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PRESS RELEASE

A majority (57%) of Europeans expect to travel this summer

France and Italy lead with 67% expecting to take their usual summer holiday

Paris, 17 June 2021 – Europ Assistance (“EA”) today announced the international findings of their 20th Anniversary edition of the Holiday Barometer. The survey was conducted by Ipsos, a global market research firm, among 14,000 people across 14 countries and three continents. It tracks global travel trends and this 2021 edition features questions about the impact of the pandemic on several areas including attitudes toward travel. The survey was taken between May 5th and May 20th, 2021.

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Francine Abgrall, Group Head of Travel at Europ Assistance commented: “*We have been sponsoring the Ipsos Holiday Barometer for two decades and we think this is the most important one we have commissioned. As we see the impact of the pandemic lingering into a second summer travel season, there is room for optimism. Several European countries are expecting increases in summer travel over 2019 numbers. Almost 70% of Europeans see travel returning to normal over the next three years. This year’s Holiday Barometer shows that people are excited to see and hug their families again (58%) and back to the simple activities like eating in a restaurant (40%).*”

Key Takeaways

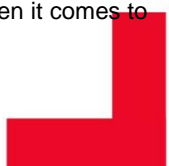
- Overall, 57% of Europeans expect to travel during the usual summer holiday period, this is a six percent drop from 2019. Even with the drop, more Europeans expect to travel than Americans (50%), Chinese (53%) or Thais (44%). Some countries are seeing double-digit drops in summer travel plans, such as Germany (-21 points), United Kingdom (-14 points) and Belgium (-12 points). Other European countries are seeing a rise in travel desire including Italy (+6 points) and Poland (+5 points).
- Europeans report their travel budgets have taken a bigger hit than their American counterparts. Overall European travel budgets dropped over 20% from 2019, but American budgets only dropped 2%. The biggest drops in were seen in Spain (-30%), France (-26%), Germany (-25%) and Austria (-21%). Portugal was the only country from the 2019 survey in which travel budgets stayed the same.
- The British, Belgians and Americans lead the world in travel optimism with most of them seeing travel returning to normal in 2022 or 2023. The Czechs, Poles and French lead the survey when it comes to those who think travel will never return to normal.

Upcoming Travel Plans

- Europeans are still heading to the seaside – topping all areas with 58% of respondents. Trips to the countryside (26%) and the mountains (24%) each gained four points from 2019 and are closing the gap.
- Europeans continue to favor spending their holidays within their home country (47%). For those traveling outside of their country, the top destinations are Spain, France and Italy, which historically have been top three are the traditional survey leaders.
- Some countries that traditionally lead the survey in traveling abroad saw large increases in those staying within their borders for summer holidays compared to 2019. Belgians staying in Belgium grew 17 points up to 32%. The number of Swiss travelers were up 15 points and UK respondents were up 16 points.
- While they lead the survey in the desire to travel, Europeans trail the pack when it comes to



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actually booking holiday travel. Only 35% of European respondents booked any part of their summer travel, compared with 47% of Americans, 37% of Chinese and 50% of Thai respondents. The Italians are among the fewest to have booked their holiday travel at 23%, whereas UK residents lead in Europe at 56%.

Pandemic Considerations

- The restrictions caused by the pandemic over the past year impacted the habits of European citizens. This is particularly true for the Italians, Poles, French and Austrians, who greatly miss seeing their relatives (58% miss it a lot), being able to move without restrictions (52%), enjoying daily activities like going to the restaurant (40%), and traveling freely within their own country (39%).
- Unsurprisingly, there is an increased focus on travel insurance due to the pandemic. Over 45% of Europeans reported they would increase their travel insurance coverage as a result of the COVID-19 crisis.
- Vaccines are not an obstacle to travel, as 81% of Europeans indicate that they are ready to get vaccinated in order to travel again.
- Finally, respondents are strongly considering including the environmental, societal and economic impacts of their travel into their habits, and changing their behaviors to be more respectful of the environment around them:
 - 89% of Europeans are considering using a travel bottle instead of disposable plastic (57% are already doing it and 32% are ready to take the leap).
 - 88% are willing to change their behaviors to avoid wasting local resources.
 - The same number of travelers are willing to help the local economy by eating and shopping in places owned by locals (87%) and staying at locally-owned accommodations (85%).

Survey Methodology

The 2021 edition of the Holiday Barometer from Europ Assistance and Ipsos was conducted in 14 countries including the United States, United Kingdom, Italy, France, Spain, Switzerland, Germany, Austria, Portugal, Belgium, Poland, China and Thailand. In each country, 1,000 consumers aged 18 years and older took part in an online questionnaire. The survey was conducted between May 5th and May 20th and investigated consumer holiday plans and travel preferences.

ABOUT EUROP ASSISTANCE GROUP

Founded in 1963, Europ Assistance, the inventor of assistance, supports customers in over 200 countries and territories thanks to our network of 750,000 approved providers and 41 assistance centres. Our mission is to bring people or corporates from distress to relief – anytime, anywhere. We provide roadside assistance, travel assistance and insurance, as well as personal assistance services such as the protection of the elderly, the protection of digital identity, telemedicine and the Conciergerie. The vision of our 8,000 employees is to be the most reliable care company in the world.

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ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 16,000 people. Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.





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