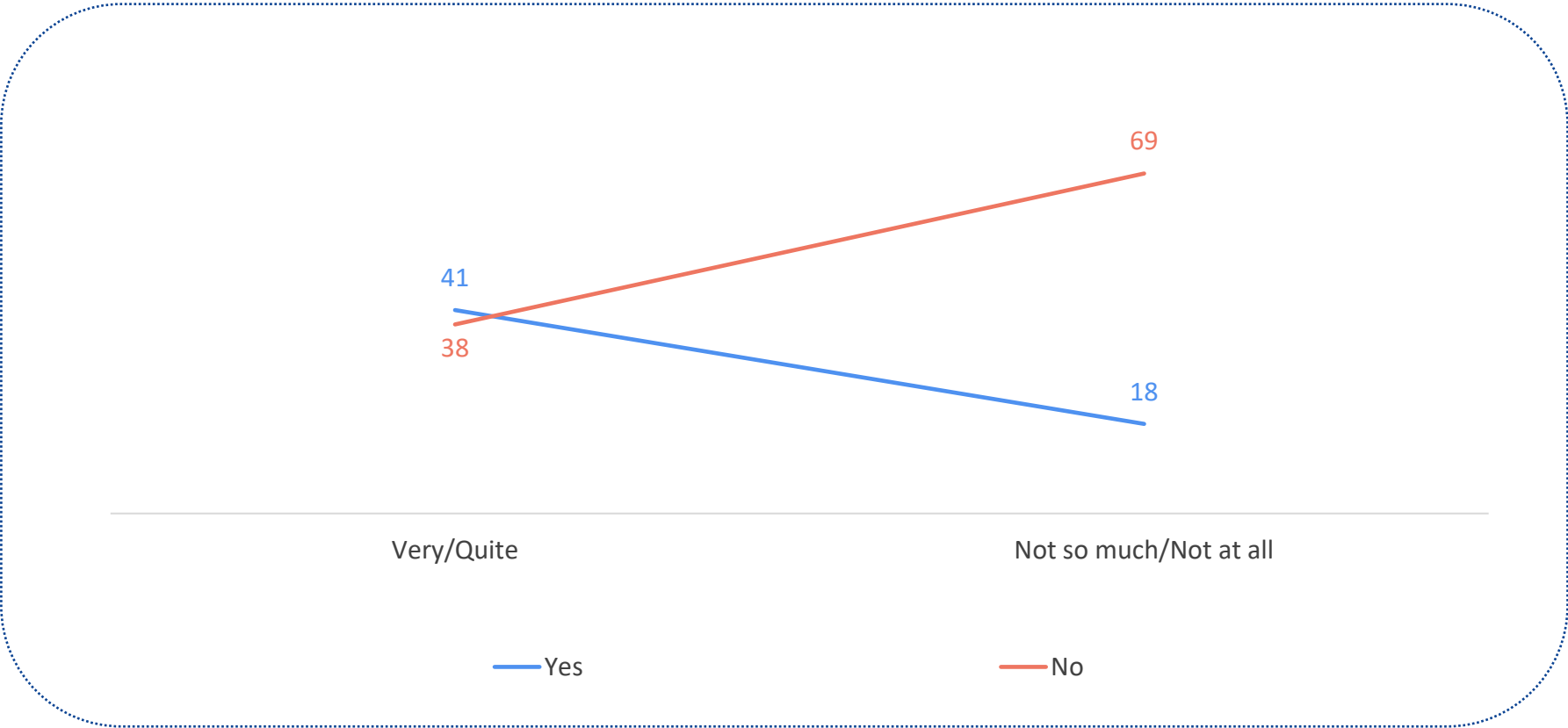
“And would you be willing to pay some more to stay in an accommodation that has an eco-label/environmental certification?”



%

Base: 83% of respondents who have rented accommodation in the past three years

# Willingness to pay extra for accommodation with an eco-label/environmental certification by level of concern about climate change



%

Base: 83% of respondents who have rented accommodation in the past three years

# Willingness to pay extra for accommodation with an eco-label/environmental certification

## by employment status and self-reported socio-economic class

	Total	Self-employed/ Employers	Public sector employees	Private sector employees	Unemployed**	Students**	Pensioners	Housewives**	Other**	Farmers/ Working class	Lower-to-middle class	Middle class	Upper class
Yes	38	45	32	37	32	43	44	35	35	50	35	36	50
No	42	35	46	45	42	20	41	49	55	35	47	42	42
Don't know	20	20	22	17	26	38	15	16	10	15	18	23	8

%

Base: 83% of respondents who have rented accommodation in the past three years

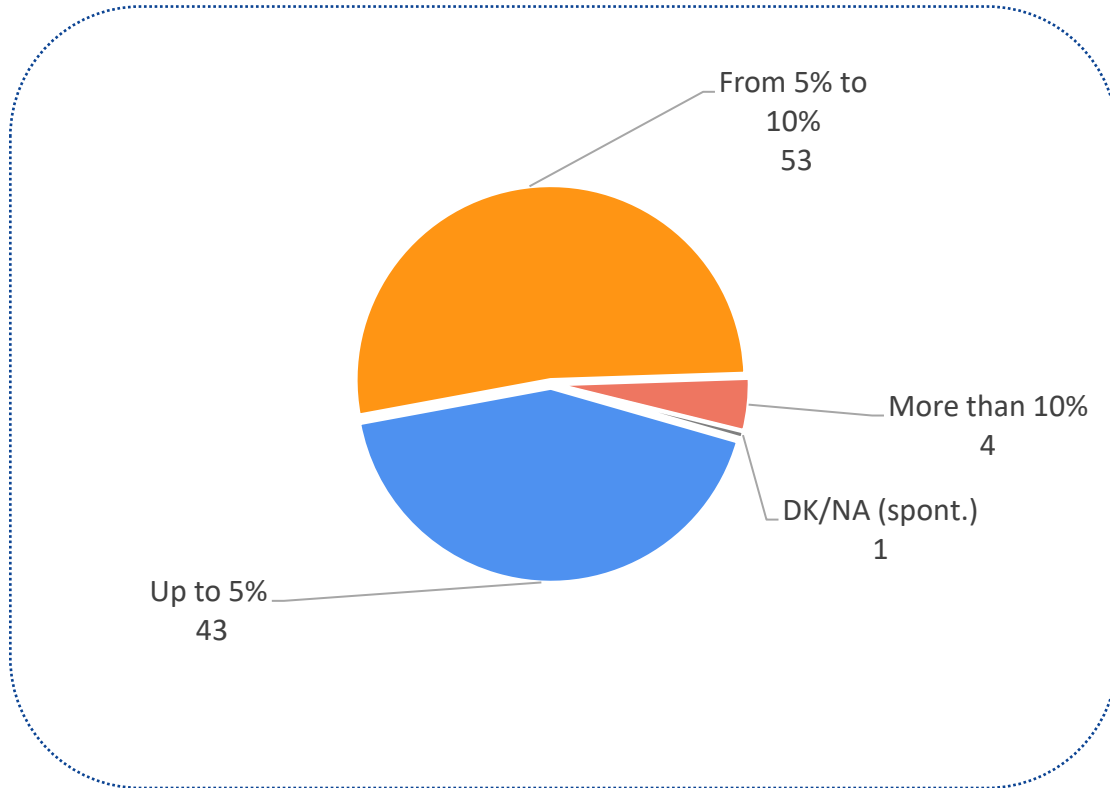
METRON ANALYSIS

\* Percentage <0.5%  
\*\* Base smaller than 60 individuals



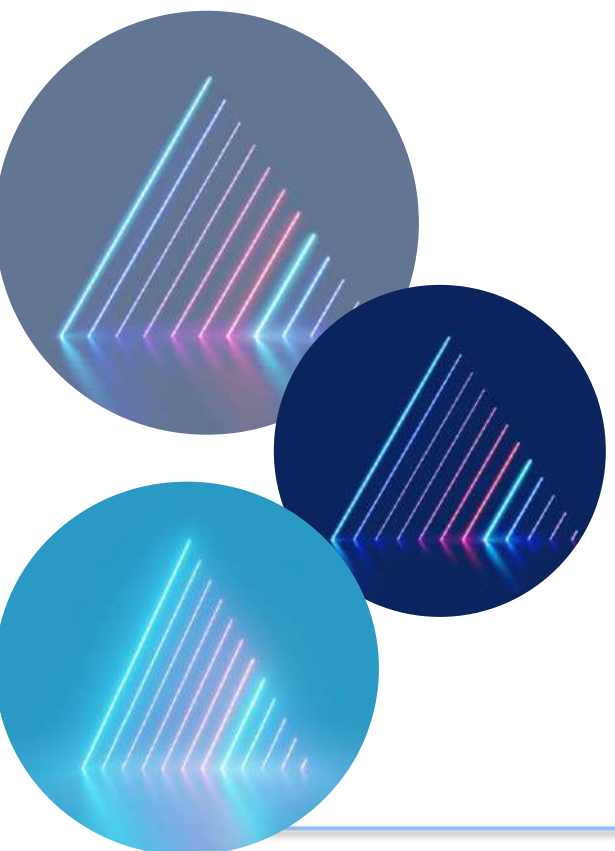
Those with a budget of up to 60 euros per day for accommodation would be more willing to pay up to 5% more for eco-certified accommodation, while those with a budget of over 60 euros would be more willing to pay 5%-10% more

“And how much more would you be willing to pay?”



	Total	Average daily accommodation spending		
		Up to 60 euros	From 60 to 80 euros	Over 80 euros
Up to 5%	43	58	35	41
From 5% to 10%	53	40	61	54
More than 10%	4	3	5	5

Base: 32% of respondents who have rented accommodation in the past three years and would be willing to pay more

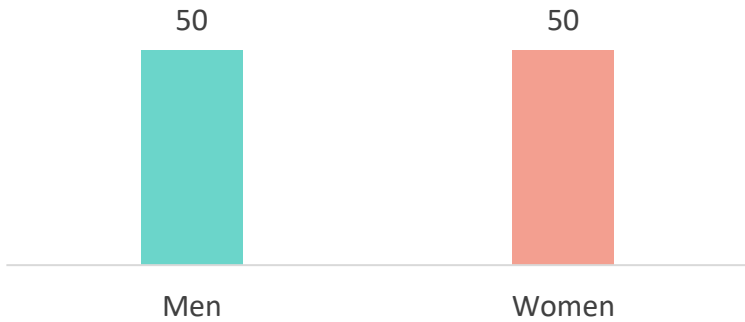
Three overlapping circles containing glowing, multi-colored lines that create a sense of depth and movement. The top-left circle is dark blue, the middle-right is dark blue, and the bottom-left is light blue. The lines are in shades of cyan, magenta, and blue.

## Respondents' socio-demographic profile

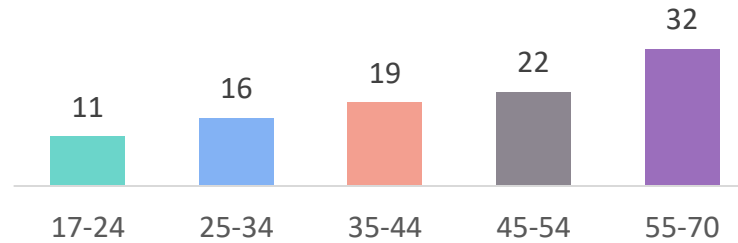
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# Respondents' socio-demographic profile

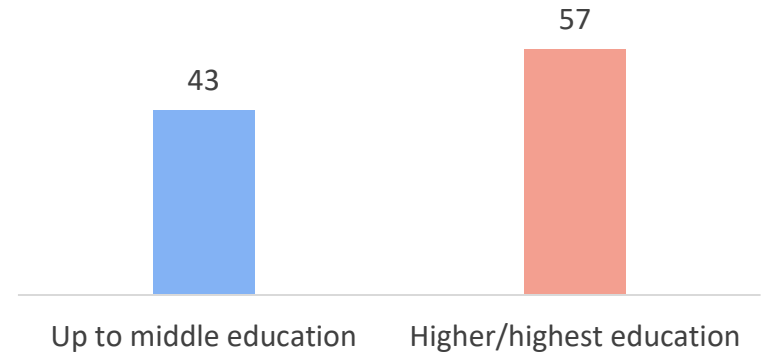
### Gender



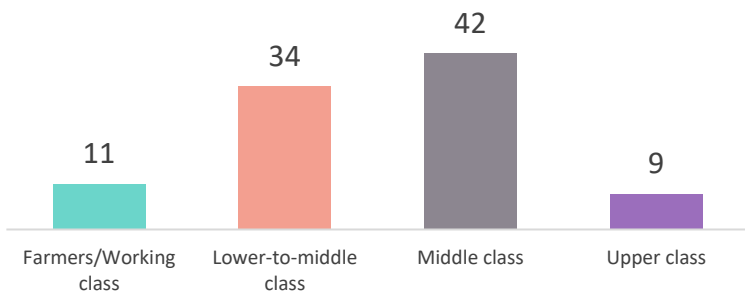
### Age



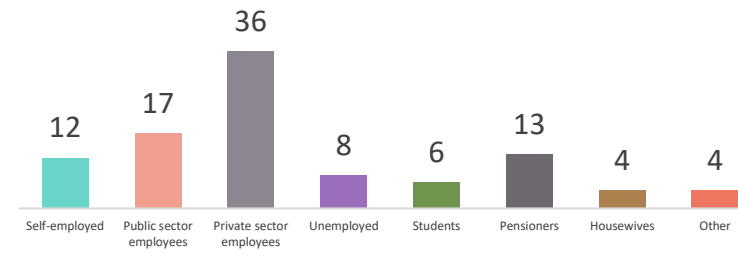
### Education level



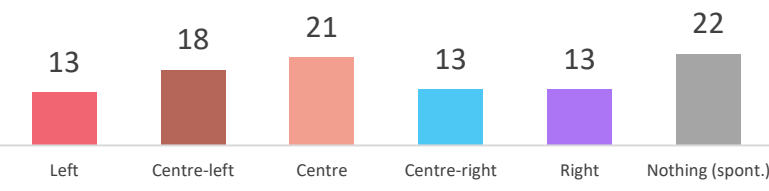
### Self-reported socio-economic class



### Employment status



### Political self-positioning



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# Nationwide Public Opinion Survey on Tourism Behaviour and Sustainability

October 2024

