

# Holiday Barometer among Europeans, Americans & Asians

IPSOS/EUROP ASSISTANCE SURVEY  
20<sup>TH</sup> EDITION



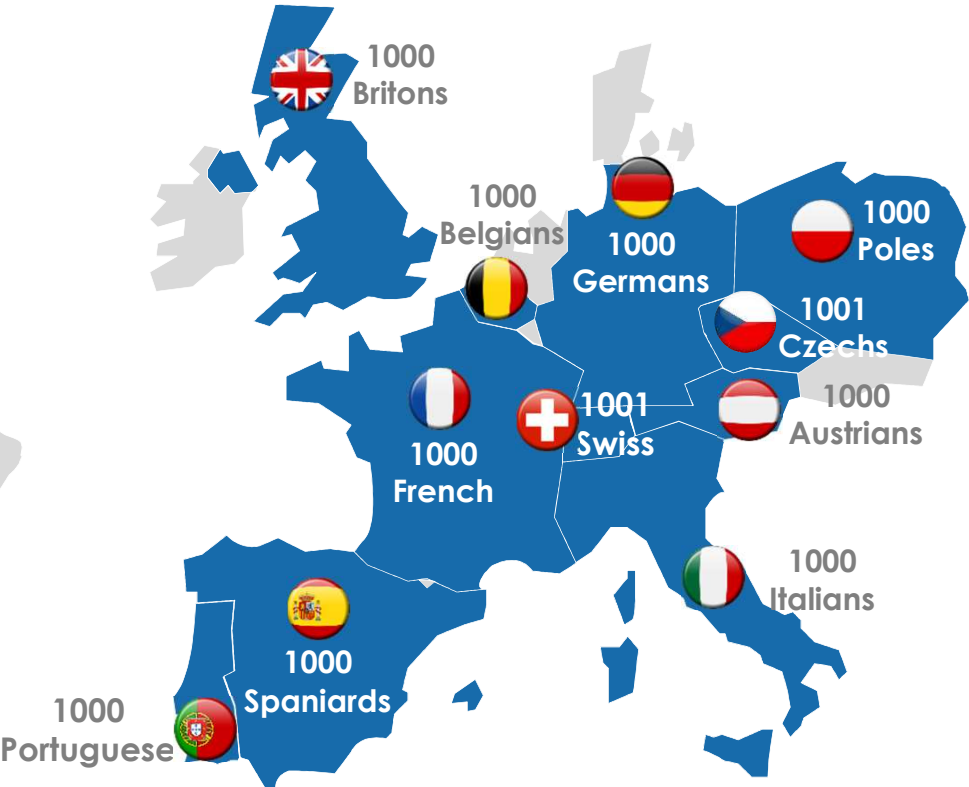
# SCOPE OF THE SURVEY

14 COUNTRIES  
14,002 INTERVIEWS

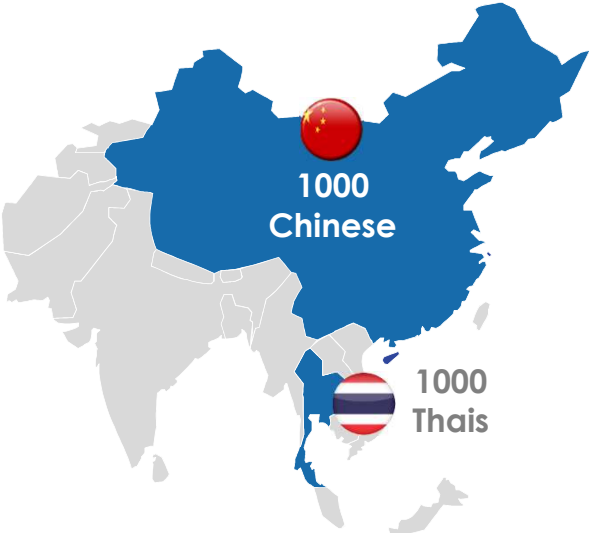
## American scope



## European scope



## Asian scope

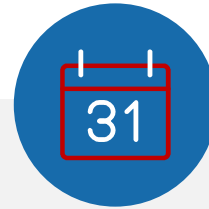


# METHODOLOGY



## Samples

In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older, put together using the quota method (gender, age, profession) after stratification by region and by city size.



## Timeline

The field studies were carried out between May 5th and May 20th 2021



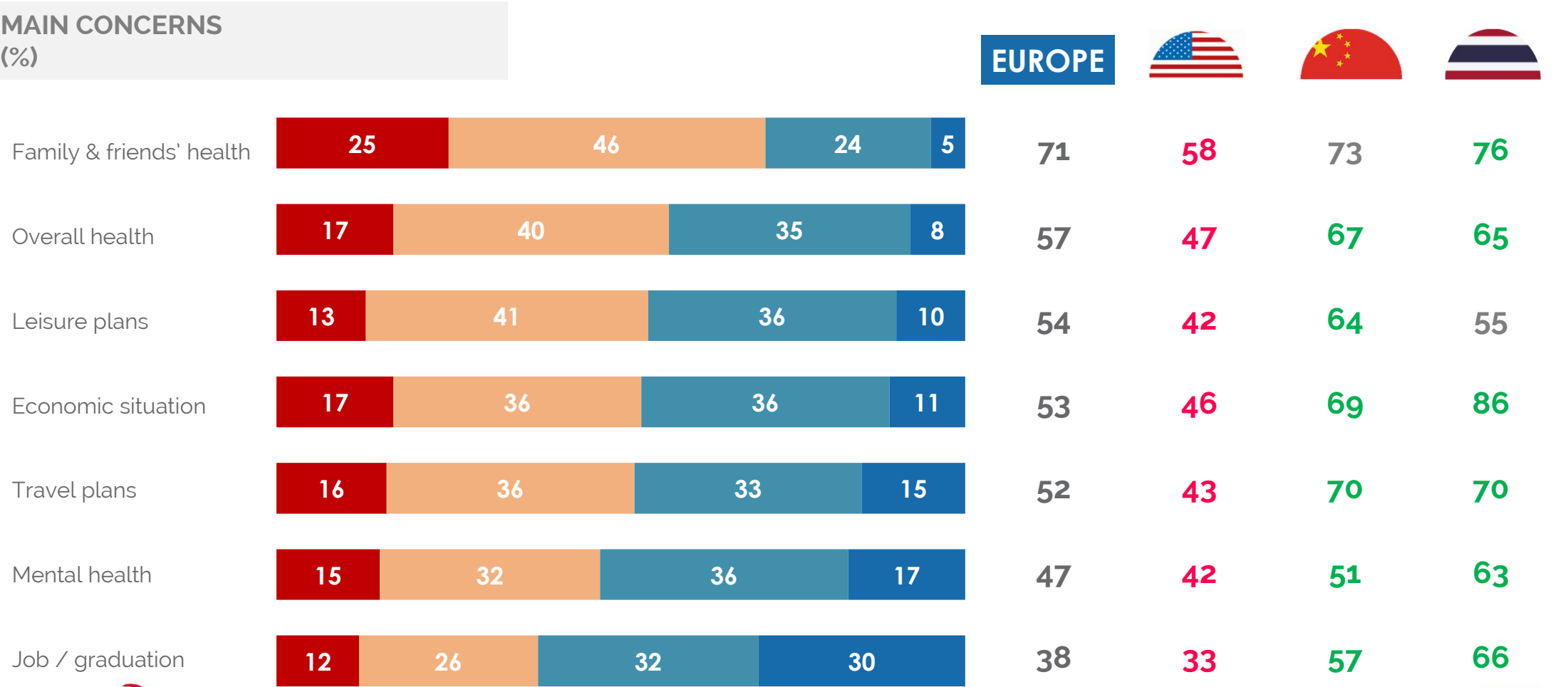
## Method of data collection

Online survey in the 14 countries







# 1. IMPACT OF COVID-19 ON PERSONAL SITUATION

- > Main concerns
- > Activities missed due to COVID

# AMERICANS, EUROPEANS AND CHINESE ARE MAINLY CONCERNED ABOUT HEALTH, WHILE THAI FOCUS MORE ON THEIR ECONOMIC SITUATION



# THE DEGREE OF CONCERN VARIES GREATLY BETWEEN EUROPEAN COUNTRIES: THE ITALIANS, POLES, PORTUGUESE AND SPANISH ARE THE MOST WORRIED OVERALL




MAIN CONCERNS (%)											
											
Family & friends' health	50	70	60	73	58	75	75	88	91	55	68
Overall health	35	53	46	55	47	62	65	75	82	36	50
Leisure plans	39	54	41	60	51	58	54	59	52	48	54
Economic situation	38	46	43	56	39	59	61	75	71	42	46
Travel plans	43	54	51	54	48	59	53	55	49	55	52
Mental health	34	48	36	44	40	50	51	64	65	35	45
Job / graduation	25	29	29	34	26	49	39	57	61	33	32

Are you concerned about the following regarding COVID-19?Very + quite concerned

GAME CHANGERS










# AS EUROPEANS ARE EXPERIENCING MORE RESTRICTIONS THAN AMERICANS AND CHINESE, THEY MISS VARIOUS ACTIVITIES MORE INTENSELY, ESPECIALLY SEEING THEIR RELATIVES AND MOVING FREELY

ACTIVITIES MISSED <u>A LOT</u> DUE TO COVID (%)	EUROPE			
Seeing relatives without restrictions	58	32	29	33
Moving when and where wanted	52	20	32	42
Going to a restaurant	40	28	21	28
Travel within own country	39	27	28	32
Travel abroad	36	23	20	22
Going to the cinema / theatre / museums / concerts	35	25	22	29
Go to inside sport places: swimming pool, gym, ...	27	20	18	22
Going to bars / nightclubs	20	15	10	18
Go to shopping centers	20	16	22	28



AMONG EUROPEANS, ITALIANS ARE THE ONES WHO MISS THE ACTIVITIES THE MOST, FOLLOWED BY THE POLES, THE FRENCH AND THE AUSTRIANS. ON THE CONTRARY, THE BRITISH AND THE CZECHS SEEM LESS AFFECTED BY THE RESTRICTIONS

ACTIVITIES MISSED A LOT DUE TO COVID (%)

											
Seeing relatives	49	55	40	64	51	67	54	58	63	46	53
Moving when/where wanted	44	41	38	60	47	77	58	54	51	42	33
Going to a restaurant	47	37	28	45	48	49	35	36	26	45	35
Travel within own country	29	14	27	36	35	66	42	39	44	19	25
Travel abroad	41	39	30	30	36	43	33	33	30	49	39
Going to the cinema, ...	33	24	28	34	28	52	41	36	32	30	29
Go to inside sport places	33	20	30	25	32	34	35	26	18	28	18
Going to bars / nightclubs	18	18	20	18	15	31	29	20	18	20	17
Go to shopping centers	19	12	14	20	22	28	25	19	15	13	14





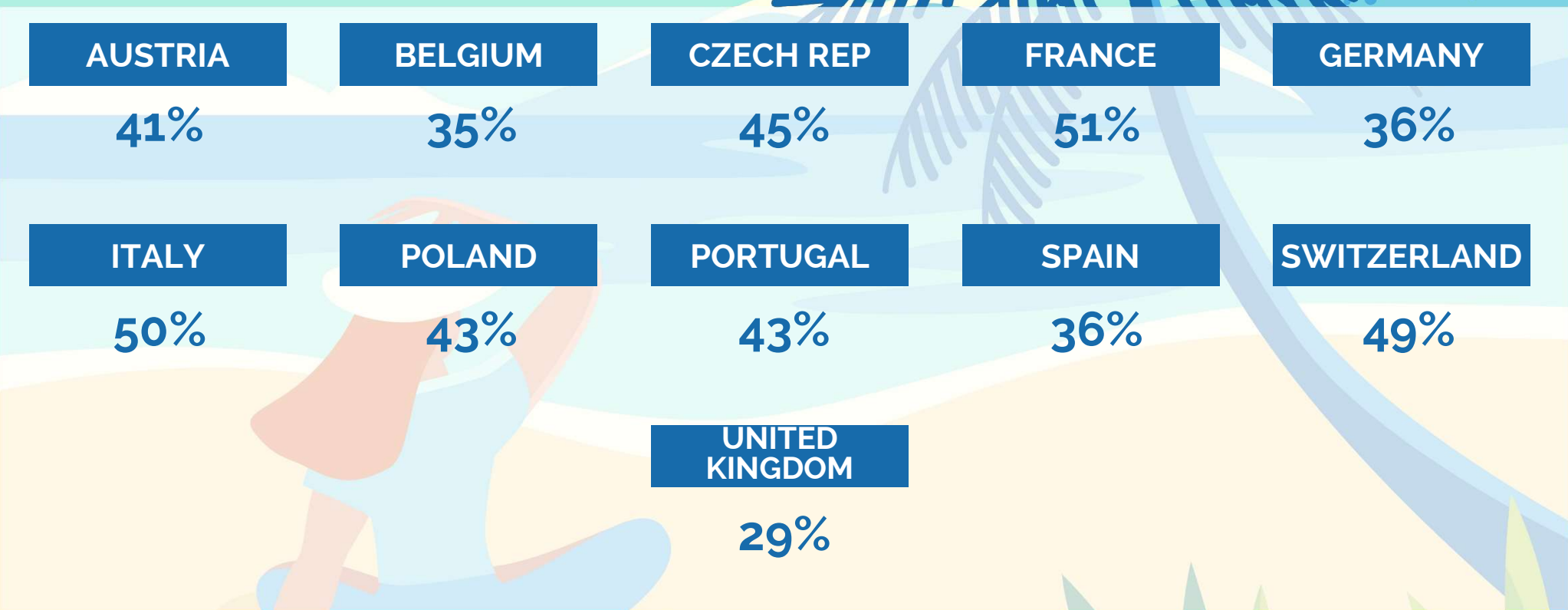
# 2.

## BACK TO 2020 SUMMER HOLIDAYS

- > Summer travels
- > Destinations
- > Reasons not to travel




AMONG THE EUROPEANS, SITUATIONS ARE QUITE DIVERSE: FRENCH, ITALIANS AND SWISS ARE THE ONES WHO WENT THE MOST ON HOLYDAYS

SUMMER HOLIDAY TRIPS IN 2020



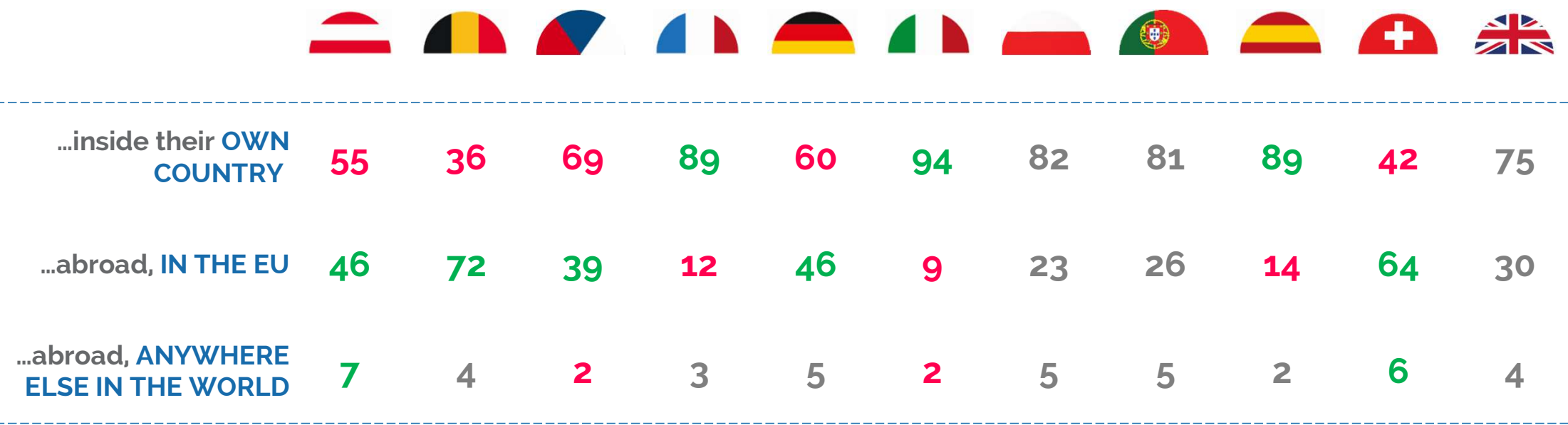
LAST SUMMER, HOLIDAY MAKERS MOSTLY TRAVELED INSIDE THEIR OWN COUNTRY

2020 SUMMER DESTINATION  
(%)

	EUROPE			
...inside their OWN COUNTRY /STATE	79%	63%	97%	93%
...abroad, IN BORDER COUNTRIES / STATES	25%	50%	6%	12%
...abroad, ANYWHERE ELSE IN THE WORLD	4%	8%	3%	1%

SAME GOES FOR THE EUROPEANS HOLIDAY MAKERS, EXCEPT FOR THE BELGIANS AND THE SWISS, WHO MAINLY TRAVELED WITHIN THE EU

2020 SUMMER DESTINATION (%)



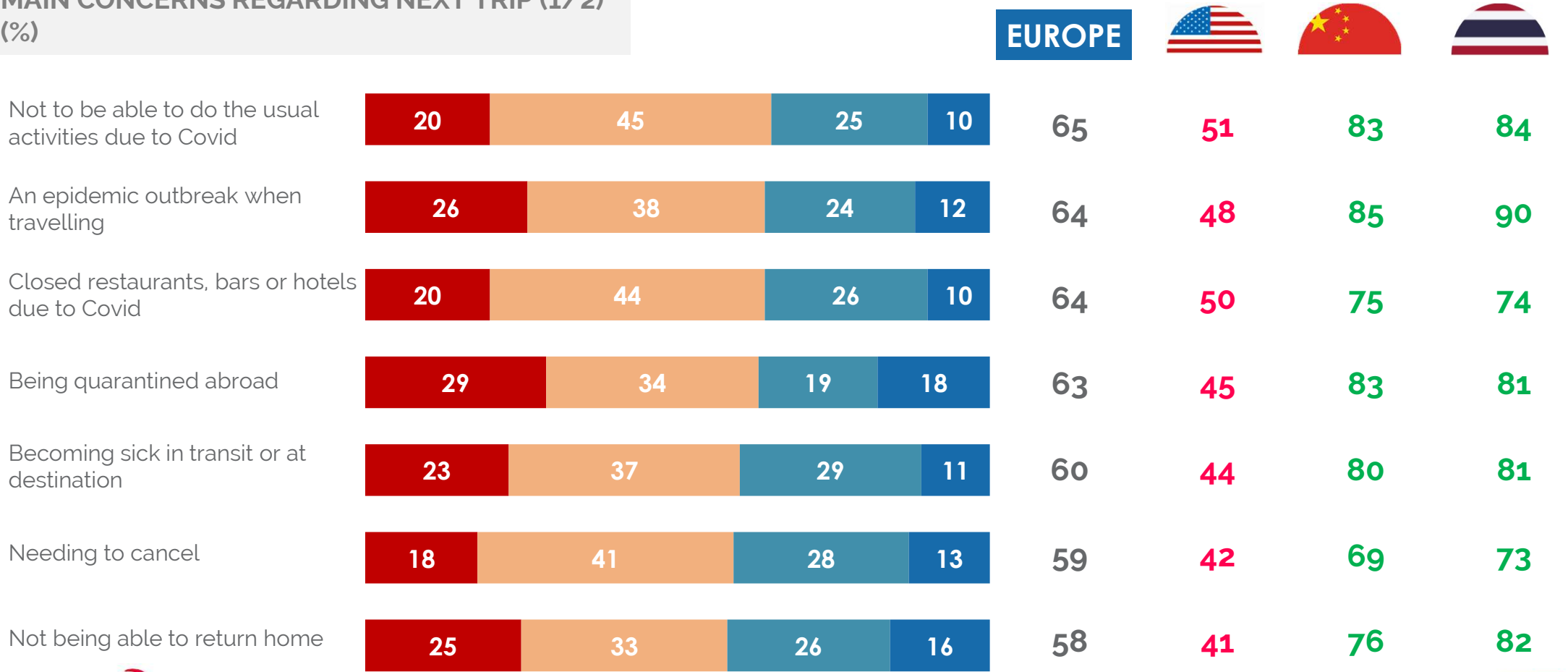
# 3.

## STATE OF MIND REGARDING NEXT TRIP

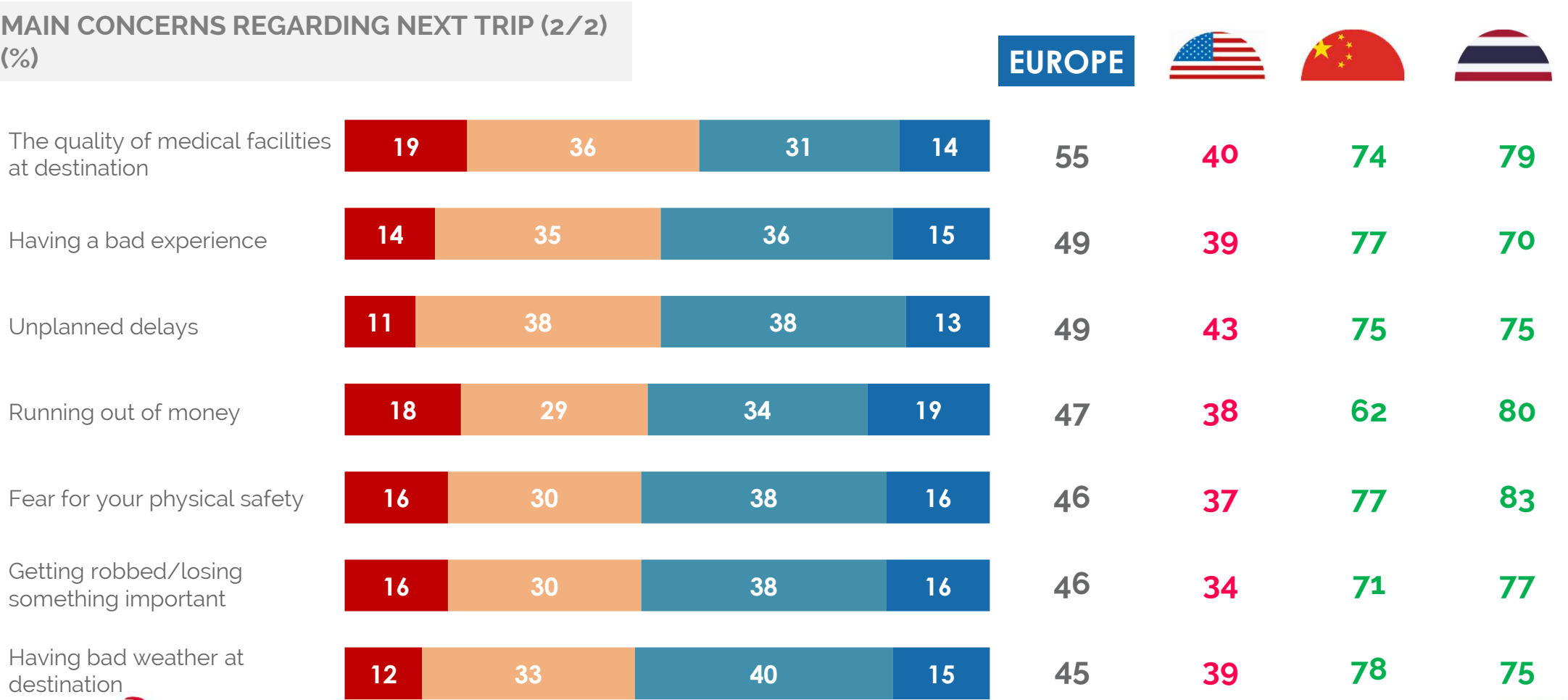
- > Excitement or anxiety ?
- > Main concerns and conditions to fulfill
- > Do and don't
- > Intention to get vaccinated
- > Opinion on smart vaccination / digital travel health pass

# WHEN THINKING ABOUT THEIR NEXT TRIP, THE RESPONDENTS FEEL MAINLY CONCERNED ABOUT ISSUES RELATED TO THE SANITARY CRISIS. AMERICAN PEOPLE ARE SYSTEMATICALLY LESS WORRIED THAN CHINESE OR THAI

MAIN CONCERNS REGARDING NEXT TRIP (1/2)  
(%)




OTHER RISKS ARE DREADED BY LESS THAN ONE OUT OF TWO RESPONDENTS
















PORTUGUESE, SPANIARDS AND ITALIANS (AND POLISH IN A LESSER EXTENT) ARE THE MOST FRIGHTENED BY MEDICAL RISKS SUCH AS BEING QUARANTINED OR BECOMING SICK. SWISS AND AUSTRIANS ARE THE LEAST FRIGHTENED.

MAIN CONCERNS (1/2)  
(%)

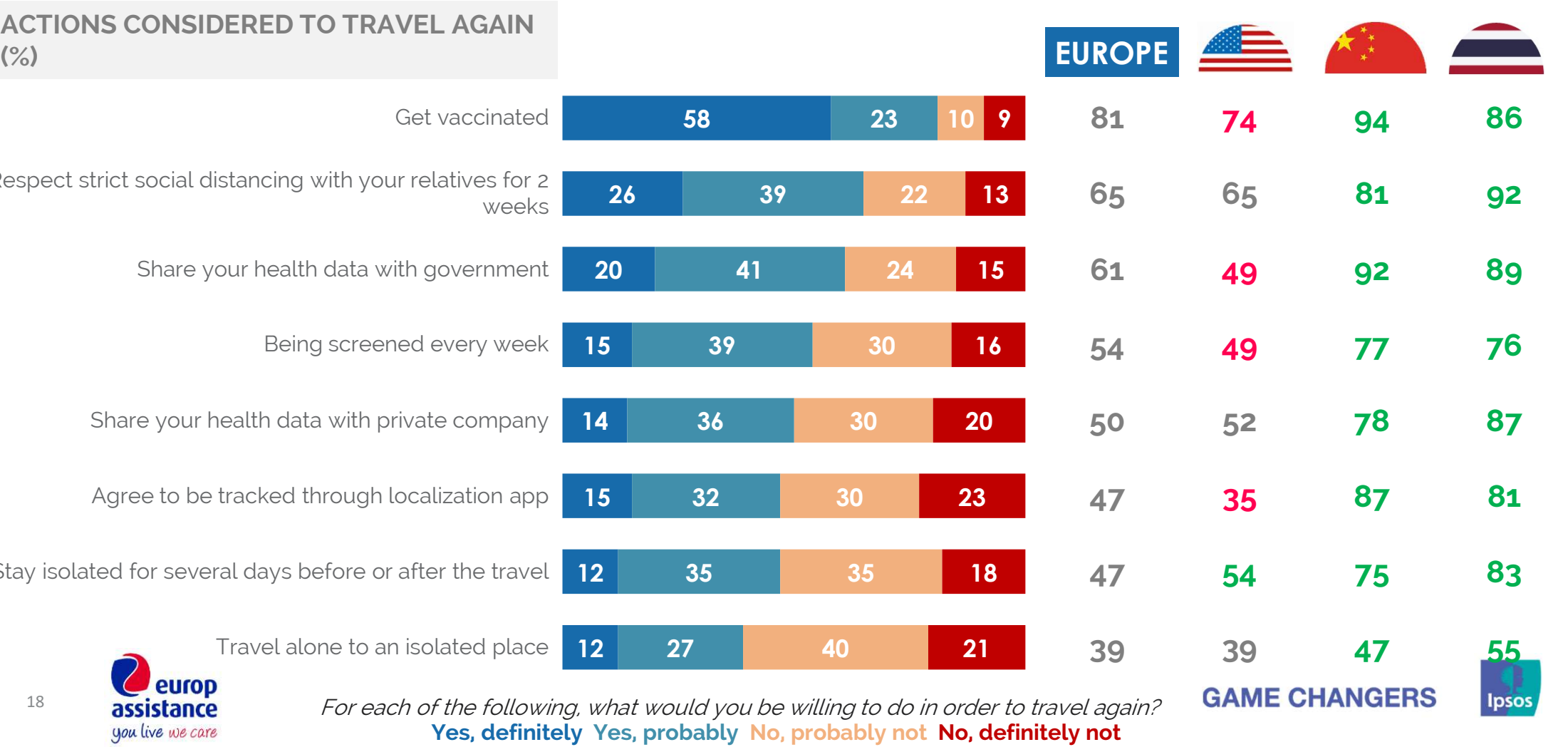
											
Not to be able to do the usual activities due to Covid	51	63	52	70	59	68	72	71	67	53	64
An epidemic outbreak when travelling	48	64	50	63	54	68	65	81	82	47	64
Closed restaurants, bars or hotels due to Covid	55	68	52	66	64	63	65	64	64	58	64
Being quarantined abroad	56	66	51	56	62	71	61	73	76	58	59
Becoming sick in transit or at destination	46	54	47	54	51	71	66	75	82	44	50
Needing to cancel	48	55	44	60	54	62	59	64	66	51	60
Not being able to return home	48	53	44	56	54	56	62	72	77	45	57

LOGICALLY, THEY ALSO FEEL PARTICULARLY CONCERNED BY THE QUALITY OF MEDICAL FACILITIES AT DESTINATION

MAIN CONCERNS (2/2)  
(%)












											
The quality of medical facilities at destination	46	49	39	51	51	63	58	70	73	41	49
Having a bad experience	37	41	32	43	46	59	29	66	71	32	52
Unplanned delays	42	37	33	37	50	50	51	60	62	40	54
Running out of money	37	39	33	49	37	58	61	67	64	36	31
Fear for your physical safety	35	40	32	43	41	55	56	64	63	29	35
Getting robbed/losing something important	34	41	38	47	34	52	56	66	69	30	36
Having bad weather at destination	35	39	39	49	32	53	56	60	50	31	42

# THE RESPONDENTS ARE MAINLY WILLING TO GET VACCINATED IN ORDER TO TRAVEL AGAIN. AMERICANS ARE MORE RESERVE ABOUT SHARING THEIR HEALTH DATA WITH THE GOVERNMENT AND BEING TRACKED THROUGH LOCALIZATION APPS

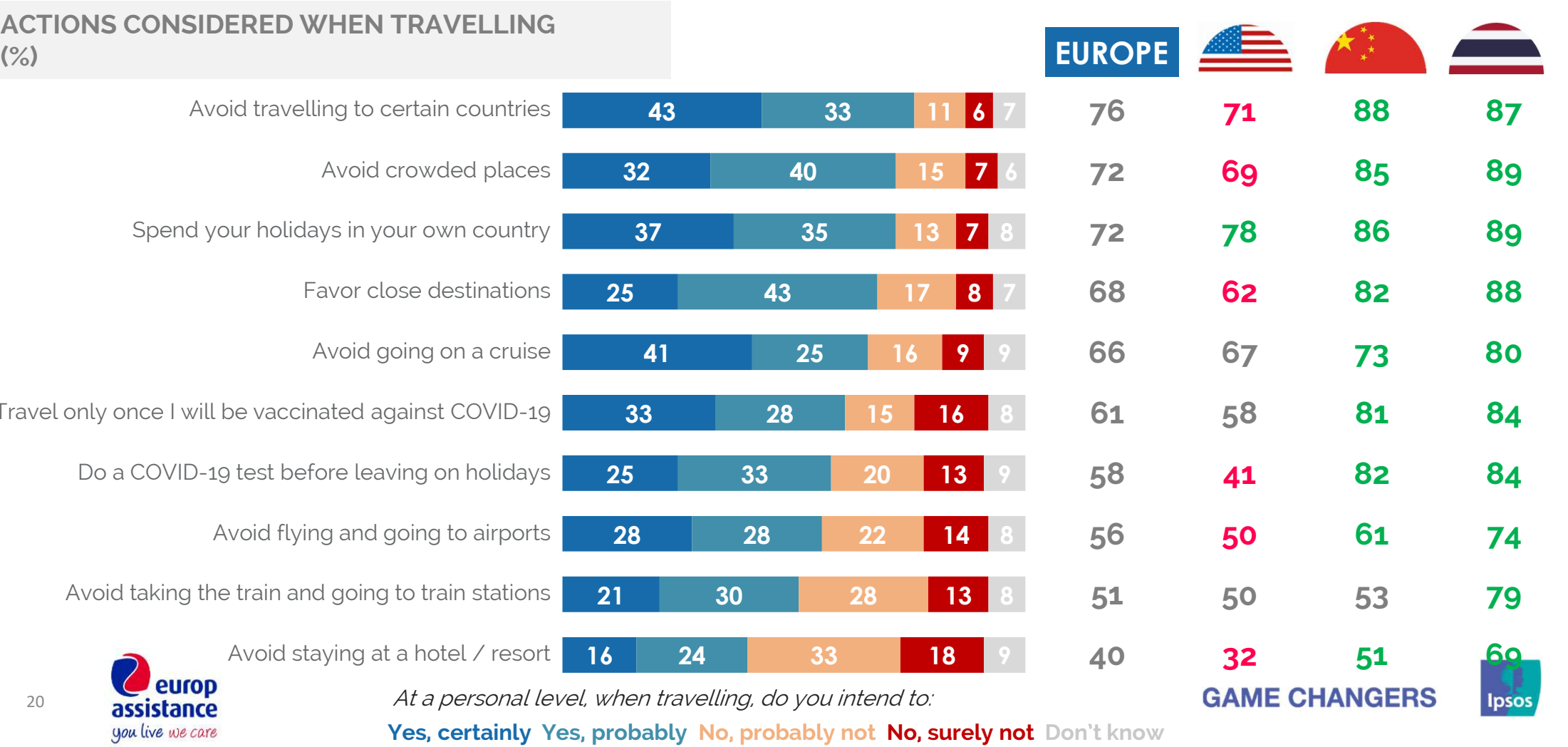


# AMONG THE EUROPEANS, THE BRITISH, ITALIAN, PORTUGUESE ARE THE MOST WILLING TO TAKE ACTIONS IN ORDER TO BE ABLE TO TRAVEL AGAIN.

## ACTIONS CONSIDERED TO TRAVEL AGAIN (%)












											
Get vaccinated	76	84	71	74	76	88	71	87	87	73	92
Respect strict social distancing with your relatives for 2 weeks	41	58	49	79	43	75	54	86	68	50	79
Share your health data with government	63	58	50	50	61	74	35	74	65	57	73
Being screened every week	63	39	42	44	56	60	40	63	58	45	67
Share your health data with private company	46	42	50	40	45	60	36	65	53	48	61
Agree to be tracked through localization app	46	34	34	38	52	54	21	50	54	51	56
Stay isolated for several days before or after the travel	39	42	39	49	44	54	38	53	47	40	53
Travel alone to an isolated place	39	38	50	39	45	41	28	41	39	47	35

# MOST OF THE EUROPEAN RESPONDENTS ARE WILLING TO PICK CAREFULLY THEIR DESTINATION BY AVOIDING CERTAIN COUNTRIES AND EVEN FAVORING HOLIDAYS IN THEIR OWN COUNTRY (ESPECIALLY AMERICAN, CHINESE AND THAI PEOPLE)



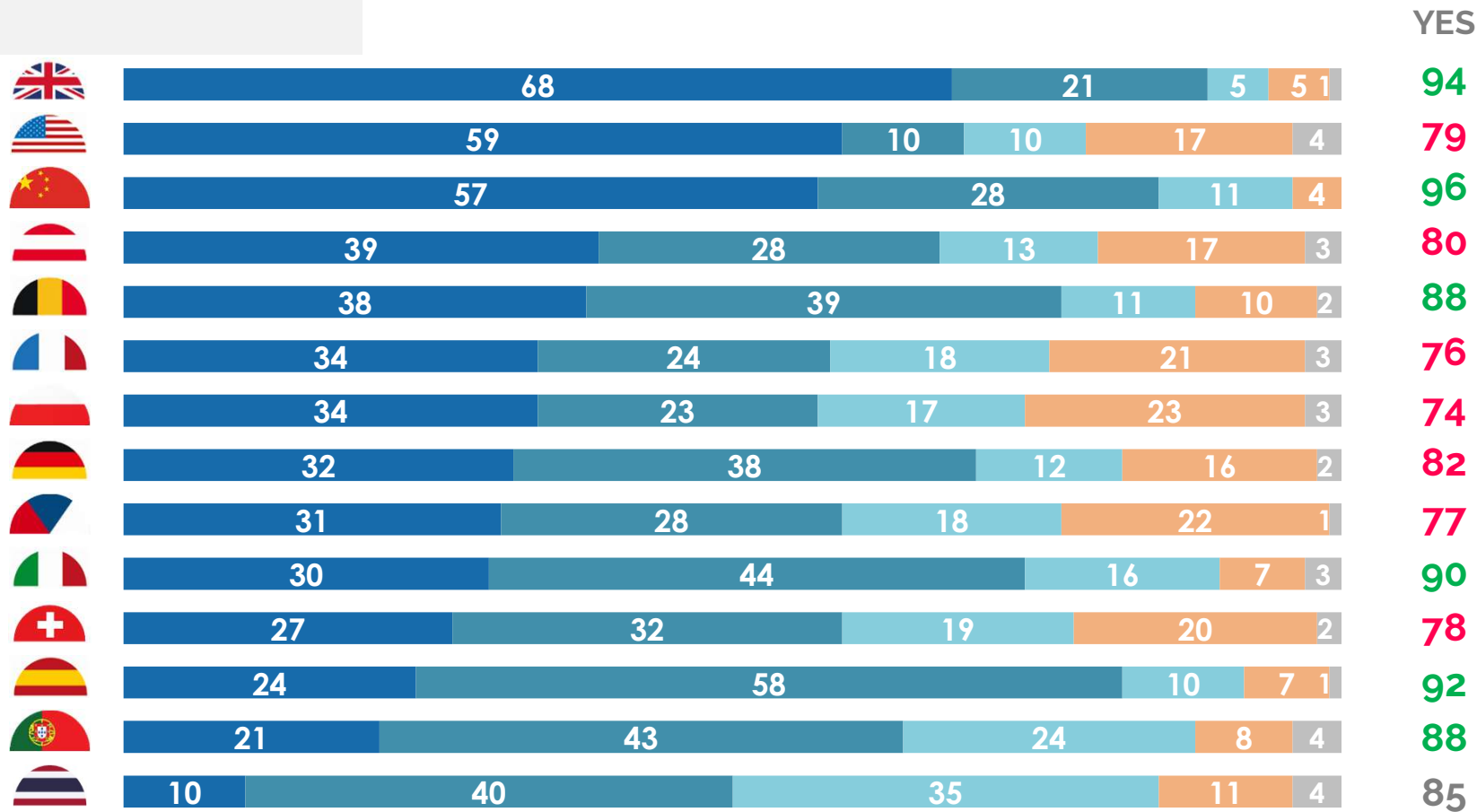
# FRENCH, ITALIANS, PORTUGUESE AND SPANIARDS ARE THE ONES WHO INTEND THE MORE TO TRAVEL IN THEIR OWN COUNTRY. THESE LAST 3 ARE ALSO THE MOST CAREFUL EUROPEAN POPULATIONS WHEN IT COMES TO PRECAUTIONARY MEASURES

## ACTIONS CONSIDERED WHEN TRAVELLING (%)

											
Avoid travelling to certain countries	76	73	69	76	73	80	62	85	81	70	82
Avoid crowded places	59	72	71	71	63	85	66	89	81	58	73
Spend your holidays in own country	66	50	69	75	63	84	68	85	83	61	66
Favor close destinations	69	63	64	65	63	77	56	83	79	63	66
Avoid going on a cruise	70	61	37	68	71	69	44	67	67	62	73
Travel only once vaccinated	61	63	53	55	59	65	54	67	61	49	70
COVID-19 test before leaving	70	53	56	51	59	64	37	73	60	56	64
Avoid flying and going to airports	53	51	45	57	57	61	49	57	58	44	55
Avoid taking the train and going to train stations	43	49	32	49	53	60	44	53	52	36	51
Avoid staying at a hotel / resort	34	36	33	42	41	39	35	43	42	31	38

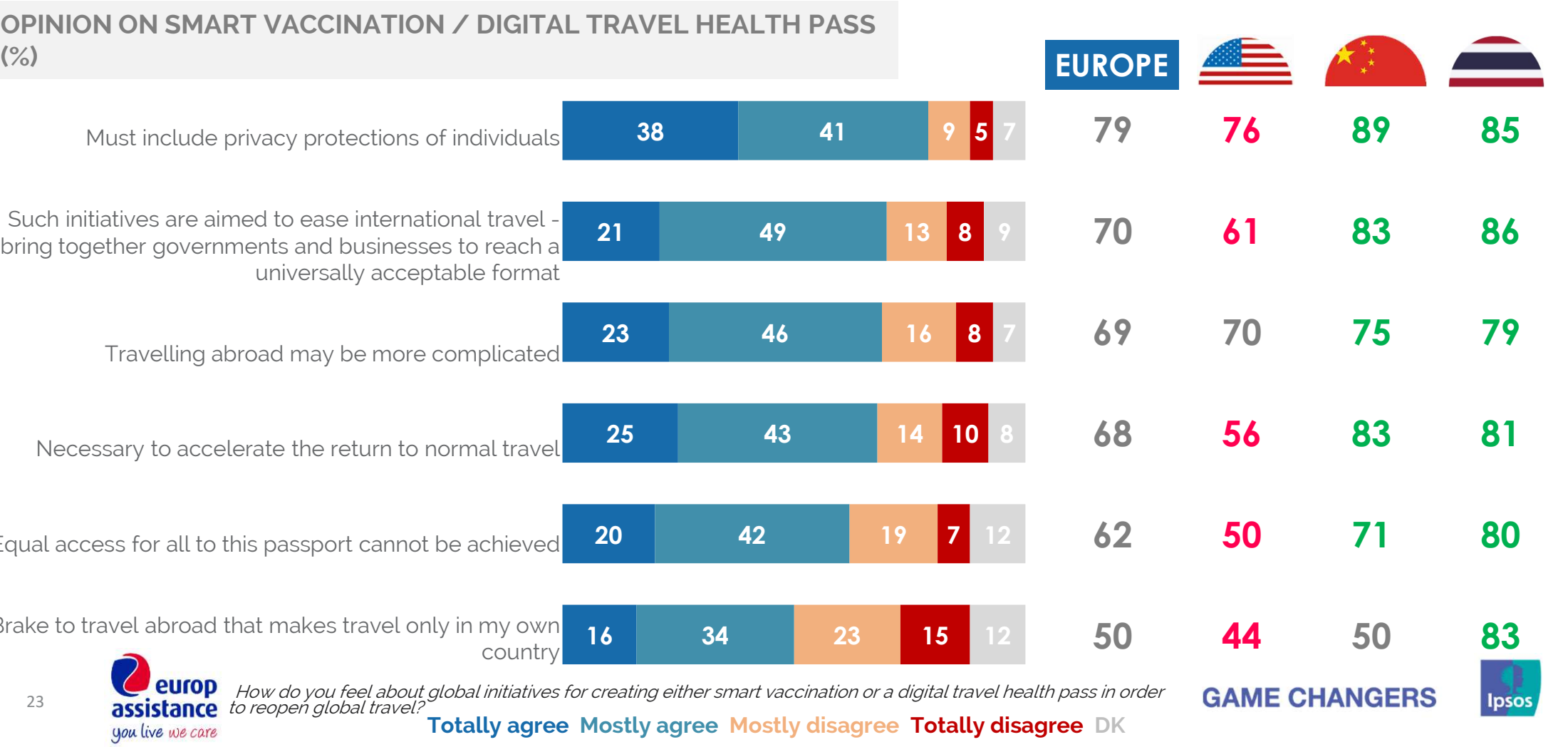
# THE BRITISH, AMERICANS AND CHINESE ARE THOSE WHO HAVE MOSTLY BEEN ALREADY VACCINATED AGAINST COVID-19. THE POLES, CZECHS, FRENCH AND SWISS ARE THE MOST RELUCTANT TO RECEIVE THE VACCINE

COVID-19 VACCINATION INTENTION (%)
















# RESPONDENTS MOSTLY AGREE ON THE FACT THAT DIGITAL TRAVEL HEALTH PASS MUST INCLUDE PRIVACY PROTECTION OF INDIVIDUALS. EXCEPT FOR THE THAI, IT IS NOT CONSIDERED AS A BRAKE TO TRAVEL ABROAD



# PORTUGUESE, SPANIARDS, ITALIANS AND FRENCH CONSIDER THE MOST THAT THE DIGITAL TRAVEL HEALTH PASS IS A BRAKE TO TRAVEL ABROAD

## OPINION ON SMART VACCINATION / DIGITAL TRAVEL HEALTH PASS (%)

											
Must include privacy protections of individuals	75	78	79	81	72	80	80	88	84	77	81
Such initiatives are aimed to ease international travel - bring together governments and businesses to reach a universally acceptable format	68	68	66	64	66	79	60	85	77	66	74
Travelling abroad may be more complicated	71	59	70	60	67	70	65	78	68	69	84
Necessary to accelerate the return to normal travel	68	65	61	63	64	77	56	83	75	62	70
Equal access for all to this passport cannot be achieved	65	60	63	54	62	64	64	61	74	61	56
Brake to travel abroad that makes travel only in my own country	48	42	51	55	41	56	53	61	54	50	47



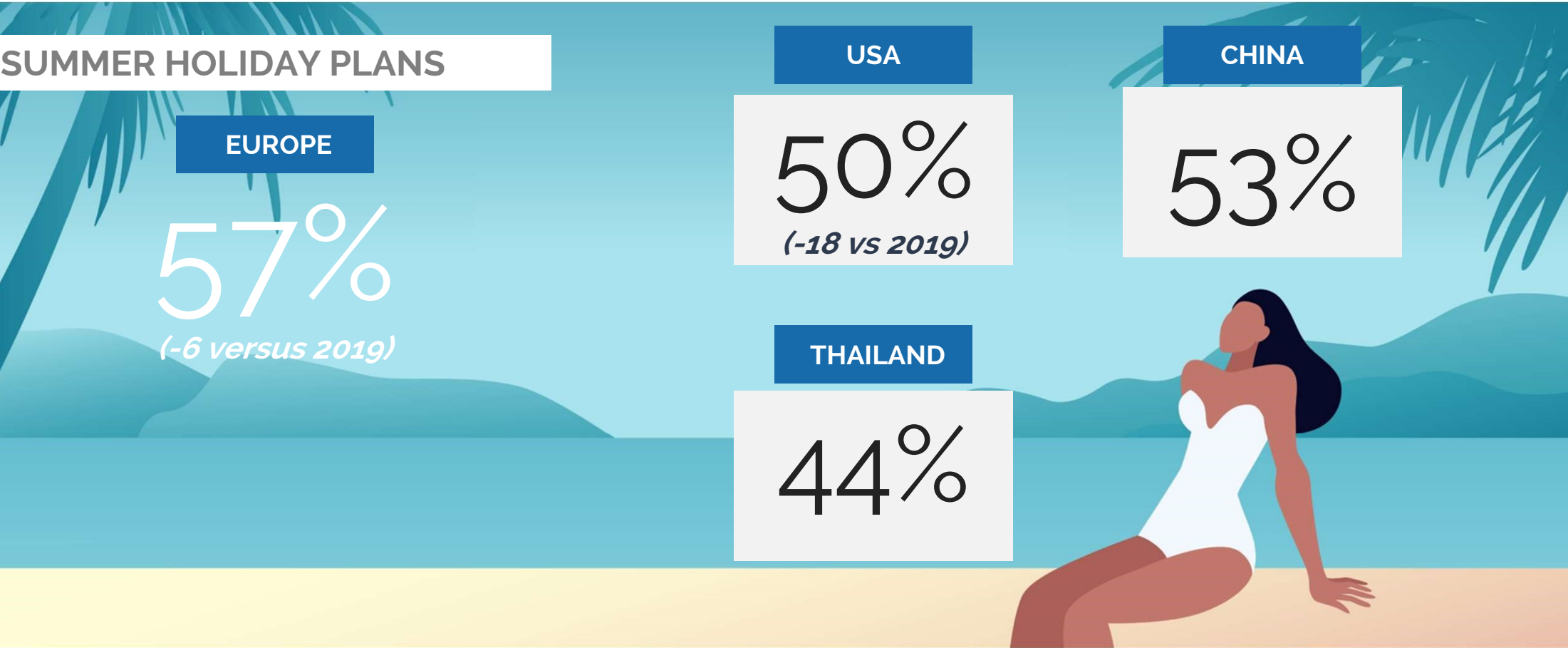
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## 2021 SUMMER HOLIDAY PLANS

- > Summer holiday plans
- > Budget
- > Summer trip duration

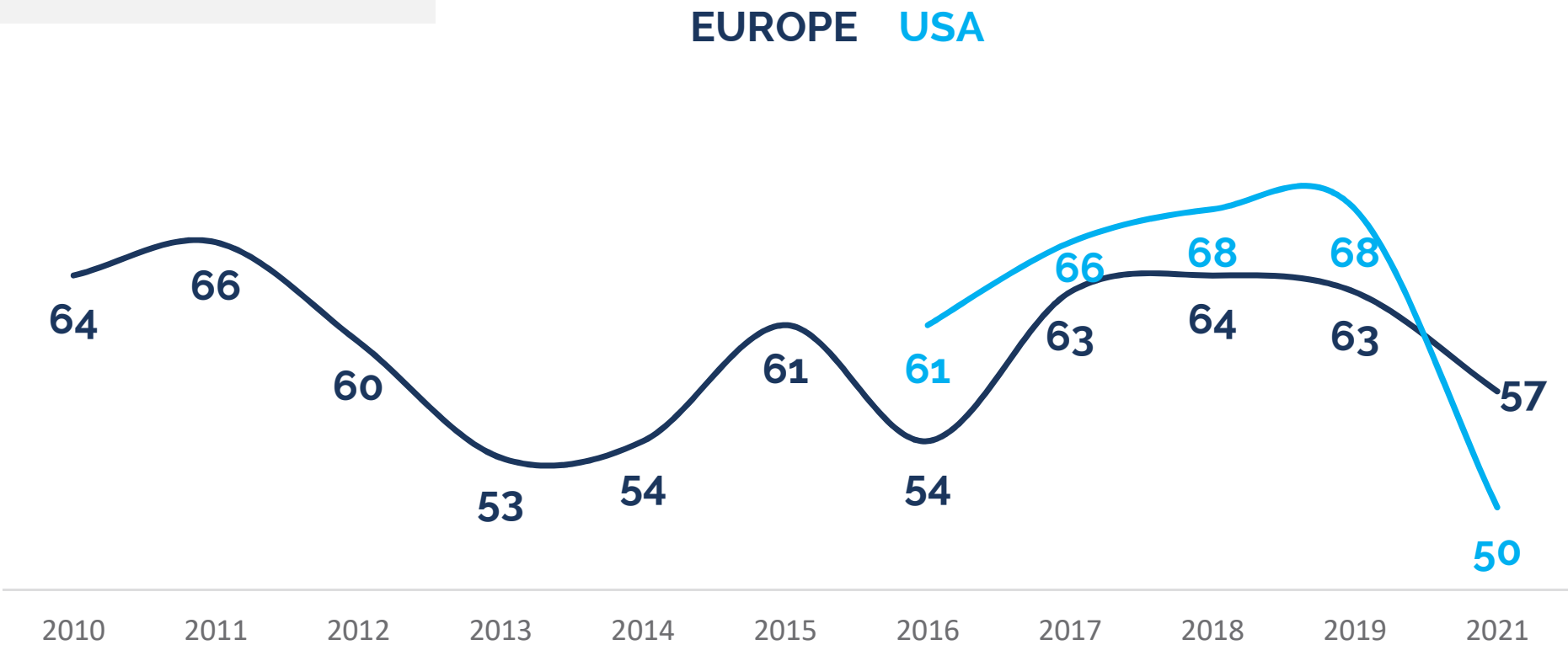
SUMMER PLANS ARE DECREASING COMPARED TO 2019, ESPECIALLY IN THE US

SUMMER HOLIDAY PLANS



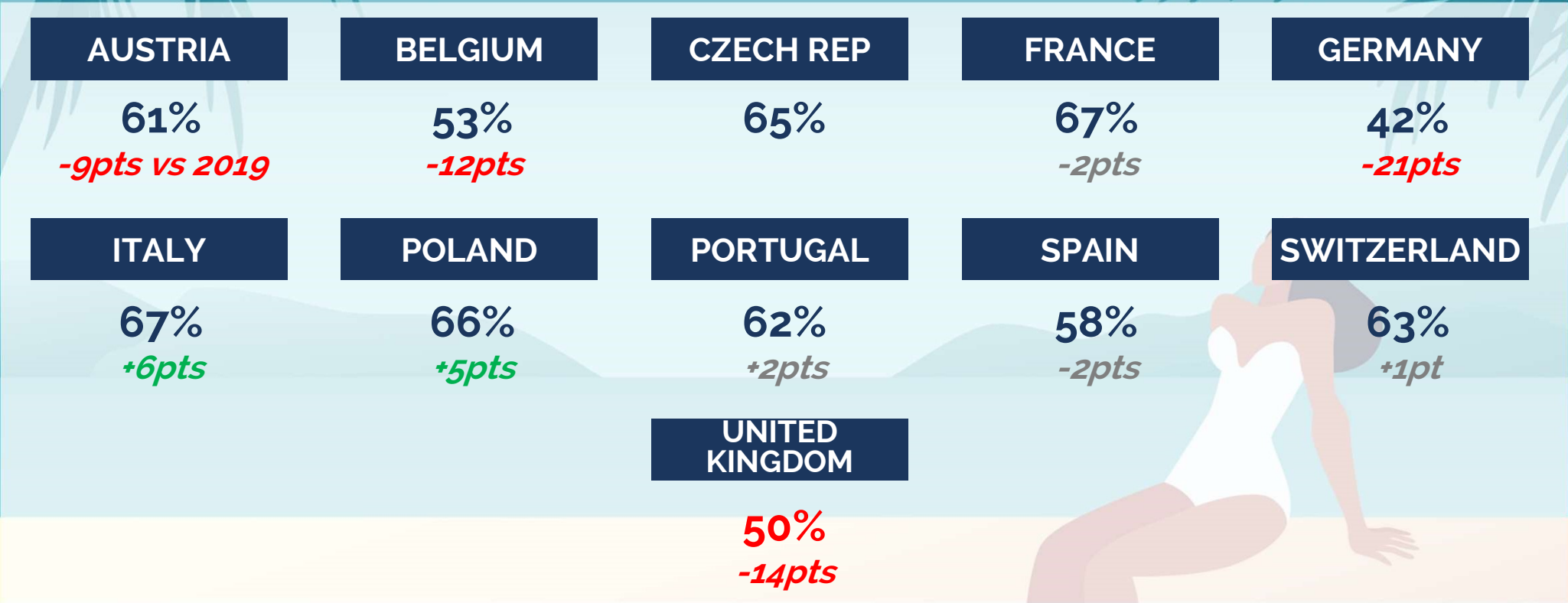
THE NEGATIVE TREND OCCURS AFTER A CONSOLIDATED POSITIVE TREND BETWEEN 2017 AND 2019

EVOLUTION OF HOLIDAY PLANS (%)



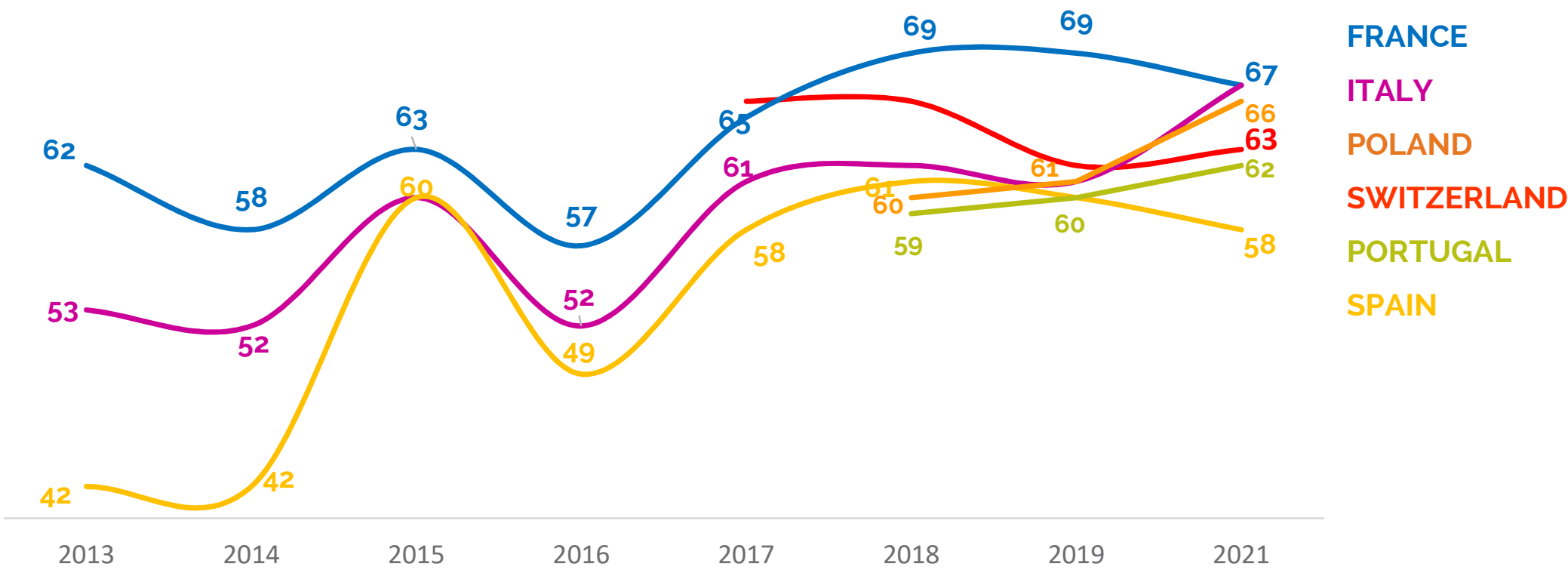
AMONG EUROPEANS, THE SITUATIONS ARE QUITE DIVERSE

SUMMER HOLIDAY PLANS



INTENT TO GO ON HOLIDAY REMAINS STABLE IN FRANCE, PORTUGAL, SPAIN AND SWITZERLAND. IT INCREASES SLIGHTLY IN ITALY AND POLAND

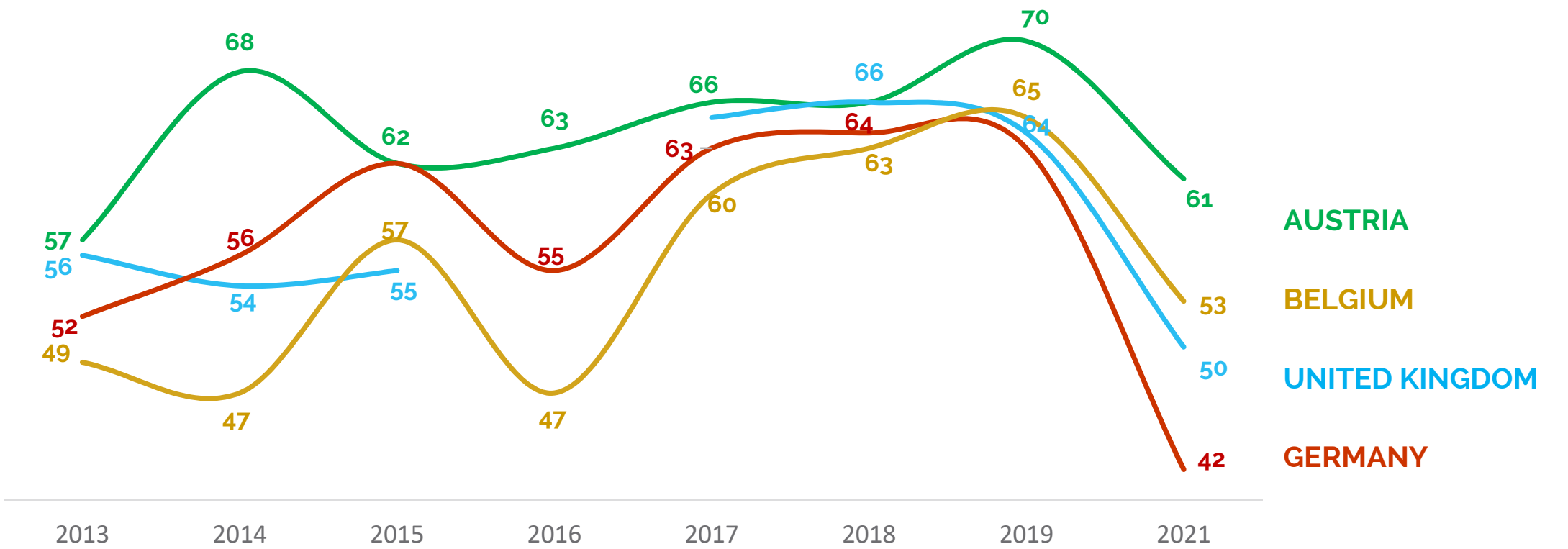
SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)








ON THE CONTRARY, IT IS PARTICULARLY DECREASING IN GERMANY, THE UK, BELGIUM AND AUSTRIA

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)



BUDGET RESTRICTIONS ARE MOSTLY IMPACTING THE EUROPEANS AND AMERICANS. THE THAI ARE THE MOST AFRAID OF THE PANDEMIC




MAIN REASONS NOT TO TRAVEL IN 2021 (%)

	EUROPE			
Couldn't afford it	27	36	16	24
Wanted to avoid the sanitary restrictions	27	12	37	45
Afraid of the pandemic	26	26	27	57
Didn't want to risk quarantine	19	11	25	31
Want to save money	16	29	21	30

BUDGET REASONS FOR NOT TRAVELLING HAVE INCREASED EVERYWHERE THIS YEAR, WHEREAS  
SANITARY REASONS ARE LESS FREQUENT.

MAIN REASONS NOT TO TRAVEL IN 2021 VS  
MAIN REASONS NOT TO TRAVEL IN 2020  
(%)

5)

	EUROPE							
	2020	2021						
Couldn't afford it	22	27	25	36	12	16	21	24
Wanted to avoid the sanitary restrictions	29	27	21	12	45	37	35	45
Afraid of the pandemic	33	26	41	26	40	27	49	57
Didn't want to risk quarantine	20	19	17	11	32	25	32	31

THE GLOBAL HOLIDAY BUDGET DECREASED VS 2019

SUMMER HOLIDAY BUDGET

EUROPE

€ 1,556

-21% VS 2019

Evolution calculated on same scope as 2019

USA

\$2 319

-2%

€1 878

CHINA

¥11 850

€1 422

THAILAND

฿53 400

€1 068

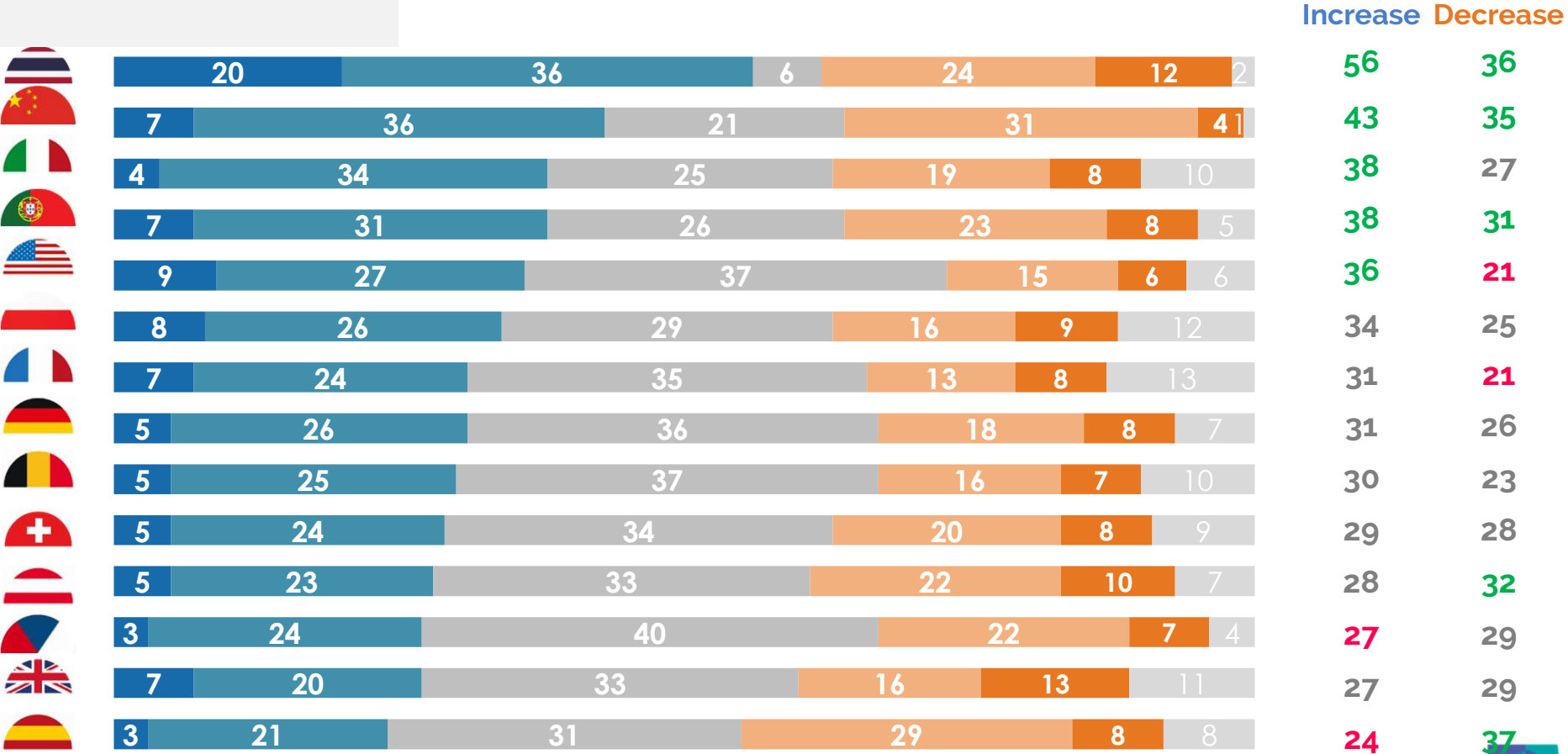
THE BUDGET DECREASE COMPARED TO 2019 IS PARTICULARLY IMPORTANT IN SPAIN, FRANCE, GERMANY AND AUSTRIA. PORTUGAL IS THE ONLY COUNTRY MAINTAINING A STABLE BUDGET

## SUMMER HOLIDAY BUDGET

<b>AUSTRIA</b> <b>€2 088</b> -21%	<b>BELGIUM</b> <b>€1 983</b> -12%	<b>CZECH REP</b> <b>Kč 26 900</b> <b>€807</b>	<b>FRANCE</b> <b>€1 627</b> -26%	<b>GERMANY</b> <b>€1 843</b> -25%
<b>ITALY</b> <b>€1 589</b> -10%	<b>POLAND</b> <b>Zł 3 950</b> -9% <b>€869</b>	<b>PORTUGAL</b> <b>€1 339</b> =	<b>SPAIN</b> <b>€1 256</b> -30%	<b>SWITZERLAND</b> <b>CHF 2 713</b> -17% <b>€2 442</b>
<b>UNITED KINGDOM</b> <b>£1 543</b> -17% <b>€1 775</b>				

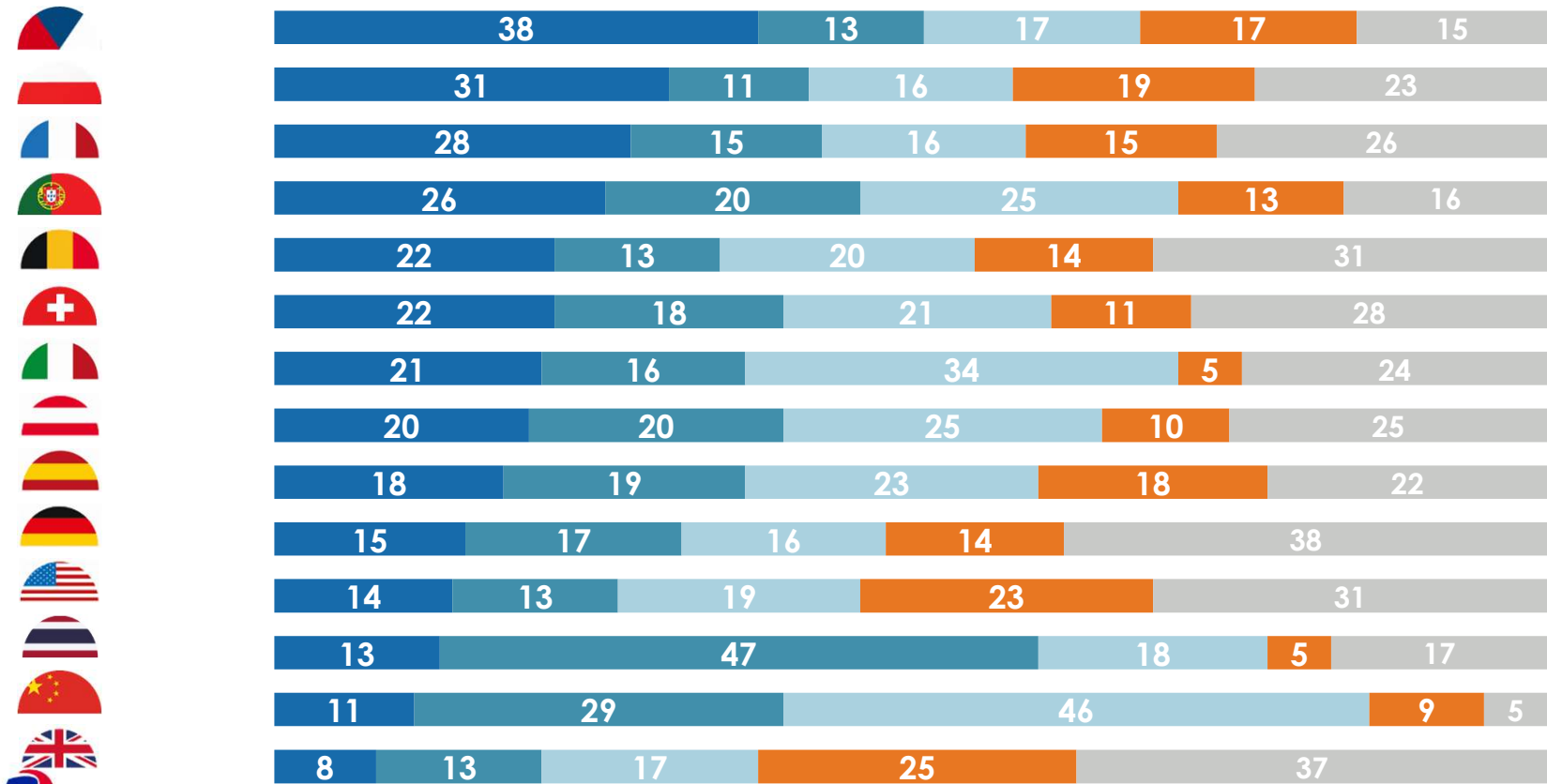
THIS DECREASE IN AVERAGE BUDGET HIDES DISPARITY WITHIN COUNTRIES: BETWEEN ONE QUARTER (SPAIN) TO MORE THAN A HALF (THAILAND) INTEND TO INCREASE THEIR BUDGET, WHEREAS BETWEEN ONE FIFTH (FRANCE, THE US) AND MORE THAN ONE THIRD (THAILAND, CHINA) INTEND TO DECREASE IT.

# EVOLUTION OF HOLIDAY BUDGET (%)



IN CZECH REPUBLIC, POLAND AND FRANCE, ABOUT ONE OUT OF THREE TRAVELERS DOES NOT WANT TO CUT ITS HOLIDAY BUDGET

IMPORTANCE OF HOLIDAY BUDGET



Which of the following statements best matches your opinion? This year, summer trips make up a budget category...

Don't want to touch Cut costs significantly Cut costs slightly Will do without None

GAME CHANGERS





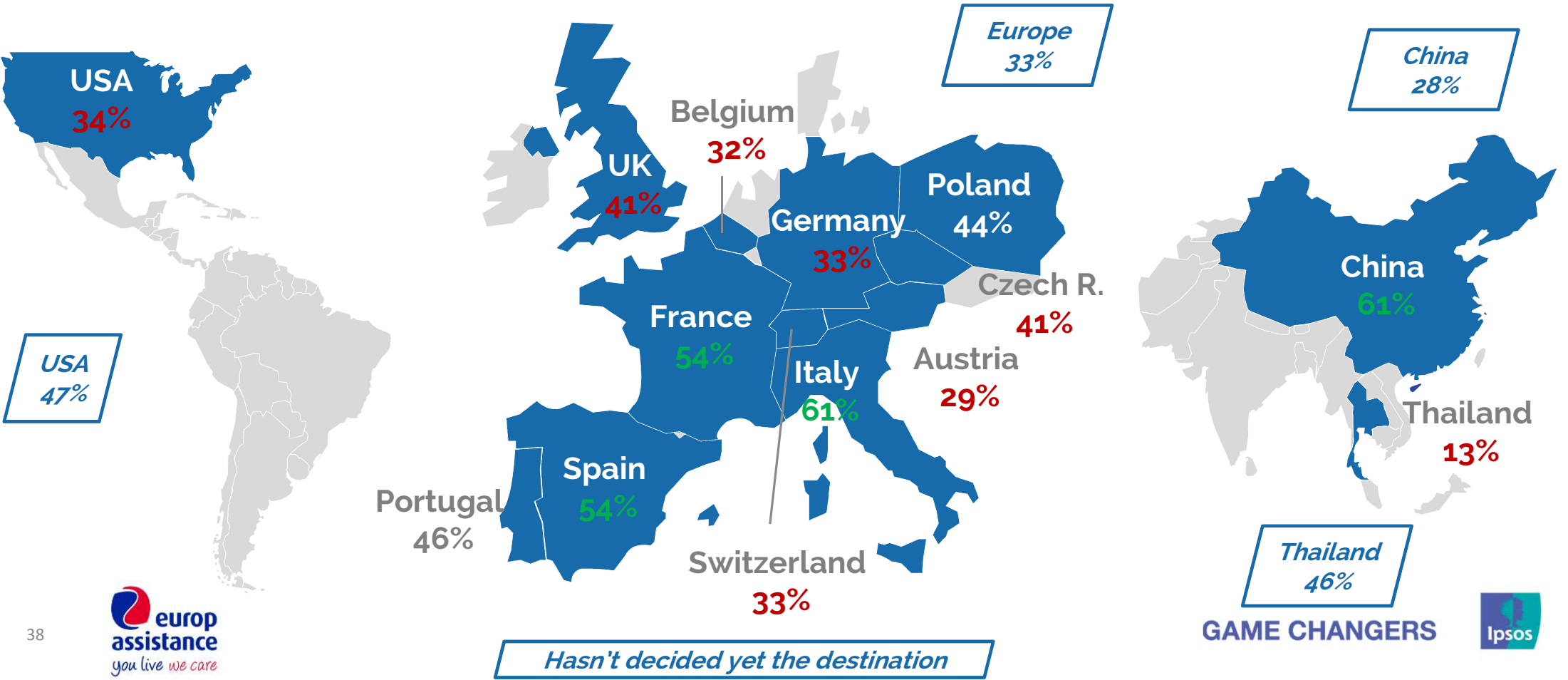
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## FAVORITE DESTINATIONS

- > Summer destinations (country)
- > Summer destinations (type of location)
- > Choice criteria for destination

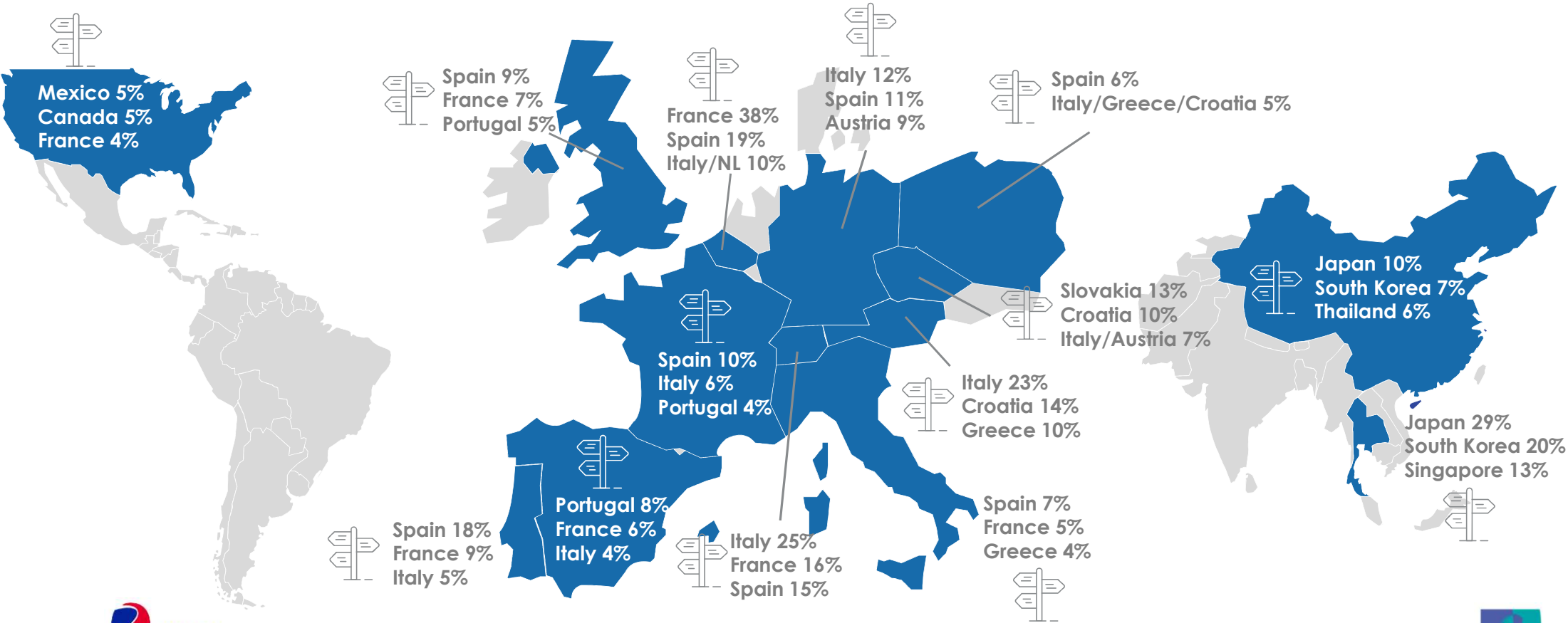
CHINESE, ITALIAN, FRENCH AND SPANISH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER. AMERICAN AND THAI ARE THE MOST UNDECISIVE

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



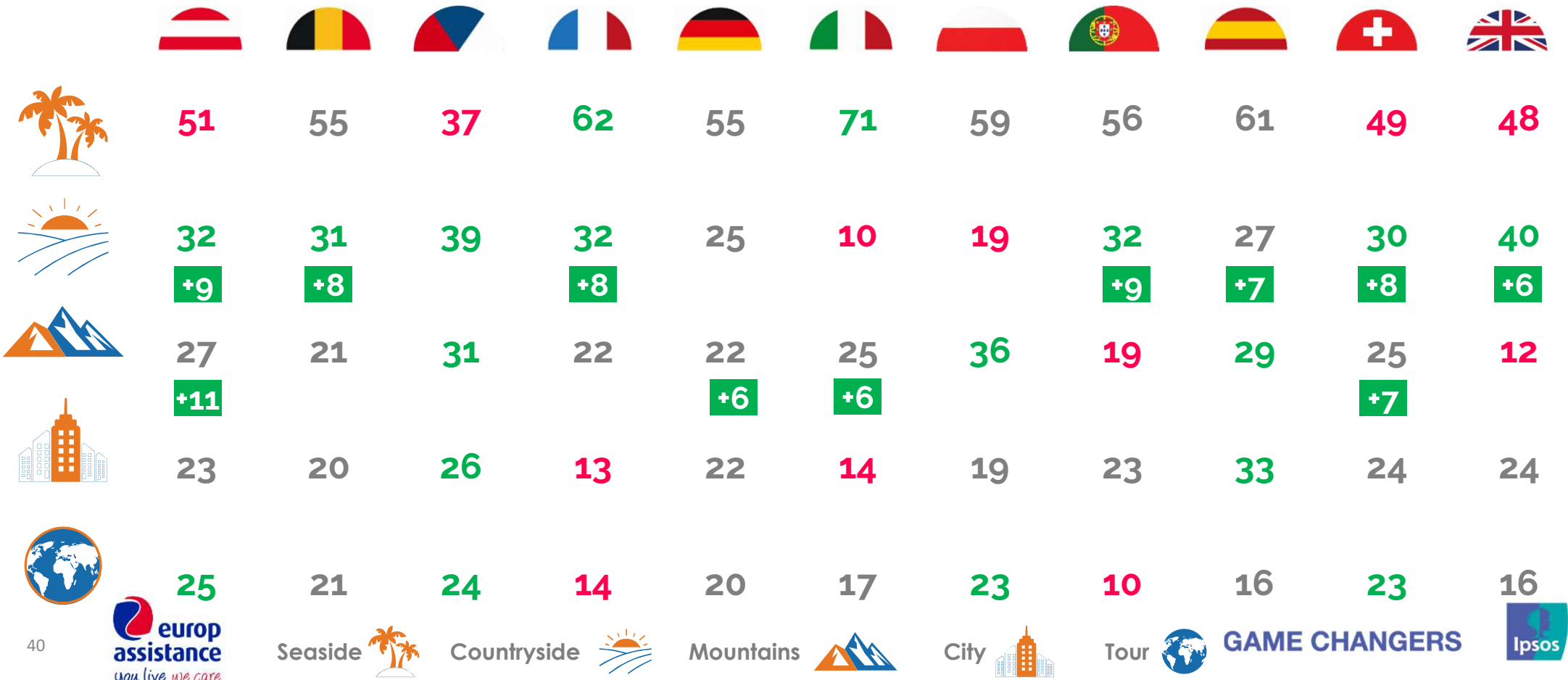
WHEN CHOOSING TO TRAVEL ABROAD, HOLIDAY MAKERS MOSTLY CHOOSE NEIGHBORING COUNTRIES.  
IN EUROPE, FRANCE, ITALY AND SPAIN ARE STILL THE MOST ATTRACTIVE COUNTRIES

FOREIGN DESTINATIONS PLANNED THIS SUMMER



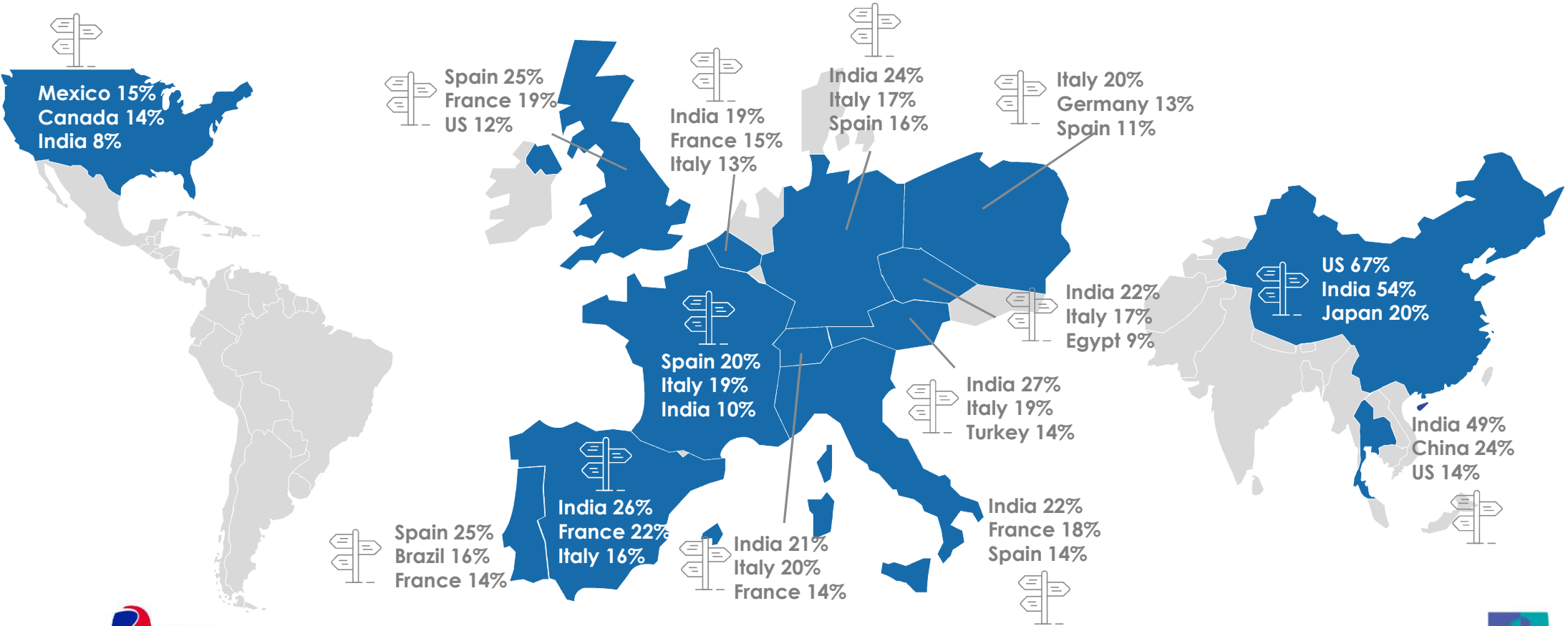
YET, EUROPEANS ARE INCREASINGLY ATTRACTED BY THE COUNTRYSIDE AND THE MOUNTAINS

SUMMER HOLIDAY PREFERENCES



IN THE PANDEMIC CONTEXT, HOLIDAYMAKERS WILL MOSTLY AVOID TRAVELING TO INDIA THIS SUMMER. EUROPEANS WILL ALSO AVOID FRANCE AND ITALY

FOREIGN DESTINATIONS AVOIDED THIS SUMMER



Which country/countries did you give up visiting this year?  
Questions asked to those who mentioned that the risk of a coronavirus infection played a role in their choice of destination



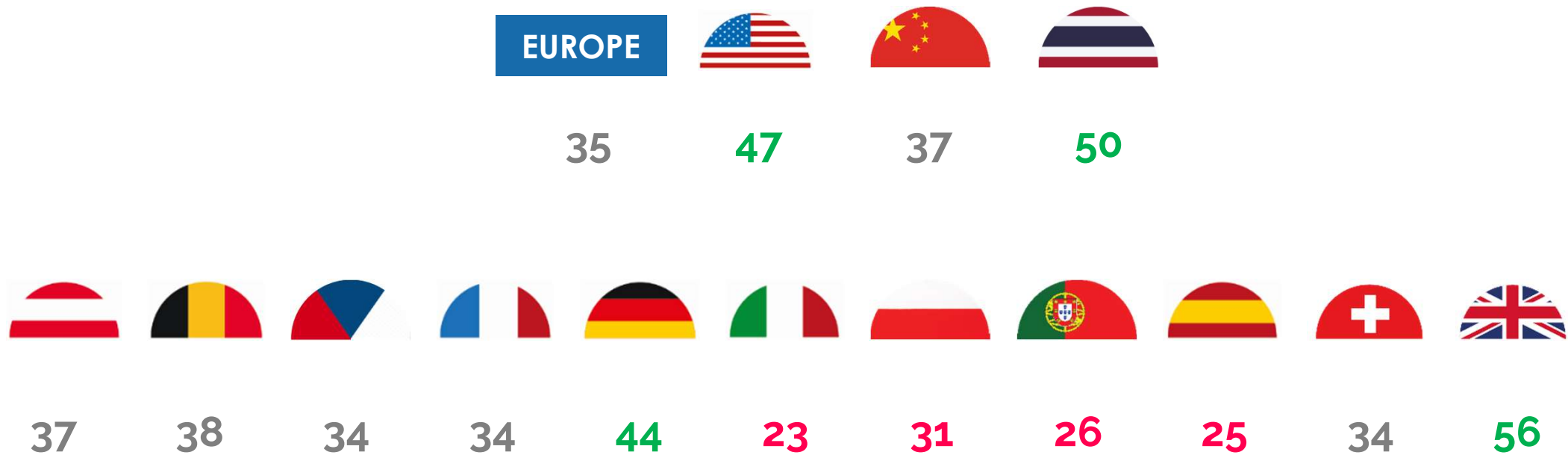
6.

## 2021 SUMMER HOLIDAYS ORGANIZATION

- > Holiday reservation
- > Travel partners
- > Transportation
- > Accommodation
- > Activities













MOST OF THE HOLIDAY MAKERS DIDN'T BOOK THEIR TRIP YET. THE BRITISH, THE THAI, THE AMERICANS AND THE BELGIANS ARE THE MOST ORGANIZED AS THEY ALREADY BOOKED AT LEAST PART OF THEIR TRIP

SUMMER HOLIDAY RESERVATION (%)






# SUMMER HOLIDAYS ARE MOSTLY SHARED WITH THE CLOSEST MEMBERS OF THE FAMILY (PARTNER AND CHILDREN), ESPECIALLY IN ITALY, PORTUGAL AND AUSTRIA

## TRAVEL PARTNERS

												
Partner	63	63	64	66	64	70	63	67	66	59	66	66
Children	24	31	36	34	23	35	40	37	29	26	29	29
Friends	16	16	25	14	12	16	21	11	17	19	15	15
Alone	12	9	11	9	15	7	10	8	8	14	10	10
Parents	8	10	11	9	8	7	10	10	11	10	12	12
Extended family	6	5	9	9	3	10	11	9	8	6	8	8
Siblings	6	8	6	7	5	6	8	6	10	5	5	5














# EUROPEANS PREFER TO USE THE CAR TO GO TO THEIR HOLIDAY DESTINATION WHILE THE ASIANS PREFER TO USE THE PLANE

TRANSPORTATION	EUROPE			
Personal car	64	55	28	48
Plane	22	38	55	42
Train	14	5	43	7
Bus	5	6	11	7
Boat	4	3	3	3
Rental car through an agency	3	10	4	5
Bike	3	5	2	4
Camper van	3	5	1	7
Rental car between private individuals	2	6	5	8
Carpooling	2	6	4	6
Motorbike	2	3	1	7

PERSONAL CAR IS THE PREFERRED TRANSPORTATION MODE ACROSS EUROPE. PLANE IS ALSO APPRECIATED IN SWITZERLAND, BELGIUM AND PORTUGAL

TRANSPORTATION

											
Personal car	63	62	59	69	60	70	65	58	70	51	57
Plane	25	30	21	16	26	18	19	34	20	34	28
Train	16	12	21	15	13	13	17	11	13	17	13
Bus	5	5	17	2	4	2	9	7	6	5	6
Boat	3	2	2	3	4	7	1	4	2	3	5
Rental car - agency	2	3	2	3	3	3	1	4	5	2	4
Bike	3	3	7	2	6	2	3	1	1	2	3
Camper van	4	3	4	3	5	3	3	2	2	4	2
Rental car - private individuals	3	2	2	1	1	3	2	4	2	3	3
Carpooling	3	2	3	3	3	1	1	2	4	1	2
Motorbike	3	2	2	2	5	2	1	2	1	3	1




What kind of transportation will you use this summer to go to your holiday destination?

GAME CHANGERS






HOLIDAYMAKERS ARE MAINLY CHOOSING THEIR MODE OF TRANSPORTATION BY CONVENIENCE OR HABIT

CRITERIA OF CHOICE OF TRANSPORTATION MODE

	EUROPE			
Most convenient way to reach destination	57	63	62	51
Used to taking this mode of transportation	43	43	41	38
More affordable	25	37	36	35
Less risk for infection	22	23	33	36
Less risk to infect others	13	17	21	28

## HOTEL REMAINS THE MOST POPULAR ACCOMMODATION AMONG HOLIDAYMAKERS, ESPECIALLY IN CHINA. EUROPEANS ALSO ENJOY HOUSE RENTALS, AMERICANS STAYING AT RELATIVES'S HOUSES

### PREFERRED TYPE OF ACCOMMODATION












	EUROPE			
Hotel	37	48	64	40
Rental of a house or apartment	32	20	29	16
Friends' / family's houses or in your holiday home	27	33	18	31
A bed & breakfast	12	13	22	43
Camping	12	15	7	17
A motor home, camping trailer or mobile home	5	9	6	10
Boat (e.g. cruise)	3	7	4	10

GAME CHANGERS

*Regarding your accommodations during your summer trip in 2021, do you mostly intend to:*












AMONG EUROPEANS, HOTEL IS PARTICULARLY APPRECIATED IN AUSTRIA, SPAIN, POLAND AND SWITZERLAND. IN FRANCE, FAMILY HOUSE AND RENTALS ARE PARTICULARLY ENJOYED

## PREFERRED TYPE OF ACCOMMODATION




											
Hotel	52	35	39	25	41	38	43	35	45	43	31
Rental of a house or apartment	22	39	12	35	34	33	25	32	35	26	31
Friends' / family's houses or in your holiday home	21	25	29	37	21	26	24	28	29	30	23
A bed & breakfast	13	11	30	4	10	20	11	25	9	10	12
Camping	9	10	19	19	13	8	9	7	6	11	13

PORTUGUESE, SPANISH, CZECH AND POLISH HOLIDAYMAKERS WILL MOSTLY SPEND TIME RELAXING WHILE THE BELGIANS AND FRENCH WILL PRIORITIZE ON SPENDING TIME WITH THEIR FAMILY

ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS

											
Family time	43	44	43	46	35	43	34	37	41	37	38
Relax	24	30	41	28	30	41	41	45	44	30	28
Enjoy home	30	31	24	15	34	14	19	22	17	28	32
Discover new cultures	12	13	8	14	8	13	10	14	12	11	11
Read, learn	11	12	7	8	11	8	10	13	12	10	8
Do sports	13	10	18	12	10	7	9	8	9	13	8
Make new acquaintances	8	7	6	5	5	7	5	4	5	7	4

FOR EUROPEANS, ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS ARE NOT SO FAR FROM THE IDEAL ONES. ONLY DISCOVERING NEW CULTURES SEEM SLIGHTLY UTOPIAN THIS YEAR WHILE ENJOYING ITS HOME APPEARS AS MORE REALISTIC

IDEAL / ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS		EUROPE			
IDEAL	Come together as a family or with friends	56	47	35	48
	Relax, have peace of mind	48	41	27	48
	Discover new cultures, enjoy a total change of scenery	35	29	37	31
	Enjoy your home	16	20	27	46
ACTUAL	Come together as a family or with friends	40	34	31	26
	Relax, have peace of mind	34	28	25	36
	Enjoy your home	24	29	29	47
	Discover new cultures, enjoy a total change of scenery	11	10	26	16

# FOCUS ON SENIOR TRAVELERS

## HOLIDAY PLANS *Senior vs whole sample*

EUROPE



HOLIDAY PLANS

54% vs 57%

44% vs 50%

BUDGET

1821€ vs €1556

1892€ vs 1878€

Will be AWAY ON A TRIP

for 3 or 4 weeks

28% vs 20%

11% vs 12%

Less willing to adopt initiatives to travel

MORE SUSTAINABLY

Accommodation

with a green certification

73% (vs 78%)

44% (vs 64%)

Bringing goods to donate

57% (vs 70%)

37% (vs 62%)

## HOW THEY FEEL ABOUT COVID AND ITS IMPACT

EUROPE



Already VACINATED

71% vs 37%

89% vs 59%

More OPENED to global initiatives to reopen travel :

Necessary to accelerate the return to normal travel

76% vs 68%

63% vs 56%

But more reluctant to make efforts

Stay isolated for several days before or after the travel

41% vs 47%

42% vs 54%

Travel alone to an isolated place

28% vs 39%

24% vs 39%

More OPTIMISTIC : Be able to travel under "normal

conditions" again in 2022

46% vs 39%

44% vs 41%

*How to read? 54% of European senior of more than 65 yo plan to go on summer holidays, vs 57% of Europeans as a whole*

GAME CHANGERS



An illustration of a person with dark hair, wearing a white tank top and red shorts, sitting on a sandy beach. They are looking out at a blue ocean under a clear blue sky. There are green tropical plants in the foreground and a palm frond in the top left corner.

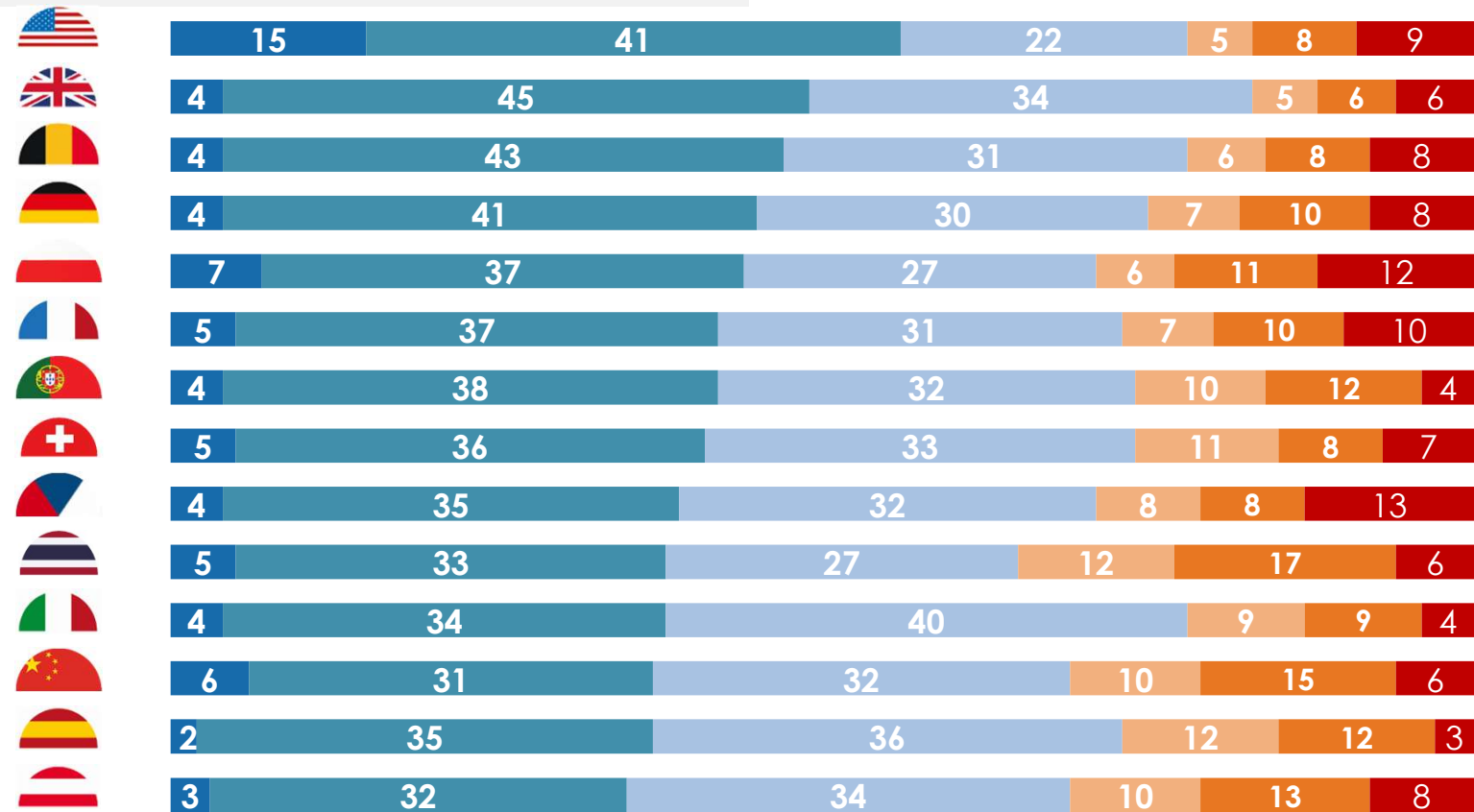
# 7.

## NEW TRAVEL PRACTICES

- > Optimism regarding the return to normal
- > Durable impact on travel habits
- > Sustainable travel
- > Workation

# AMERICANS, BRITISH AND BELGIANS ARE THE MOST OPTIMISTIC REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL. THE CZECHS, THE POLES AND THE FRENCH ARE THE MOST WHO THINK THAT WE CAN NEVER GO BACK TO THE WAY WE WERE BEFORE THE PANDEMIC

OPTIMISM REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL (%)



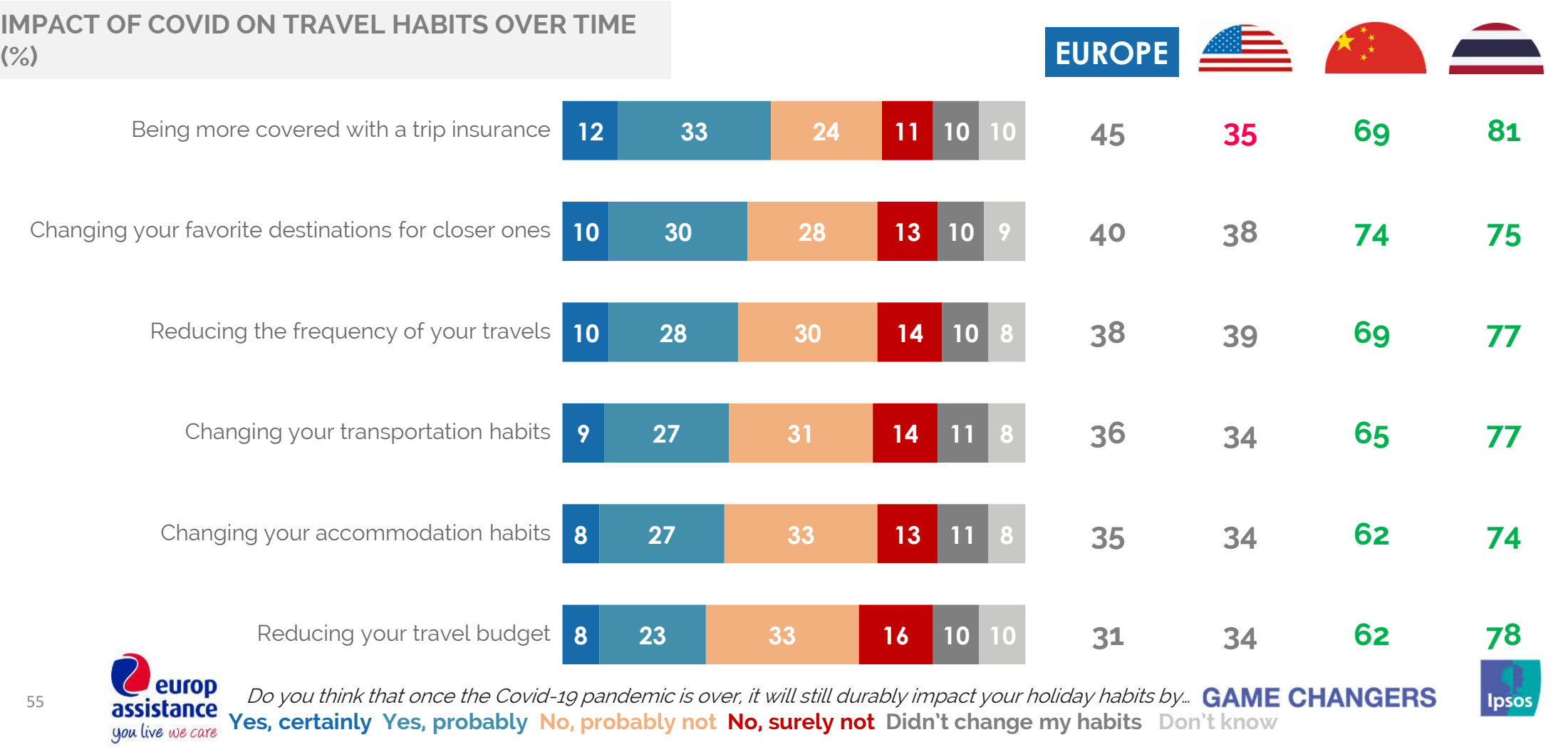
When do you think that we will be able to travel under "normal conditions" again, and without necessity of masks or tests?

2021 2022 2023 2024 After 2024 Never

GAME CHANGERS














# TRIP INSURANCES ARE AN INTERESTING OPTIONS TO TRAVEL PEACEFULLY. IT SEEMS EASIER / MORE ATTRACTIVE THAN REALLY CHANGING ITS TRAVEL HABITS (DESTINATIONS, TRANSPORTATION OR FREQUENCY).

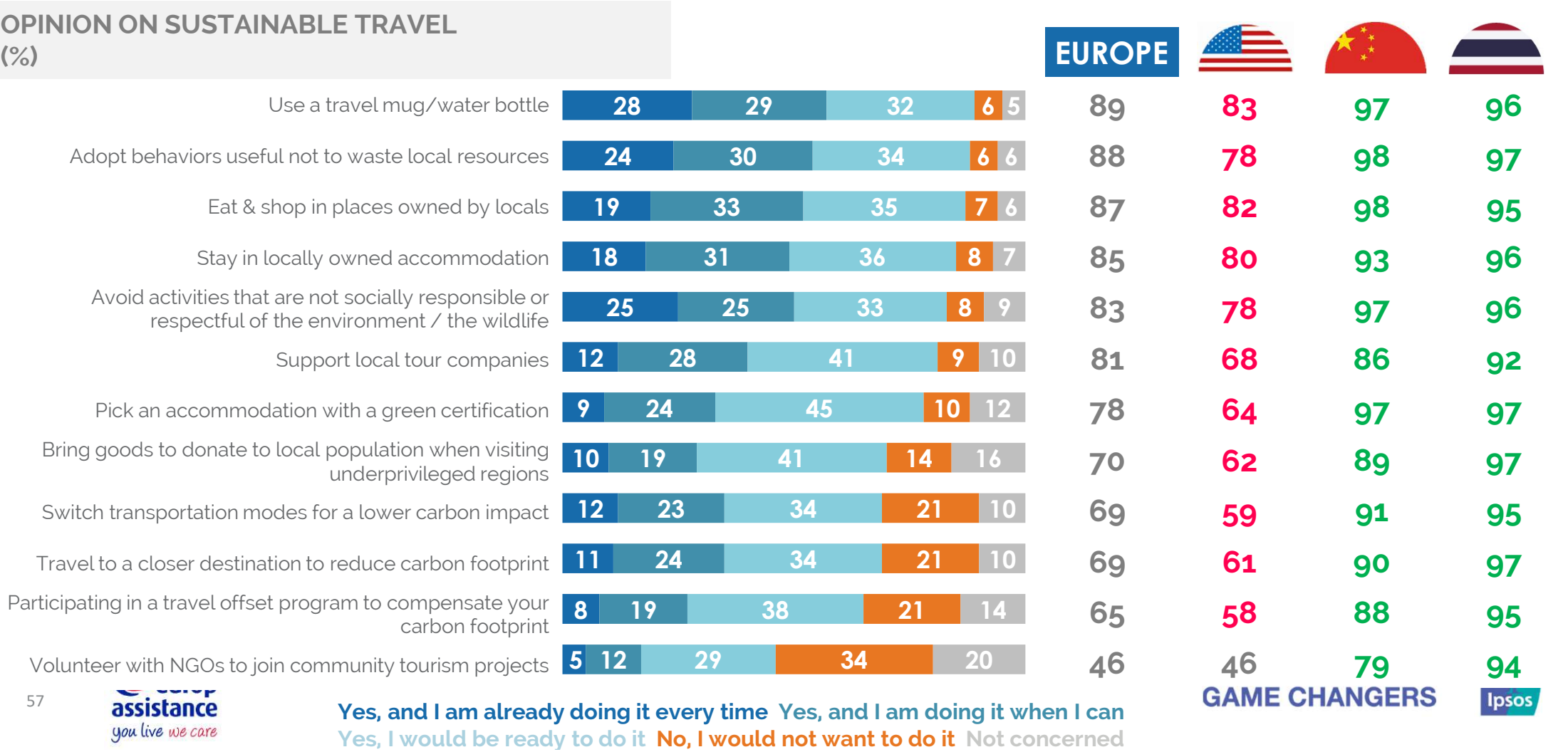


# THERE AGAIN, AMONG EUROPEAN TRAVELERS, PORTUGUESE, SPANIARDS AND ITALIANS ARE THE MOST WILLING TO CHANGE THEIR HABITS REGARDING EVERY DIMENSION

IMPACT OF COVID ON TRAVEL HABITS OVER TIME (%)









											
More covered with a trip insurance	44	40	44	37	38	51	32	52	59	39	56
Changing for closer destinations	40	33	35	45	34	48	28	55	52	36	34
Reducing the frequency of travels	36	30	33	36	33	46	30	51	48	35	38
Changing transportation habits	31	27	30	31	27	50	27	51	49	27	34
Changing accommodation habits	32	26	31	32	27	49	27	50	47	25	31
Reducing travel budget	29	23	30	31	22	43	28	48	42	25	26

SOME ACTIONS ARE ALREADY WELL ROOTED IN THE TRAVELERS' HABITS SUCH AS AVOIDING EXTRA USE OF PLASTIC, AVOIDING ACTIVITIES NOT SOCIALLY RESPECTFUL OF THE ENVIRONMENT AND THE WILDLIFE OR NOT WASTING LOCAL RESOURCES



ITALIAN AND PORTUGUESE ARE THE READIEST TO ORGANIZE THEIR TRAVEL MORE SUSTAINABLY AND MORE RESPECTFULLY

OPINION ON SUSTAINABLE TRAVEL (%)

											
Use a travel mug/water bottle	87	84	86	89	85	92	91	94	91	86	87
Adopt behaviors useful not to waste local resources	88	82	61	91	80	93	87	95	94	86	85
Eat & shop in places owned by locals	90	87	89	82	85	93	86	92	88	86	90
Stay in locally owned accommodation	88	77	83	76	86	90	90	91	89	85	84
Avoid activities that are not socially responsible or respectful of the environment / the wildlife	84	83	73	80	82	91	81	93	86	79	81
Support local tour companies	82	76	66	84	79	79	82	89	92	83	75
Pick an accommodation with a green certification	75	74	68	74	73	86	79	90	87	73	73
Bring goods to donate to local population when visiting underprivileged regions	63	66	67	71	62	77	72	83	75	70	61
Switch transportation modes for a lower carbon impact	66	63	63	64	61	80	70	82	81	62	60
Travel to a closer destination to reduce carbon footprint	68	61	62	66	60	81	66	85	77	62	64
Participating in a travel offset program to compensate your carbon footprint	60	51	51	53	57	80	76	82	72	56	60
Volunteer with NGOs to join community tourism projects	46	36	42	36	48	54	56	65	50	48	34

A stylized illustration of a person wearing a white hat and a purple swimsuit, lying on their stomach in a blue pool. The pool is flanked by two large, vibrant flower arrangements with pink and blue blossoms. In the background, there is a bright blue sky and distant, light blue mountains.

# End of document

# SURVEY OVERVIEW

## CAWI survey – Online panel



### SAMPLE

- **Target** : Male/female aged 18 y.o and older
- **Selection of the respondent** : participant selection using a quota method
- **Sample representativeness** : gender, age, occupation, region, city size



### DATA COLLECTION

- **Fieldwork dates** : 11-14 May
- **Sample achieved** : 14002 interviews
- **Data collection** : online
- Loyalty program with points- based award system for panelists
- Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- Checking of IP and consistency of demographic data.



### DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, age, region, occupation