Digital Nomads as Travellers in Europe

Ina Tuomela

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Author(s)
Ina Tuomela

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This research-oriented thesis aims to identify digital nomads as a traveller segment with a focus on Europe as their destination. Understanding their travelling habits, preferences and behaviours can help tourism and hospitality industry stakeholders to get more familiar with this customer segment and allow them to use the insights to better cater to the needs of digital nomads'.

Digital nomads are defined as people that use technology in order to work remotely and achieve location independence that allows them keep working no matter where they live or travel to. While the initial inspiration may have come from Timothy Ferriss' book The 4 Hour Workweek, the digital nomad phenomenon has gained momentum from the rise of social media and the COVID-19 pandemic in the past couple of years.

The research was conducted as a quantitative online survey posted on Facebook groups, LinkedIn and sent directly to digital nomads on Instagram. The survey covered topics such as digital nomad demographics, accommodation, transportation, spending habits, destination choices and sustainability. With two extensions to the original timeline due to difficulties with approval time of Facebook group posts and low response rates, the survey ended up being open for participation 12.11.-23.11.2022. It was closed after 23 responses.

The main findings indicate that most digital nomads have started working remotely in the last four years, likely continuing to work remotely after making the transition due to the restrictions during the pandemic. They stay in private apartments most of the time and appreciate possibilities to cook meals themselves and have flexible cancellation and change policies. Digital nomads take short trips of up to two weeks and longer trips of one to two months whilst changing cities a few times before changing the country. Their most frequent expenses are groceries, food and beverage services and public transportation. Digital nomads are culturally aware and like to blend in the local setting, but they are not as proactively educated on the impacts of their travels on the local community and environment. Based on the gathered data, a digital nomad customer avatar was created for a 29-year-old American woman who works fully remotely as a consulting freelancer in creative services and plans to be a digital nomad permanently.

In order to best market their products to digital nomads, businesses should highlight proximity to tourist attractions, cafés and restaurants, flexible change and cancellation policies, privacy of their rooms and keep their website and social media frequently updated. Collaborations with digital nomads and highly visible reviews on websites and social media are great ways to attract other digital nomads and build trust since they listen to the recommendations and experiences of their peers. On destination level, reliable internet connection, smooth public transportation and working together to make services easily available are crucial.

Key words
Digital Nomads, Nomadic Lifestyle, Customer Segmentation, Europe

Table of contents

1 Introduction

This research-oriented thesis aims to understand digital nomads as travellers in Europe by identifying their travelling habits, behaviours and preferences. Its purpose is to help stakeholders in the tourism and hospitality industry to gain more knowledge of this up-and-coming customer segment.

The study focuses on digital nomads who are currently residing in Europe or have done so within the past six months. There are no limitations on the country of origin, gender, field of profession or age for the participants, however these things will additionally be analysed in order to look for any possibly emerging trends or patterns within a particular demographic.

Increasing amounts of people from the younger generations seem to be striving for location independence and making a living through social media or other online platforms, which frees them to travel in a more permanent basis. Instead of saving up and having a strict budget for short trips limited by vacation days from work, they are able to travel for longer periods of time and not exhaust their financial resources since they can keep making money on the go. There is also a segment of digital nomads who freelance in fields like influencer or content marketing within the tourism industry itself while simultaneously being travellers. This means that they are getting at least part of their income for travelling by actually travelling, causing them to blur the line between business, leisure and lifestyle in a new way.

Digital nomads form a new and exciting segment with a lot of potential: the number of digital nomads is growing rapidly, social media continues to develop as a business platform and hefty paychecks from online platforms are becoming more achievable. The COVID-19 pandemic has caused remote work to become increasingly common and many professionals are not going back to the offices even though restrictions are over. In a global survey during March 2021, 69 percent of respondents were currently working remotely and 31 percent were expecting to work remotely permanently (Sava, 2022a). The same survey was re-done in 2022 and while the amount of people currently working remotely had dropped to 45 percent, the amount of people expecting to work remotely on a permanent basis had barely gone down by two percentage points to 29 percent. It goes to show that while remote work may not be for everyone and it may not be suitable for all occupations, those who can work remotely and are committed to doing so really do stick to it.

In a survey for digital nomads, 20 percent of the participants had become digital nomads during 2020, which further indicates that COVID-19 played part in their transition to the lifestyle (Kelly & Arelano, 2021). On average between US, UK, Canada and Australia, around 19 percentage of respondents listed freedom to travel or relocate as a benefit to remote work as well as the ability to live where one wants to live (Sava, 2022b). This strongly indicates that there is a group of people with the opportunity and desire to live as digital nomads temporarily or permanently.

Digital nomads have the ability to bring revenue to the hospitality and tourism industry that has been shaken by the travelling restrictions during the COVID-19 pandemic. In addition, they can help to balance out the peak season visitor flow in crowded destinations since their work does not tie them to travelling purely during the busiest holidays.

Digital nomads have been studied more in the last years, but it is still a new phenomenon that has research potential. This study focuses on digital nomads as travellers, bringing a fresh tourism perspective on the subject. Studying this new type of traveller segment will help to uncover what the tourism industry can offer to better serve them and how this traveller segment can also benefit the industry in a post-pandemic world.

This thesis is written using the Harvard referencing style.

1.1 Research questions and objectives

The main research question is:

1. *What are the travelling habits of digital nomads in Europe?*

Sub-questions supporting the main research question are:

2. *What factors affect their decision-making while choosing a destination?*
3. *How do digital nomads find potential destinations?*
4. *What means of transportation they use between destinations and during their stays?*
5. *What type of accommodation and duration of stay they prefer?*
6. *What do digital nomads spend money on in the destinations?*
7. *How do they benefit the destinations and local communities as travellers?*

Based on these questions, prior research and the theoretical framework, the aim is to make this thesis a highly useful resource for anyone looking to gain a competitive advantage by tailoring their products and services to best suit the travelling habits and preferences of digital nomads. Thus, the thesis will support the stakeholders in breaching the gap between the tourism product and service supply and the travelling needs and wants of digital nomads, eventually benefiting both the stakeholders and the travelling digital nomads. In addition, it offers guidance for destination management and marketing for destinations that are looking to create a stronger pull factor for digital nomads and positively stand out from the crowd when digital nomads are deciding where to go next.

The objective of this thesis is to identify the travelling habits of digital nomads in Europe by answering the main research question as well as the sub-questions supporting it. This includes their needs, wants, non-negotiables, previous experiences and preferences when it comes to choosing destinations, products and services. The collected data is designed to help destinations as well as tourism and hospitality businesses to examine and improve the suitability of their products and services for digital nomads and their potential to attract this particular traveller segment.

After gathering the data, the objective is to analyse it to identify any patterns or habits amongst the survey participants. In addition to only looking for patterns and habits that most participants have and therefore represent digital nomads on a more general level, there will be a closer look into demographic sections including, but not limited to, different age groups and genders in order to understand the patterns and habits of more defined target groups. This type of knowledge is aimed to further help tourism and hospitality stakeholders to attract the specific target groups, such as young women, within digital nomads.

In order to reach the objectives and communicate the findings of the thesis' research and survey clearly, there will be a section that includes recommendations and materials for those interested in improving their understanding of digital nomads as travellers. Based on the research and questionnaire data, a customer avatar will be created to further help visualise and represent digital nomads as a target group. When the industry stakeholders familiarise themselves with the travelling habits and preferences of digital nomads, they are able to tailor the marketing and packaging of their products and services to appeal to them. Thus, companies and destinations are able to attract new customers, gain competitive advantage and increase their revenue.

1.2 Thesis structure

This thesis consists of six main chapters supported by sub-chapters. Introduction walks the reader through the general subject and objectives of the thesis and its research. The second chapter on digital nomads lays the foundation for understanding and defining who digital nomads are through prior research. The third chapter dives deeper into the European tourism market as a digital nomad destination from its push and pull factors to current regulations regarding digital nomads. Chapter four dissects the process of creating the research for the thesis from choosing the methodology to finding the target audience and executing the survey. In chapter five, the results of said survey are analysed and presented. The last chapter offers conclusions of the thesis, complimentary with a customer avatar of a digital nomad as well as suggestions for destinations and businesses hoping to attract digital nomads. The thesis is wrapped up by discussing the success of the thesis and reflecting on the learning process provided by it. Sources can be found in the last section.

2 Digital nomads

2.1 Definition

Digital nomads are characterised as people who use technology to work remotely and therefore gain location independency that enables them to travel and do their job from any part of the world (Hannonen, 2020; Hermann & Morris Paris, 2020; Makimoto & Manners, 1997; MBO Partners, 2020). Digital nomads were first introduced by Makimoto and Manners in 1997 when they had a vision of a globalised future world where new technology, work practices and entrepreneurialism would change the relations between business, leisure and travel. Thus, people could make a choice between settling down or living as nomads. Digital nomadism is, in practice, a far more recent phenomenon that has been strengthened by the normalisation of remote work possibilities during the COVID-19 pandemic (Hermann & Morris Paris, 2020; MBO Partners, 2020; Kelly & Arelano, 2021). Often combining a traveling businessperson and a backpacker-like lifestyle of being on the road, they form a new segment of business leisure (so called 'bleisure') travellers (Hannonen, 2020; Hermann & Morris Paris, 2020).

It is argued that the digital nomad phenomenon is heavily influenced by the ideologies in Timothy Ferriss' book The 4-Hour Workweek published in 2009 (Grooms, 2016; Liu, 2020). The book revolves around the concept of the new rich, people whose currency is their mobility and time, and offers advice on how to leave the regular 9-5 job and create a business that can be automated to practically run without you.

The growing popularity of social media platforms like Instagram, YouTube and TikTok has made digital nomadism a more visible phenomenon with many influencers living as digital nomads whose lives are often romanticised by their followers who may not see the whole picture. In addition to influencers who create travel related content, most full-time influencers in other fields could live as digital nomads if they wanted to: they make their money online and are free to travel. There are estimated to be around two million professional content creators out of whom approximately half make their money on YouTube, 500 000 on Instagram and 300 000 on Twitch (Karuza, 2022).

2.2 Demographics

The leading age group for digital nomads is millennials at 42 percent, followed by Gen X at 22 percent and Gen Z at 19 percent while baby boomers only account for 17 percent of digital nomads (MBO Partners, 2020). In Kelly and Arelano's (2021) study, 51 percent of the participants who answered the optional question regarding their age stated they were between 25 to 34 years old. From these statistics it can be argued that digital nomadism seems to be transitioning towards being dominated by the younger generations with 62 percent identifying as millennials or younger. When it comes to the gender of digital nomads, men make up the majority at 59 percent (Kelly and Arelano, 2021; Tourism Review News Desk,2022).

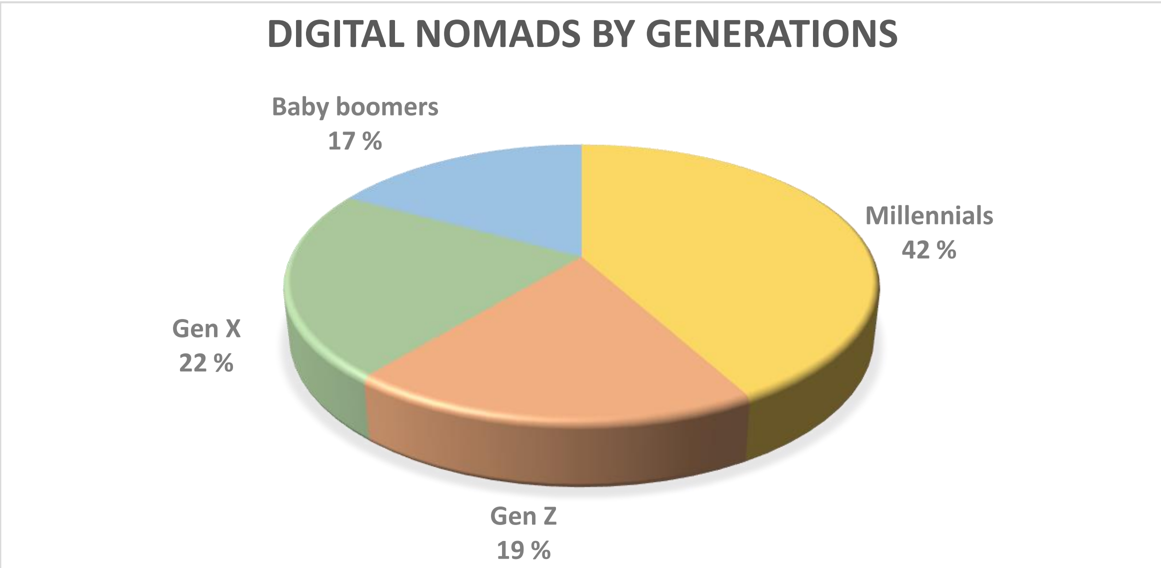


Figure 1. Digital Nomads by Generations (based on MBO Partners, 2020)

In a survey conducted by Fiverr in May 2018, almost 80 percent of the over 3700 participating remote workers stated their desire to keep working remotely as long as possible; marketing professionals and creatives took the lead when it came to wanting to continue working remotely indefinitely. When it comes to digital nomads' employment situation, 71 percent work full-time with 33 percent of them being entrepreneurs, 36 percent freelancing and only 21 percent being employees of a single individual company (MBO Partners, 2020; Tourism Review News Desk, 2022).

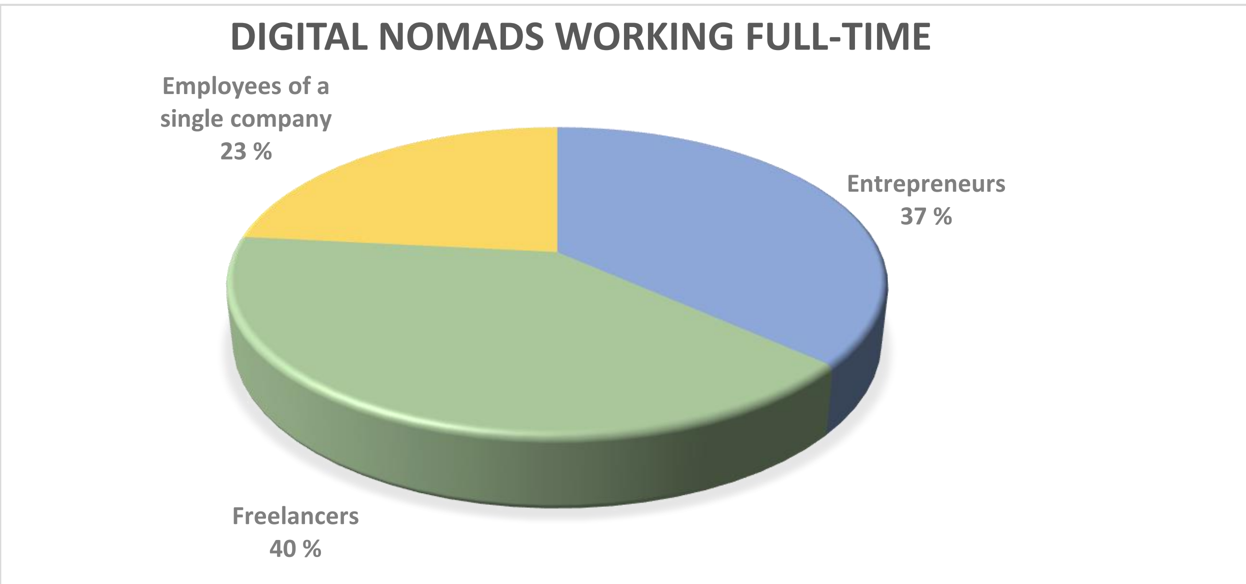


Figure 2. Working situation of digital nomads who work full-time (based on MBO Partners, 2020; Tourism Review News Desk, 2022)

Some of the leading occupations by digital nomads are information technology at 12 percent, education and training at 11 percent, consulting, coaching and research at 11 percent, sales, marketing and public relations at 9 percent and creative services at 8 percent (MBO Partners, 2020). These statistics show what a wide range of jobs and fields digital nomads have since these top five fields barely make up half of the total fields digital nomads work in.

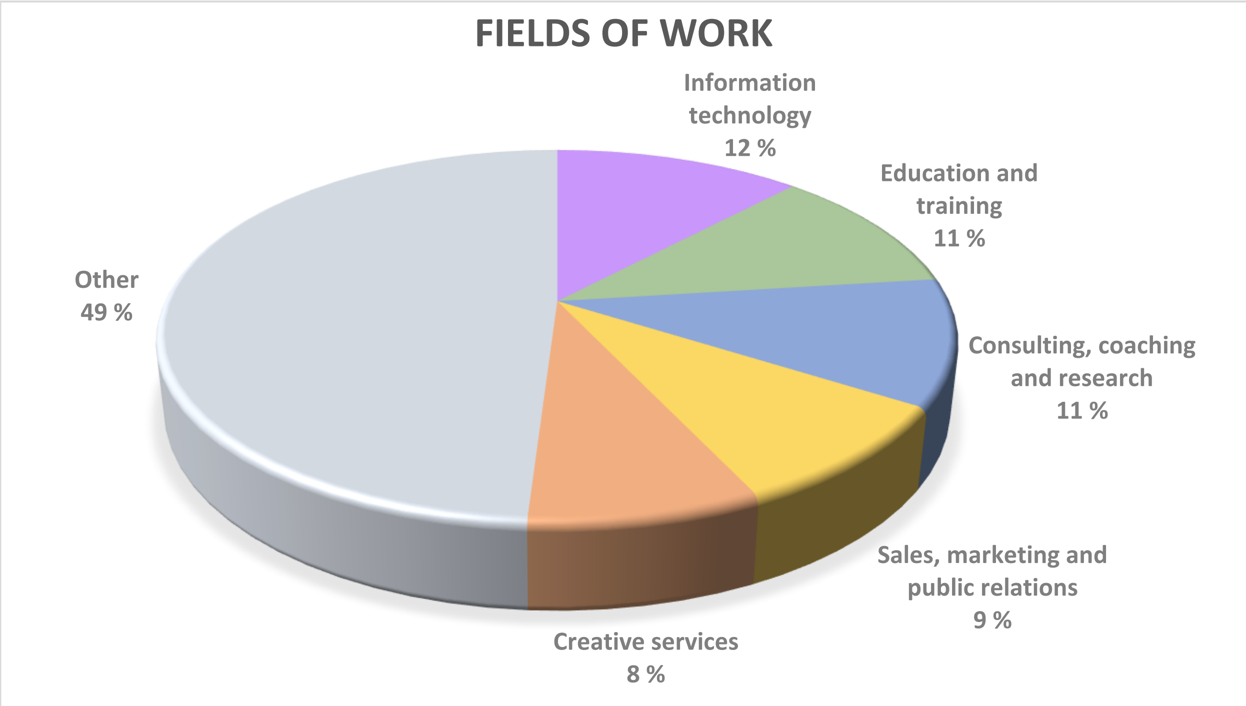


Figure 3. Digital Nomads' Fields of Work (based on MBO Partners, 2020)

87 percent of digital nomads in Kelly and Arelano's (2021) study made all their income as digital nomads while the remaining 13 percent had savings or support from their family to finance their lifestyle. Less than 25 percent of digital nomads earn less than 25000 US dollars annually while over 38 percent earn at least 75000 US dollars (MBO Partners, 2020; Tourism Review News Desk, 2022). Kelly and Arelano's (2021) study argues that the average salary of a digital nomad is around 4500 US dollars monthly, or 54000 US dollars annually. In addition to objectively looking at the income as numbers, digital nomads enjoy what they do. In a survey by MBO Partners (2020) they reported being either satisfied or highly satisfied at 90 percent for work satisfaction and at 76 percent for income satisfaction.

Nearly 61 percent of digital nomads are married with 31 percent having their partners travelling with them full-time and 38 percent having their partners join them part-time (Tourism Review News

Desk, 2022). However, even with these statistics, 30 percent of digital nomads named lack of community as the biggest challenge to their happiness while working remotely (Fiverr, 2018). This shows that digital nomads crave a sense of community beyond their partner or the person they travel with, which can be more difficult to achieve when they are travelling instead of simply settling down in one place.

2.3 Digital nomads as travellers

2.3.1 Characteristics

Digital nomads stand out as a customer segment with their needs and wants related to working remotely while on the road. In his article published on Forbes in 2021, Nathan Mayfield gives suggestions for hospitality businesses on how they can meet the needs of digital nomads. One of his suggestions is providing a space that allows the guest to work with maximum productivity. This could be an extra room for work purposes or a makeshift cubicle within the room they are staying in, but a café with access to Wi-Fi and amenities like computers and printers in the premises of the business would do. In addition to having these spaces, they should be promoted on the website and social media to ensure potential visitors know about them. Other amenities and services include outlets for charging, space to cook during longer stays, free toiletries and water bottles, secure storages like safes as well as contactless check-in and check-out.

Highlighting the proximity of local attractions and informing potential customers about them is mentioned by Mayfield (2021) since digital nomads would like to know which activities are easily accessible during their free time. Digital nomads are, after all, also travelling and want to see local attractions like any other travellers. In case there are no famous attractions close by, nature spots should be promoted as digital nomads might be looking for some peace and quiet on their downtime to balance out the time spent looking at screens. Similar thing is highlighted by digital nomad and seven figure online business owner Marie Fe (2021), who mentions good weather and beautiful nature as one of the criteria to look for when choosing a city as a digital nomad. According to her, being able to go outside and enjoy your free time bring a much-needed balance to staring at a screen all day. She brings up the importance of searching for places that support a good work-life balance. For her it means activities, entertainment, networking events, culture, arts and history as well as having pretty locations (so called “Instagramable” spots) nearby for content creation. All of this support the argument that the drivers for the lifestyle are being able to experience different cultures, meet local people and travel constantly (Kelly & Arelano, 2021).

Ekaterina Chevtaeva (2021) argues that a sense of belonging and community are essential for the wellbeing of digital nomads, which explains why bonding with likeminded people has been noted as one of the principal advantages of co-working and co-living spaces in her study. This lines up with the results and findings of the study by Fiverr (2018) stating that a lack of community is a challenge for many digital nomads' happiness. Marie Fe (2021) furthermore supports this argument by highlighting the importance of having good people around you as a digital nomad because lots of digital nomads work alone and thus need to create a community for themselves. Co-working spaces have their benefits like ergonomic workplaces and strong Wi-Fi-connection, but she additionally mentions the possibility to network as their advantage. When digital nomads were interviewed, around 90 percent listed community sense as a benefit of co-working and co-living spaces while around 25 percent mentioned the lack of privacy as a disadvantage (Chevtaeva, 2021).

Kelly and Arelano (2021) argue that reliable internet is the most important non-negotiable for digital nomads. Sharing her own experiences and advice for other digital nomads, Marie Fe (2021) supports this argument by listing fast and reliable internet as one of the most important things to look for in a city as a digital nomad since they fully rely on being connected to be able to get work done.

In their study on digital nomads, Kelly and Arelano (2021) found out that the survey participants' monthly spending was around 1000 US dollars on accommodation, 211 US dollars on transportation and 409 US dollars on food. These results indicate that digital nomads spend nearly half of the amount on food that they spend on accommodation. When that knowledge is combined with the finding that 36 percent of these digital nomads' average 4500-US-dollar income is spent locally (Kelly & Arelano, 2021), digital nomads become especially lucrative traveller segment for the local food and beverage industry.

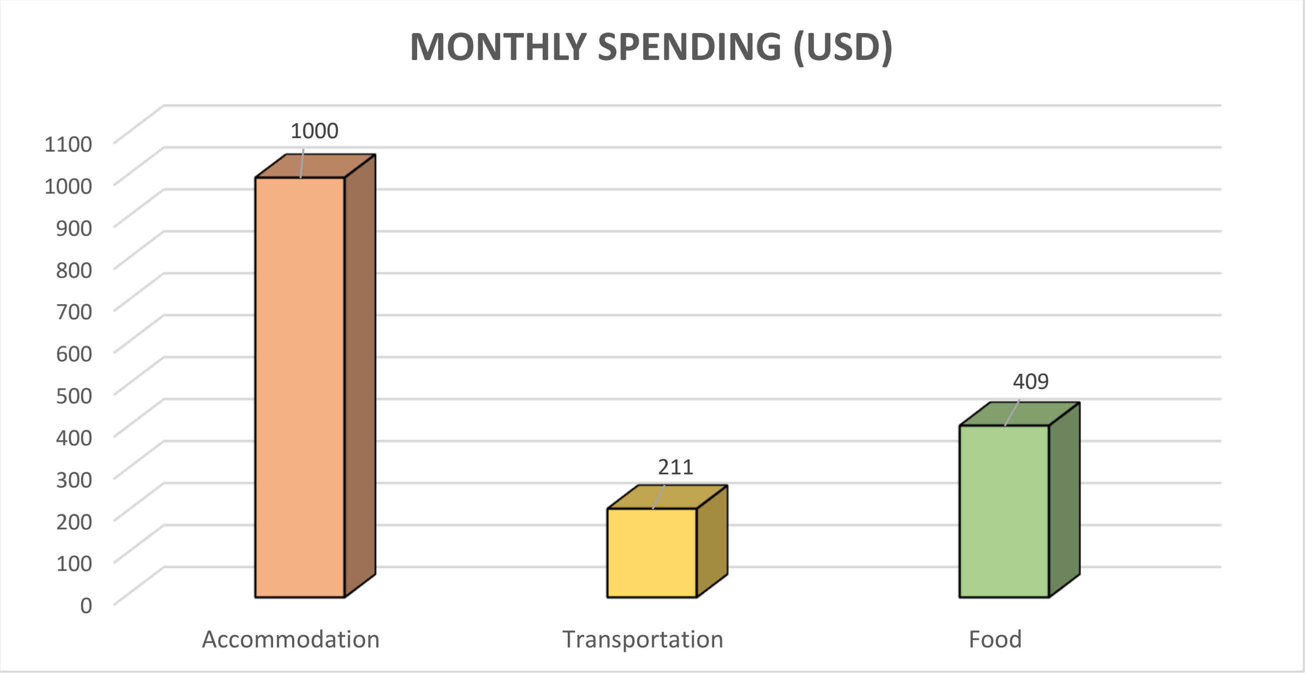


Figure 4. Monthly spending in US dollars (based on Kelly & Arelano, 2021)

2.3.2 Explorer Quotient and Toussaint's categorisation

In 2015, Destination British Columbia introduced a tool, Explorer Quotient, for customer segmentation and description using values. There are nine explorer profiles: 1) free spirits, 2) cultural explorers, 3) authentic experiencers, 4) personal history explorers, 5) cultural history buffs, 6) rejuvenators, 7) gentle explorers, 8) no hassle travellers and 9) virtual travellers. These nine explorers can be grouped into four segments: free spirits into enthusiastic indulgers; cultural explorers, authentic experiences, personal history explorers and cultural history buffs into learners; rejuvenators into escapists and gentle explorers, no hassle travellers and virtual travellers into familiarity seekers. (Destination British Columbia, 2015)

When it comes to the nine explorer profiles, digital nomads fall mainly into the category of free spirits and cultural explorers. The free spirits are described as highly social, open-minded travellers that are experimental and adventurous. These characteristics fit digital nomads, however the aspects of free spirits loving high-end hedonistic experiences may vary between individuals. Digital nomads fulfil the criteria of cultural explorers to an even greater extent: they are constant travellers and love to get immersed in local culture, people and settings. Being a mix of these two profiles makes digital nomads part of both enthusiastic indulgers and learners as a segment. (Destination British Columbia, 2015)

Toussaint (2009) divided digital nomads into three categories: 1) continuous travellers, 2) independent workers and 3) business travellers. The continuous travellers are those digital nomads who are constantly on the move because they love to travel. Toussaint describes their lifestyle to be as simple as possible to save money and their methods of getting income as asking for donations or having sponsors. In today's online environment, it is safe to argue that while the constantly moving digital nomads are still a category, their means to get a living have been broadened from being simply reliant on donations and sponsors. However, as found in the study by Kelly and Arelano (2021), around one in ten digital nomads use either their own savings or support from family members.

Toussaint's (2009) second category of digital nomads, the independent working travellers, chose a profession that allows them to fulfil their love of travel. They need to meet their clients in person, but other communication can be done using different techniques. This means they get to travel, but it is somewhat dictated by their work obligations and where their clients reside.

This category fits the digital nomads who work as freelancers - for example, content creators who collaborate with hospitality and tourism businesses. Thus, they need to meet their clients in person and create content at the property. They have chosen a profession where they can travel continuously and communicate through online channels, but they are still making pitstops to meet with clients.

The third category by Toussaint (2009) is the business travellers who travel while they run their businesses and choose a place to live that meets their criteria for a good habitat. This is the closest category of digital nomads to the traditional nomadic lifestyle, and the most fitting for today's digital nomads who are online entrepreneurs. This type of digital nomad is most likely cultural explorer in the Explorer Quotient: they want to immerse themselves into the local community.

2.3.3 Travelling statistics

The majority of digital nomads visit one to five countries per year (Fiverr, 2018; Tourism Review News Desk, 2022). When it comes to the length of stay, 45 percent of digital nomads spent one week to three months in the same place (Statista, 2022). Thus, it is clear that their average stays are longer than that of most customer segments. This makes them more likely to use products and services that most travellers do not need on their short trips.

The Holidu Index Score ranks Lisbon, Barcelona and Budapest as the top three European cities for remote working by considering factors like accommodation, food, tourist attractions, average prices on selected services and products, Wi-Fi connection and climate (López, 2022). However, London is still the most visited city by digital nomads (Statista Research Department, 2022). This indicates that while some destinations may be better suited for longer stays and remote work, other destinations may be more popular for shorter visits from more of a traveller than a remote worker perspective for digital nomads.

2.3.4 Destination perspective and economics

Whilst there is not much information about digital nomads as travellers compared to other traveller types, this thesis aims to open the conversation regarding the things that sets digital nomads apart as a customer segment. From the destination's perspective, digital nomads have potential to alleviate problems regarding peak season travel, tourism income and promotion of responsible tourism in the destination as well as be less disruptive by staying in the destination longer, learning about the local culture and people. This gives digital nomads a chance to integrate more into the local setting than a traveller on a weekend getaway.

Another interesting aspect is how digital nomads spend their money in the destination, which will be included in the survey and analysed to find out what impact their expenditure can have in a destination. Digital nomads can have a need for a wider variety of services and products during their longer stays from trivial things like hairdresser and barber services to work related things like co-working spaces and repairs for products like laptops or phones.

2.3.5 Case example: Raquel Janeiro and Miguel Mimoso

The story of content creator and business owner couple Raquel Janeiro and Miguel Mimoso can be used as an example to make today's digital nomads more tangible and show the potential they have as a customer segment. Janeiro and Mimoso met in 2017 in their home country of Portugal. Together, they travelled to different countries for a couple of nights each month and ended up starting an Instagram account to document their passion for travel and photography in August that year (Ruiz, 2021). This led to them starting to get content creation and influencer marketing deals. After beginning to receive some income from Instagram, they quit their regular jobs to travel full-time in 2017 (Ruiz, 2021). Just one year later in 2018, Janeiro and Mimoso made six figure sales in four months with their first digital product launch (Club Life Design, 2022).

In September 2022, the couple's account @explorerssaurus_ boasted a following of 1,3 million on Instagram (Instagram, 2022). Going from budget travellers who had limited time off from work to seven figure business owners working fully online and having flexibility to travel for longer periods of time, the couple managed to achieve the digital nomad lifestyle and financial freedom many people dream of these days (Club Life Design, 2022).

When starting out their digital nomad careers, Janeiro and Mimoso fell under the second category of Toussaint's (2009) categorisation, independent working travellers who need to meet with clients in person, since they started out by working with businesses and brands that sometimes required them to do so. Later on, they transitioned into the third category as digital nomads who run their own businesses while travelling and choose where to stay based on their criteria for a good place to live. Janeiro and Mimoso run their own online businesses, such as their social media academy, and have chosen to have their bases in Portugal and Bali, not out of necessity, but purely due to their own preferences.

These days, Janeiro and Mimoso are free to travel when and for how long they want. Their income is not negatively affected by their travels and they have disposable income to spend on products and services they might not have been able to before becoming digital nomads. In addition, they use a wider range of services than those traveller types who are only visiting destinations for a short period of time. Their significant online following means they have an undeniable influence on hundreds of thousands of people who trust their opinion, which means the destinations they visit and the services they promote get a boost of visibility that can lead to a flood of new customers.

3 European tourism market as a digital nomad destination

3.1 Push and pull factors

When it comes to digital nomads from countries belonging to the European Union, one of the biggest pull factors is the ease of travelling within Europe. European Union citizens can stay in another European Union country for three months by simply reporting their presence to local authorities and for stays over three months, they only need to register their residence in the country (Your Europe, 2022). This allows digital nomads who have citizenship in a European Union country to travel around the European Union without any official registration or visas as long as they stay a maximum of three months in each country at once. This seems to be the preferred length of stay for most digital nomads anyways, with only 12 percent stating they stay in the same place even for the three months (Tourism Review News Desk, 2022).

Digital nomads look for places that have a pleasant climate (Fe, 2021; Tourism Review News Desk, 2022). The weather is another undeniable pull factor for Europe as a digital nomad destination thanks to it being sunny and warm for most of the year, especially in southern European countries such as Spain, Italy and Portugal. Even if the southern regions are currently more popular, there is unharnessed potential to use the unique weather and nature of the northern European regions to attract digital nomads looking for something different and exciting.

For digital nomads originally from the United States of America, Australia and Canada, most European countries have a lower cost of living than their home countries when looking at the price level index (Statista Research Department, 2021). The higher cost of living at home can act as a push factor to travel to Europe, where the lower cost of living simultaneously acts as a pull factor. The lowest price level indexes are in Poland, Hungary, Lithuania, Latvia and Czech Republic, whilst the highest are in Iceland, Norway, Denmark, Sweden, Luxembourg and Finland (Statista Research Department, 2021). However, the cost of living is still higher in these countries compared to popular low-cost backpacking and digital nomad destinations in South-East Asia or South America.

3.2 Products and services available to digital nomads

Portugal is a notable innovator in attracting digital nomads. Madeira’s local government created a pilot project in 2021 called ‘Madeira Digital Nomads,’ in which participants are able to live in their Nomad Village in the city of Ponta do Sol. The village offers free Wi-Fi, Slack-community, coworking spaces, exclusive events and accommodation in either private villas or hotels. (Digital Nomads Madeira Island, 2022; European Travel Information and Authorisation System, 2022; Visit Madeira, 2022). The aim of the project is to blend digital nomads and locals together, and the pilot programme has seen success in its first years and will be running at least until 2024 (Digital Nomads Madeira Island, 2022; Visit Madeira, 2022). In addition, the Portuguese temporary resident visa is set apart from other digital nomad visas as it can be used as a steppingstone to permanent residency in the country for those hoping for a more permanent relocation (European Travel Information and Authorisation System, 2022).

The event industry is gradually catching up with the remote work trend too. Business conferences like the Remote Working Expo in London and more "bleisure" events like Nomad Island Fest in Madeira are great examples of events targeted to digital nomads (The Business Revival Series, 2022; The Nomad Escape, 2022). Co-working spaces are another service offered for digital nomads as well as locals. London is the leading city when it comes to flexible office space operators per city in Europe with 148 operators, leading by a significant difference to the following cities of Paris (63 operators), Copenhagen (56 operators) and Barcelona (55 operators) (Statista Research Department, 2022a).

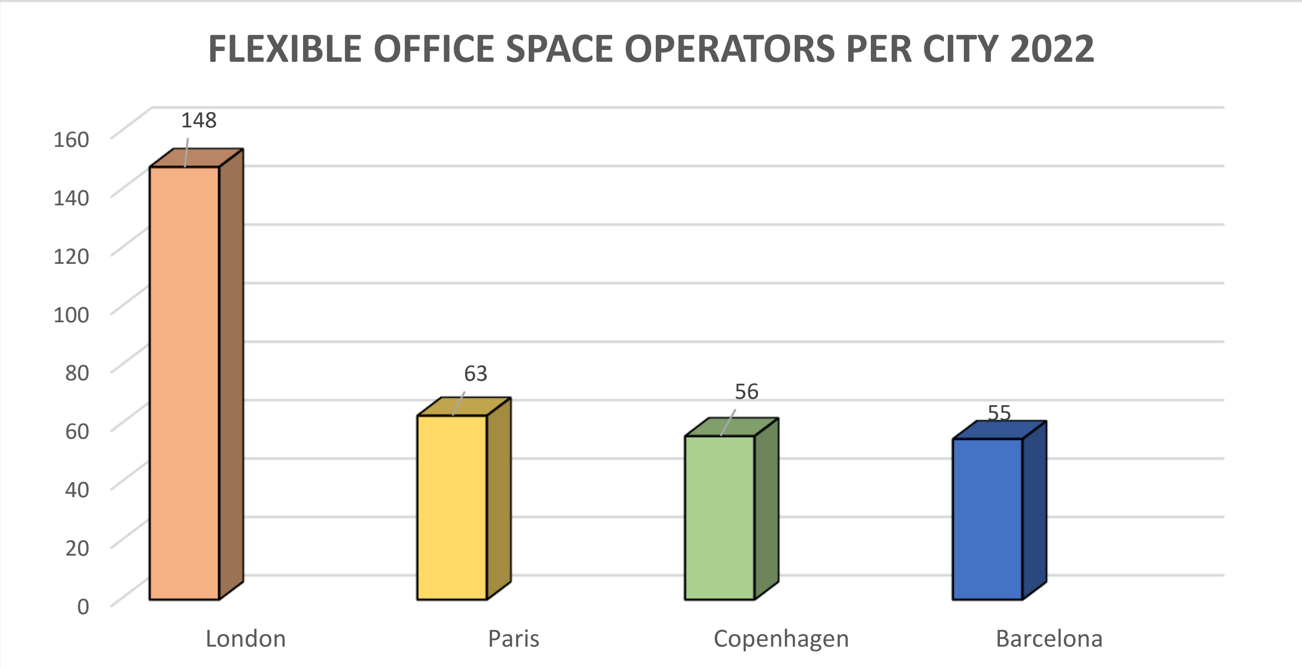


Figure 5. Flexible office space operators per city (based on Statista Research Department, 2022a)

Since digital nomads work online and depend on a reliable internet connection, Malta stepped up to cater to that need and was the first European Union country to establish a countrywide 5G network. Additionally, countries such as Greece have started the process of extending their 5G networks with digital nomads in mind. (European Travel Information and Authorisation System, 2022).

3.3 Current digital nomad regulations

3.3.1 Visa

Since digital nomads are not invited to countries by employers and do not have work contracts with local businesses, they cannot take advantage of the traditional working visa many European countries offer. Without special visas, digital nomads enter countries using tourist visas and have their stays limited. The exception are European Union citizens staying in countries belonging to the European Union, who do not need any permits or visas for staying less than three months and only need to register their presence to local authorities for longer stays (Your Europe, 2022).

Several European countries have introduced a digital nomad visa with varying requirements and eligibility criteria with the aim to attract remotely working professionals and benefit from the economic boost they can give. Such countries include but are not limited to Portugal, Iceland, Hungary, Estonia, Malta, Italy, Germany, Greece, Croatia and Czech Republic. Germany was the first European country to introduce a freelance visa even though it does require the freelancer to have clients based in Germany to be eligible for the visa. In June 2020, Estonia became one of the trailblazers as the first country to offer an e-residency programme for online entrepreneurs from other nations. The visa allows freelancers and remote workers to stay in the country for up to one year while either having a remote position for a foreign employer or working for their own company registered abroad. Most of the visas meant for digital nomads are valid for one to five years, however the Norwegian digital nomad visa is an exception since it is valid for the entire life of the accepted applicant. (European Travel Information and Authorisation System, 2022)

In most cases, the applicants must be able to prove they are earning a steady income to support themselves while residing in the country – for example, Greece and Romania require proof of funds to support oneself at 3500 euros per month (European Travel Information and Authorisation System, 2022). These limitations may lower the number of applicants for digital nomad visas, especially ones who have become digital nomads more recently, since the income requirements are fairly high. For scale, Romania’s 3500 euros per month is around three times the average salary in Romania (European Travel Information and Authorisation System, 2022). Even elsewhere in Europe, 3500 euros per month is relatively high: the average salaries in countries like Spain, Estonia, Poland and Portugal are lower than that (Statista, 2022). This indicates that the visas are aimed for professionals who are able to bring in money and expertise instead of digital nomads at earlier points in their careers, similarly to skilled worker visas.

3.3.2 Insurance

Digital nomads can have a traveller's insurance especially when staying in destinations for a shorter time whilst keeping their home base in one country. However, insurance companies are responding to the growing trend of digital nomadism by creating insurances specifically crafted for their needs. Digital nomads usually have valuable belongings with them – such as laptops, phones, bank cards and camera gear – that are essential to their ability to do their jobs and thus need to be insured. PassportCard Nomads offers three different digital nomad insurances based on the length of travel: 1) Starter insurance for travels less than six months, 2) Remote insurance for travels longer than six months and 3) Comfort insurance for travels longer than 12 months (PassportCard Nomads, 2022). They give the option to include additional protection on their digital nomad insurances for luggage lost by the airline or stolen under their care as well as laptop thefts or camera gear theft (PassportCard Nomads, 2022).

Insured Nomads is an example of an insurance company with products targeted at digital nomads: the company was created by digital nomads for digital nomads. The insurance company offers two main types of insurances: 1) a global health insurance and 2) a travel insurance (Insured Nomads, 2022a). For example, they have a travel insurance option that has a worldwide multi-trip travel policy for shorter trips with a return to home country between the trips that covers medical and personal accidents, mental health counselling, GPS-based panic button response, cybersecurity and online privacy protection in addition to having outpatient and telemedicine benefits as well as coverage for accidental deaths (Insured Nomads, 2022a). However, people aged over 74 years cannot get insured and it does not cover any trips through high-risk areas such as Crimea region, Iran, North Korea or Syria (Insured Nomads, 2022a).

Any pre-existing conditions and illnesses are not usually covered by these insurance types, which means those with pre-existing needs for treatment cannot get reimbursed for treatments abroad. These treatments must be done in their home country, out of their own pocket or with an additional insurance, like with most traditional travel insurances. However, the PassportCard Nomad's Comfort insurance for travels over 12 months offers a slightly better coverage for those who may need treatment for previously diagnosed illnesses: it covers specialist consultations, chronic and routine medical care and non-urgent selective medical treatments, but the wider coverage shows in the 200-US-dollar starting price per month (PassportCard Nomads, 2022). This means that the insurance for 12 months would be starting at 2400 US dollars whilst being heavily focused on healthcare instead of including coverage for things like laptops, phones and camera gear.

3.3.3 Taxation

In order to understand how digital nomads are taxed, it is important to be aware of the most common policies for taxation. Countries can tax people based on residence, territory or citizenship (Greenback Expat Tax Services, 2022). Most countries in the European Union use residence-based taxation, which means all legal residents are subject to paying taxes in the country of their residence, with the exception of France using territorial taxation where only income sourced within its territory is taxed (Greenback Expat Tax Services, 2022). Thus, European digital nomads travelling around in Europe can continue to pay their taxes to the country of their legal residence. When it comes to digital nomads who work remotely to a company in their country of legal residence, they will be taxed in that country regardless of where they are. If their employing company is not based on the same country as their legal residence, they may need to pay income taxes of their salary to the country of their employer. In these cases, tax treaties between countries usually ensure that the income tax will not be paid in double to both country of residence and country of employer.

American digital nomads have a more complicated taxation situation because the United States of America is the one of the only countries to base taxation on citizenship, meaning Americans with residencies abroad still need to pay federal taxes and in some cases additional state taxes to the United States of America as long as they maintain their American citizenship (Greenback Expat Tax Services, 2022). In case an American digital nomad is self-employed, which is the case for at least 33 percent of digital nomads working full-time, they need to pay around 15 percent of their income as self-employment taxes to the United States of America (Greenback Expat Tax Services, 2022; Tourism Review News Desk, 2022).

American digital nomads living abroad can be granted tax exemptions such as Foreign Earned Income Exclusion, Foreign Housing Exclusion or Foreign Tax Credit (Greenback Expat Tax Services, 2022). For example, an American earning their income in France, where territorial taxing is used, could apply for Foreign Tax Credit to get their tax payments to France deducted from their American taxation to avoid double taxation on their income. To get rid of taxation for their citizenship, American digital nomads can try to pass the physical presence or bona fide residence test: the former requires spending over 330 days abroad and the latter requires living an entire tax year in one country (Greenback Expat Tax Services, 2022). Since almost half (45 percent) of digital nomads stay in one destination less than three months, the bona fide residency can be difficult to pass and thus it makes more sense to opt for the physical presence test (Greenback Expat tax Services, 2022; Statista, 2022).

In addition to being granted the right to temporary residency, there are additional tax-related perks offered for digital nomads who use the digital nomad visas. The digital nomad visa exempts the visa holders from paying income tax in Croatia and even allows them to bring close family members to the country with them. In Italy, digital nomads with legal residency get 70 percent detaxation of the income they make in the country and after the new 2021 legislation in Greece, individuals moving their tax residence to Greece can get a 50 percent exemption from income and special solidarity contribution taxes for the first seven years (European Travel Information and Authorisation System, 2022; Stylopoulos & Associates, 2021).

3.4 Largest outbound digital nomad markets

Whilst China is notably the largest outbound travel and tourism country, the United States of America is the largest outbound market when it comes to digital nomads with a massive 52 percent share of all digital nomads being American (Statista Research Department, 2020; Statista Research Department, 2022b). In another survey, Americans showed the highest percentage of respondents per nationality listing freedom to travel and relocate at 26 percent and to have the ability to live where you want to live at 23 percent as benefits to working remotely (Sava, 2022b). The next biggest outbound markets for digital nomads are the United Kingdom at 8 percent of all digital nomads, followed by Russia at 5 percent, Canada at 4 percent and Germany and France both at 3 percent (Statista Research Department, 2022b).

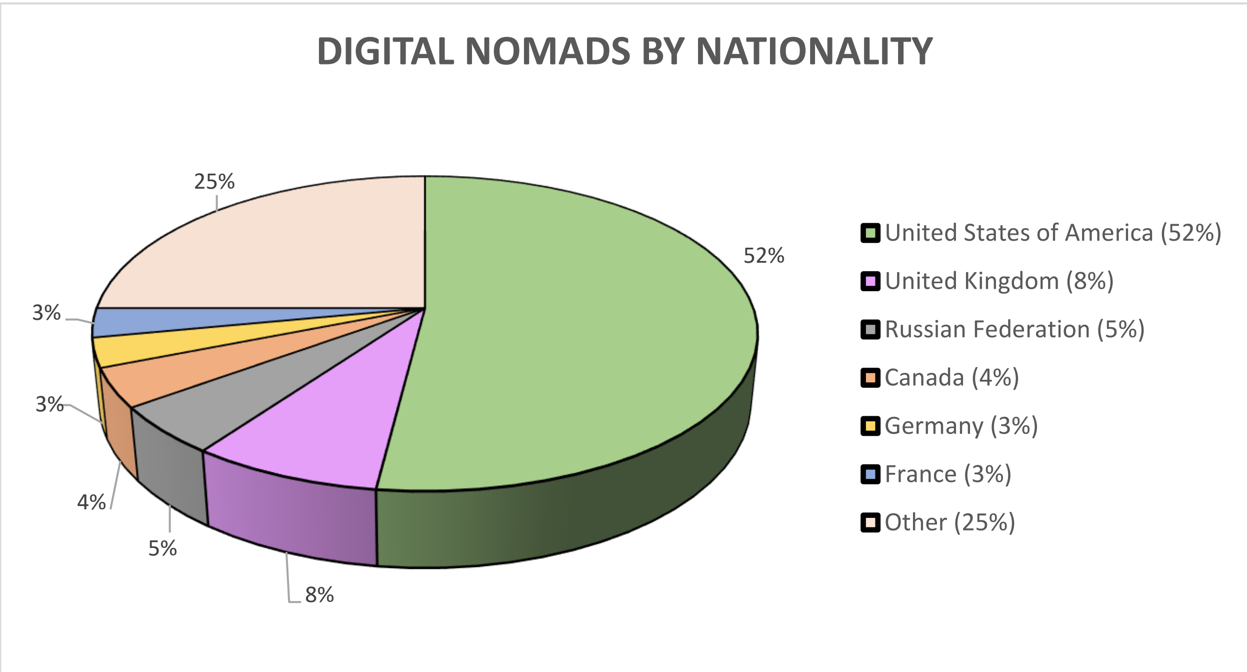


Figure 6. Digital nomads by nationality (based on Statista Research Department, 2022b)

It can be forecasted that the share of Russian digital nomad market will drop at least momentarily due to the political situation and restrictive sanctions in 2022. Even if Russian nationals had the desire to travel and live as digital nomads, they might not be able to get visas to enter or stay in European countries and their existing visas might be at risk of being cancelled as the political tensions heighten. In addition, their credit cards may not work abroad due to restrictions. For this reason, the safest bet for European destinations is to focus on steady American, British, Canadian, German and French markets for attracting digital nomads.

3.5 Post-pandemic situation analysis

In the research conducted by the MBO Partners in 2019, the results showed that the number of American digital nomads had increased by 49 percent between 2019 and 2020. In addition to the people already living as digital nomads, the study gathered data about plans of becoming digital nomads. The result was overwhelmingly in support of digital nomadism – when asked whether they were planning on becoming digital nomads in the next two to three years, 19 million people said yes and 64 million people said maybe. These numbers show a sharp increase, 18 percent for yes and 10 percent for maybe, in the desire to strive for digital nomadism between 2019 and 2020 (MBO Partners, 2020). Even if all of these people do not actually become digital nomads, it is clear that there has been an increase in interest for the lifestyle. Thus, having digital nomads using businesses and visiting destinations can be an effective way to gain visibility even amongst the customer segments outside digital nomads since their lives are being observed by massive crowds of people showing interest in what they do.

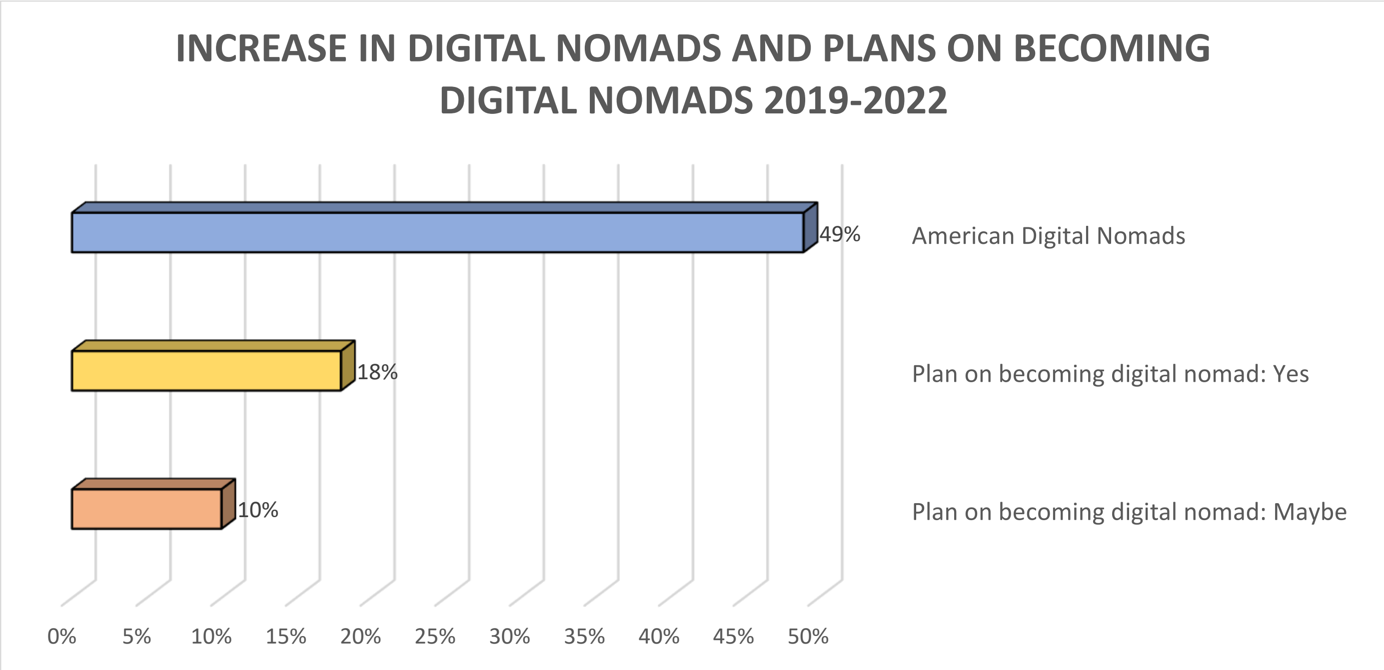


Figure 7. Increase in American Digital Nomads and Plans on Becoming Digital Nomads (based on MBO Partners, 2020)

Since the pandemic forced most employees to transition into remote working, they have gotten a taste of what it is like to work without being tied to an office space. In some cases where remote work was meant to be a temporary adjustment, it has now become a permanent option for employees. After being cooped up during lockdowns, it is likely that people are excited to get back to travelling and enjoying their spare time in ways that were not possible during the lockdown restrictions or while needing to work in the office.

The number of digital nomads who belong to baby boomers decreased by 10 percentage points from 2019 to 2020, most likely due to them being more concerned about catching the virus since their age placed them in a more vulnerable position for a serious illness (MBO Partners, 2020). Now that the situation is becoming more stable and most countries' border controls are slowly getting back to pre-pandemic routines that do not require recent COVID-testing or proof of vaccinations, the attitudes towards travelling are expected to return to more relaxed state at least among the younger generations. Furthermore, people are getting increasingly comfortable with the idea of travelling the more time passes after the peak of the pandemic – they are less consumed by the risk of catching COVID due to travelling and many have already contracted the virus in the past two years or gotten vaccinated against it up to three times.

3.6 Sustainable travel principles

The Finnish Association for Fair Tourism (2021) has created The Fair Traveller's Guide, which offers guidelines for sustainable travel in 10 topics: 1) Inform yourself and be aware of your responsibility, 2) Avoid peak seasons and rush, 3) Choose a low carbon mode of travel, 4) Spend your money fairly, 5) Save energy and water and minimise the amount of waste you produce, 6) Respect local culture and people, 7) Protect animals and nature, 8) Communicate responsibly, 9) Travel safe and 10) Promote responsible travel. These guidelines are used as a base for mapping out how sustainable and responsible digital nomads are as travellers via the research survey.

The first point in the guide is all about knowledge and awareness through proactively doing your own research as a traveller about your destination's culture and regional impact as well as looking at your own traveling behaviour critically (The Finnish Association for Fair Tourism, 2021). This is truly the key to sustainable travel because it is close to impossible to make your traveling more sustainable if you are not aware of what kind of impact your travels have and how they affect the destination you are planning to visit. Often people get excited about their upcoming trip and spend all their time planning which attractions to visit and what activities to do whilst forgetting to do the research about the sustainability of the trip, leaving the two types of preparations unbalanced.

The second guideline in The Fair Traveller's Guide is to avoid peak seasons and rush. A large number of visitors in a short peak season causes a significantly larger strain on the destination than a stable flow throughout the year. Problems that could be more manageable with steadier tourism flow may occur due to the pressure of peak season. These potential problems include waste management, traffic, erosion and water consumption in the destination. In addition to environmental issues caused by overtourism, destinations risk becoming unauthentic tourism hotspots for the traveller's entertainment. (The Finnish Association for Fair Tourism, 2021) Once the local people do not enjoy spending time in the overcrowded destination or simply cannot afford to live there anymore due to rising prices, the problem escalates rapidly. In order to avoid adding fuel to the flame, travellers can look into destinations near the more popular destination to help spread out the tourism flow into a larger geographical area (The Finnish Association for Fair Tourism, 2021).

According to the guide, the third way to make your travels more sustainable is perhaps one of the most well-known guidelines: choose a low carbon mode of travel. Trains should be chosen over airplanes but overall, it would be the most effective to decrease the frequency of travels and the distance travelled whilst increasing the time spend in the destination. Additionally, walking and cycling should be done whenever possible. The guide mentions compensation for the emissions caused by travels as the last option, which is usually applicable to air travel. (The Finnish Association for Fair Tourism, 2021) However, the emission compensation programmes have been widely questioned and criticised for their ineffectiveness. The idea that, for a couple more euros, you could fully neutralise the environmental impact of your flight offers the travellers a quick way out of their feelings of guilt over air travel and gives highly pollutive companies an easy alternative to doing the work it takes to actually lower their emissions. When a closer look was taken at these carbon compensation programmes, the compensations did not neutralise the planned amounts of pollution, their positive effects were rapidly reversed or the impact was impossible to be measured accurately (Astor, 2022). In fact, these programs are not directly tackling the problem at its source but instead paying a third party to take care of it for them – something that wealthy Western countries have been criticised for doing with a lot of issues.

The fourth point made by The Finnish Association for Fair Tourism (2021) is to spend money fairly, which means buying from local providers. Every traveller can contribute to making tourism economically viable by supporting sustainable economic development and even distribution of money in the destination to improve the standard of living for the locals long-term. In addition, the money can be used towards natural and cultural heritage protection as well as maintaining and improving the destination's infrastructure.

The guide's fifth point is to save energy and water as well as minimising the amount of waste produced during the trip (The Finnish Association for Fair Tourism, 2021). These days, most people recycle and try to save energy and water in their daily lives, but those are things that can sometimes be neglected during travels for the sake of convenience. It is important to treat the destination like you would your own home because you are simply a visitor in someone else's home. This includes turning off taps and lights when leaving, avoiding waste production and especially plastic, using electricity and water sparingly, choosing environmentally friendly service providers and recycling to the best of your ability (The Finnish Association for Fair Tourism, 2021).

When it comes to making travel more responsible, it is crucial to take into consideration the local people and their culture. This is the sixth point of The Fair Traveller's Guide, which encourages travellers to do research of the culture, customs, beliefs and religions at the destination before the trip (The Finnish Association for Fair Tourism, 2021). Being aware of how to behave respectfully in regard to these things makes tourism more enjoyable for all parties involved and helps avoid any misunderstandings. In addition, one should always keep in mind that any injustices or crimes should always be reported (The Finnish Association for Fair Tourism, 2021). By doing all these things, it is possible for travellers to fight prejudices between cultures as well as support the local people's wellbeing.

The seventh point in the guide by The Finnish Association for Fair Tourism (2021) is to protect animals and nature. Animals should be given their space and be allowed to live peacefully according to the needs of their species. While going on safaris and excursions can be alluring, it is vital to choose a provider who has committed to the principles of fair tourism and treats animals with the utmost respect. Under no circumstances should the traveller participate in activities where animals are used as entertainment. When it comes to being in the nature, no marks of the traveller's presence should be left behind and nothing should be taken from nature as a souvenir.

The eighth and tenth points in the guide are tied together: communicating responsibly and promoting responsible travel. Travellers should be mindful of how they portray the destination and being respectful towards the local people and destination while sharing their experiences. However, it is important to showcase the responsible providers and destinations so more people can make responsible decisions on their travels. Helping to create demand for responsibility in tourism industry makes a difference, because the providers are more likely to upgrade the responsibility and sustainability of their products and services when people are asking for it. Another great way to support more responsible tourism and travel is to become an advocate for it and promote it. (The Finnish Association for Fair Tourism, 2021) The more people know about the impacts of their actions and the options available to them, the more likely they are to make changes.

The ninth point made in The Fair Traveller's Guide is to travel safe by paying attention to the safety and health of yourself and others, which was highlighted during the COVID-19 pandemic and its health regulations for travellers. Furthermore, traveling safe means being prepared and aware of the risks and how to act in case something goes wrong, as well as taking preventative measures against illnesses and accidents (The Finnish Association for Fair Tourism, 2021). Examples of this include checking whether you need any vaccinations before travelling to a destination, staying home if you have a contagious disease and being aware of your surroundings and traffic rules when out and about.

4 Research methodology

4.1 Quantitative survey

Quantitative research suits phenomena that are defined, clear and well known, which gives taking advantage of conclusions from prior research and use previously created theories a central role in quantitative research (Hirsjärvi, et al., 1997, p. 129; Kananen, 2011, p.72). After gaining knowledge of the phenomenon and known theory, quantitative research method is used to test presented hypotheses, existing theories and previous models to see what type of result can be obtained from them (Hirsjärvi, et al., 1997, p. 129; Kananen, 2011, p.72). This resulting data is made suitable for numerical and quantitative measurement from which conclusions can be made based on statistical analysis (Hirsjärvi, et al., 1997, p. 129). Since digital nomads are a well-defined and clear phenomenon with a sturdy background of research and theories, quantitative research method suits the subject and can be used to further test the existing knowledge of their travelling habits and gain new insight from this perspective.

While qualitative research method can yield more detailed responses and help define a new phenomenon, the sample size is usually notably smaller and the ratio of human resources per respondent is high. Quantitative method makes it possible to receive a lot of easily analysable data even in a short time frame without needing to use as much human resources (Kananen, 2011; Regmi, et al., 2016).

On this basis it was decided that the quantitative method would best suit the plan and purpose of this research. When it came to choosing how to conduct the quantitative research for this thesis, one of the most important aspects was to make participating as easy as possible for the target group to ensure getting enough participants. Since there are no restrictions on the current location of the participants (as long as they have been in Europe at some point in the past six months), different time zones had to be taken into consideration as well as the fact that digital nomads may prefer to work at different times of the day.

There are three traditional research strategies: 1) experimental study, 2) survey study and 3) case study. Experimental studies measure one changing variable’s effect on another, whereas survey studies gather data from a group of people in standardised form and case studies explore detailed information about an individual case or a small number of cases that are related to each other. Since survey studies aim to use the gathered data to describe, compare and explain phenomena, it is the most suitable option out of the three traditional research strategies for this thesis research. (Hirsjärvi, et al., 1997, pp. 122-123)

Survey forms can be used to gather data about behaviour, knowledge, values, attitudes, beliefs and opinions, which are essential to this thesis' aim and further make the case for this method of research. In addition, the method is suitable for creating the digital nomad customer avatar since surveys can also include background questions of participant demographics. (Hirsjärvi, et al., 1997, p. 184).

Online surveys can include a variety of question types from open-ended questions to scales and multiple-choice questions while staying convenient and easy for the participants to respond to: they can fill them out when it best suits them, split responding into several sessions and take all the time they need (Kananen, 2011; Regmi, et al., 2016). Digital nomads work online and are familiar with online platforms, so the decision to create an online survey is not a problem for the target group. Additionally, online surveys require low human resources to conduct while still yielding sufficient data in a short time frame as well as decrease the chances of human error when handling data since they do not require transferring written notes or interview audio on to a computer (Regmi, et al., 2016). Thus, an online survey is the most suitable option: it is fast, participant friendly, accurate, can be done from anywhere anytime and has the possibility to have a larger sample size.

Survey studies have their challenges which must be taken into account during the research. It is difficult to know how well the questions and answer options are made from the participants point of view in order to get accurate responses. In addition, one cannot be absolutely sure whether the questions have been correctly understood by participants or even how well the participants actually know the subject of the questions. Furthermore, it is not possible to scope the participants honesty, seriousness and thoroughness while completing the survey. (Hirsjärvi, et al., 1997, p. 182)

4.1.1 Creating the survey

Surveys can have three different types of questions: 1) open-ended questions, 2) multiple choice questions and 3) scale-based questions (Hirsjärvi, et al., 1997, pp. 185-190). Out of those three, open-ended questions are not suitable for the kind of online survey created for this thesis research since they cannot be transformed into numerical and statistical data. If the number of participants is high, it would take excessive quantity of human resources to go through the data. In comparison, multiple choice questions allow participants to respond to the same question in a manner that makes it possible to compare responses and easily analyse them on a computer (Hirsjärvi, et al., 1997, pp. 185-190). Even though open-ended questions allow the participants to explain their responses and truly say what is on their minds, multiple choice questions make it easier for the participants to recognise what is being asked instead of remembering it themselves since they can choose from pre-existing responses (Hirsjärvi, et al., 1997, p. 188). When using multiple choices, it is crucial to make sure the options cover enough opinions to allow the participant to choose an accurate response and avoid having too many participants choose the option ‘*Other*’.

When it comes to scales-based questions, there are a variety of different scales that can be used. One of the most popular quantitative ways to measure participant attitudes and opinions is the Likert Scale. It utilises psychometric testing in order to create analysable data of participants’ opinions, beliefs and attitudes. Questions written using this scale are close-ended and typically feature a scale from 0 to 10 in measuring the participants’ agreement to a statement. Likert Scale’s benefits include easily analysable data, respondents’ ability to take a neutral stand and being easily understandable. (SmartSurvey, 2022) In addition, the scale is familiar to most people and quick to respond to. But as with any tool or method, it is important to take into consideration it’s challenges too. Likert scale should not be used for evaluations or justifications of behaviour, opinions or beliefs, because these precise matter-of-facts should be asked using simple open questions or multiple choices (Hirsjärvi, et al., 1997, p. 184). Additionally, people tend to lean either on neutral stances or extreme opinions or answer according to what they think is expected of them, which can distort the results of Likert Scale surveys (Hirsjärvi, et al., 1997; SmartSurvey, 2022).

Problems also arise if participants who do not have an opinion or do not know enough about the subject to respond to the question and participants who neither agree nor disagree both choose the neutral middle value (Kananen, 2011, p. 86). To avoid these two types from choosing the same answer and distorting the results, extra work should be done by always giving the possibility to choose option *no opinion* to separate the two types of participants and the option should be given a value that is then excluded during data analysis (Hirsjärvi, et al., 1997, p. 189-190; Kananen, 2022, p. 86). Up to around 12-30 percent of participants may choose this option, which proves how necessary it is (Hirsjärvi, et al., 1997, p. 190). Furthermore, it is vital that the statements are clear and simple to ensure the participants fully understand what is being asked and can thus answer accurately and to the best of their knowledge.

Semantic differentials can be used to research participants’ opinions by presenting opposite adjectives with giving them values (such as 1 and 10) and having the participants choose a value between those two adjectives according to their opinion on the subject (Kananen, 2011, pp. 83-84). The Stapel Scale works in a similar style but with only one attribute at a time for the participant to rate, which makes it simpler as there is no need to find compatible opposites (Kananen, 2011, p. 84).

Since the aim of this thesis study is to find out the traveling habits of digital nomads in Europe and what affects their decision-making, the Likert Scale, semantic differentials and Stapel Scale were chosen as the main scales for the survey. Likert Scale’s strengths lay in measuring opinions and attitudes, whereas semantic differentials can be used to map out the preferences and associations between two opposing attributes and Stapel Scale can be used for those attributes that do not have a suitable opposing attribute. Furthermore, they support the aim to have a low threshold for participating and being easily understandable for people from different parts of the world.

The disadvantage of these three scale tools is that they do not let the participants elaborate on why they chose a certain answer, which causes a lot of important data that could explain the drivers of the attitudes and opinions to be left out. For this reason, another question type is needed to gather more detailed information on some issues. Open-ended questions allow participants to write out the reasoning for their opinions and thus giving greater insight on what it is exactly that caused them to form their opinion. Since writing out long borderline quantitative responses can be tiring and might cause the participant to drop out of the survey, a balance can be found by introducing open-ended questions that only require shorter answers or by giving them an optional text box where they can write additional information and details regarding their choices and opinions.

With every question regardless of the style of tool used to measure the replies, there are three things that define how successful the results will be: the participant understands the question correctly, knows enough about the subject of the question and is prepared to give the information asked (Kananen, 2011, p. 92). In order to address the challenges of surveys and to ensure questions are understood correctly and in the same manner by all participants, they should be kept clear, specific and short. Additionally, the choice of words and how questions are portrayed need to be carefully planned because they can have a huge impact on the participants' understanding of the question and how they respond. Any terminology or words the participants may not understand should be left out and questions should only ask one thing at a time to avoid dual meanings and always stay neutral instead of leading the participants towards a certain response. (Hirsjärvi, et al., 1997, pp. 189-190). This criteria for good questions are at the core of creating every survey question for the research part of this thesis.

After creating the survey, it was tested on three people to get final feedback before publishing it. Some minor changes were made after getting suggestions from the test round. Firstly, a couple of factors affecting the choice of destination and accommodation were left out to make the survey slightly shorter and lighter for the respondents. For example, similar options were left only in either destination or accommodation section. Question 'Do you have children?' was deleted completely, since the next question about travel companions includes the information whether the respondent has children: options from travelling with a child 'most of the time' to 'never' indicate the respondent has at least one child and option 'not applicable' indicates they do not have children. Additionally, in question number 8 about travel companions, the scale was narrowed down to four options to make it less strenuous while still maintaining the Likert scale to get more detailed information.

While conducting these test runs of the survey, the average response time was around 20 minutes. However, this time is an estimation since the test respondents were simultaneously on a call to give feedback in real-time while filling out the survey and the approximate time it took for talking through the feedback was deducted from total time.

4.1.2 Survey structure

The landing page for the survey will include a short introductive cover letter to present the purpose and aim of the survey and the thesis behind it. The goal is to inform the participants so that they can better understand what to expect from filling out the survey and whether they are qualified to participate. Requirements for participation are stated clearly in this section, which will help filter out the people who are not in the target group right away instead of having them responding to several question before leaving the survey.

Personal data and how it is handled is one of the biggest concerns for survey participants, which is why the landing page will clearly indicate how it will be done. Privacy, transparency and anonymity are the utmost priorities when handling the participants' data.

Since the survey needs to result in creating a customer avatar of digital nomads, it is important to gather data that helps to create accurate and detailed demographics for the avatar. One of the survey sections is dedicated to this purpose and includes quick questions about the participants such as age, perceived gender, occupation, marital status and nationality.

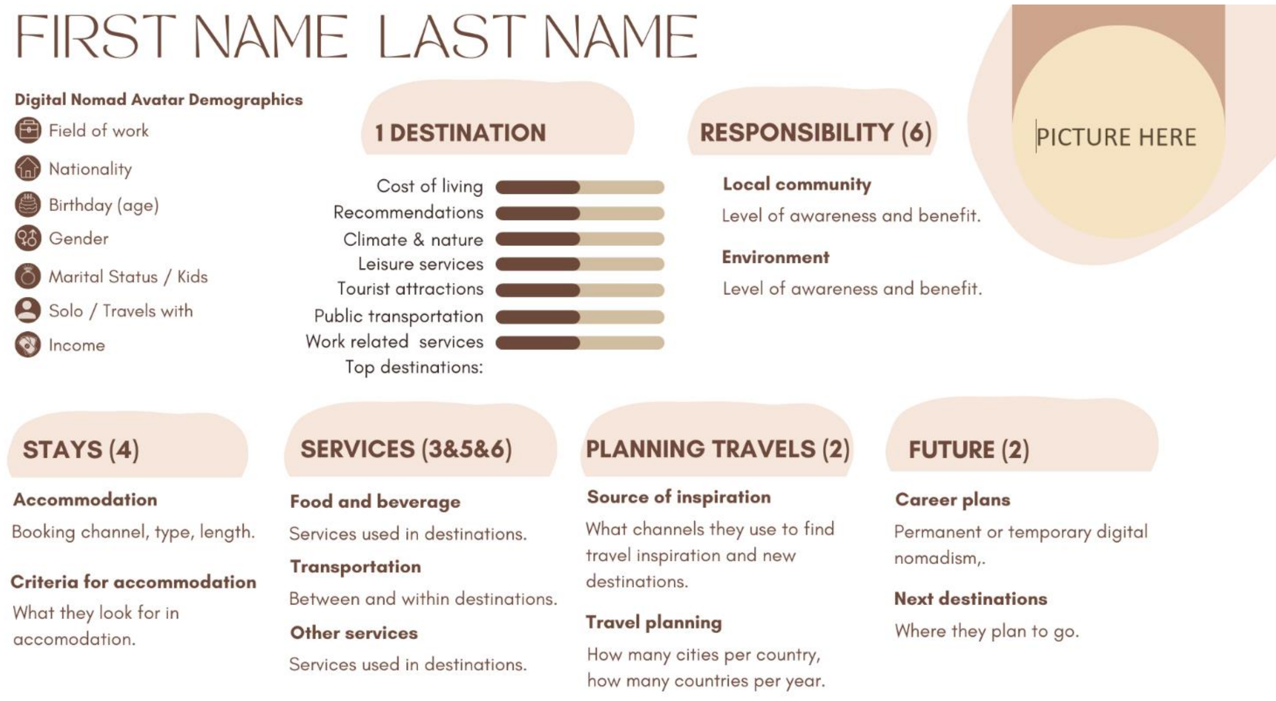


Figure 8. Template for creating the customer avatar of digital nomads

The entire goal of the research is to understand and define the travelling habits of digital nomads in Europe. The main research question, *What are the travelling habits of digital nomads in Europe?*, is reflected throughout the survey. The six sub-questions first introduced in Chapter 1.1. support the main research questions and help create the sections for the survey structure:

1. *What factors affect digital nomads' decision-making while choosing a destination?*
2. *How do digital nomads find potential destinations?*
3. *What means of transportation they use between destinations and during their stays?*
4. *What type of accommodation and duration of stay they prefer?*
5. *What do digital nomads spend money on in the destinations?*
6. *How do they benefit the destinations and local communities as travellers?*

After general demographics, the survey dives into what factors affect the decision-making process when choosing a destination and what criteria they have as well as what channels digital nomads use to find potential destinations.

The next section is dedicated to finding out what types of transportation digital nomads prefer while staying at a destination and when travelling between two destinations. In addition to what transportation they use, the questions will map out why they have chosen those forms of transportation and whether they wish they could use another form of transportation that is not always available, for example wanting to travel more sustainably by choosing a train but the connections are too difficult so they choose to fly.

One section is all about accommodation in the destination. It explores what accommodation types, features and overall criteria digital nomads have. These include the importance of factors like price, distance from services and attractions, balance between privacy and community, online reviews and word of mouth, available utilities, level of service on the premises and booking channels.

The next question section explores how digital nomads perceive their travelling habits to affect the local communities and destinations. While the sub-question regarding this section, *How do they benefit the destinations and local communities as travellers?*, will be analysed from their responses to the previous sections, it is important to gain understanding of how digital nomads themselves see their impact. This section handles questions like choices between local and international brands or businesses, peak and low season travel and integration into local community during longer stays.

Because finances can be tricky to discuss, the section regarding spending and finances is left to be the last one. This part includes questions about the participants' spending in the destination from the services they use to the products they buy and which ones of those they spend the most and least money on as well as their income streams and levels. While making it mandatory to respond to a question in order to be able to move onto the next question can help increase the response rate for each question, it is important to keep in mind that it becomes a challenge if the participant does not wish to answer the question (Regmi, et al., 2016). Since questions about personal finances may not be comfortable to answer to for all individuals, they will be optional (participant can choose option *prefer not to share*) and include a salary range to choose from instead of giving the exact amount. Participants will also be asked their main income streams without sharing the specific numbers. This way the participants will not quit filling out the survey if they do not wish to share their finances, but it is still possible to gather data of the financial situation of digital nomads from those who are willing to share theirs.

4.1.3 Defining and reaching the target audience

The aim of this thesis it to study the travelling habits of digital nomads in Europe, which does not require restrictions on factors like their country of origin, age, gender or marital status. In order to be eligible to take part in the survey, there are two requirements:

8. *Participant is currently residing in Europe or has resided in Europe in the past six months.*
9. *Participant works online (part-time or full-time, entrepreneur or employed by another).*

The participants need to be either currently residing in a European country or have done so in the past six months to ensure they have relevant and timely input for the subject of the survey. For those not currently residing in Europe, it does not matter how much time the participant has spent there during the last six months or how many countries they have visited while there. The only important factor is having been in Europe at some point during the past six months.

The second requirement is that the participant works online, whether it be a full-time or part-time job. This means that they are fully living as digital nomads or their work arrangements allow them to work remotely part of the year. There is no limitation on the amount of money the participant makes through their online work, as long as they consider themselves working online. This way newer entrepreneurs and influencers are not ruled out from participating if they do not yet have a stable salary from their business endeavours or they are receiving their pay in other form than money, for example free stays at hotels in exchange of content creation.

To ensure reaching the right crowd, the survey is posted to Facebook groups meant for digital nomads and especially to ones that focus on Europe as a destination. When posting the survey, there will be clear instructions on who is eligible to take part in the survey. In addition, the survey is sent to individual digital nomads who meet the requirements of participation on Instagram.

4.1.4 Analysis of the results

There are several ways the survey results can be analysed. The simplest method is cross tabulation, where two variables are analysed at the same time. Depending on the type of variables in question, either differences or regularities can be examined. If the variables are nominal scale ones, for which the response either exist or does not exist, only differences can be analysed. (Kananen, 2011, pp. 103-104) Such variables include gender, nationality and occupation, which cannot rise or decline. If the variables are continuous, for example income, age or level of use for a certain service, cross tabulation can be used to look for regularities between the relationship of the two variables (Kananen, 2011, pp. 104-105). An example of this would be the frequency of eating out in restaurants increasing when the level of income increases. However, it is important to pay attention that the results are linear when making statements like this to avoid making false statements (Kananen, 2011, p. 105).

Opinion surveys are normally presented as percentage distributions or weighted averages. Weighted averages have the advantage that they can be used to create a profile graph that helps to visualise all the important findings of the results quickly. (Kananen, 2011, pp. 111-113) Percentages can be used in text to support statements about more straightforward results. For example, if 28 percent of participants stated they travel between destinations by train, the percentage can be presented when making a statement such as “nearly one third (28 percent) of the participants travel by train between destinations.” The results of the online survey will be presented using both of these methods.

4.1.5 Carrying out the survey

The chosen survey tool is Webropol 3.0, which is simple for the participants to use and allows for them to stay anonymous. Surveys created with this survey tool can have different types of questions and the collected data can easily be analysed. Responses between different questions can also be cross-referenced to reveal patterns in relation to smaller sub-groups of digital nomads, such as how participants identifying as men prefer to travel within a destination.

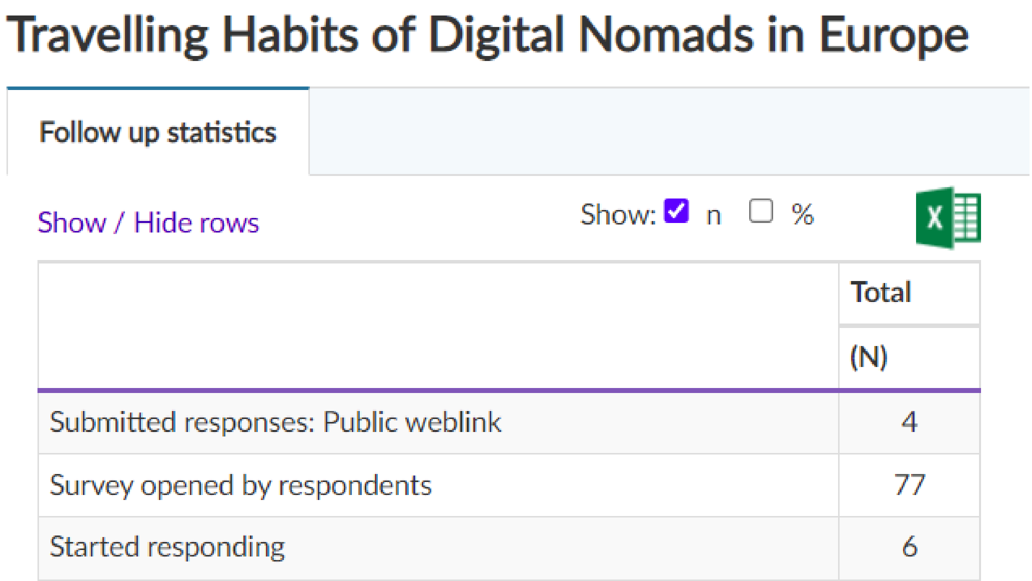
The survey will be created in October 2022 and posted on Facebook groups for digital nomads as well as sent to individual digital nomads on Instagram. Depending on the response rate, it will stay open for participation for around three days and then be closed before the start of analysing the replies. Since digital nomads are a highly heterogenous population, the aim is to get as many participants as possible to ensure larger sample size.

5 Survey results

5.1 Survey statistics

The survey link with the cover letter text was posted on several digital nomad and remote worker groups on Facebook. At that time, it was discovered that an admin needs to approve the post before it is published for everyone to see. The survey post was finally approved and published on 14.11.2022 in two groups with a total of over 50,000 members and the response time was then extended to 16.11.2022. However, it became evident that there would not be enough responses despite the high number of members in these two groups where it got approved.

The survey post was not approved to a digital nomad group for Barcelona and was still pending for approval on three other Facebook groups on 16.11.2022. On that same day, the survey was sent for approval to three additional groups with an extended response time until 17.11.2022 as well as to individual digital nomads in hopes of getting more participants. In addition, reminder comments about participation were posted on the approved posts to boost visibility and get more people involved.


Travelling Habits of Digital Nomads in Europe

Follow up statistics

Show / Hide rows Show: n %

	Total (N)
Submitted responses: Public weblink	4
Survey opened by respondents	77
Started responding	6

Figure 9. Survey follow up statistics on 16.11.2022

As of 16.11.2022, there were not enough responses to analyse the results. Out of the 77 people who opened the survey, four finished filling it out and two more started but did not finish. The low percentage of people starting to respond after opening the survey was unexpected – only around eight percent of the people who opened the survey started to fill it out.

To combat this issue, the survey link was sent as a direct message to around 35 suitable individuals on Instagram, posted on LinkedIn and people who were planning to become digital nomads were allowed to participate. The response time was extended by several days to give these newly targeted people time to react. After taking these actions, the survey link reached 158 opening times and 23 responses by 23.11.2022. Six more people had started to respond but quit before submitting their answers, meaning 79 percent of those who started responding (29) finished the survey (23). The number of responses was lower than originally intended while choosing the type of research method and creating the survey. Whilst the data gathered is not a direct reflection of the entirety of digital nomads, it can still offer valuable guidance to their travelling habits and open up the discussion about it.

Travelling Habits of Digital Nomads in Europe

Follow up statistics

Show / Hide rows Show: n %

	Total	
	(N)	%
Submitted responses: Public weblink	23	79
Survey opened by respondents	158	544
Started responding	29	100

Figure 10. Follow up statistics on 23.11.2022

5.2 Participant demographics

Out of the 23 participants, 78 percent (n=18) were currently in Europe and 13 percent (n=3) had been in Europe in the last six months. Two participants stated they had not been in Europe in the past six months, meaning they were unqualified for continuing the survey after the page. However, they were still allowed to respond to the other question on the first page about their work situation regarding remote work: 52 percent (n=12) were working fully remotely, 22 percent (n=5) worked remotely part-time and 26 percent (n=6) were not currently working remotely but were planning to do so in the future. Out of the 15 participants who responded to the question regarding how long ago they started to work remotely either full-time or part-time, 47 percent (n=7) responded 0-2 years, 27 percent (n=4) 3-4 years, 13 percent (n=2) 5-6 years and 13 percent 9 (n=2) years or longer.

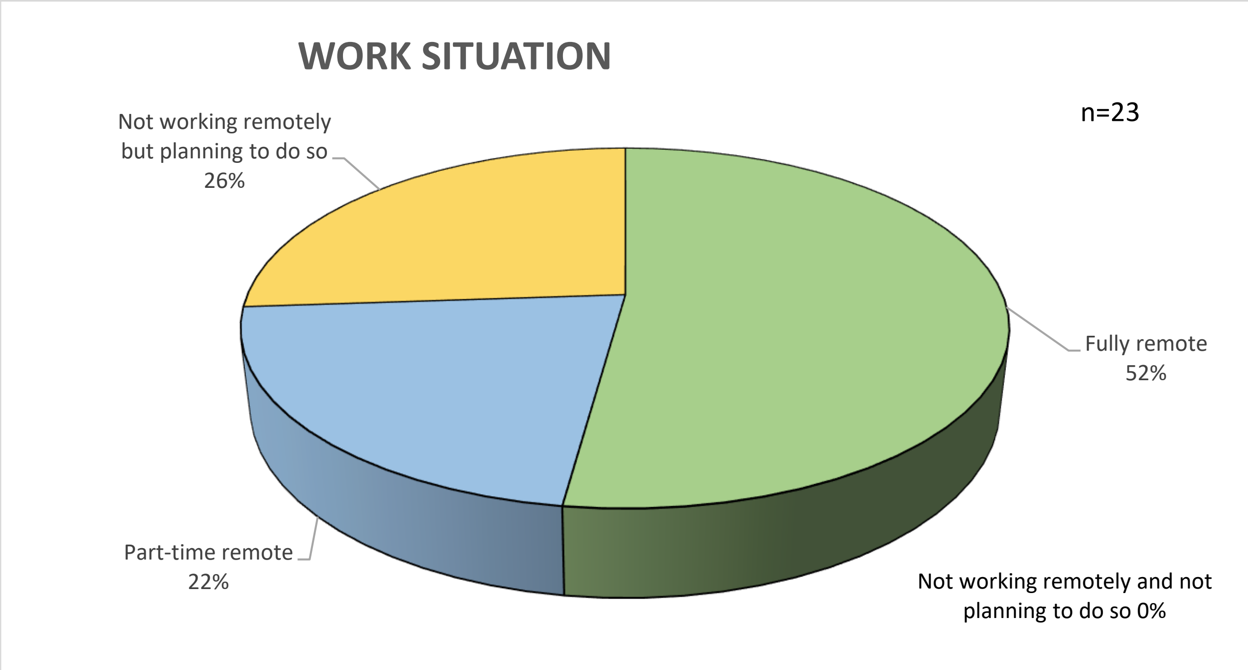


Figure 11. Work situation of participants

A staggering majority (62 percent, n=13) stated they plan on living as digital nomads for as long as possible or permanently. The next biggest section was those who were not sure, making up 24 percent (n=5) of all 21 participants. 5 percent (n=1) were planning on being digital nomads for 4-6 more years while 10 percent (n=2) were planning on continuing the lifestyle less than a year or were already looking for on-site jobs.

When it came to the nationality of the participating digital nomads, 19 percent (n=4) were American, 5 percent (n=1) were British and both German and French counted for 14 percent each (n=3 each).

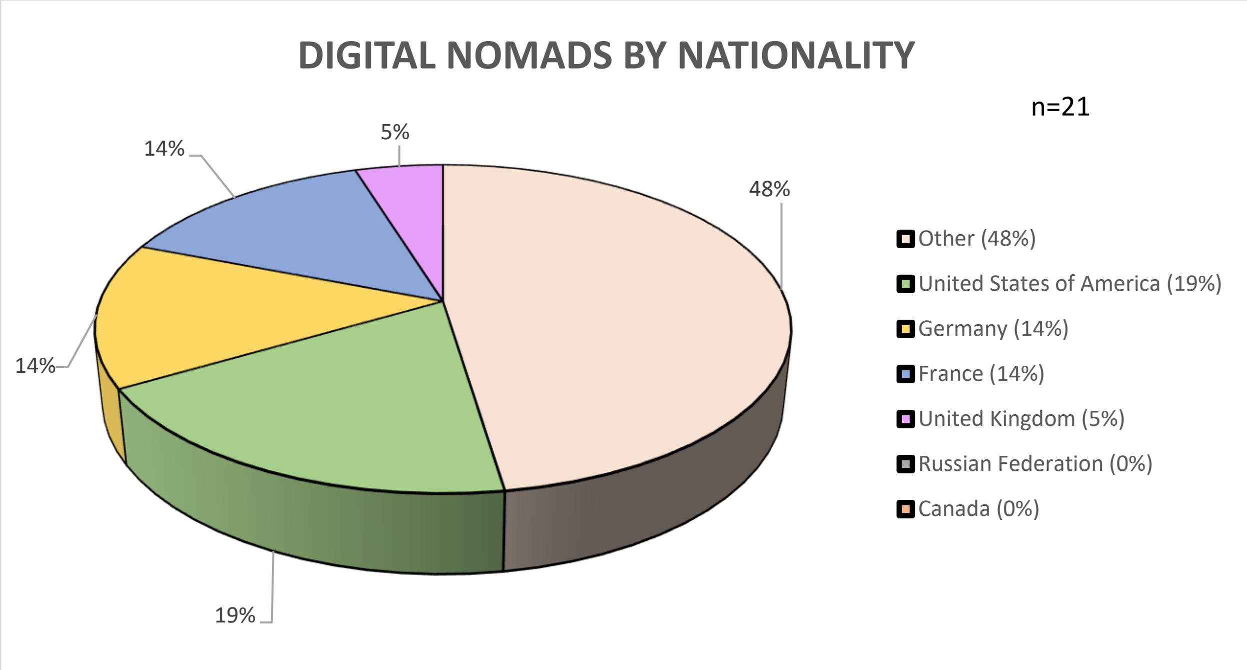


Figure 12. Digital nomads by nationality

The biggest share chose option ‘Other.’ Out of these 10, 40 percent (n=4) were Finnish, 20 percent (n=2) Portuguese, 10 percent (n=1) Polish and 10 percent (n=1) Swedish.

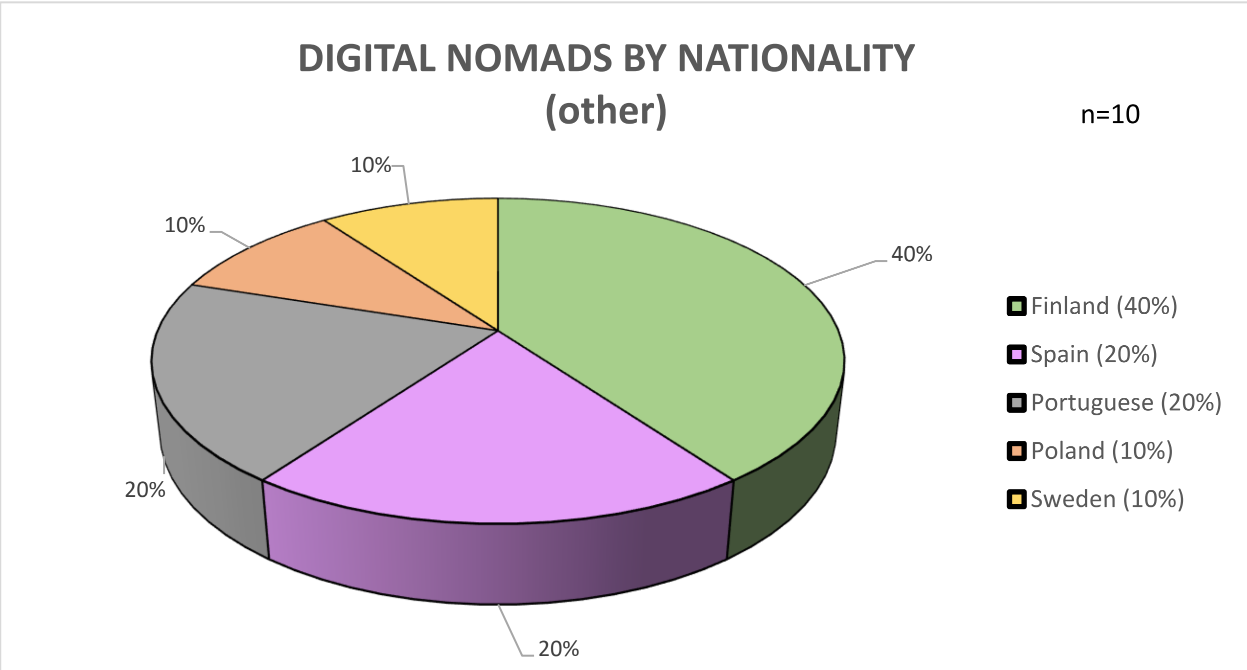


Figure 13. Digital nomads by nationality (other)

In this survey, the vast majority of respondents were women: up to 81 percent (n=17) identified as female and the remaining 19 percent (n=4) identified as males. According to the survey, the digital nomad sector is dominated by people below 41 years old. The biggest age groups were gen Z (18-25 years old) and millennials (26-41 years old). However, it is important to acknowledge that gen Z had the narrowest age range out of all generations. 29 percent (n=6) of the respondents belonged to gen Z aged 18-25 years, 38 percent (n=8) were millennials aged 26-33 years and 19 percent (n=4) were millennials between 34-41 years. 10 percent (n=2) were gen X aged 50-57 years and 5 percent (n=1) were baby boomers aged 58-65 years. None of the participants were gen X aged 42-49 years or baby boomers over 66 years.

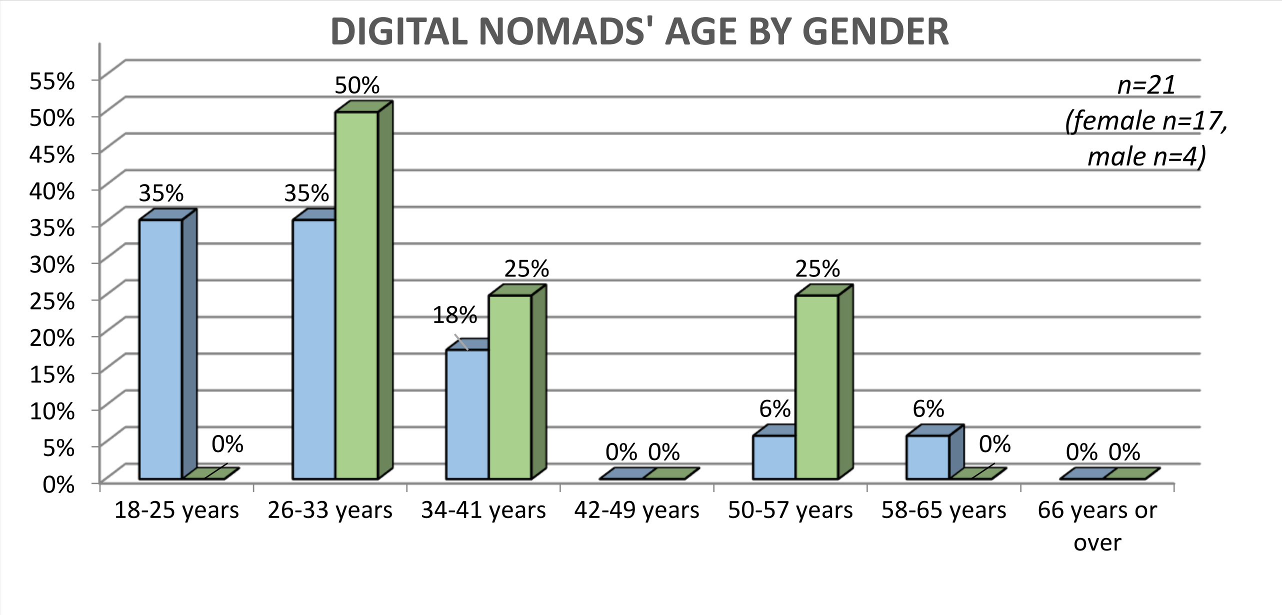


Figure 14. Digital nomads' age by gender

Out of the 21 qualifying participants, 43 percent (n=9) were single, 33 percent (n=7) were in a relationship and 24 percent (n=5) stated they were married. The most common travelling companion was a friend with 81 percent of participants stating they travel with a friend most of the time or sometimes. It was followed by solo travel at 71 percent and partner or spouse at 57 percent. The least common people to travel with were relatives at 76 percent responding they rarely travel with relatives. Out of those who found travelling with a pet applicable, none travelled with them more frequently than rarely.

5.2.1 Factors affecting decision-making

5.2.2 Destinations

When asked about the last country the participants had visited in Europe, there was division but the two most common responses were Portugal (n=4) and Spain (n=3). These were followed by Croatia (n=2), Italy (n=2) and the Netherlands (n=2).

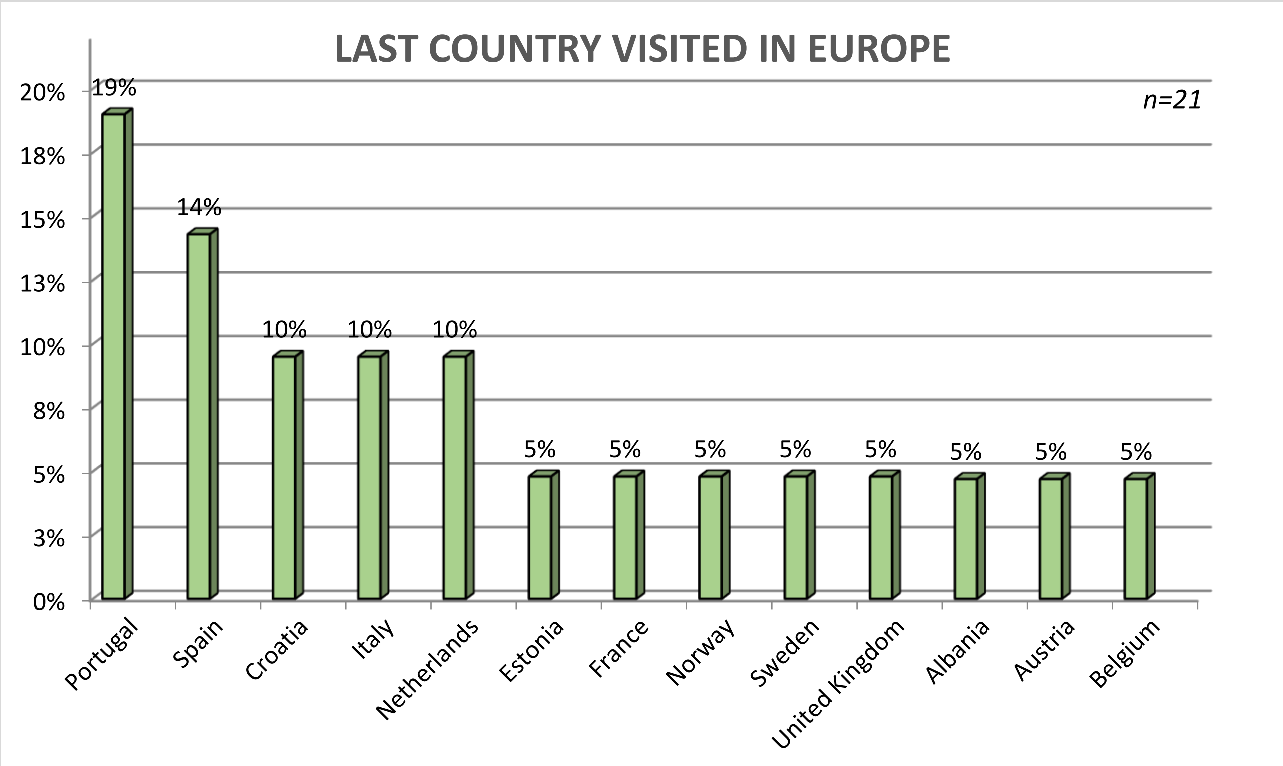


Figure 15. Last country visited in Europe

The participants' most common favourite country turned out to be Spain, which 33 percent (n=7) of participants identified it as their favourite European country they have ever been to. Spain was followed by Italy and United Kingdom both at 14 percent (n=3 each). Other mentioned countries were Austria and Greece both at 10 percent (n=2 each) as well as Hungary, Poland, Portugal and Denmark each at 5 percent (n=1 each).

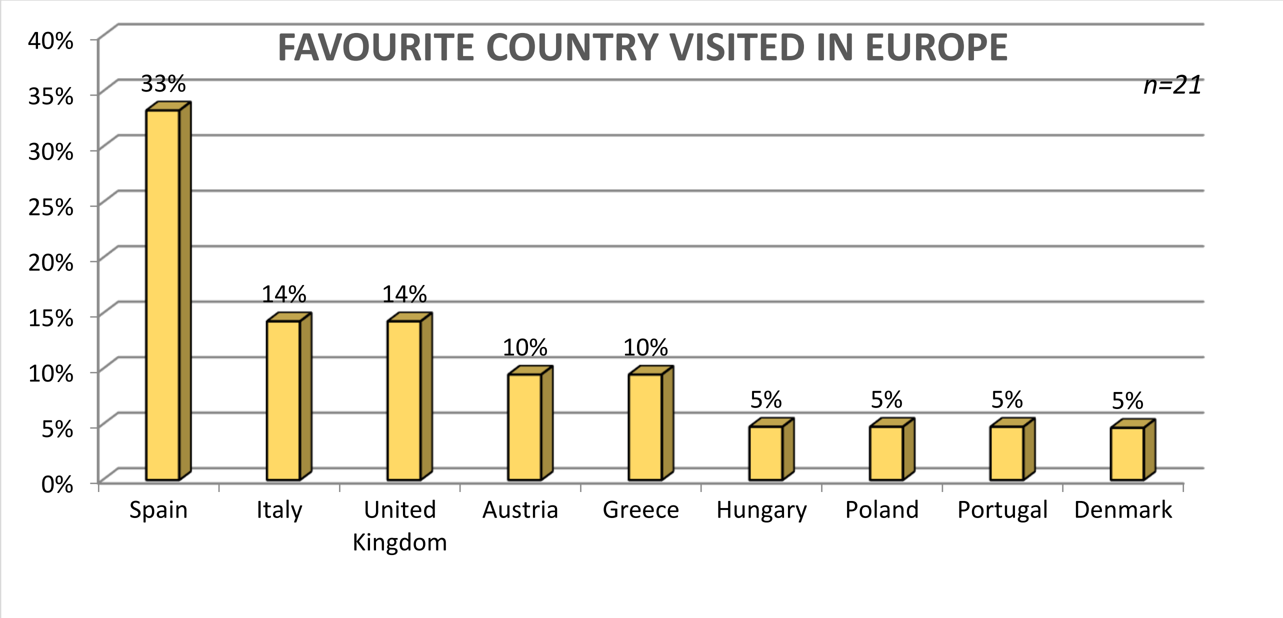


Figure 16. Favourite country visited in Europe

Thinking about their future travels and which destinations the participants would like to visit next, the participants' responses covered 12 countries. The most commonly mentioned country was Portugal, which was identified as a future destination by 14 percent (n=3) of participants. Croatia, France, Germany, Hungary, Ireland and Spain all tied for second place, each of them at 10 percent (n=2). Other mentioned countries were Denmark, Greece, Iceland, Italy, Poland and Belgium.

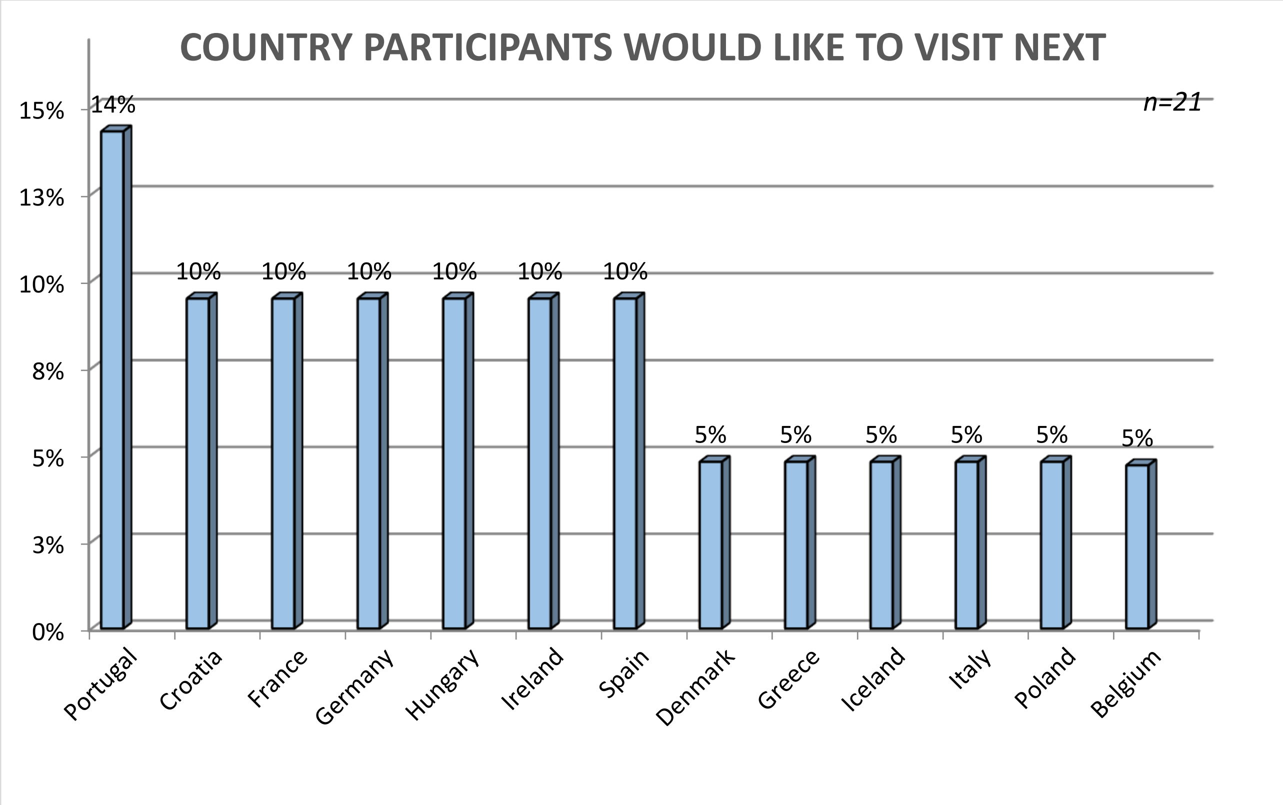


Figure 17. Country participants would like to visit next

When it comes to features digital nomads consider important on a scale from 1 to 5 with the higher number being more important, the highest averages were scored by fast and reliable internet (4,3), no visa needed (3,9) good public transportation (3,8), walkable distances (3,7), tourist attractions (3,6) and a great variety of restaurants and cafes (3,5). Fast and reliable internet had the highest median (5). The lowest averages were digital nomad visa programme (1,6), coworking spaces (2,1), leisure events (2,2), good shopping opportunities (2,4), networking opportunities (2,4) and "Instagramable" spots (2,8). The lowest median (1) was given to digital nomad visa programme.

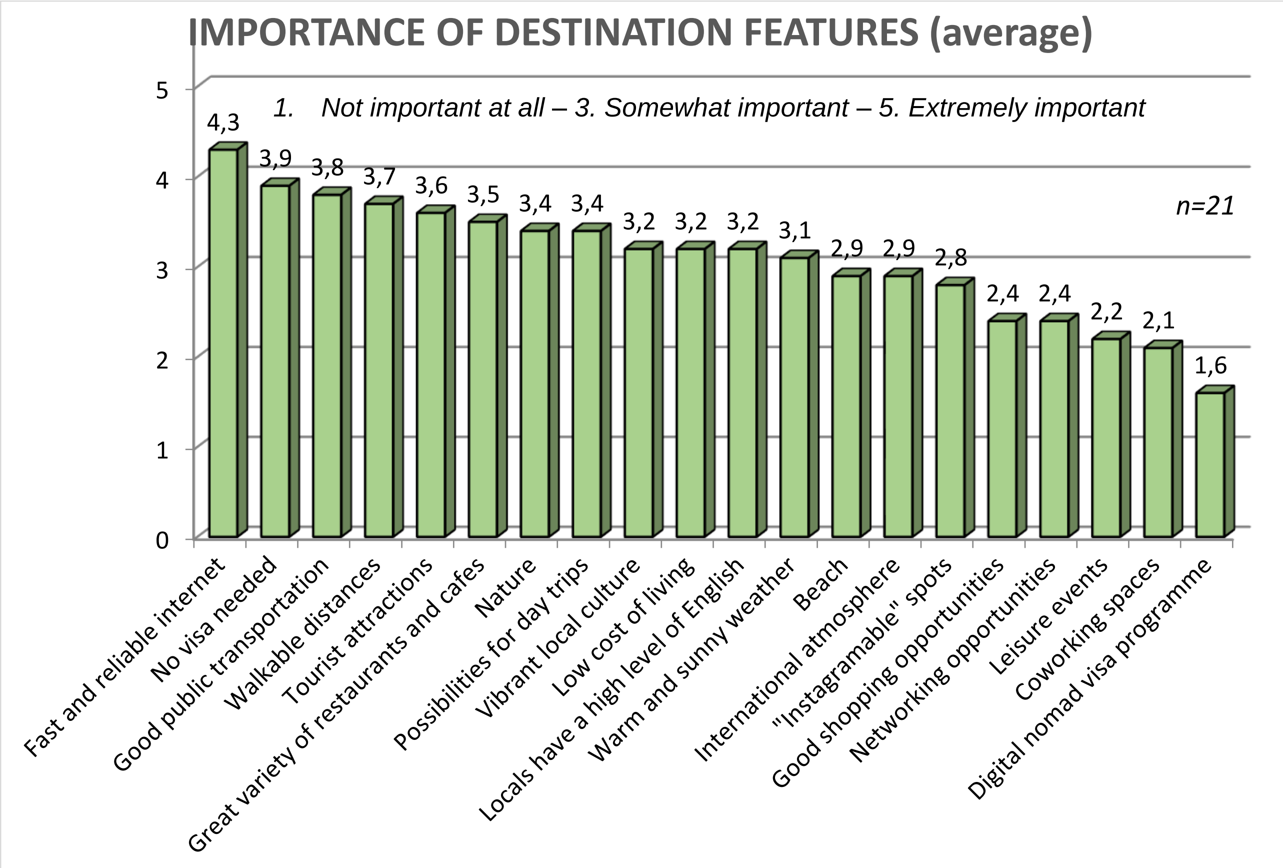


Figure 18. Importance of destination features (average)

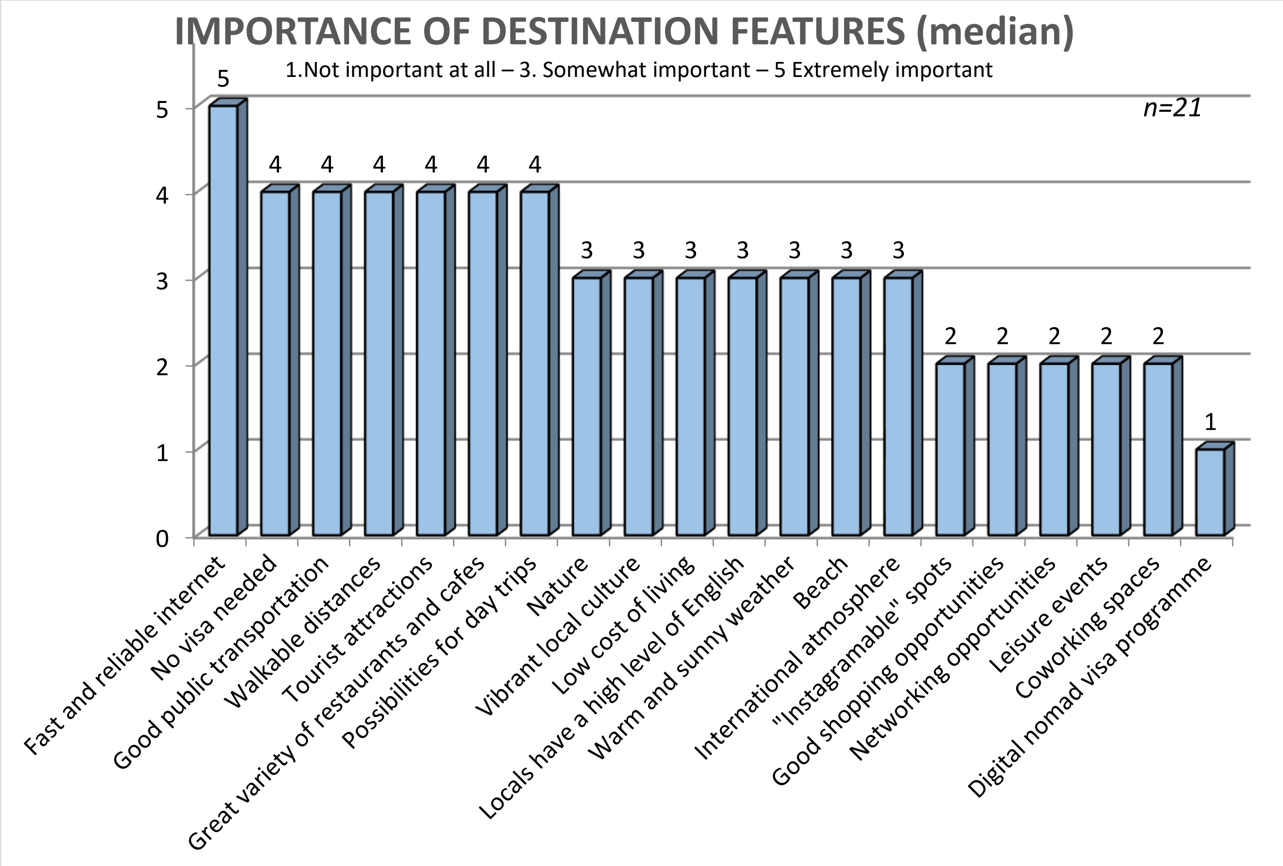


Figure 19. Importance of destination features (median)

The participants were asked about their preferences when it comes to the length of their stay in one destination. The most popular duration for stays was up to two weeks, chosen as the length of stay for ‘most of the time’ by 48 percent of the participants. 14 percent stated they stay in destinations most of the time for 1-2 months, 14 percent 2-3 months and 10 percent for 3-4 weeks.

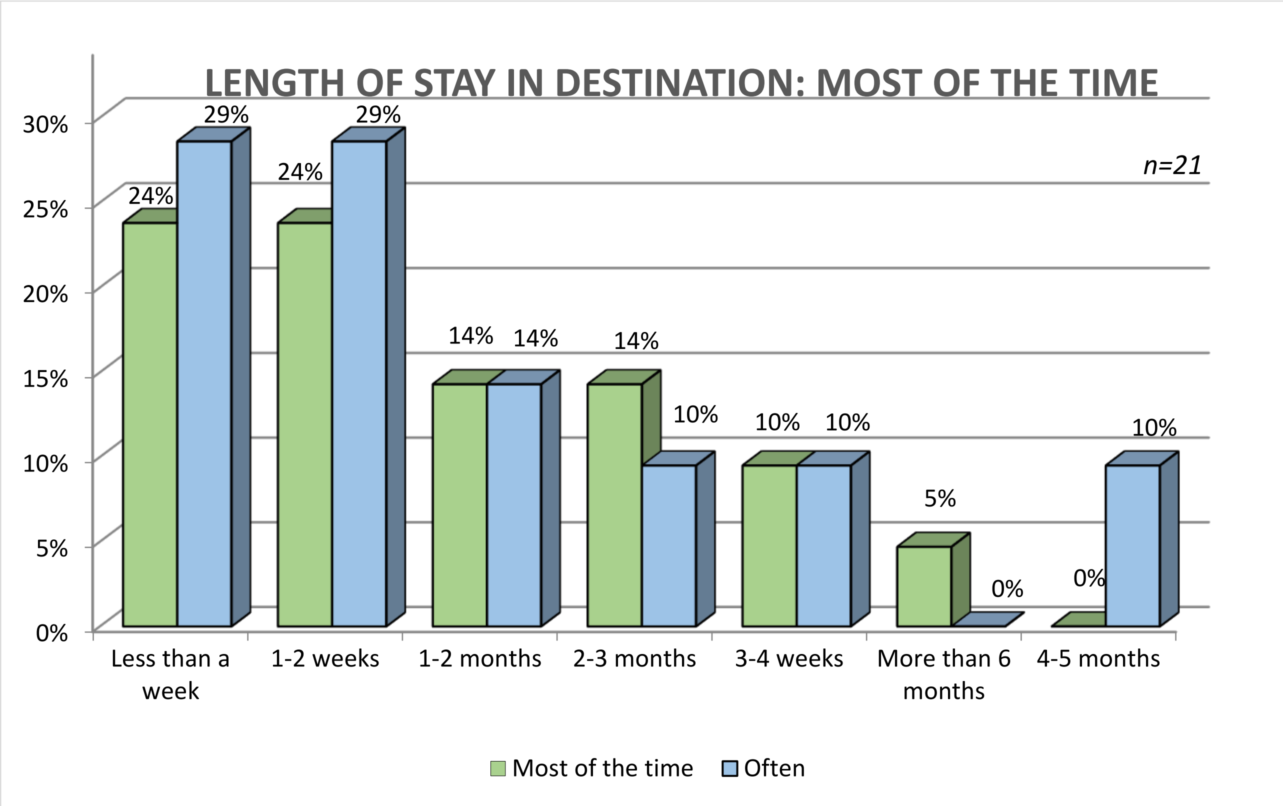


Figure 20. Length of stay in destination: most of the time

86 percent stated they never stay in destinations for more than six months at a time whilst 62 percent never stay longer than 4-5 months and 38 percent never longer than 2-3 months.

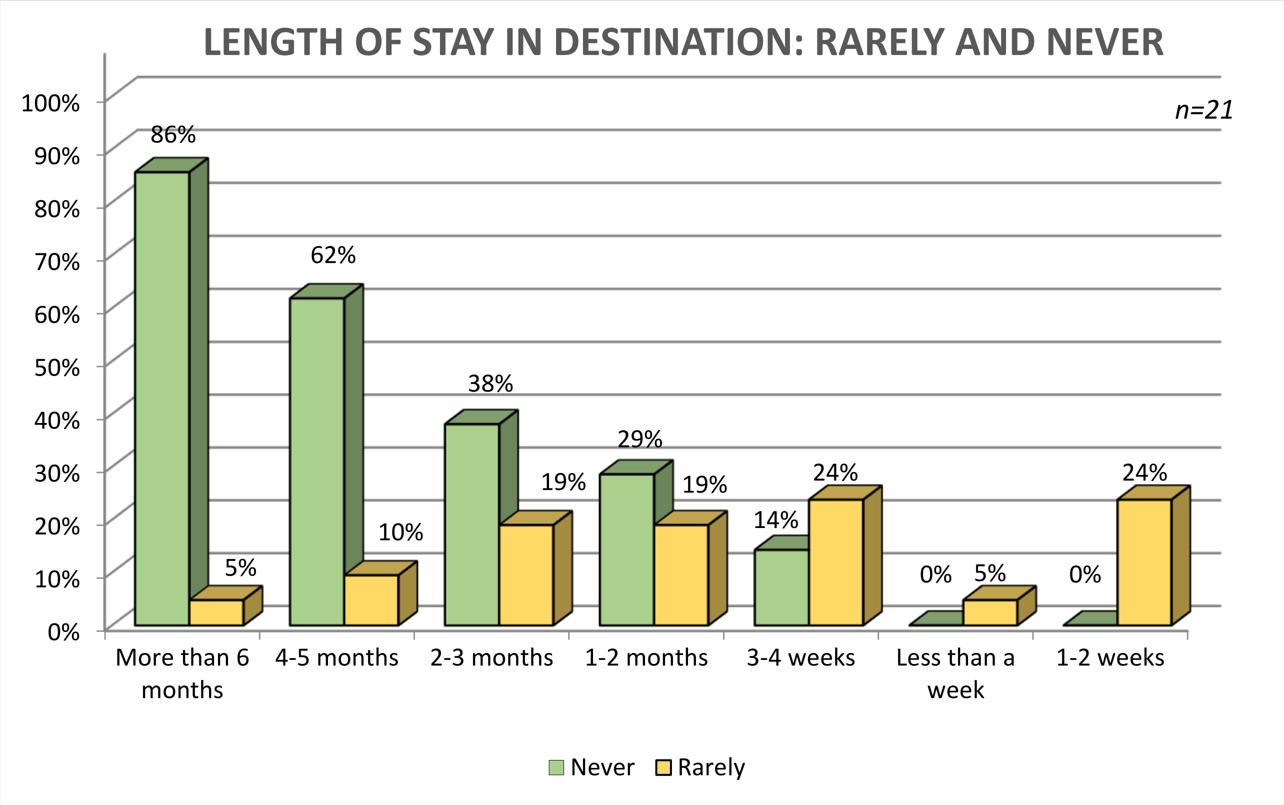


Figure 21. Length of stay in destination: rarely or never

60 percent (n=12) of the participants stated they change cities once or twice before changing the country, whilst the remaining 40 percent (n=8) were equally split between those who change cities several times before changing the country and those who changed countries straight away.

The participants used several online sources to find potential destinations and get inspiration for future travels, but Instagram was the most popular one with 62 percent always using it as well as an additional 29 percent sometimes using it. The second most common response was articles or blog posts with 38 percent always using them and 48 percent sometimes using them for inspiration. 33 percent always took advantage of digital nomad communities with 38 percent doing so sometimes. The least popular ways to look for potential destinations were offline sources with 62 percent of participants using them rarely or never, and Pinterest with 67 percent for the same responses.

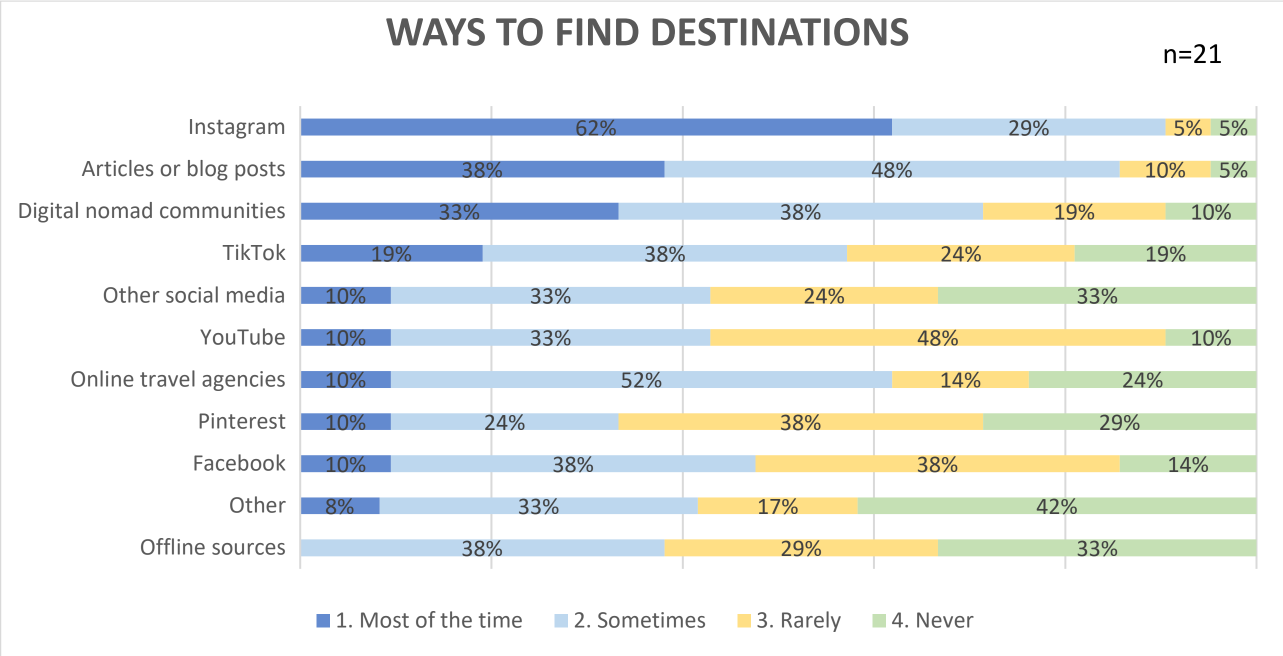


Figure 22. Ways to find destinations

5.2.3 Accommodation

48 percent of participants used private villa, Airbnb or holiday house most of the time and 38 percent sometimes, making them the most common type of accommodation option. Hotels were a close second with 29 percent of participants mostly staying in hotels and 43 percent doing so sometimes. 62 percent of participants stated they stayed with friends and family sometimes, whilst all participants did that at least rarely. The least popular type of accommodation was couchsurfing at 81 percent never using it, followed by campervan, car or trailer at 71 percent never using them as accommodation and 62 percent never using bed and breakfast accommodations.

While booking their accommodation, the majority use Airbnb (91 percent, n=19). Other popular options were online travel agencies and direct booking both at 57 percent (n=12 each). Only one participant (5 percent) used couchsurfing whilst 48 percent (n=10) had not needed to book any type of accommodation. 48 percent (n=10) additionally chose that they did not need booking, meaning they might be, for example, staying with friends or in a campervan. 10 percent (n=2) additionally chose the option ‘other.’

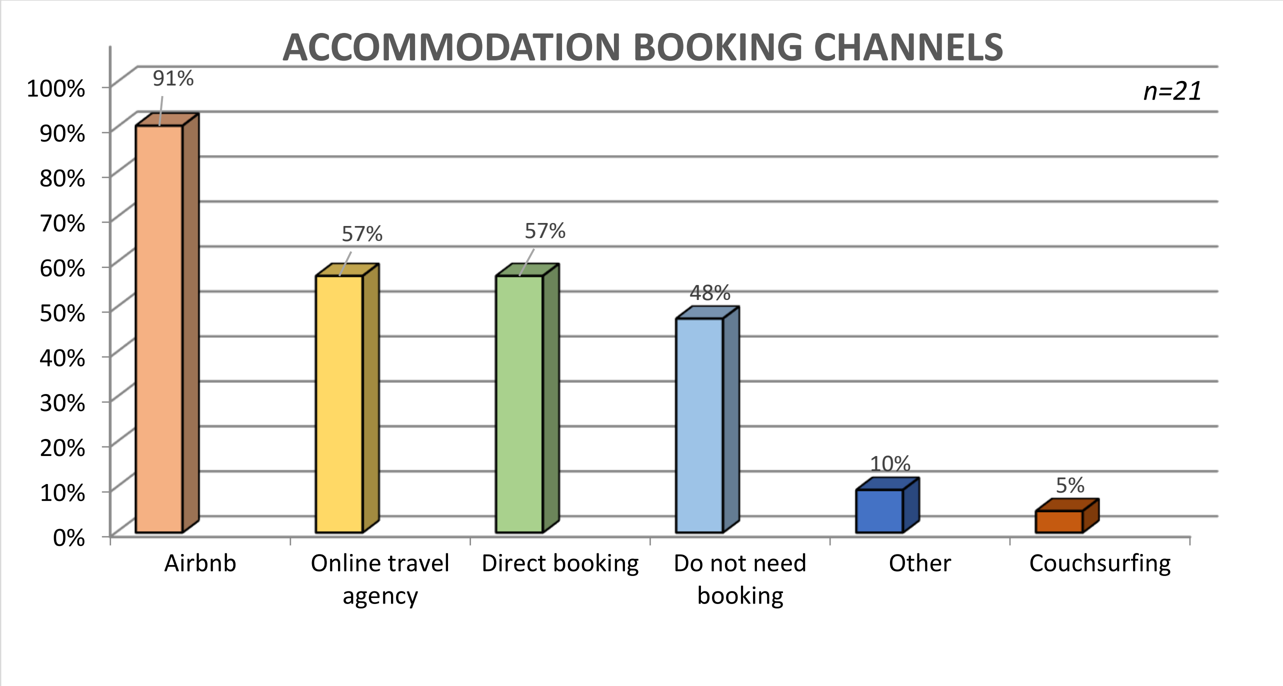


Figure 23. Accommodation booking channels

Out of all the accommodation features, private rooms had the highest average (4) whilst sharing the highest median (4) with flexible change and cancellation policies and updated social media and website. The features with the lowest averages were gym or other workout space (1,7), community spaces (1,8), breakfast included (2,1) and staff on site 24/7 (2,2).

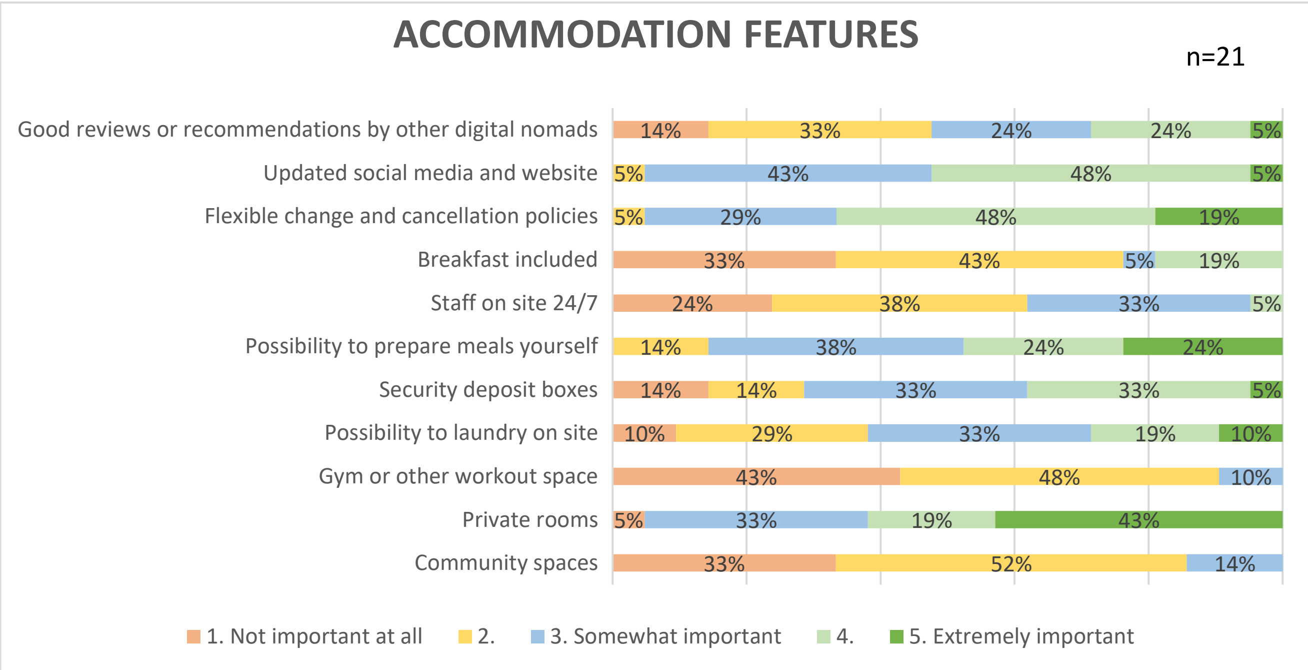


Figure 24. Accommodation features

5.2.4 Transportation

When looking at the average scores of transportation types between countries, the most popular ones were airplane, train, bus and own car or campervan. 76 percent used airplane either always or often, making it the single most used mode of transportation. Those using airplanes were the most loyal and consistent in using the same type of transportation: a staggering 43 percent of participants stated they always travel by airplane compared to the next biggest percentage of 14 percent always traveling by bus. Traveling by train was always the choice for 10 percent of participants, but often the choice for 48 percent. Own car or campervan was always or often the type of transportation for 10 percent each. Rental car or campervan and ship or boat were used often by 5 percent of participants each.

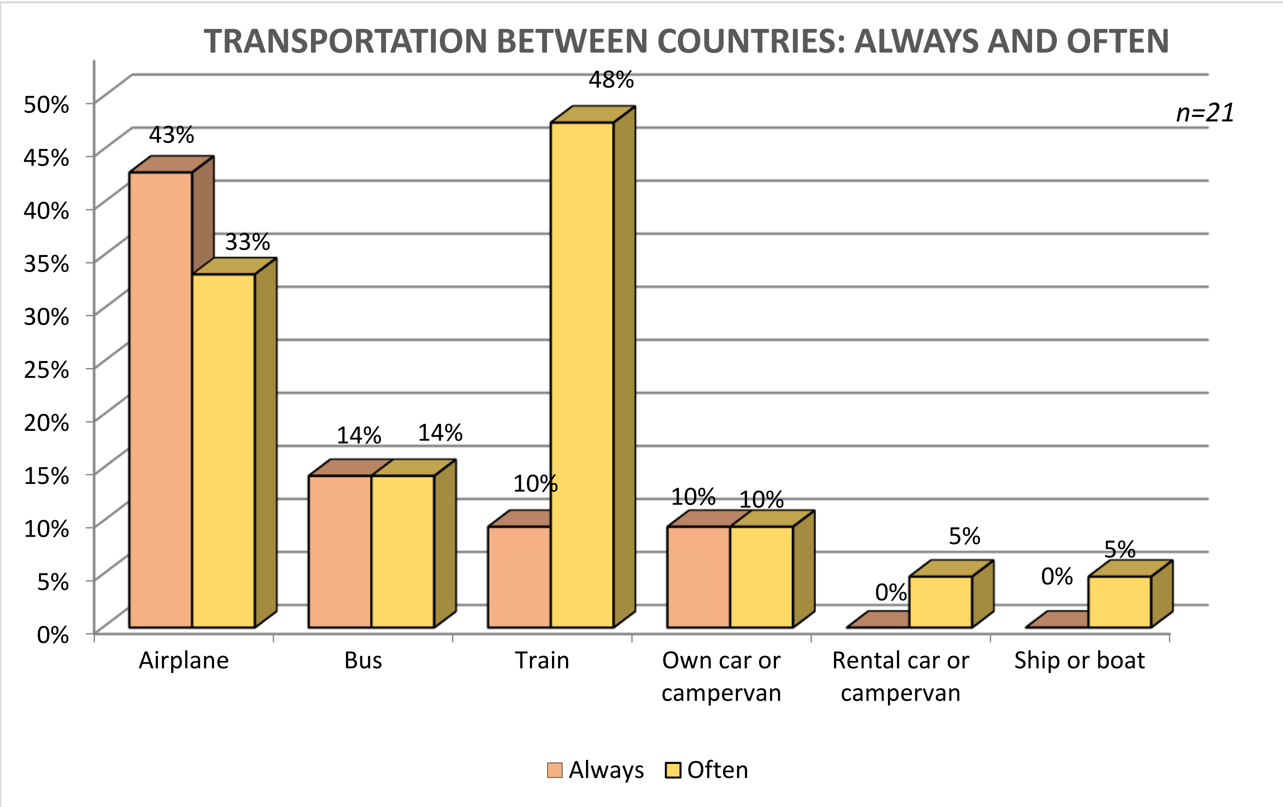


Figure 25. Transportation between countries: always and often

Rented or owned cars or campervans were among the least popular options: they were never or rarely used by 86 percent (rental) and 61 percent (own). Ships or boats were rarely or never used by 76 percent.

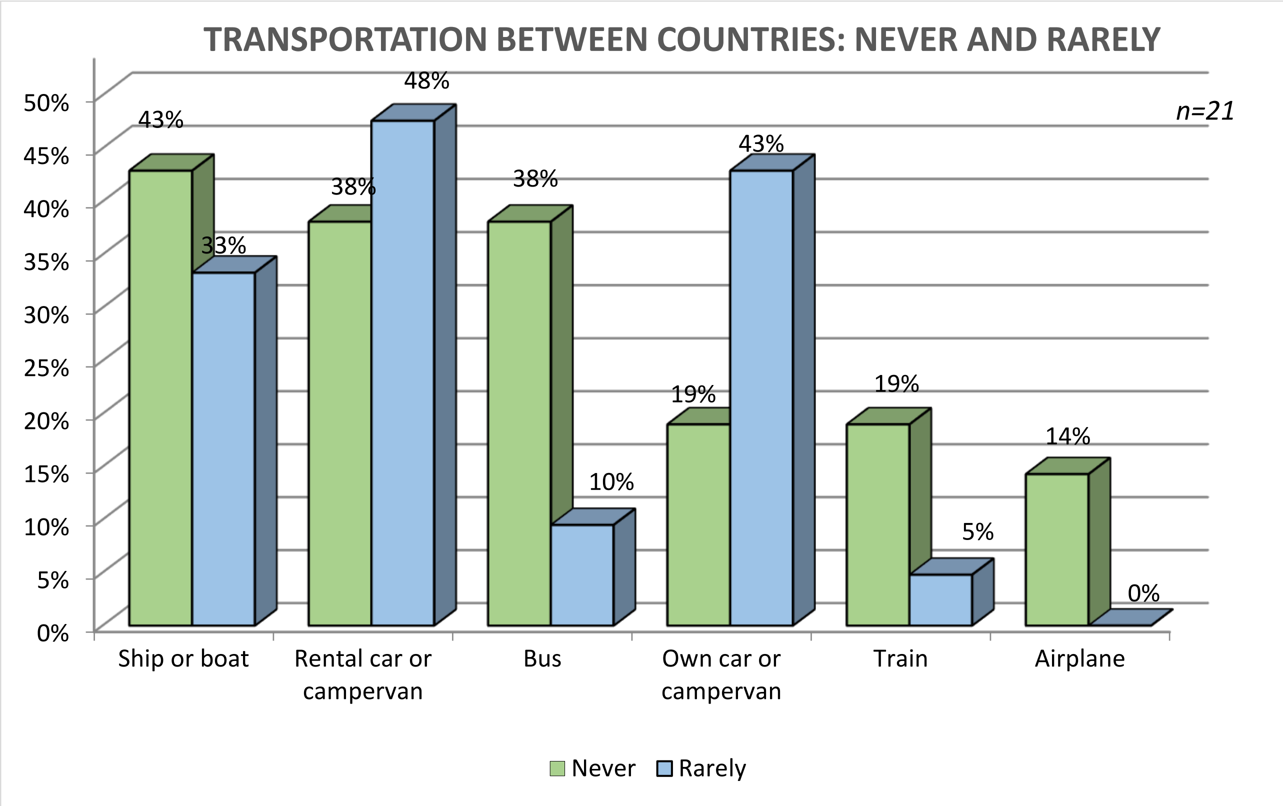


Figure 26. Transportation between countries: never and rarely

While staying in a city, walking was the most popular mode of transport with 86 percent stating they always walk. Other options with high response percentages of 'always' were buses with 43 percent and trams with 29 percent. On the other hand, scooters or motorcycles were the least used with 95 percent using them either rarely or never. Cars were rarely or never used by 76 percent, making them the second least used mode of transportation within a city. The most often bought ticket type was one-way or return tickets at 86 percent (n=18), followed by daily tickets at 33 percent (n=7) and weekly tickets at 24 percent (n=5).

The factors affecting the transportation decisions were measured with a semantic differential, where the participants could pull a slider to a value between the two factors depending on their opinion. When the choice was made between sustainability and short travel time, the latter played a bigger part in decision-making. 48 percent (n=10) valued it more than sustainability whilst 19 percent (n=4) found both factors equally important. When sustainability was assigned the value of one and short travel time five, the response average was 3,1 and the median 3,0. Transfers during transportation turned out to divide the participants almost equally in half: 48 percent (n=10) found high price without transfers better than lower price with transfers while 43 percent (n=9) preferred lower price with transfers. The average response and median for this pairing were both 3,0 when high price without transfers was assigned the value of one and lower price with transfers was assigned the value of five. When it came to sustainability versus low price, the majority at 52 percent (n=11) preferred low price and only 19 percent preferred sustainability. 27 percent (n=6) valued both equally. Sustainability was given the value of one and low price the value of five, making the average response value 3,1 and the median 4,0.

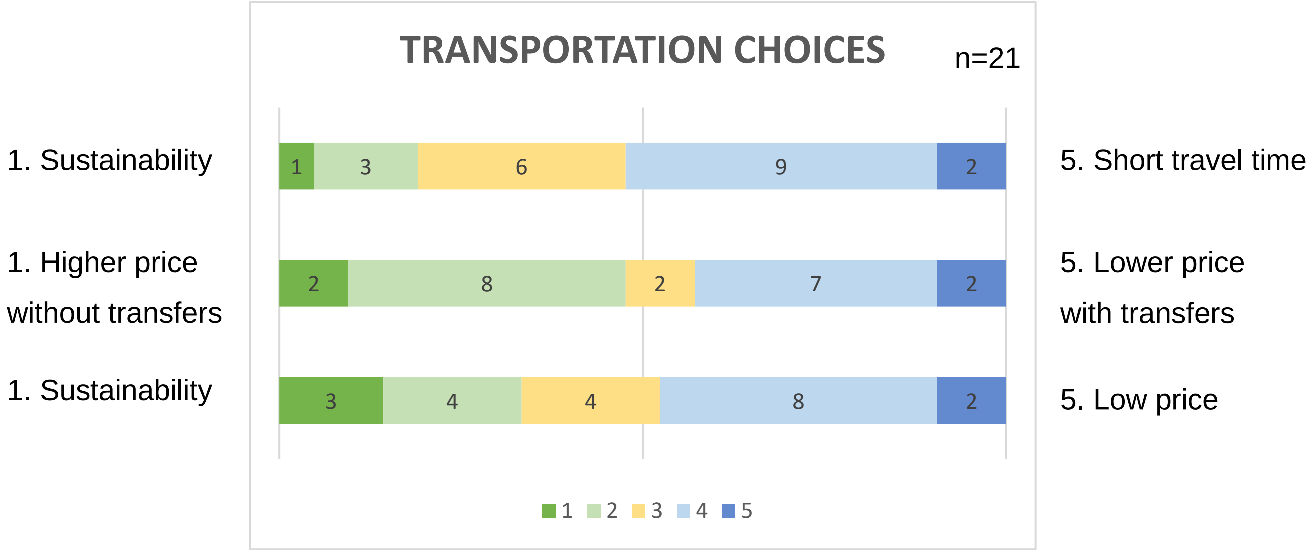


Figure 27. Transportation choices

5.2.5 Income and expenditure

The most common annual income range was 20 000-35 000 euros at 43 percent (n=9), followed by 19 000 euros or less at 29 percent (n=6) and 52 000 – 67 000 euros at 10 percent (n=2). Only 24 percent (n=5) received compensation in other forms than money and an additional 38 percent (n=8) did not but would like to. 38 percent (n=8) did not receive or want to receive other forms of compensation than money whilst 10 percent (n=2) received them but preferred not to.

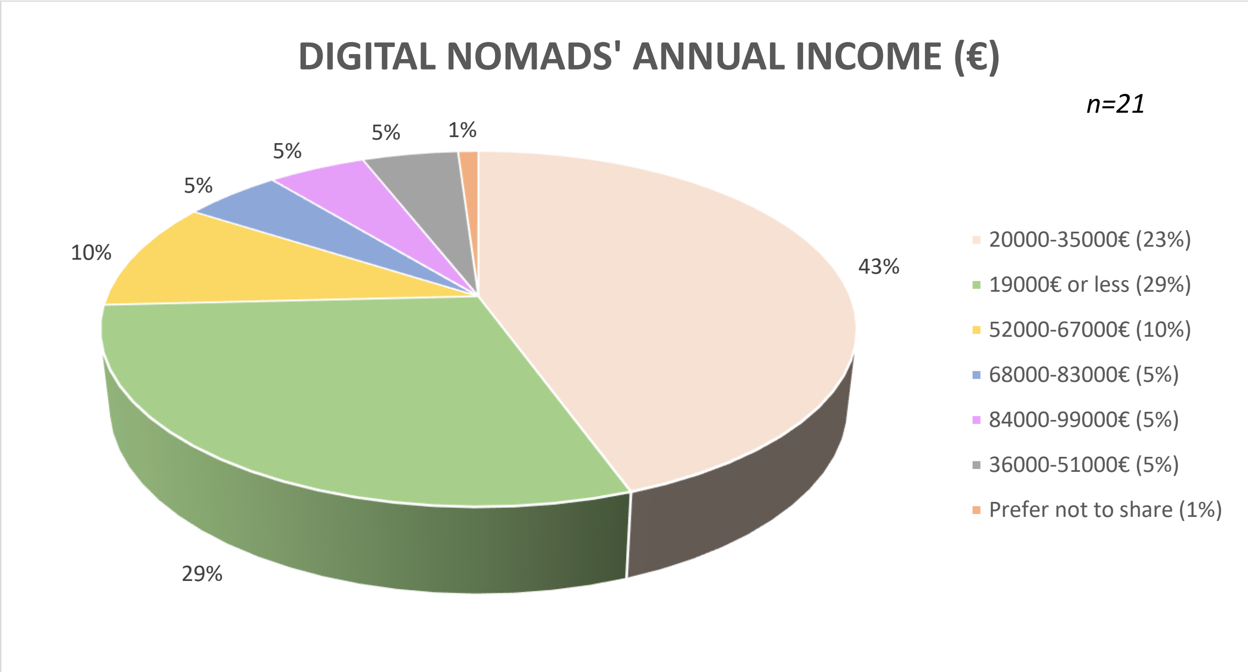


Figure 28. Digital Nomads' Annual Income (€)

95 percent (n=20) of the participants were registered for taxation in the country of their legal residence.

When it came to expenditure, 57 percent of participants responded they buy groceries daily. 19 percent spent money daily on public transportation, 10 percent on cafés and 10 percent on coworking spaces. Bars, pubs and nightclubs, private transportation and restaurants were all a daily expenditure for 5 percent of participants each.

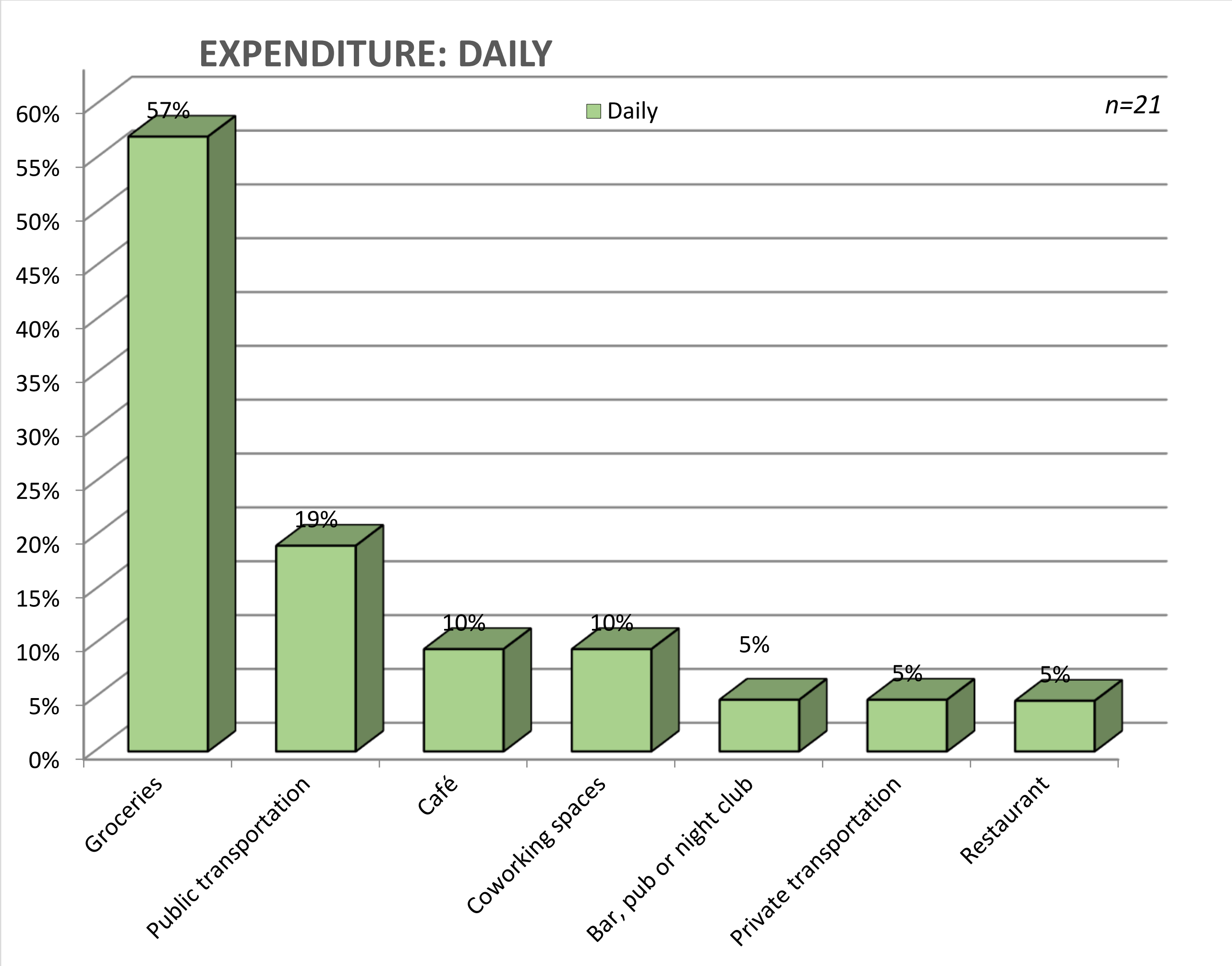


Figure 29. Expenditure: daily

If expenditure is looked at on a weekly basis, the number of services used increased significantly. Cafés and restaurants took the lead, the former used weekly by 81 percent and the latter by 76 percent. Public transportation was a weekly expense for 57 percent, groceries for 38 percent and bars, pubs or nightclubs for 33 percent. 19 percent spent money on coworking spaces on a weekly basis and 14 percent on private transportation.

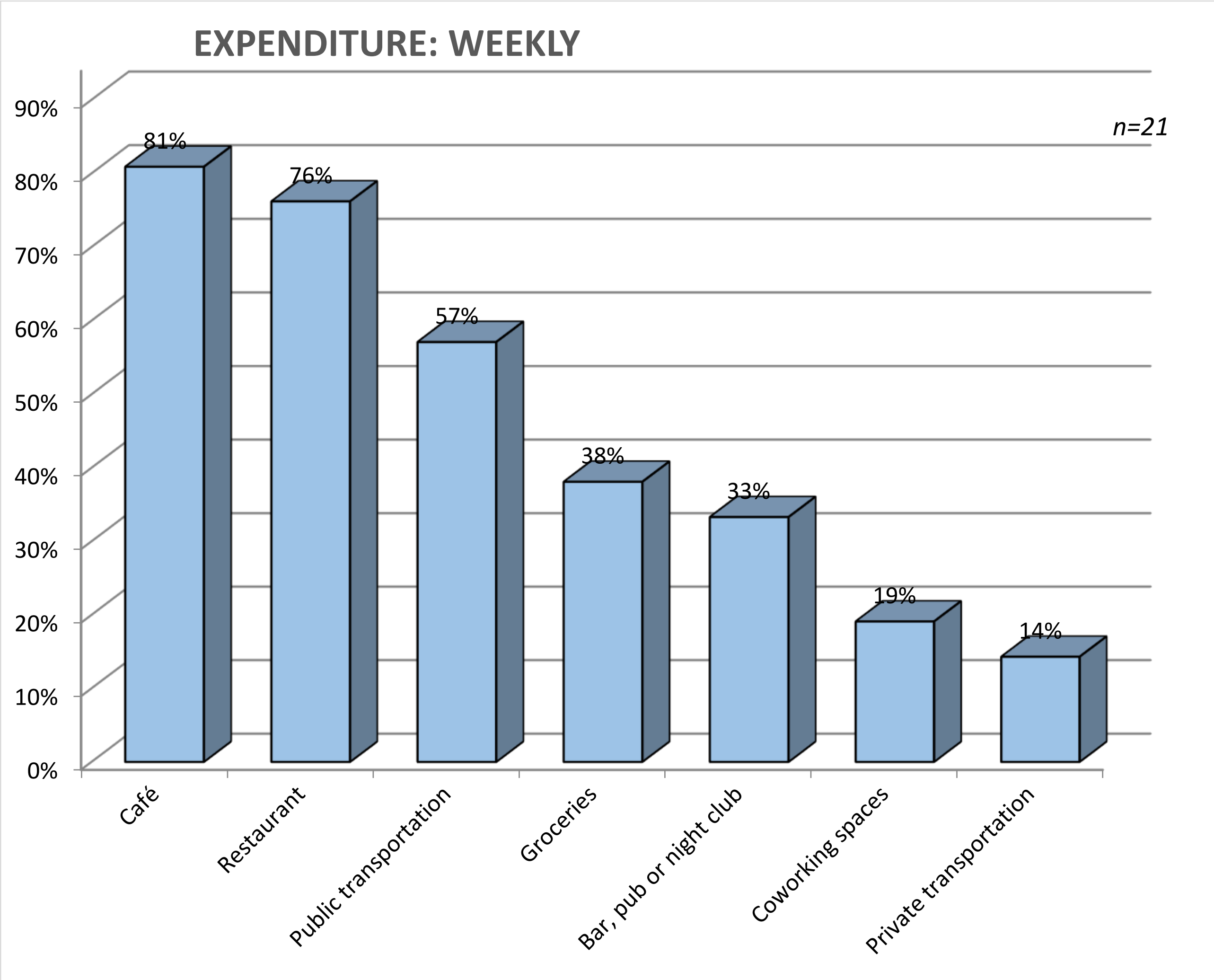


Figure 30. Expenditure: weekly

Other weekly expenses included museum and art galleries, tourist attraction entry, souvenirs and gym, exercise spaces or workout classes each at 10 percent. 5 percent of participants stated they spent money weekly on spa or pool access, concerts or music festivals, leisure events (other than music), clothing, networking events and laundry services each.

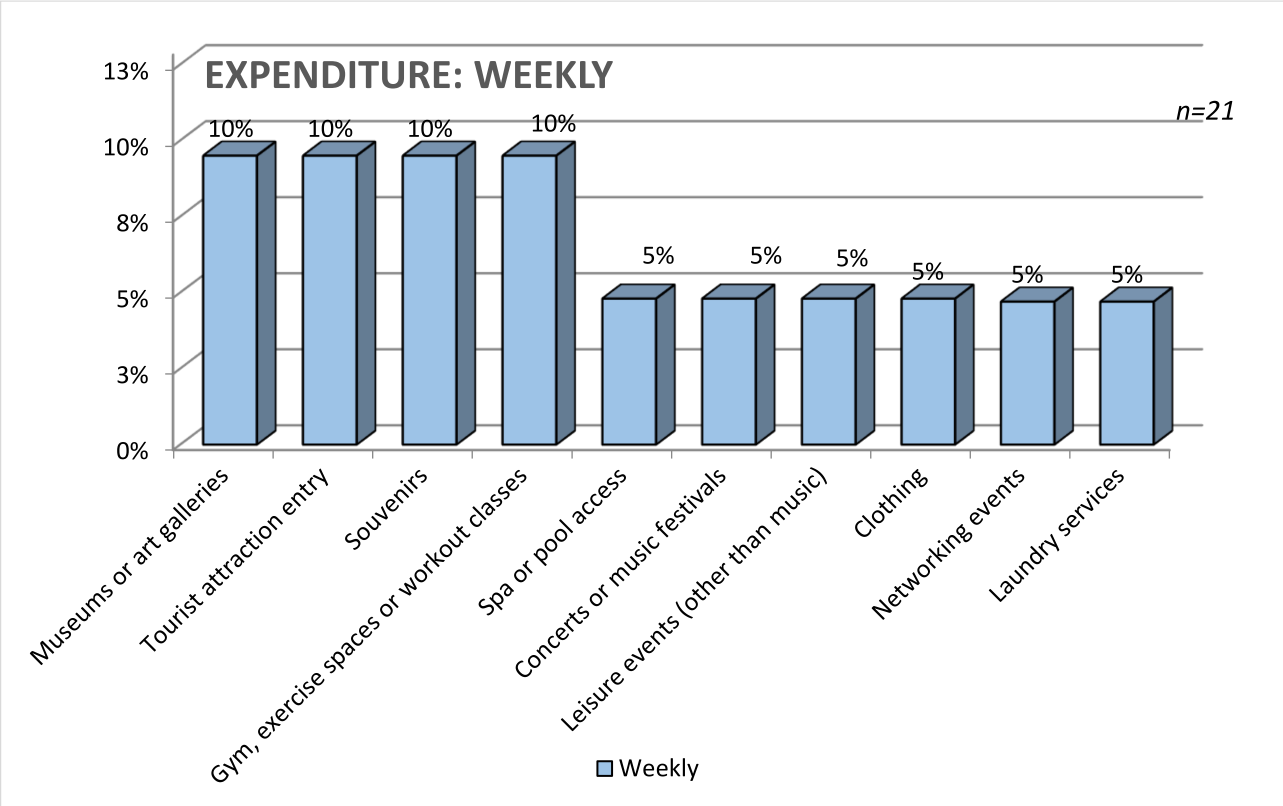


Figure 31. Expenditure: weekly

67 percent stated they spend money on laundry services on a monthly basis. Tourist attraction entry was a monthly expense for 52 percent, spa or pool access for 48 percent, museums or art galleries for 38 percent, clothing for 33 percent and coworking spaces for 24 percent.

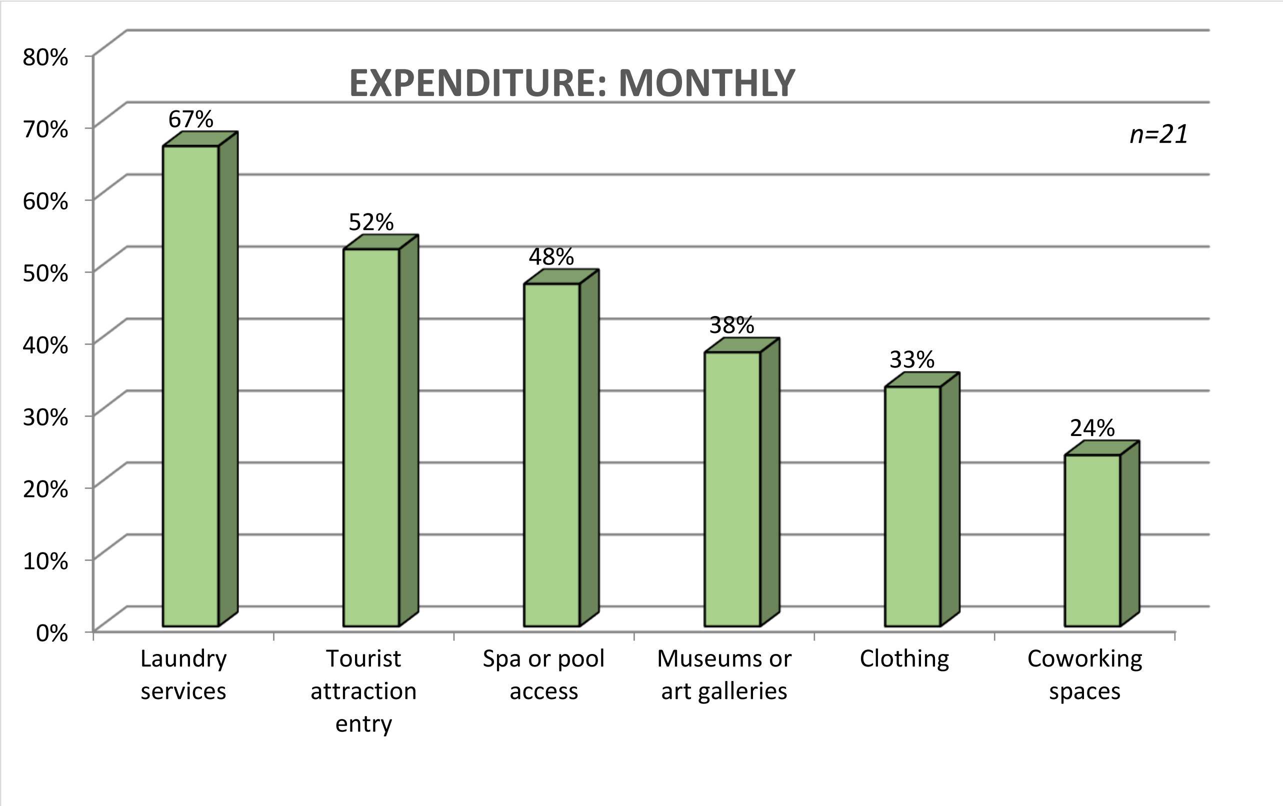


Figure 32. Expenditure: monthly

19 percent stated hairdresser or barber, public transportation and bar, pub or restaurant to be an expense for them at a monthly level each. Gym, workout space or workout classes, souvenirs, networking events and beauty salons were a monthly expense for 14 percent of participants each.

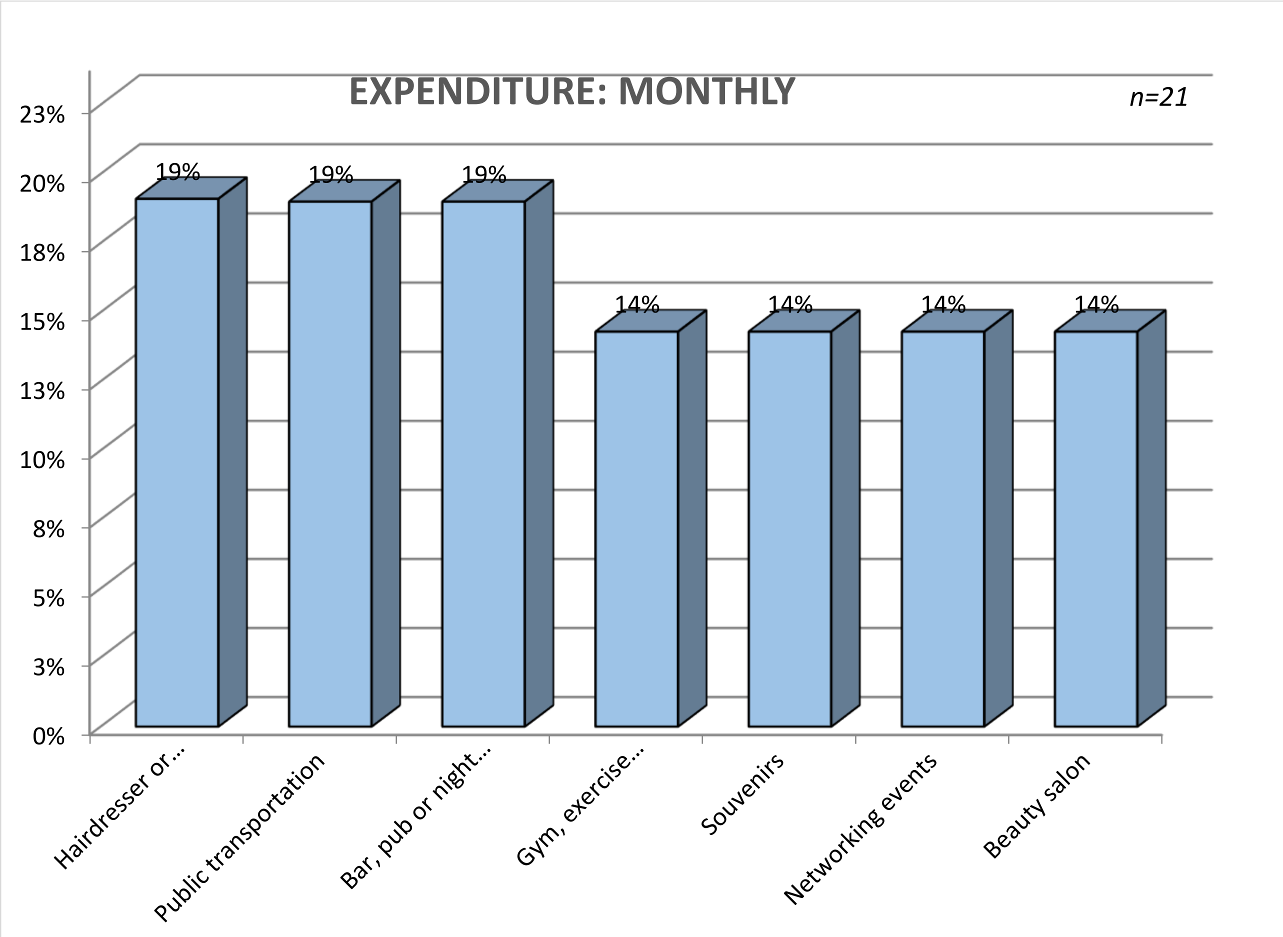


Figure 33. Expenditure: monthly

Restaurants, private transportation, concerts or music festivals and repair shops were each a monthly expense for 10 percent of participants. 5 percent spent money monthly on leisure events (other than music), retreats, library or books, children's entertainment and extreme sports.

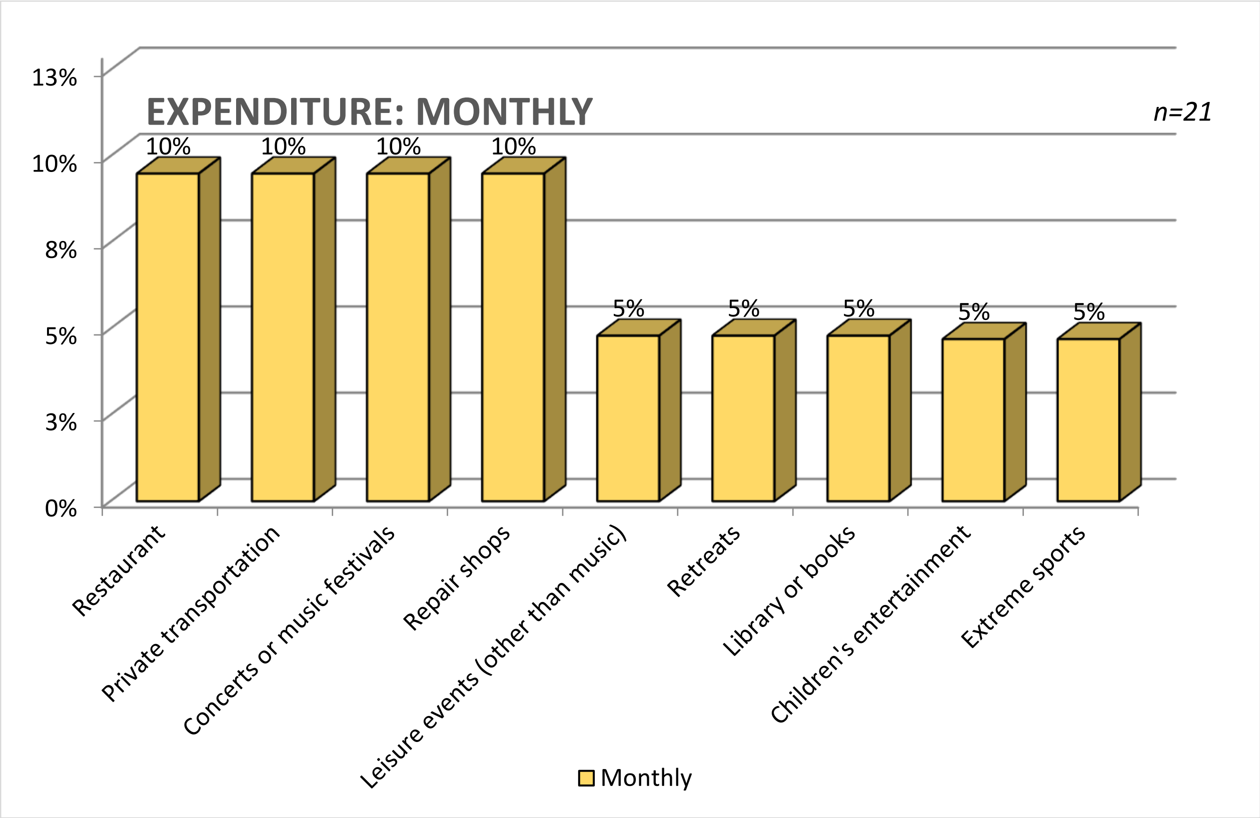


Figure 34. Expenditure: monthly

The more occasional expenses occurring every two to three months were hairdresser or barber at 52 percent, clothing at 48 percent, concerts or music festivals at 48 percent, networking events 48 percent and souvenirs at 48 percent. 43 percent of participants spent money every two to three months on leisure events whilst 33 percent spent money on library or books and spa or pool access each. Beauty salon and museum or art gallery were expenses on this frequency for 29 percent of participants each.

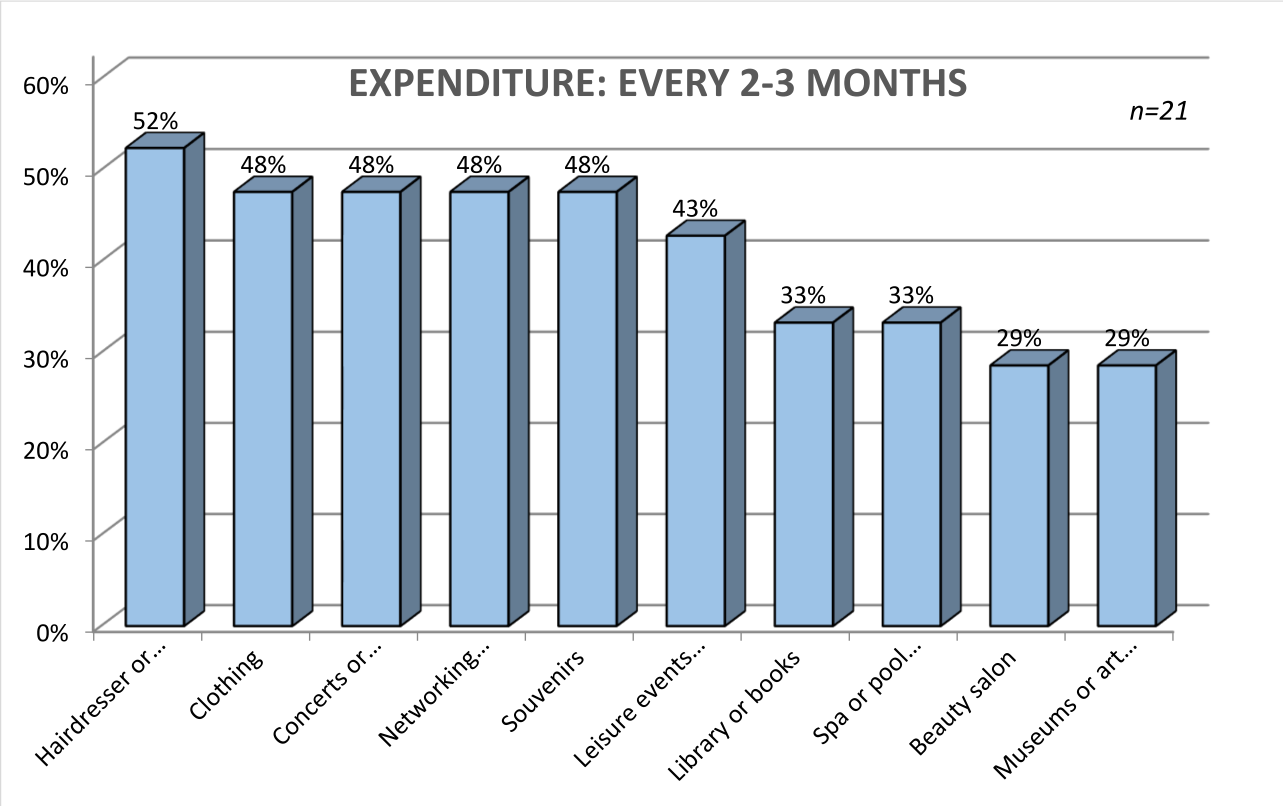


Figure 35. Expenditure: every 2-3 months

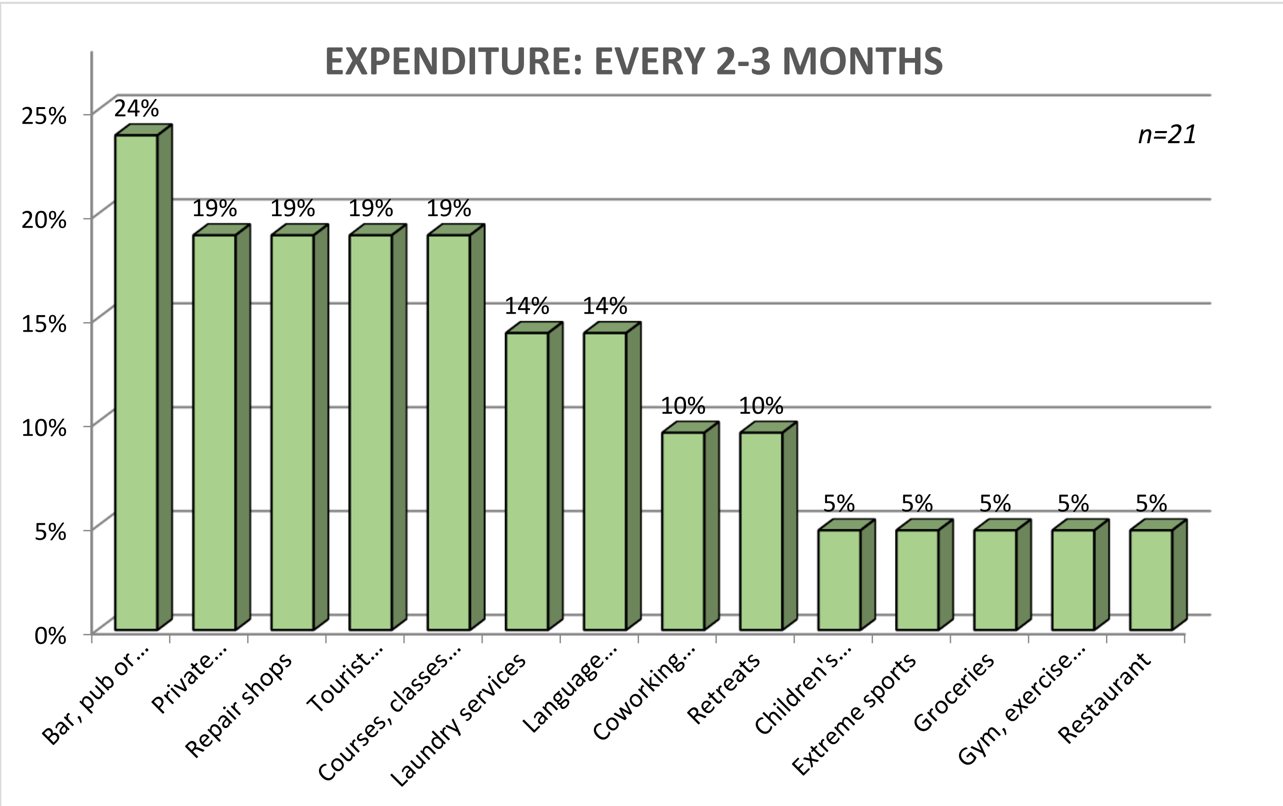


Figure 36. Expenditure: every 2-3 months

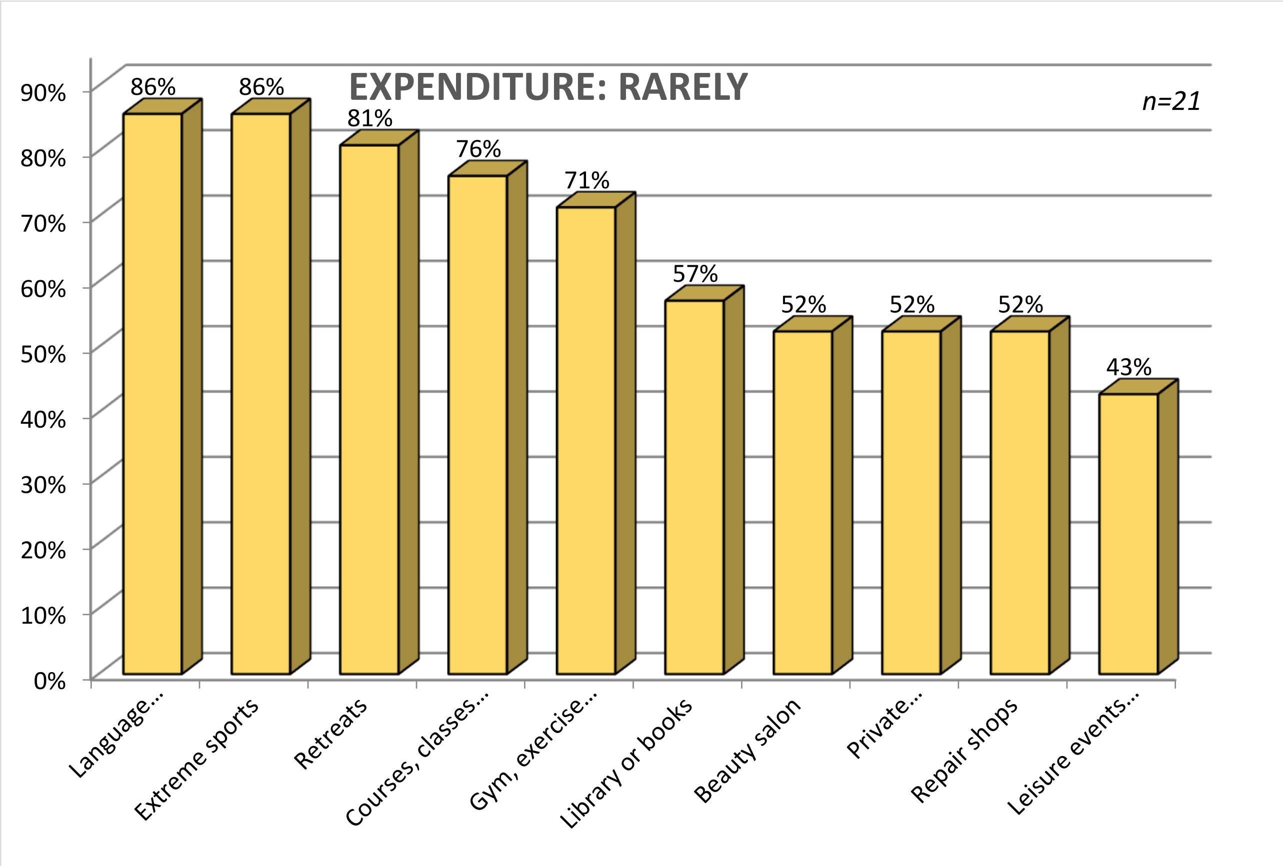


Figure 37. Expenditure: Rarely

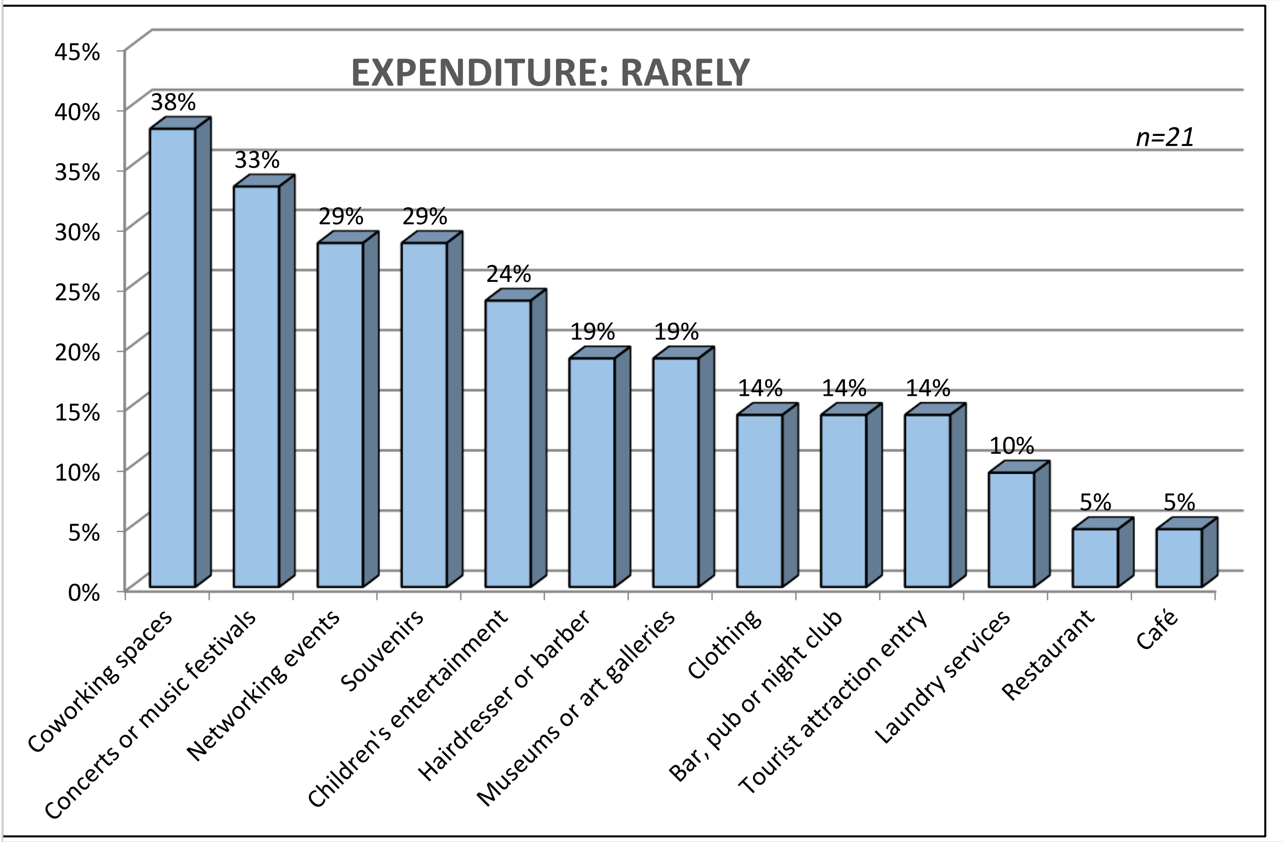


Figure 38. Expenditure: Rarely

5.3 Sustainability and impact on destination

Digital nomads' sustainability and impact on destination as travellers were measured by using the Fair Traveller's Guide created by The Finnish Association for Fair Travel (2021).

There were two statements measuring the use of local versus international businesses and brands. One of them was 'I choose local businesses whenever possible' and the other one 'I prefer international brands I know and trust.' In the former, 67 percent chose they either agree or strongly agree the choose local businesses while 62 percent chose they disagree or strongly disagree with the latter statement of choosing international brands. An additional question was more particularly about choosing local cuisine. The statement ('I mainly eat local cuisine') was agreed or strongly agreed with by 67 percent of participants, somewhat agreed with by 33 percent and disagreed by none.

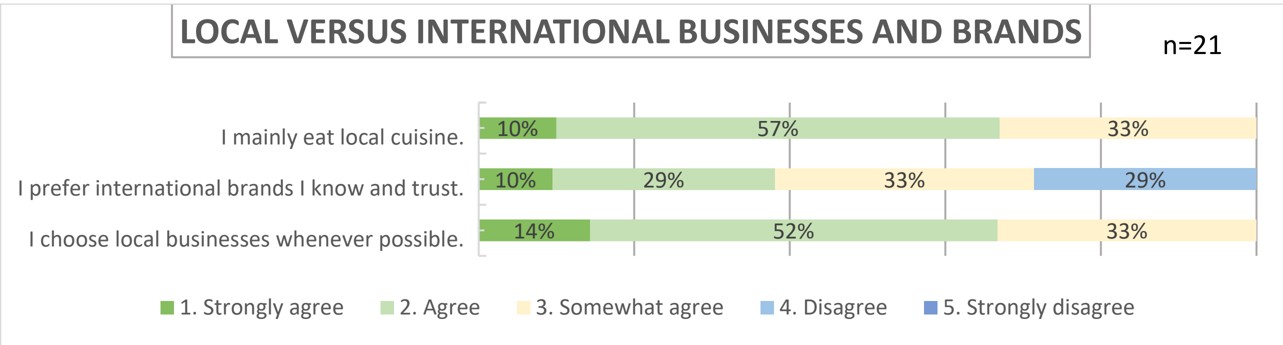


Figure 39. Local versus international businesses and brands

Another measured aspect was travel during peak seasons and choosing popular destinations. 52 percent agreed or strongly agreed they travel to popular and well-known destinations whilst only 5 percent disagreed with the statement. The most common response was ‘somewhat agree’ at 43 percent of all participants. When it came to preferring to travel outside of destination’s peak season, 52 percent agreed that was their preference and 14 percent disagreed while 33 percent somewhat agreed.

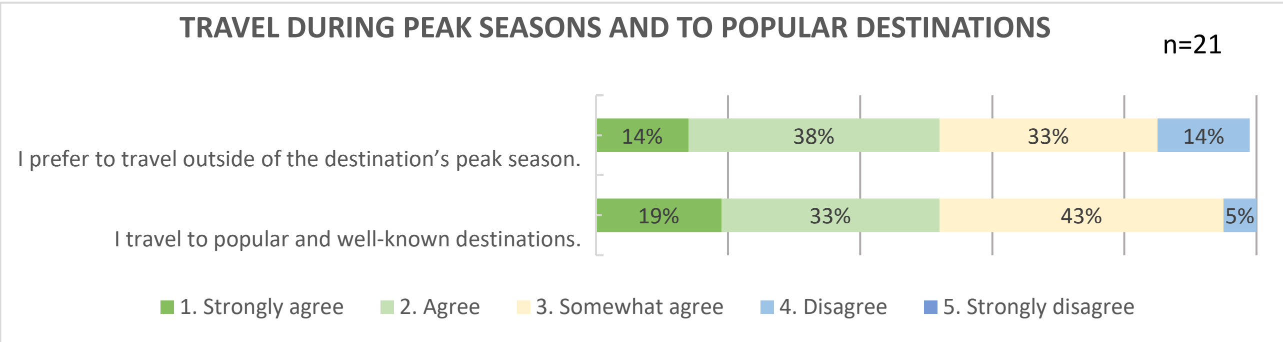


Figure 40. Travel during peak seasons and to popular destinations

The amount of waste created and the way it is disposed of was part of this Likert scale. 62 percent of participants agreed or strongly agreed with a statement that they recycle their trash while travelling. Only 5 percent disagreed and 33 percent somewhat agreed. On the other hand, only 43 percent agreed or strongly agreed that they minimise the amount of trash and plastic they use during travels and up to 27 percent disagreed with the statement.

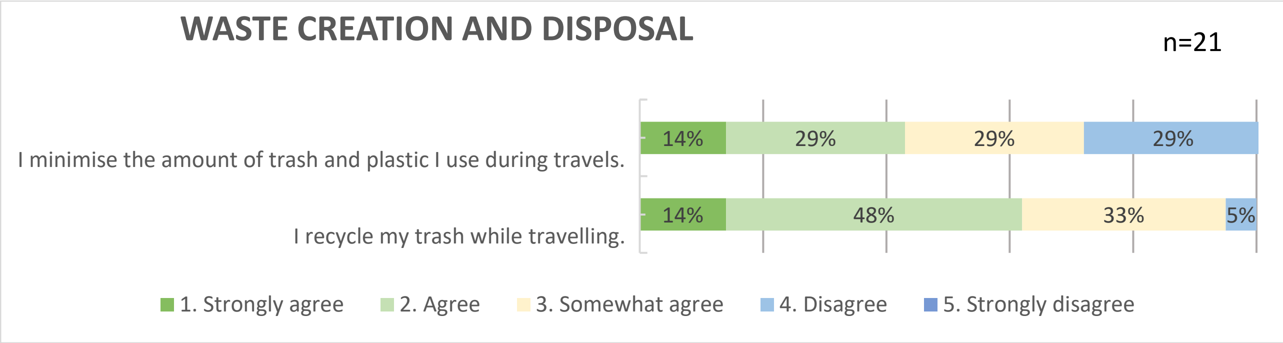


Figure 41. Waste creation and disposal

Statements additionally measured awareness of issues caused by travel, education and being advocate for sustainable practises. 43 percent of participants agreed or strongly agreed they educate themselves on the impacts of travel on local people and destinations, while 33 percent somewhat agreed and 24 percent disagreed. The statement about educating oneself on the local culture, beliefs and customs before travelling had the majority of the participants agreeing or strongly agreeing at 59 percent, while only 5 percent strongly disagreed and 33 percent somewhat agreed. 95 percent of participants either disagreed or strongly disagreed with the statement ‘ I participate in leisure activities that include animals.’ Only 5 percent somewhat agreed with the statement, but nobody agreed or strongly agreed with it.

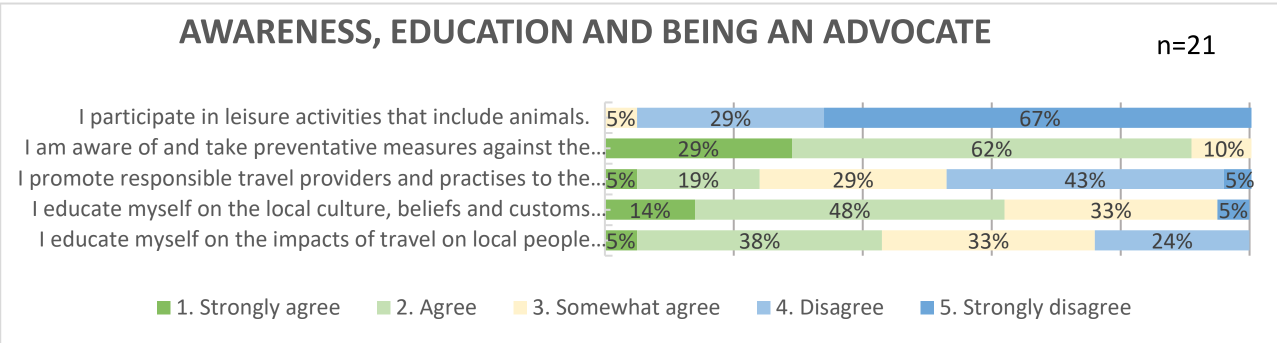


Figure 42. Awareness, education and being an advocate

When it came to transportation, as many as 67 percent of participants agreed or strongly agreed that they avoid travelling long distances for short trips while 19 percent somewhat agreed and 14 percent disagreed. Only 5 percent agreed that they pay for carbon compensation programmes, whilst 10 percent somewhat agreed that they do and 86 percent disagreed or strongly disagreed paying for the programmes.

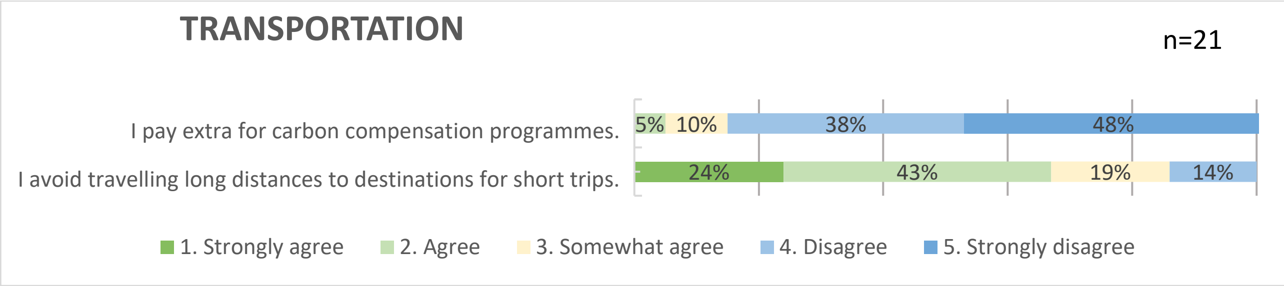


Figure 43. Transportation

6 Conclusion

6.1 Digital nomad customer avatar

One of the main results from the survey is that 47 (n=7) percent of the participants had started out as digital nomads in the last two years and an additional 27 percent (n=4) in the last four years. In the study by Kelly and Arelano (2021), 20 percent of participants had started working remotely in the year prior to the survey. In the survey for the research of this thesis, the scale was two years instead of just one, which can explain why the percentage was higher. These results strongly indicate that recent events have affected the increasing number of digital nomads. The COVID-19 pandemic shut many offices and businesses down for an extended period of time, which forced people to try out remote work and that became a new norm in many workplaces even after the restrictions were over. These results support the arguments made by Hermann & Morris Paris (2020), MBO Partners (2020) and Kelly & Arelano (2021) that the normalisation of remote work due to the COVID-19 restrictions fuelled the rise of the digital nomad movement. While it may have felt like taking a risky leap to change into remote work, the restrictions gave no choice and helped level out the playing field by putting everyone in the same position. It is natural that ap art of these companies realised that this arrangement could work in the future with benefits like lowering the costs of running an office space and more content workers, and thus allowed remote work to continue past the restrictions. The survey shows that 62 percent of participants are planning on working remotely permanently, making it clear that there surely is a segment of people who are happy to work remotely. This percentage is higher than what was reported by a global survey done by Sava (2022a), where 29 percent of participants had stated they plan to work remotely permanently. This difference could be due to the lower number of participants in the survey for this thesis. However, it is notable that in the survey by Sava (2022a), the percentage of people planning to keep on working remotely on a permanent basis had stayed practically the same in the two years of conducting the survey even though the amount of people who were working remotely at the time of the survey had dropped.

Another key finding was regarding the length of stay in one destination. Short stays of either less than a week or up to two weeks were the most common with 24 percent of participants stating their length of stay to be either one of those most of the time. One previous study showed that 12 percent of participants had stated they stay in one place for three months while another said 45 percent of participants stayed between one week and three months (Statista, 2022; Tourism Review News Desk, 2022). It was expected that shorter stays are more frequent based on the previous research, but additionally it is easier to fit several shorter stays in the timeframe of one longer stay. In previous studies discussed in the theoretical framework, digital nomads were said to visit one to five countries per year (Fiverr, 2018; Tourism Review News Desk, 2022). In this thesis survey, 86 percent had visited a maximum of five countries, confirming the numbers of previous research. When visiting four or five countries a year, stays cannot all be several months long to fit them all in one year. Another factor is that there would be a need for a visa even for European Union citizens if staying longer than three months in one country, which was discussed in chapter 3.1. This can drive people to prefer shorter trips. The numbers speak for themselves as 62 percent never stayed 4-5 months in one country while 86 percent never stayed longer than six months. In addition to the short stays of up to two weeks, 29 percent of participants stayed either often or most of the time in a country for one to two months. Thus, it can be said that the majority of stays is under three months, divided into more frequent short trips of up to two weeks and longer stays of one to two months.

One of the notable findings is that private villa, Airbnb or holiday house was the most commonly used type of accommodation with 86 percent of survey participants using them most of the time or sometimes. Since private rooms, possibility to prepare meals and flexible change and cancellation policies were rated as the most important accommodation features, it is no surprise that these accommodation types were the most frequently used. The results indicate that digital nomads do not necessarily desire high level of service and pampering, but instead they want to be able to live independently during their travels. Booking an accommodation type that allows them to use the accommodation's facilities instead of having to make trips to and spending additional money on coworking spaces, laundry services, restaurants and cafés is convenient for digital nomads. Groceries were the most frequent expenditure as 57 percent spent money on groceries daily and 38 percent weekly, making it clear that digital nomads have a need for a space to store and prepare their groceries during their stays. In his article, Nathan Mayfield (2021) recommended hospitality businesses to provide working spaces, office amenities and possibilities for cooking during longer stays as well as Wi-Fi access that all need to be promoted on the website and social media. His recommendations were shown to be accurate in the survey for this thesis since similar findings were made about the needs and habits of digital nomads. This solidifies the potential of projects such as the Madeira Digital Nomads in Portugal (discussed in chapter 3.2), where services like free Wi-Fi, coworking spaces, events and private accommodation in villas or hotels are centred in the nomad village for easy access (Digital Nomads Madeira Island, 2022; European Travel Information and Authorisation System, 2022; Visit Madeira, 2022).

Digital nomads turned out to be interested in the culture and customs of their destinations whilst not taking a proactive stance in supporting the community and environment by learning about the impact they are making in places they visit. This indicates that digital nomads would fall into the cultural explorer category of the Explorer Quotient by Destination British Columbia (2015). Digital nomads love to get immersed in local culture, people and settings like cultural explorers. While being fascinated by the culture and wanting to be aware how to behave in the destination, they can forget that they are making an impact for better or for worse on the local community and environment with their travels.

To answer the sub-question regarding the factors affecting digital nomads' decision-making while choosing a destination, the most important features they look for are fast and reliable internet, no need for a visa, good public transportation and walkable distances. Furthermore, they look for destinations with tourist attractions and a great variety of restaurants and cafés.

When it comes to finding potential destinations, the most used platform to look for inspiration for future travels is Instagram. Instagram was used most of the time by 62 percent of the participants in the survey, making it the most loyally used platform for travel inspiration. It is the most effective way to reach digital nomads, since the use went up to 90 percent when combining those who used Instagram most of the time and those who used it sometimes. However, this could be affected by the fact that many participants were found through Instagram and thus were active users of the platform. Other popular ways to find destinations were articles and blog posts, digital nomad communities and TikTok.

When travelling between countries, digital nomads preferred airplanes and trains. Airplanes were always used by 43 percent of the participants and often by 33 percent. While it was the most popular mode of transportation, its users were also the most loyal to always use airplanes. The second most common transportation between countries was trains, used always or sometimes by 57 percent of participants. Within the city, most digital nomads walk or take the bus or tram. 86 percent of the participants always walk, whilst 43 percent always and 24 percent often used the bus. The third most common transportation was trams with 29 percent using them always and 19 percent often. Metro or subway was less popular than bus or tram, with none using it always and 38 percent using it often.

When looking at the research sub-question about the preferred accommodation type and length of stay, it was clear that private villa, Airbnb or holiday house were the most popular choice. They were used most of the time by 48 percent of the participants and sometimes by 38 percent. The second most common accommodation type as hotels with 29 percent using them most of the time and 43 percent sometimes. The preferred length of stay in one country was up to two weeks, chosen as the length of stay most of the time by 24 percent each, followed by stays of one to two months or two to three months by 14 percent each. 86 percent never stayed in one country more than six months and 62 percent never stayed four to five months.

The fifth sub-question was about the things digital nomads spend money on in the destination. The most frequent expenditure was groceries, reported as a daily expense by 57 percent and a weekly one by 38 percent. Cafés were used by 81 percent, restaurants by 76 percent and bars, pubs or nightclubs by 33 percent weekly. 19 percent spent money on public transportation daily and 57 percent weekly. On a monthly basis, digital nomads most commonly stated their expenditures to be tourist attraction entry (52 percent), spa or pool access (48 percent) and museums or art galleries (38 percent).

The last sub-question was how digital nomads benefit the destinations and local communities as travellers. Based on their responses to the question about their spending, it is notable that they frequently spend money on food and beverage businesses. 67 percent said they either agree or strongly agree that they choose local businesses whenever possible and also 67 percent responded the same way to a question about eating local cuisine. These statistics would indicate that most of the money spent on these services goes to local business owners and brings in revenue for them. Considering that 86 percent of the participants stated they prefer to travel outside of the destinations peak season, the revenue is coming in during the quieter months and helps to balance out the income for local business owners. Since buses and trams were used by digital nomads, they can help keep up the demand for public transportation within the city even outside the peak season and making it easier for locals to take advantage of these services.

62 percent agreed or strongly agreed that they educate themselves on the local culture, beliefs and customs before their travels. Thus, digital nomads are culture savvy customer segment that can be easier for locals to coexist with. It is clear digital nomads aim to be aware of how to be respectful towards locals and mindful of fitting in the local scene. However, they are not as advanced when it comes to educating themselves on the impacts of travel on local people and destinations – only 43 percent took the initiative to educate themselves on these matters.

To sum up the answer to the travelling habits of digital nomads in Europe, a customer avatar was created to represent digital nomads as a customer segment brought to an individual level (Figure 44). The profile was created for Caroline Holt, a 29-year-old American. She works as a freelancer doing creative consultation. Whilst having the option, she never took advantage of being able to work remotely until the COVID-19 pandemic forced her to make the transition. Ever since, she has worked fully remotely making an estimated 25000 euros annually. She travels both solo and with friends, usually having friends visiting her during her longer stays.

Figure 43. Digital nomad customer avatar

When it comes to destinations, Caroline's favourites have been Spain and Italy. She appreciates recommendations from her peers, tourist attractions, low cost of living and leisure services as well as nature and climate. Her focus is clearly on the leisure side of travel, but she does require the destination to have a reliable internet connection to get her work done.

When it comes to her transportation choices, Caroline uses airplanes to travel longer distances such as the intercontinental flight from the United States of America to Europe or travelling from one side of Europe to another. However, when she is travelling from a country to its neighbouring one, she will take the train or sometimes hop on a bus. When she has arrived in the destination she plans on staying in for a while, she will switch to walking and using the bus to get around the city.

Caroline's biggest expenditure after daily grocery shopping are food and beverage services. She spends money weekly on cafés and restaurants as well as on bars every other week. Around once a month she will treat herself to a visit in the local spa or a museum. During the busiest workdays of the month, she will use coworking spaces to give herself the best possible environment for success. Additionally, she pays for public transportation weekly and laundry services once a month.

When it comes to responsible travel, Caroline's strengths are her willingness to learn about the local culture before travelling, taking her trips outside of the peak season and preferring local businesses whenever possible. She aims to be respectful and mindful of the locals during her stay and tries to blend in. Her weaknesses are travelling to already popular destinations, not educating herself on the impacts of her travels and the amount of trash she creates, although she does try to recycle it to the best of her ability. She does not promote or advocate responsible travel to the people around her.

Caroline stays in private Airbnb apartments for the majority of time, especially when she finds a city she loves and will then stay there between one to two months. Many Airbnb owners give discounts for longer stays, which makes this type of accommodation more affordable. Her choices are furthermore affected by the fact that this type of accommodation gives her privacy, allows her to cook her own meals and make changes in her reservations. Airbnb apartments give her a homier feeling in a new city and let her live closer to the way local residents do. She can additionally save money by cooking herself and has more space to work from home or spend a relaxing evening in. For shorter visits, about one week in length, she will opt for hotel stays for a little luxury knowing she will not need all the additional features of an apartment.

When it comes to planning travels, Caroline finds inspiration for travels and destinations mostly through Instagram and follows it up by reading articles or blog posts to find more in-depth information. She values the opinions of her peers highly, so she checks digital nomad communities for recommendations on destinations and what she feels like are more reliable experiences.

Caroline has been to four countries in the last year and after discovering her love for Southern Europe, she plans to next visit Portugal and Greece. She hopes to live as a digital nomad permanently and is looking to make her travels even more affordable by collaborating with hotels to get a stay in the hotel in exchange of her consultation work.

6.2 Suggestions

6.2.1 Destinations

76 percent of the survey respondents used airplanes as their mode of transportation between countries most of the time or often, so it is essential for destinations to ensure the transportation from the airport to the city is convenient. When it comes to transportation within the city, the two most frequently ways to get around the city were by walking or taking the bus. Up to 86 percent of survey participants always walked in the destination, so it is crucial to ensure walking is safe even in busier city centres and the routes are marked clearly. Additionally, bus routes should cover the essential services and attractions. To take the travel by bus to a next level, there should be Wi-Fi available in the buses and the bus fleet should be kept in good condition.

When it comes to finding the next destination, Instagram was used by 62 percent of the participants to look for travel inspiration. Additionally, updated social media and website was at least somewhat important to 95 percent of the survey participants. Thus, it is crucial that a destination has a solid presence and brand on Instagram to reach digital nomads when they are planning their travels. The website and social media should be updated frequently and visibly promote the characteristics digital nomads found to affect their choice of destination. In order to reach digital nomads in several media platforms, it is recommended to either write blog posts or articles or collaborate with a digital nomad to do it for the destination.

Destinations should make sure that there are accommodation types available for the digital nomads who want to be able to live as trivially as possible in the destination. Whilst having more time in destinations during longer stays, digital nomads correspondingly have more chores to take care of than others staying a shorter period of time. It is easier to focus on enjoying the destination and getting work done when these chores can be done in the comfort of the accommodation and free of charge. While it is not the most beneficial arrangement for the destination that the visitors book an Airbnb and use it for all their additional service needs, there can be other solutions that suit all parties. For example, destination management organisations can work to create collaborations between businesses offering the services digital nomads use. Coworking spaces were used daily or weekly by 29 percent of the participants and monthly by 24 percent. A coworking space collaborating with a laundromat business would allow the customers to use a coworking space whilst their laundry is being washed. This way the digital nomad could use their time efficiently while waiting for the laundry to be done and have one less chore to worry about.

Destinations should analyse their possibility to start a project like the digital nomad village in Madeira, where all the necessary services are centred and the location itself is promoted to digital nomads. In a way, it is like a holiday resort for digital nomads, who can get everything they need from the village conveniently and without additional stress of searching for the necessary services. When creating something like this, it is vital to keep in mind that sustainable practices should be implemented and local people should be involved in the process as well as getting local businesses to participate by offering their services to the villagers. In addition, destinations can create itineraries for digital nomads to get them to stay longer. These suggested itineraries should include a couple of cities with transportation information, available services and attractions in each city.

When looking to improve the sustainability of the destination, digital nomads could be educated and informed about the choices they make. While culturally aware, digital nomads are not as proactively educating themselves about the impact of their travels. Destinations could list options that help digital nomads to have a positive impact in the community and environment in the destination.

6.2.2 Businesses

From a business perspective, it is important to turn digital nomads into loyal customers and get them to come back. For example, cafés and restaurants were among the most used services by digital nomads, out of whom 81 percent spent money on cafés and 76 percent on restaurants on a weekly basis. In order to benefit from the frequent use of these services, a business should make an effort to offer the features digital nomads are looking for to keep them coming back instead of them switching to another business. The survey results indicate that fast and reliable internet is one of the most important things for digital nomads, which means it should be an absolute priority to have. Other ways to engage digital nomads and get their business include giving discounts for frequent customers, collaborating with businesses that offer other services digital nomads use and building customer relations. 71 percent of the survey respondents travelled solo most of the time or sometimes, which means they are spending a notable amount of time on their own. Making them feel seen and becoming a familiar face to them in a new destination can be a huge competitive advantage.

As mentioned in chapter 6.2.1., digital nomads prefer accommodation with comprehensive and home-like facilities. It can be difficult for accommodation businesses like hotels to compete with private villas, Airbnb apartments and holiday houses, but it is possible to make tweaks to get the most out of the facilities on-site. A hotel could convert lobby space or rooms into coworking spaces for guests, invest in a shared laundromat and set up a work corner in their on-site café or restaurant. Without needing to do huge renovations or completely redoing the business model, the hotel could upgrade its facilities to closer match what private apartments can offer and still keep the additional level of service that these apartments lack. All these features should be visibly marketed on social media and reminded of upon check-in.

Tourist attractions were among the things digital nomads looked for in a destination, so any attractions near the business should be highlighted. Additionally, since most digital nomads either walked or used the bus, it would be helpful to provide information on how to reach the business by using these means of transportation. Since buses are often used to get around the city, businesses could take advantage of the potential exposure to this customer segment by having targeted advertisement in buses.

6.2.3 Future research

When it comes to future research on digital nomads as travellers, more detailed insights on specific aspects of their travelling habits could be beneficial. For example, further research on their accommodation choices and requirements, sustainability of their travelling or their integration to local community. Another angle would be to look into how digital nomads perceive certain destinations. The travelling habits of digital nomads belonging to smaller occupational sub-categories like social media influencers, American nationals or information technology professionals would help define these customer segments in more detailed manner.

However, the issue of finding people to participate in the research remains. For this reason, my suggestion for future research would be to conduct interviews instead of online surveys to get enough data from a smaller group of individuals. Additionally, if there is a survey or need to find interviewees, I would strongly recommend finding suitable candidates and sending a message to them directly. This proved to be one of the most effective methods when trying to get more participants.

6.3 Analysis of the thesis research

In this case, the quantitative survey did not have the desired benefits of higher response rate, lower manhours and quick timeline. While research with a higher number of participants could give more credible data for analysis since digital nomads are a heterogenous group, the research for this thesis can be used as an opening discussion on digital nomads as a travelling segment. Despite the sample size staying small, the participant demographics were diverse and mainly aligning with previous research used for the theoretical framework of the thesis. This suggests that the results can still be considered indicative of the larger customer segment. However, having a higher number of participants could have given a more generalisable results and would have allowed the comparison between sub-groups like gender or age to be beneficial.

Because of the issues with response rates, the survey was opened to people who are planning to work remotely even though this was not the initial idea. Most participants still worked remotely on some level, but the survey would have been more credible if the participants had all been living as digital nomads at the moment of filling out the survey.

Even though the online survey posted on Facebook groups did not turn out to be the most suitable method and it caused issues for the research, proving one method to be problematic can help the next researcher choose more wisely and have better success. The survey was opened by a fairly larger amount of people than who filled it out. Whilst the survey took 15-20 minutes to complete, the issue was not so much about getting participants to finish filling it out but to get them to start in the first place. It could be that the opening page did not have enough information about the survey or people would have wanted to be able to move to the following pages to check what kind of questions there are before starting to answer the survey. The first page could have included a short table of contents to make the potential participants more aware of what they can expect.

All in all, the survey results can be taken as reliable steppingstone into the world of digital nomads as travellers while staying mindful that the number of participants was low and does not fully represent the heterogenous target group as accurately as a survey with higher number of participants would.

6.4 My own learning

During the writing process of this thesis, I got to learn a variety of things. First and foremost, I gained knowledge of digital nomads in general and as travellers by doing extensive reading to create the theoretical framework. This survey was the first one I have done at this level, which was a learning experience through the highs and lows. It taught me how to read up on theory and then implement it to form a base to make a survey and gather relevant data for further analysis. On a more technical side, I learnt to use Webropol survey tool to create a survey, follow up on it and examine the data.

In the process, I got to know different research methods and features that surveys can have as well as how to pick the most suitable ones. While the survey response rate was not ideal and caused some issues for the progress of the research, it was a useful learning experience to figure out how to combat the issue and move forwards. Things do not always go as planned, which was proven by this survey, and it is necessary to be prepared to deal with that.

Looking back and knowing that direct messaging turned out to be one of the most effective ways to get responses to the survey, it should have been the main way to find participants in the first place and it is something I would have definitely done differently. Additionally, the survey could have been more narrowed down to make it notably shorter and more niche to get people participating. If possible, there should have been more time to fix the issue with the survey but the best possible changes were made considering the limited time.

Overall, the process of writing this bachelor thesis was a challenging but rewarding task that has given me tools for any future research I may carry out.

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