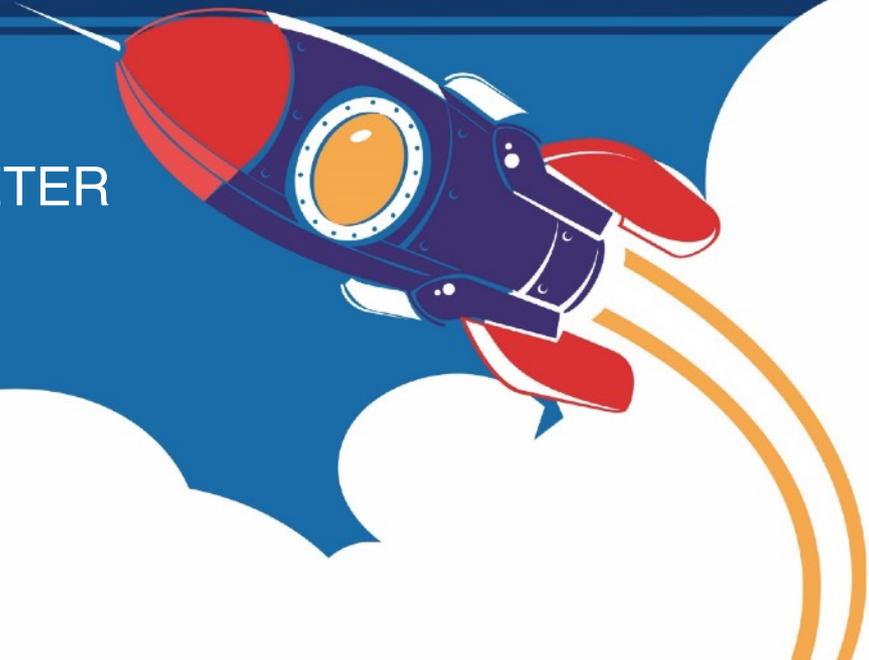


Future of Travel

IPSOS / EUROP ASSISTANCE BAROMETER
GLOBAL RESULTS

JULY 2020



METHODOLOGY



Sample

In each country, the survey was conducted among a representative sample of 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 June 5th (UK) and June 26th 2020 (Thailand)



Method of data collection

Online survey

GLOBAL RESULTS

INTEND TO GO ON HOLIDAY IN 2020 **81%**

ALREADY BOOKED OR INTEND TO *for SUMMER 2020*
(July-August) **35%**

HOLIDAY IN THEIR OWN COUNTRY IN 2020 **77%**

HOLIDAY ABROAD IN 2020 **32%**

HOLIDAY PREFERENCES FOR MAIN TRIP IN 2020*

Beach holiday **26%** 

TOP 3 RISK FREE BEHAVIOURS

Avoid travelling to certain countries **79%**

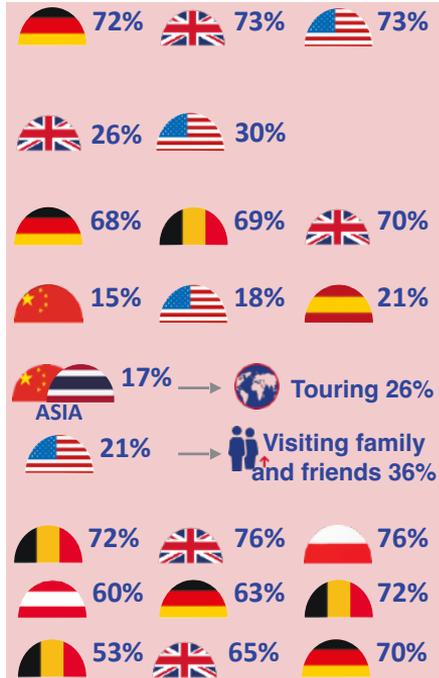
Avoid crowded places **77%**

Spend holidays in own country **76%**

COUNTRIES WITH THE HIGHEST SCORES



COUNTRIES WITH THE LOWEST SCORES



GLOBAL RESULTS

MODES OF TRANSPORTATION

SUMMER 2020

CAR 70%

PLANE 20%

TRAIN 13%

2021

CAR 51%

PLANE 44%

TRAIN 17%

ACCOMMODATION

SUMMER 2020

HOTELS 43%

PRIVATE RENTALS 33%

GUEST-HOUSE 12%

2021

HOTELS 59%

PRIVATE RENTALS 27%

GUEST-HOUSE 14%

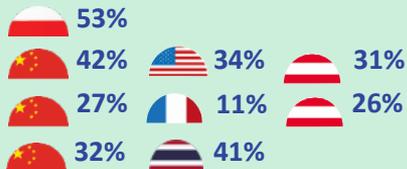
INSURANCE COVERAGE

IN THE PAST 48%

IN THE FUTURE 54%

COUNTRIES WITH THE HIGHEST SCORES

SUMMER 2020



IN THE FUTURE



COUNTRIES WITH THE LOWEST SCORES

SUMMER 2020



1. IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION



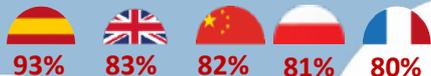
CONTEXT: THE COVID-19 SHOCK

CONCERNED ABOUT THEIR HEALTH

His/her own health / his/her family's health

74%

COUNTRIES WITH THE HIGHEST SCORES



COUNTRIES WITH THE LOWEST SCORES

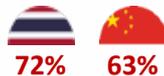


A1. Are you concerned about the following regarding COVID-19?
Your health/ Your family and friends' health / The economy of your country / Your economic situation / Your job
Base : All

ECONOMIC IMPACT

Dismissed from his/her job / Decrease in work activity / Loss of a part of revenue

41%



A3. Which of the following, if any, has happened to you as a result of COVID-19?
You were dismissed from your job / Your work activity has decreased / You lost a part of your revenue / You may lose your job or stop your activity in the next few months / None of the above
Base : All

GOT SICK / IMPACTED BY COVID-19

Himself/herself or family/friends

13%



A2. Which of the following has happened to you as a result of COVID-19?
You got sick with the virus without having to go to the hospital / You got sick with the virus and had to go to the hospital / One of your family members / close friends got sick / You didn't get sick and none of your family members / close friends got sick / You prefer not to answer
Base : All

2.

TRAVELLING IN A POST- COVID WORLD

A GREAT DESIRE TO TRAVEL IN 2020

INTENT TO TRAVEL IN 2020 IF AUTHORISED

Will *certainly or probably* travel...

...inside their own country
ONLY IN CERTAIN REGIONS 74%

...inside their own country
EVERYWHERE 64%

...abroad, **IN BORDER COUNTRIES** 29%

...abroad, **OUTSIDE BORDER COUNTRIES** 20%

GLOBAL

81%

77%
...inside their country



32%
...abroad



Total > 100 as one respondent can go abroad AND in his own country

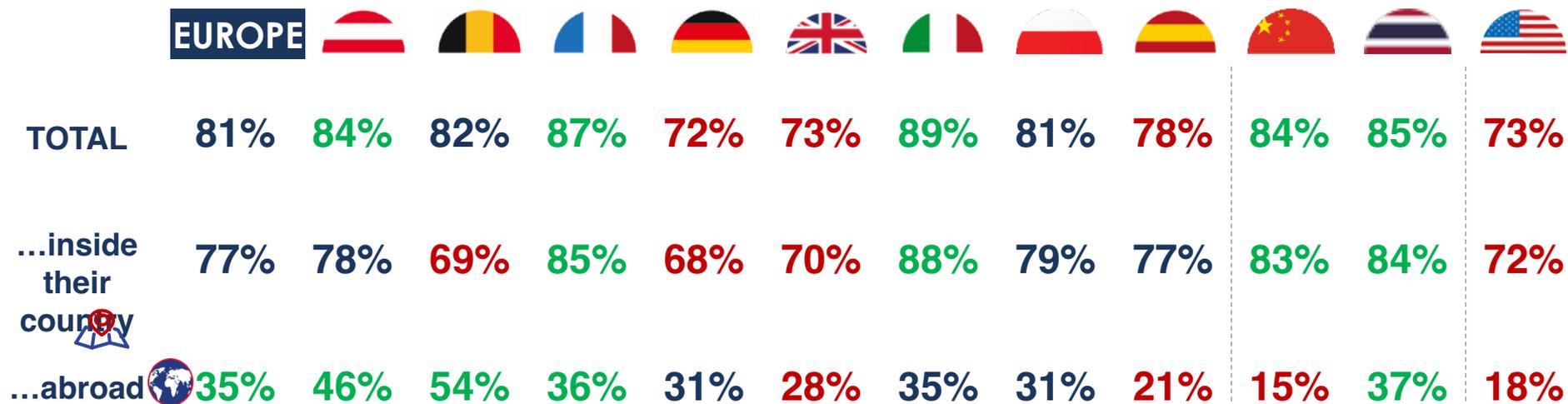
C2. If you are authorised to travel in 2020, will you travel to any of the following?
Base : All

GAME CHANGERS



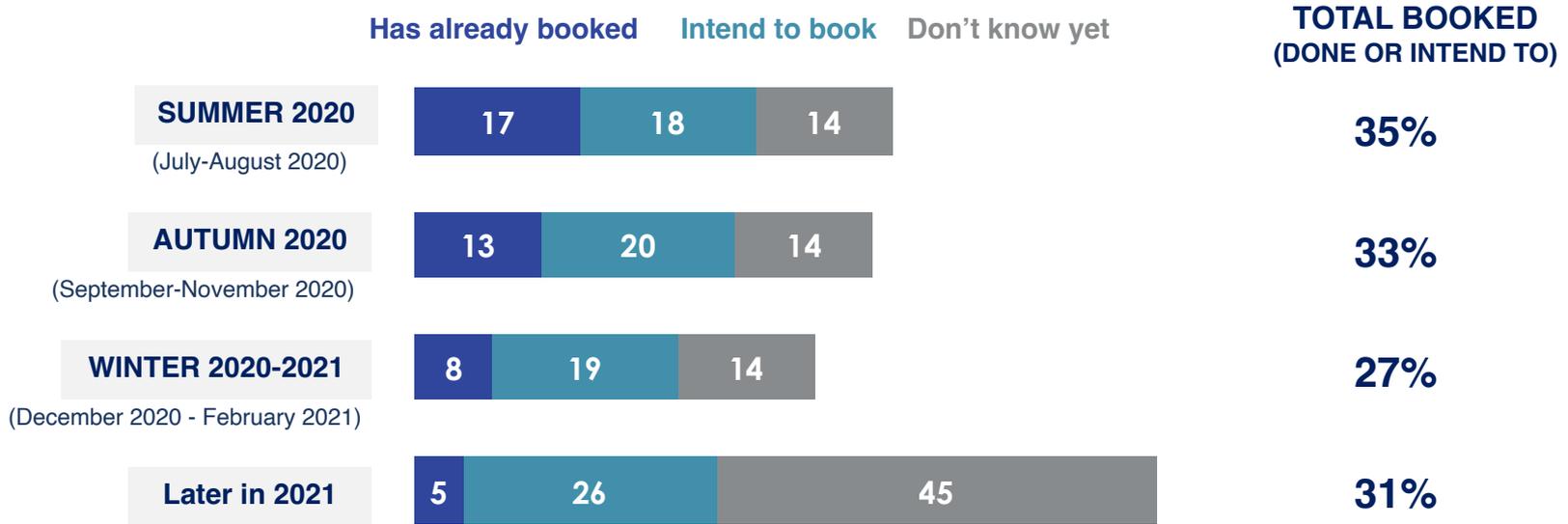
IN MOST COUNTRIES, MORE THAN 8 OUT OF 10 PEOPLE WANT TO TRAVEL IN 2020. ONLY GERMANY, THE UK AND THE US ARE LOWER THAN AVERAGE

INTENT TO TRAVEL IN 2020 IF AUTHORISED



DESPITE A GREAT DESIRE TO TRAVEL, HUGE UNCERTAINTY REMAINS REGARDING FUTURE TRIPS: MANY RESPONDENTS DON'T KNOW IF THEY ARE GOING TO BOOK A HOLIDAY IN THE COMING MONTHS, OR HAVEN'T BOOKED ANYTHING

BOOKING PER PERIOD



Difference c.f. 100 is due to people who said they would not travel for this period

C4. Have you made any travel reservations for the following period(s)? Yes, you booked a trip(s) before the lock-down/ Yes, you booked a trip(s) during the lock-down/Yes, you booked a trip(s) after the lock-down/You haven't booked a trip(s) yet, but you intend to /You won't travel during this period/You booked a trip but it's been cancelled by the company/agency/You don't know yet
 Base : All

THE AUSTRIANS AND ITALIANS ARE THE ONES WHO HAVE BOOKED THE MOST, CONTRARY TO PEOPLE IN THE UK AND US

BOOKING FOR SUMMER 2020



	 GLOBAL	 EUROPE	 ASIA
--	--	--	--

Already booked or intend to

35%

36%

37%

Don't know yet

14%

15%

12%

Already booked or intend to



45%



37%



35%



33%



26%



39%



38%



33%



37%



36%



30%

Don't know yet

17%

15%

16%

11%

11%

16%

18%

13%

10%

14%

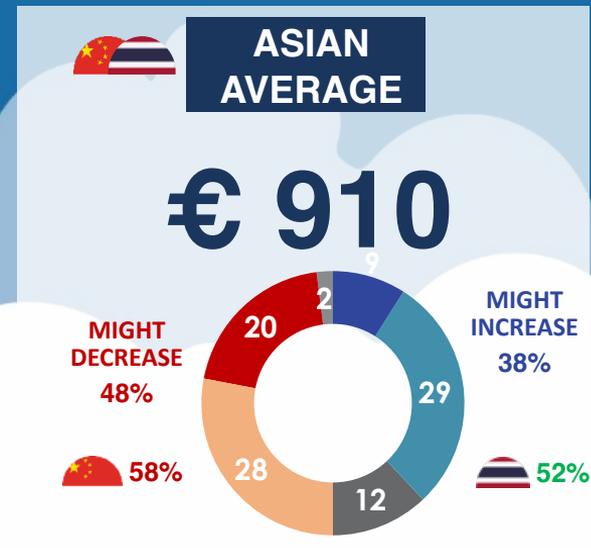
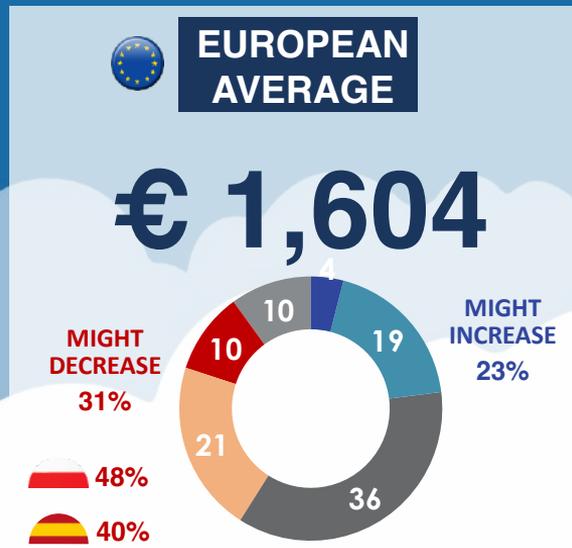
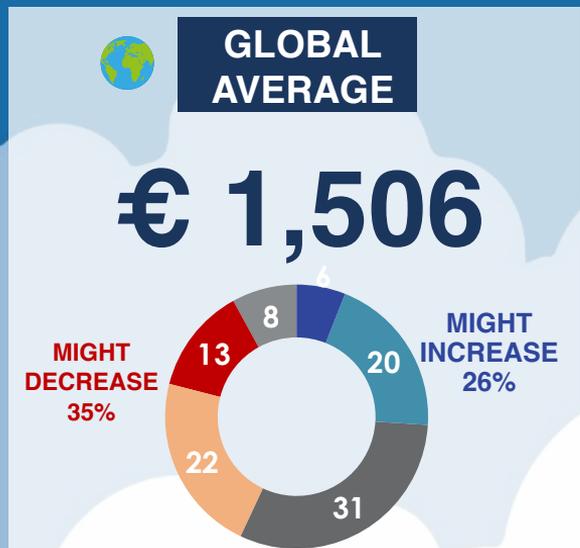
14%

C4. Have you made any travel reservations for the following period(s)? Yes, you booked a trip(s) before the lock-down/ Yes, you booked a trip(s) during the lock-down/Yes, you booked a trip(s) after the lock-down/You haven't booked a trip(s) yet, but you intend to /You won't travel during this period/You booked a trip but it's been cancelled by the company/agency/You don't know yet
Base : All

GAME CHANGERS



MAIN TRIP BUDGET IN 2020/2021: GREAT DISPARITY ACROSS AND WITHIN COUNTRIES



Increase a lot Increase slightly Stay as usual Decrease slightly Decrease a lot DK

Exchange rate applied: 1 USD = €0.888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0.029

C13. What do you consider as your full budget for your next main trip?
 C12. How might your budget for your main leisure trip change? Will it:
 Base: Intend to travel in 2020/2021

OVERALL BUDGETS SEEM TO HAVE GONE DOWN COMPARED TO 2019 (HOWEVER THE QUESTION EVOLVED BETWEEN THE 2 SURVEYS)



Exchange rate applied : 1 USD= €0.888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0.029

C13. What do you consider as your full budget for your next main trip?

Base : Intend to travel in 2020/2021

REMINDER FROM 2019 HOLIDAY BAROMETER : What is your full budget for your next summer trip (when you take into account transportation, accommodations, food, leisure activities etc.)

Base : intend to go on Holiday this summer

HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP: THE BEACH, ESPECIALLY FOR EUROPEAN COUNTRIES

	 TOTAL GLOBAL	 EUROPEAN AVERAGE	 ASIAN AVERAGE	 TOTAL USA	SINGLE TRAVELLER	2 PEOPLE TRAVELLING	AT LEAST 3 PEOPLE TRAVELLING	FAMILIES
 Beach holiday	26%	29%	17%	21%	12%	23%	29%	29%
 Visiting friends and family	21%	20%	20%	36%	43%	22%	18%	20%
 Touring holidays	15%	12%	26%	4%	9%	13%	16%	15%
 Countryside break	14%	14%	15%	12%	9%	15%	15%	15%
 City break	13%	12%	15%	8%	14%	14%	12%	11%
 Winter-ski holiday	2%	2%	4%	2%	1%	2%	3%	3%
 Cruise	2%	2%	2%	3%	1%	2%	2%	2%

C6. Ideally, what kind of trip are you planning?
Base: Those who have planned a main trip (in total)

THE SEASIDE DOMINATES SUMMER DESTINATIONS FOR EUROPEANS AS THE MAIN LEISURE TRIP. THE CHINESE PREFER CITY BREAKS, AND AMERICANS VISITING FAMILY

SUMMER HOLIDAY PREFERENCES FOR MAIN LEISURE TRIP



BEACH HOLIDAYS IN SUMMER, VISITING FRIENDS AND FAMILY IN AUTUMN AND WINTER

HOLIDAY PREFERENCES PER PERIOD FOR THE MAIN LEISURE TRIP



SUMMER 2020



AUTUMN 2020



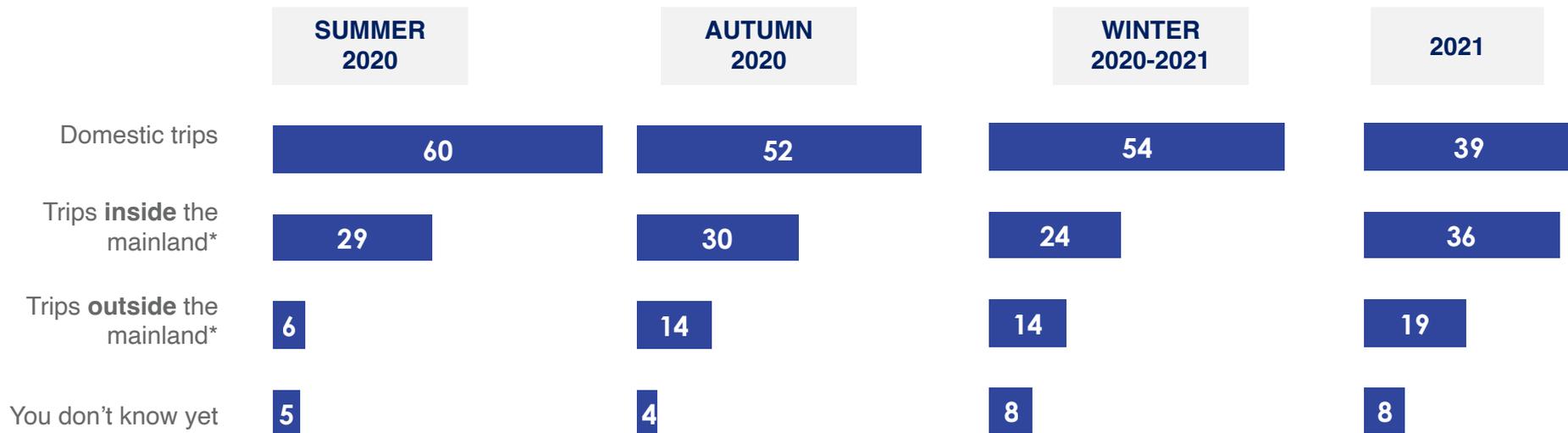
WINTER 2020-2021



2021
(FROM MARCH TO DECEMBER)

DOMESTIC TRIPS ARE WIDELY PREFERRED THIS SUMMER, BUT PEOPLE INTEND TO GO ABROAD MORE AND MORE OVER TIME

LOCATION OF TRIPS PLANNED FOR THE MAIN LEISURE TRIP IN 2020

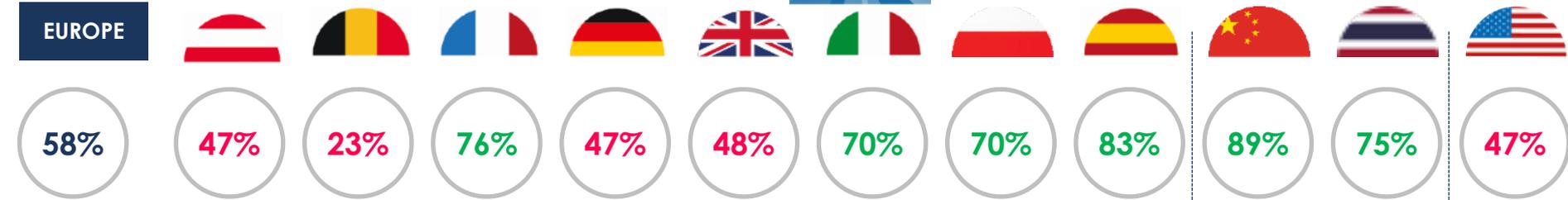


*Europe for European countries, Asia for Asian countries, and America for US

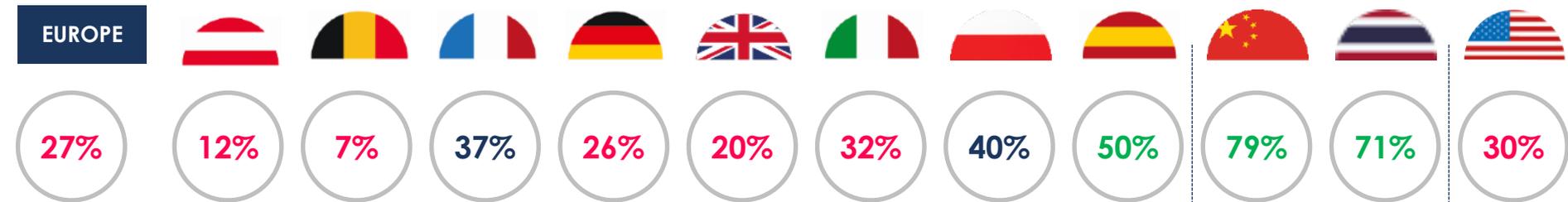
C7. Ideally, for the main leisure trip that you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:
Base : Those who have planned a main trip (per period)

DOMESTIC TRIPS ARE WIDELY PREFERRED THIS SUMMER, BUT PEOPLE INTEND TO GO ABROAD MORE AND MORE OVER TIME. ONLY THE CHINESE AND THAIS CONTINUE TO WIDELY CHOOSE DOMESTIC TRIPS IN 2021

LOCATION OF MAIN SUMMER TRIP – % DOMESTIC TRIPS



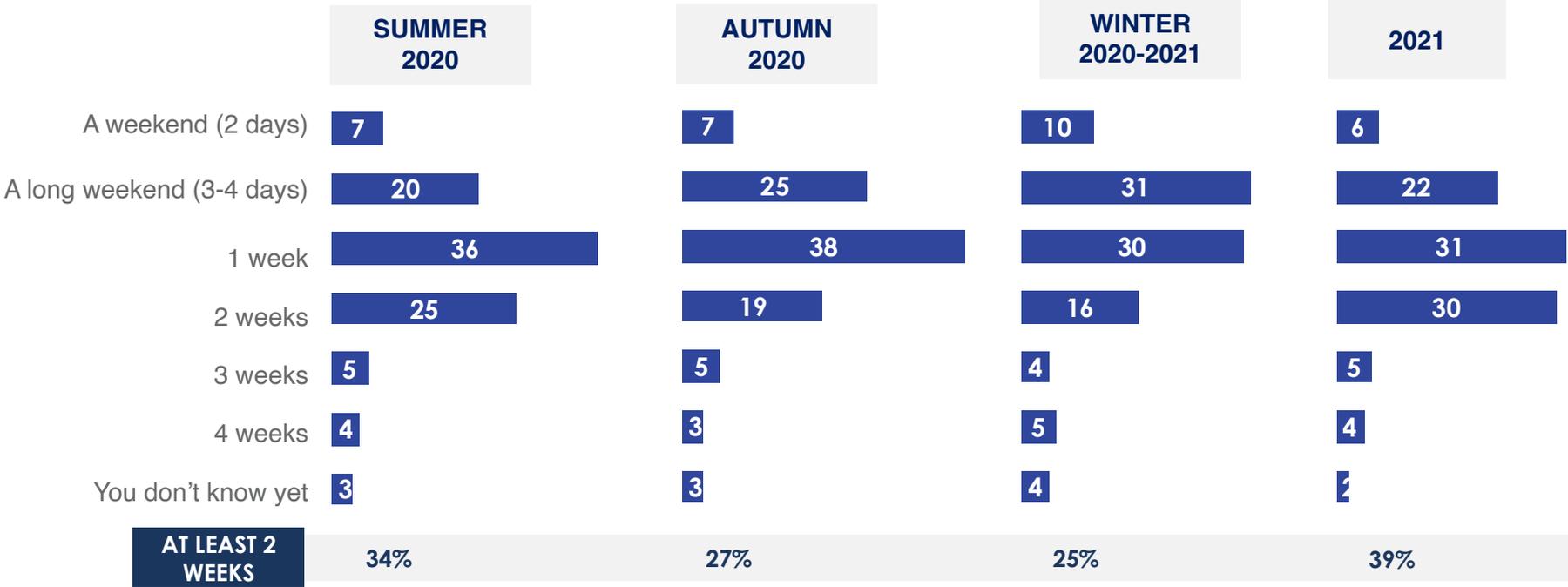
LOCATION OF MAIN 2021 TRIP – % DOMESTIC TRIPS



C7. Ideally, for the main leisure trip that you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:
 Base : Those who have planned a main trip (per period)

MAIN SUMMER LEISURE TRIP IS PLANNED TO BE LONGER THAN FOR AUTUMN AND WINTER

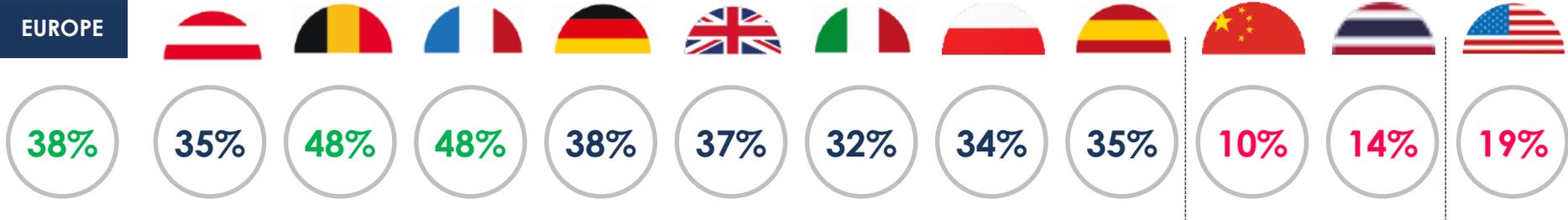
TRIP DURATION FOR THE MAIN LEISURE TRIP IN 2020



C8. For the main leisure trip that you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?
 Base : Those who have planned a main trip (per period)

ALMOST HALF THE FRENCH AND BELGIANS ARE LEAVING FOR MORE THAN 2 WEEKS THIS SUMMER, WHEREAS VERY FEW ASIANS AND AMERICANS ARE LEAVING FOR SO LONG

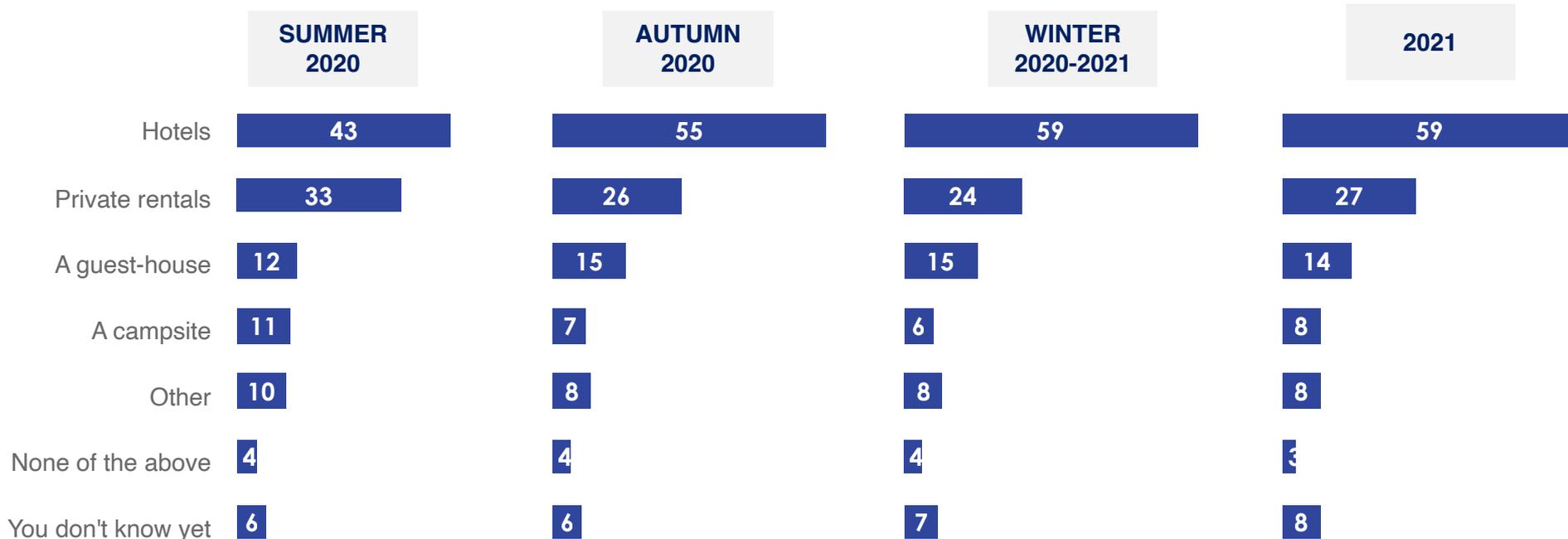
TRIP DURATION FOR MAIN SUMMER TRIP - % AT LEAST 2 WEEKS



C8. For the main leisure trip that you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?
 Base : Those who have planned a main trip (per period)

HOTELS REMAIN THE MOST POPULAR ACCOMMODATION TYPE, AND ARE INCREASINGLY BEING CHOSEN OVER TIME

TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020

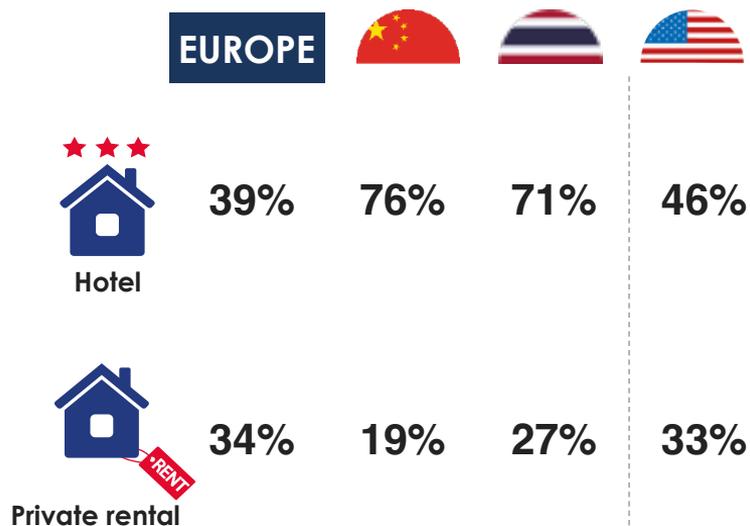


C10. Ideally, for the main leisure trip that you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:
 Base : Those who have planned a main trip (per period)

Total > 100 as one respondent can go in multiple types of accommodation

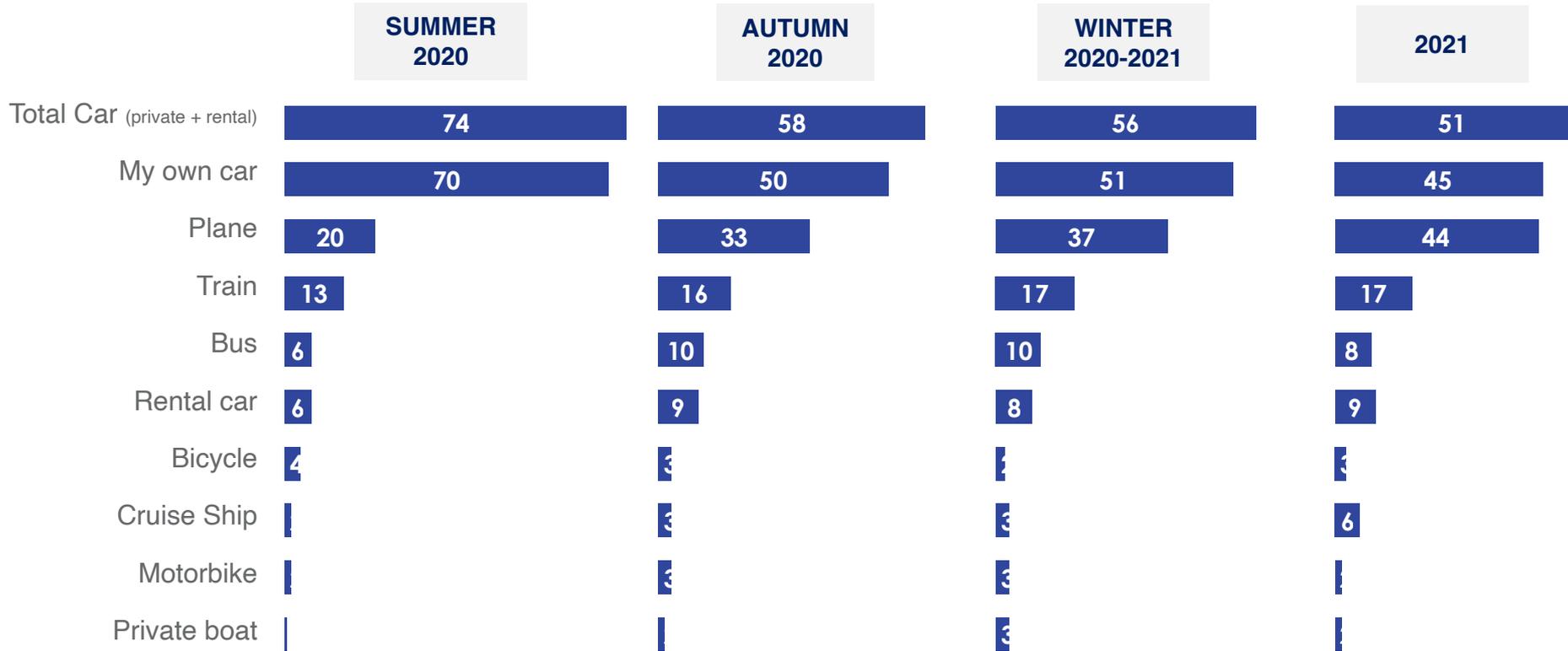
FOR THIS SUMMER, THE AUSTRIANS AND ASIANS WIDELY PREFER HOTELS, WHEREAS THE ITALIANS, FRENCH AND POLES PREFER PRIVATE RENTALS

TYPE OF HOUSING FOR MAIN SUMMER TRIP



C10. Ideally, for the main leisure trip that you would like to plan in SUMMER 2020, are you considering staying in:
 Base : Those who have planned a main trip (per period)

CARS ARE PREFERRED OVER PLANE AND TRAIN THIS SUMMER, BUT THE PLANE IS INCREASINGLY BEING CHOSEN OVER TIME



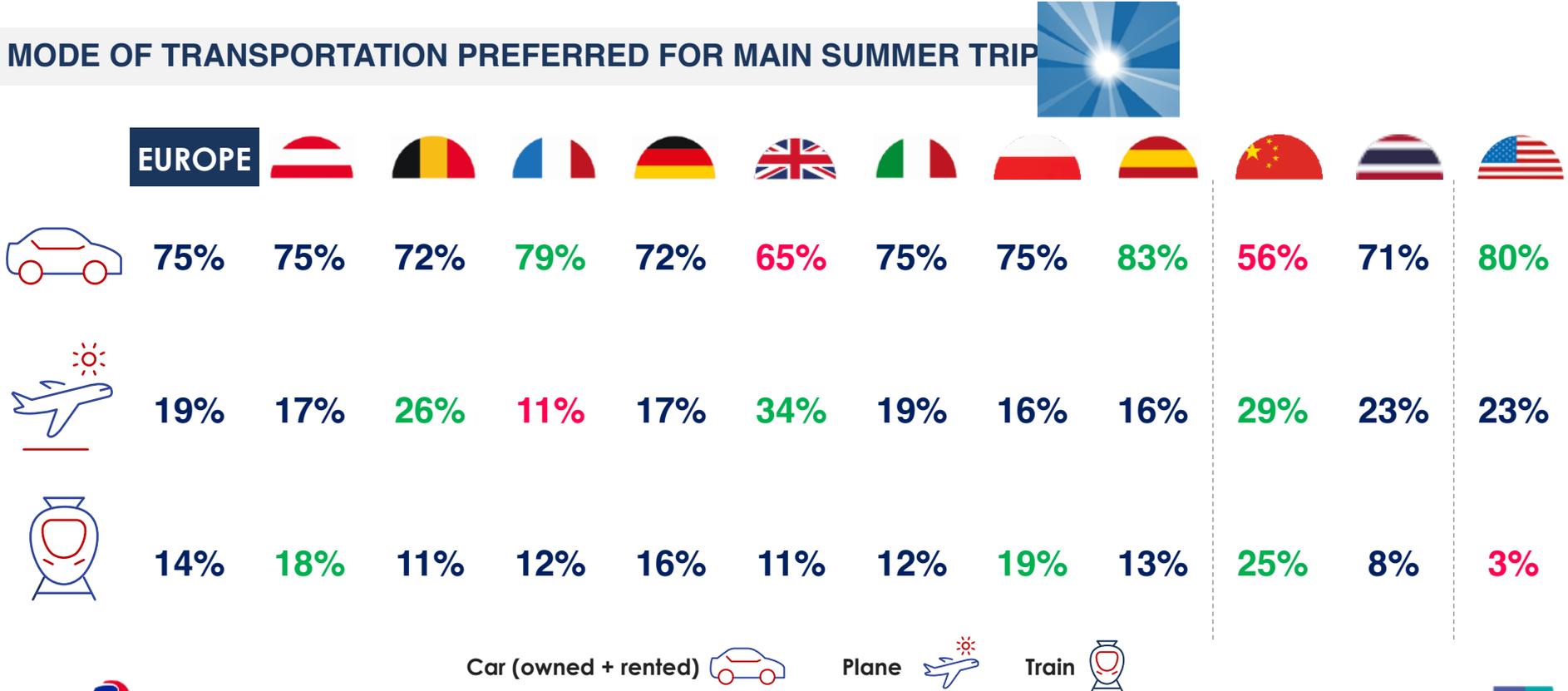
C10bis. Which mode(s) of transportation are you planning to use as a priority during your main leisure trips after COVID 19 in the coming months?
 Base : Those who have planned a main trip (per period)

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Total > 100 as one respondent can use multiple modes of transportation

THE CHINESE AND BELGIANS ARE THE MOST LIKELY TO TAKE THE PLANE THIS SUMMER

MODE OF TRANSPORTATION PREFERRED FOR MAIN SUMMER TRIP



Car (owned + rented)



Plane

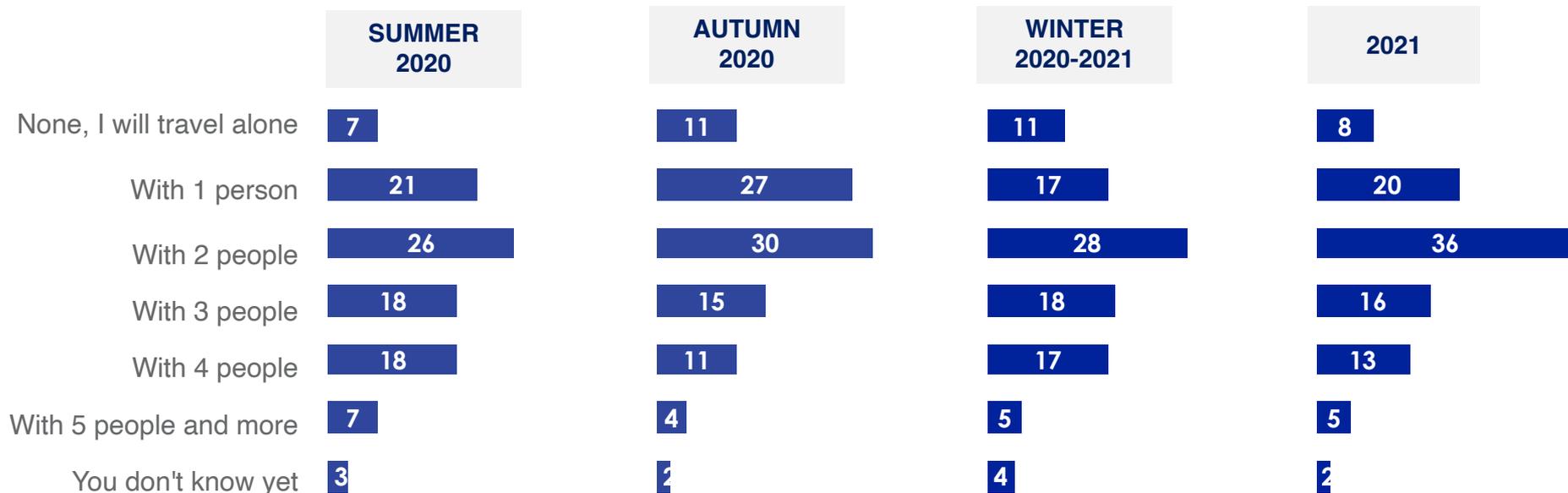


Train



THE NUMBER OF PEOPLE TRAVELLING TOGETHER REMAINS QUITE STABLE OVER TIME

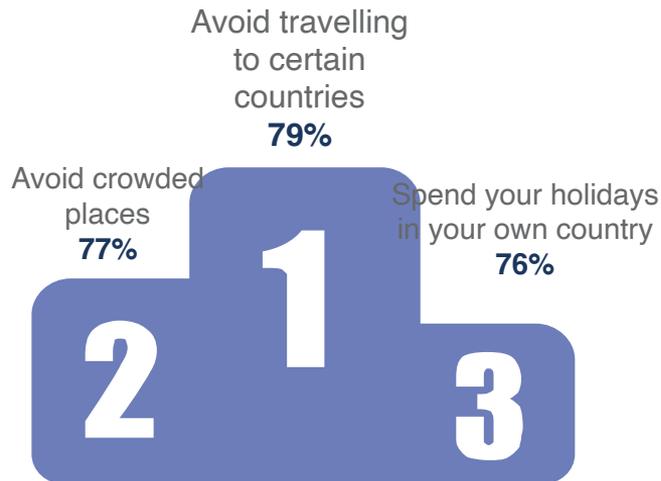
NUMBER OF PEOPLE TRAVELLING TOGETHER FOR THE MAIN LEISURE TRIP IN 2020



C9. For the main leisure trip that you would like to plan in SUMMER 2020 / FALL AUTUMN 2020 / WINTER 2020-2021, what is the average number of people travelling with you?
Base : Those who have planned a main trip (per period)

A MAJORITY OF PEOPLE WILL AVOID TRAVELLING IN CERTAIN COUNTRIES AND WILL AVOID CROWDED PLACES, ESPECIALLY OLDER PEOPLE

TOP 3 RISK-FREE BEHAVIORS



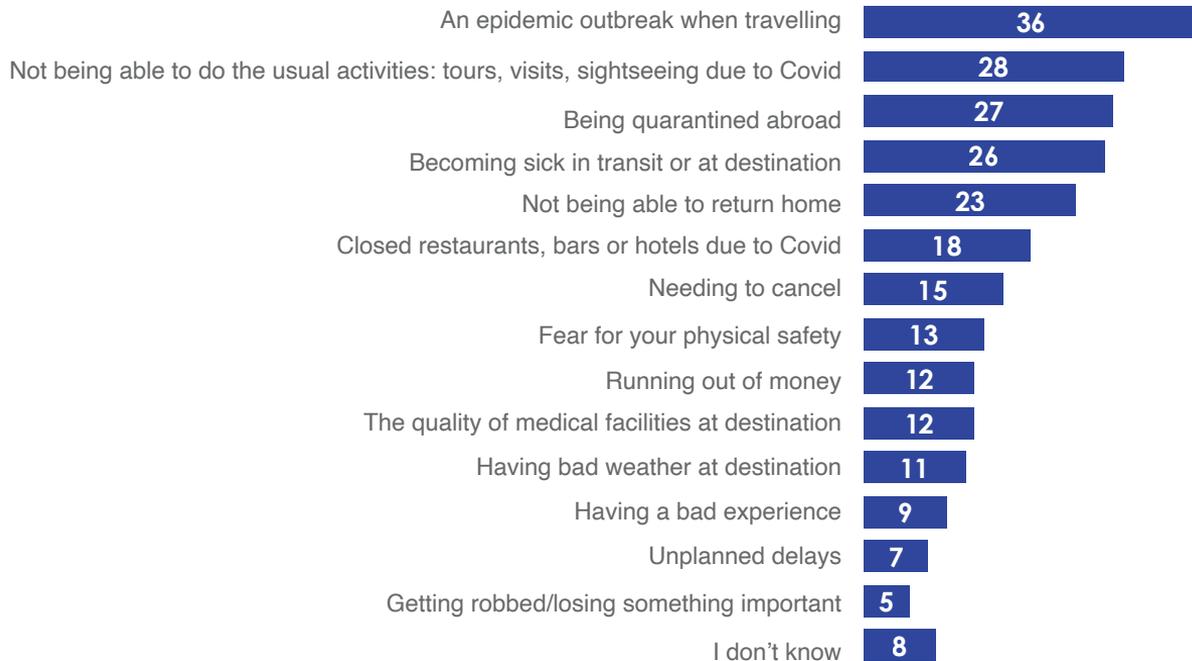
	TOTAL	YOUNG (<30 YO)	55-64 YO
Avoid travelling to certain countries	79%	74%	83%
Avoid crowded places	77%	71%	81%
Spend your holidays in your own country	76%	75%	77%
Avoid going on a cruise	72%	66%	75%
Favour close destinations you can come back from quickly	72%	69%	75%
Avoid amusement parks	64%	57%	70%
Avoid flying and going to airports	58%	54%	61%
Avoid taking the train and going to train stations	54%	49%	57%
Travel only when COVID-19 tested	44%	48%	44%
Avoid staying at a hotel / resort	41%	41%	42%

C20. On a personal level, do you plan to change anything in your way of travelling? When travelling, do you intend to:

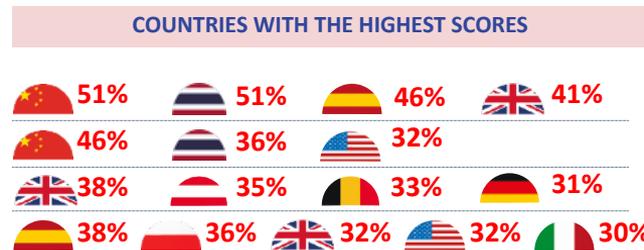
Base : All

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THE EPIDEMIC IS NOW THE MAIN FEAR WHEN TRAVELLING



Total > 100 as one respondent can have up to 3 fears



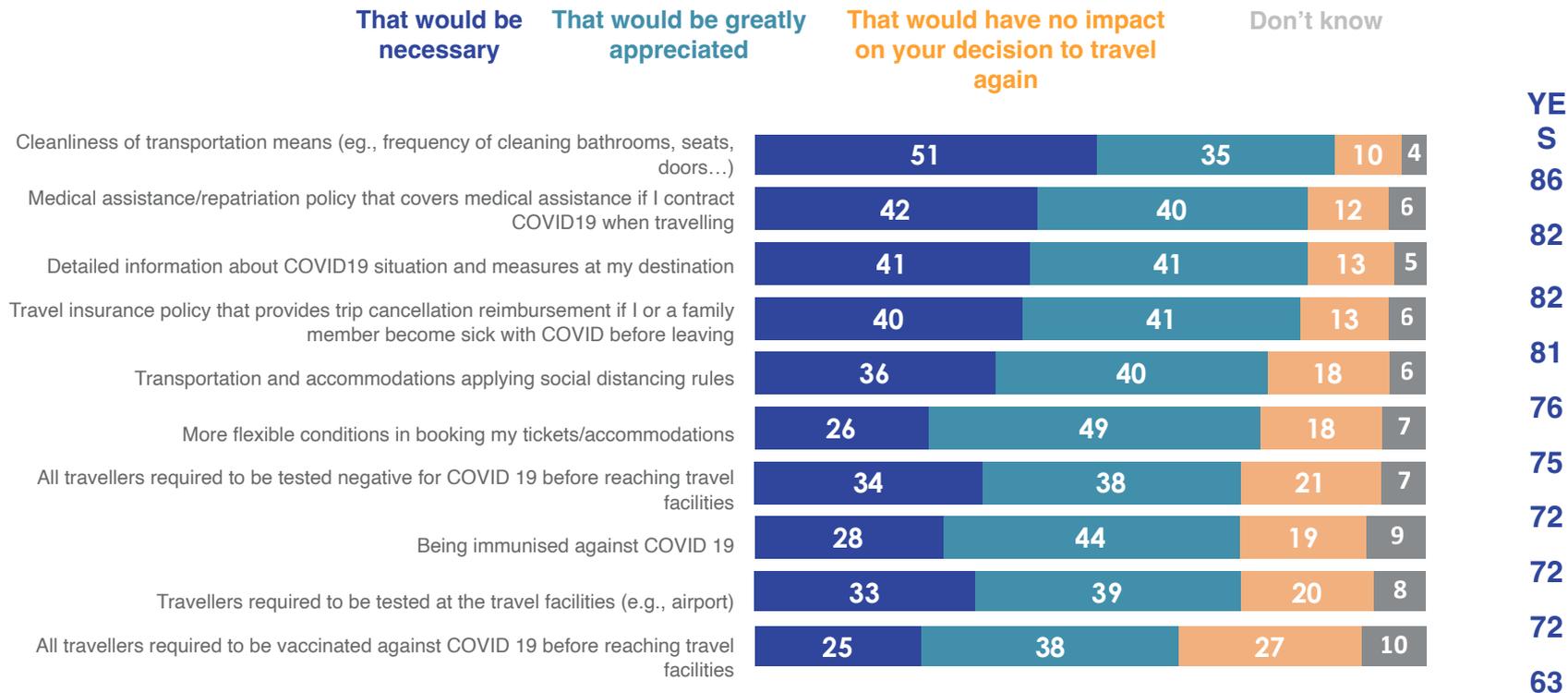
Total Medical reasons	67%
Total Bad experience <i>Including due to Covid</i>	65% 38%
Total Organisational issues	21%

C17. What are your main fears when travelling the next time you're able to travel?

Base : All

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REASSURING MEASURES



C19 In addition, which safety conditions should be provided to you to you consider travelling after COVID-19?

Base : All

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FOR PEOPLE WHO WON'T TRAVEL IN 2020, COVID-19 HAS CHANGED THE PLANS OF 1 OUT OF 2 RESPONDENTS

TO THOSE WHO SAID THEY WOULDN'T TRAVEL IN 2020

HAVE CHANGED THEIR PLANS BECAUSE OF COVID

53%

COUNTRIES WITH THE HIGHEST SCORES



COUNTRIES WITH THE LOWEST SCORES



C14. You mentioned that you will not travel in 2020, even if you are authorised to. Have your plans changed because of COVID-19?

Base : Won't travel in 2020

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TRAVEL BOOST WOULD BE *BETTER SAFETY CONDITIONS* RATHER THAN *CHEAP FARES*

TO THOSE WHO SAID THEY WOULDN'T TRAVEL IN 2020

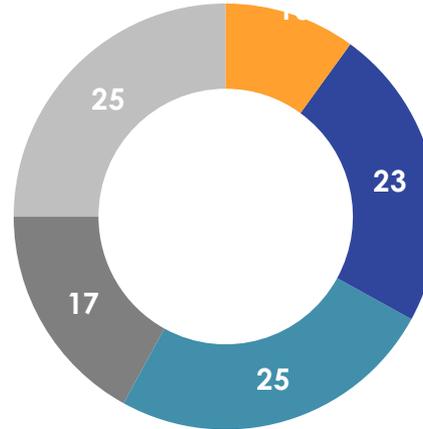
Cheap fares and offers

Good safety and hygienic conditions

Both

Other reason

I don't know



3.

TRAVEL INSURANCE AND ASSISTANCE



INSURANCE COVERAGE MAY INCREASE SLIGHTLY, BUT ONLY IN ASIA, NOT IN EUROPE

INSURANCE COVERAGE

IN THE PAST...

48%

Covered by
travel insurance

IN THE
FUTURE...

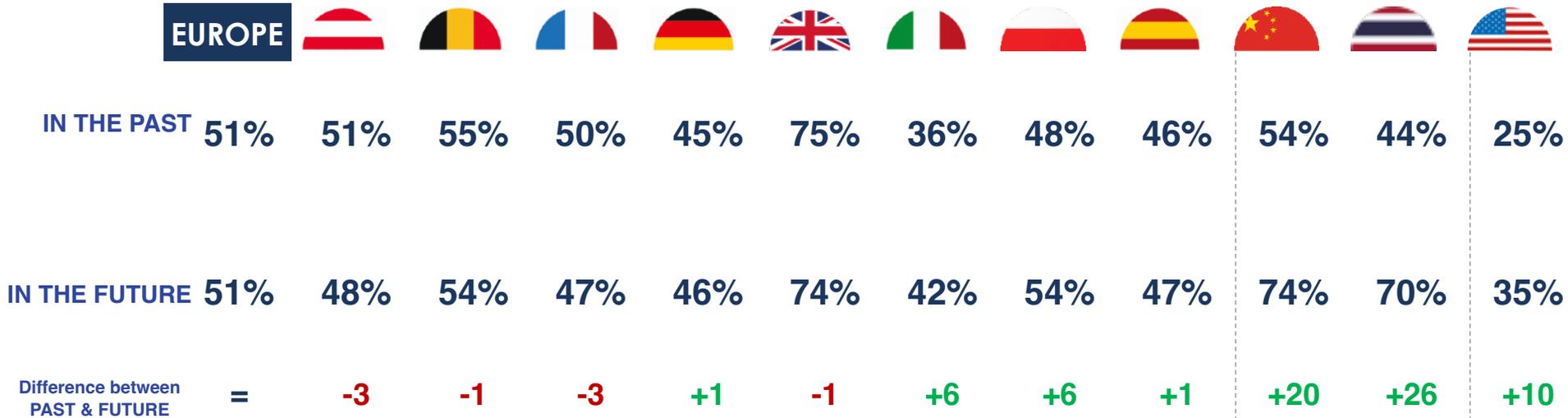
54%

Planned to purchase
travel insurance



THE CHINESE AND THAIS INTEND TO BUY TRAVEL INSURANCE MORE THAN IN THE PAST. THE ITALIANS, POLISH AND AMERICANS ALSO, BUT TO A LESSEER EXTENT

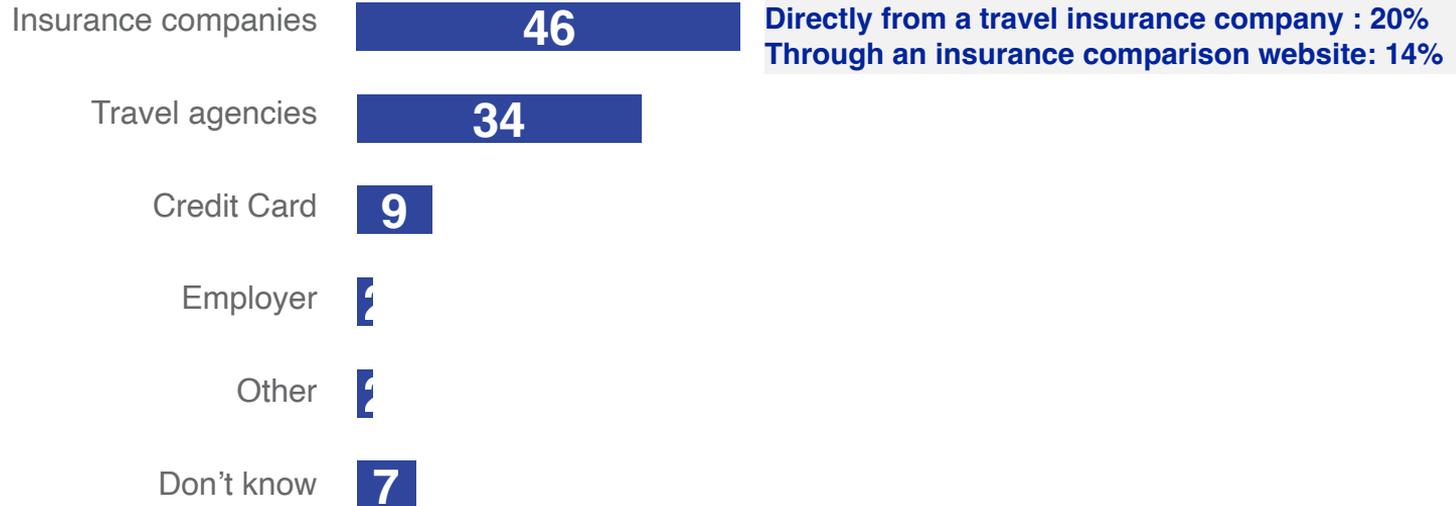
INSURANCE COVERAGE



INSURANCE COMPANIES ARE GENERALLY PREFERRED WHEN PURCHASING A TRAVEL INSURANCE POLICY

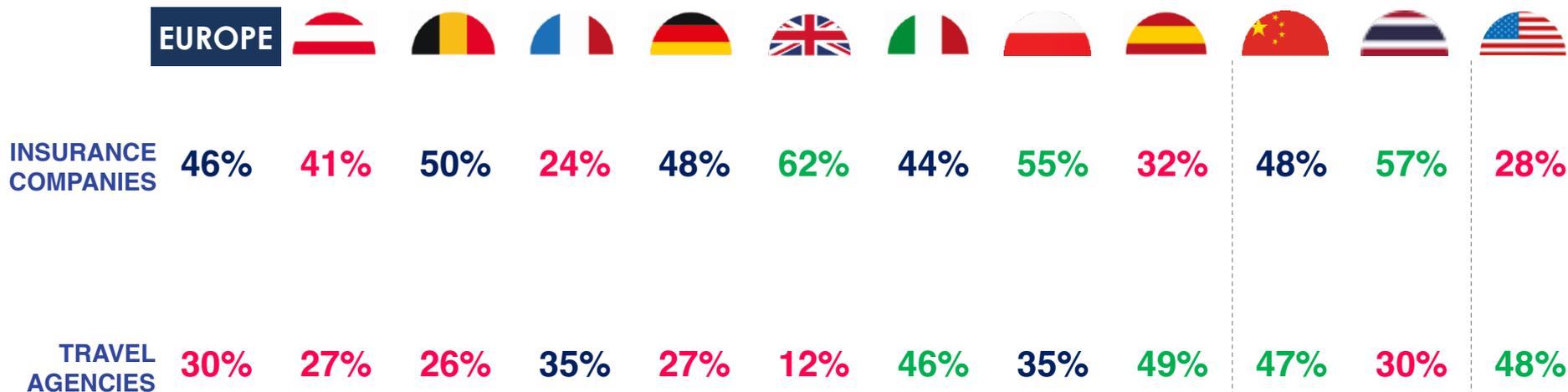
CHANNELS THEY PLAN TO USE FOR PURCHASING TRAVEL INSURANCE

Planned to buy their travel insurance in the future through...

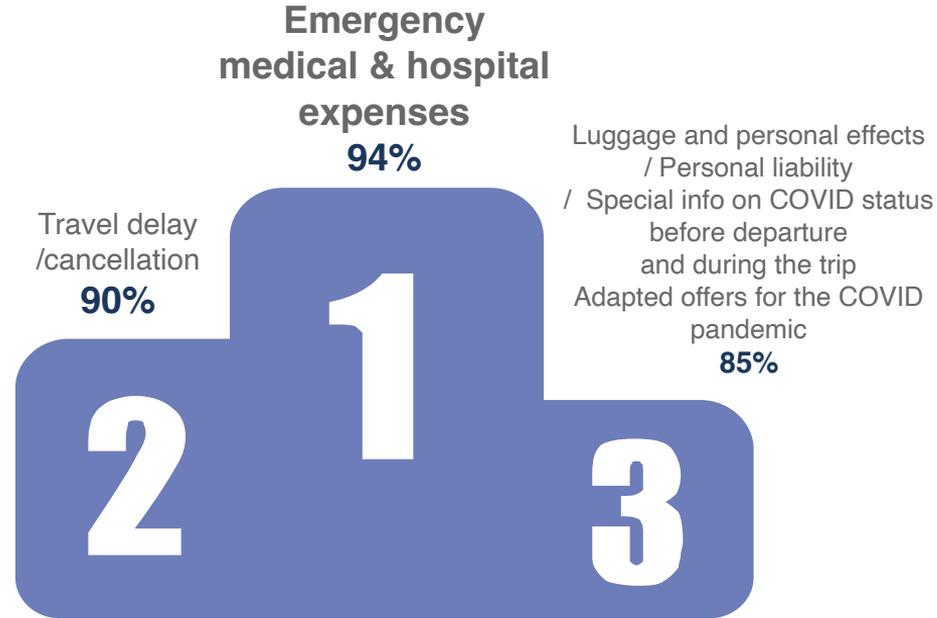


BUT THE ITALIANS, SPANISH , CHINESE AND AMERICANS PREFER TRAVEL AGENCIES

INSURANCE COVERAGE



TOP 3 TRAVEL INSURANCE COVERAGE



TRAVEL INSURANCE IS MOSTLY REQUIRED FOR EMERGENCY EXPENSES AND TRAVEL DELAY/CANCELLATION

IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWING

