

Holiday Barometer among Europeans, Americans & Asians

IPSOS/EUROP ASSISTANCE SURVEY
20TH EDITION



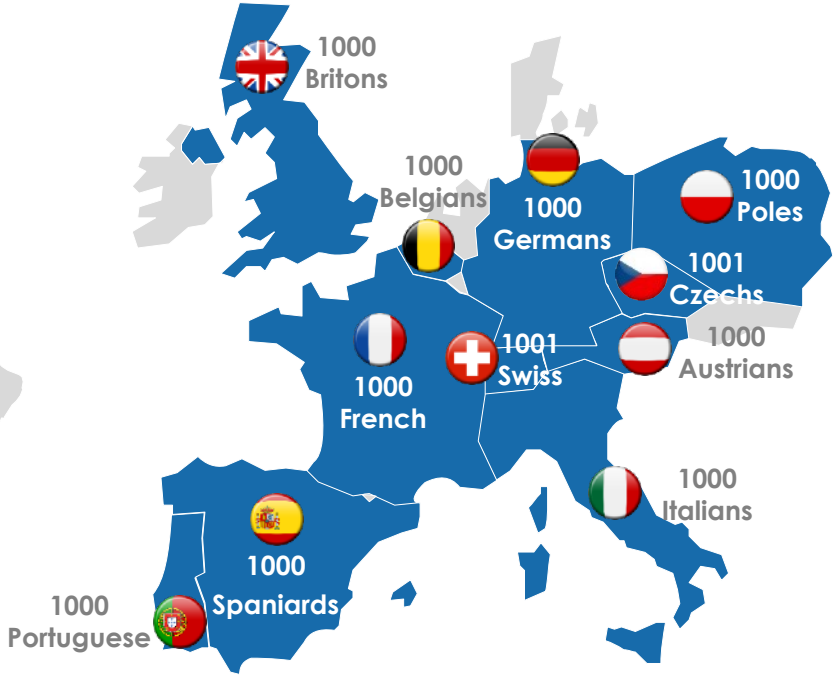
SCOPE OF THE SURVEY

14 COUNTRIES
14,002 INTERVIEWS

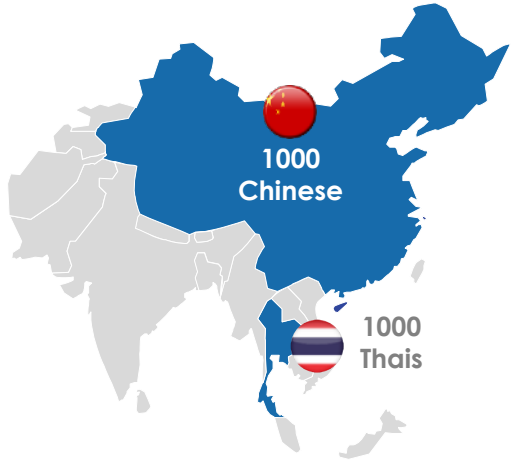
American scope



European scope



Asian scope

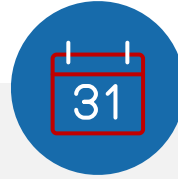


METHODOLOGY



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

CONTENT

IMPACT OF
COVID-19 ON
PERSONAL
SITUATION

P.5

1

BACK TO 2020
SUMMER HOLIDAYS
P.10

2

STATE OF MIND
REARDING NEXT TRIP
P.15

3

2021 SUMMER
HOLIDAY PLANS
P.29

4

FAVORITE
DESTINATIONS
P.44

5

2021 SUMMER HOLIDAYS
ORGANIZATION
P.53

6

NEW TRAVEL
PRACTICES
P.68

7

APPENDICES
P.78

8

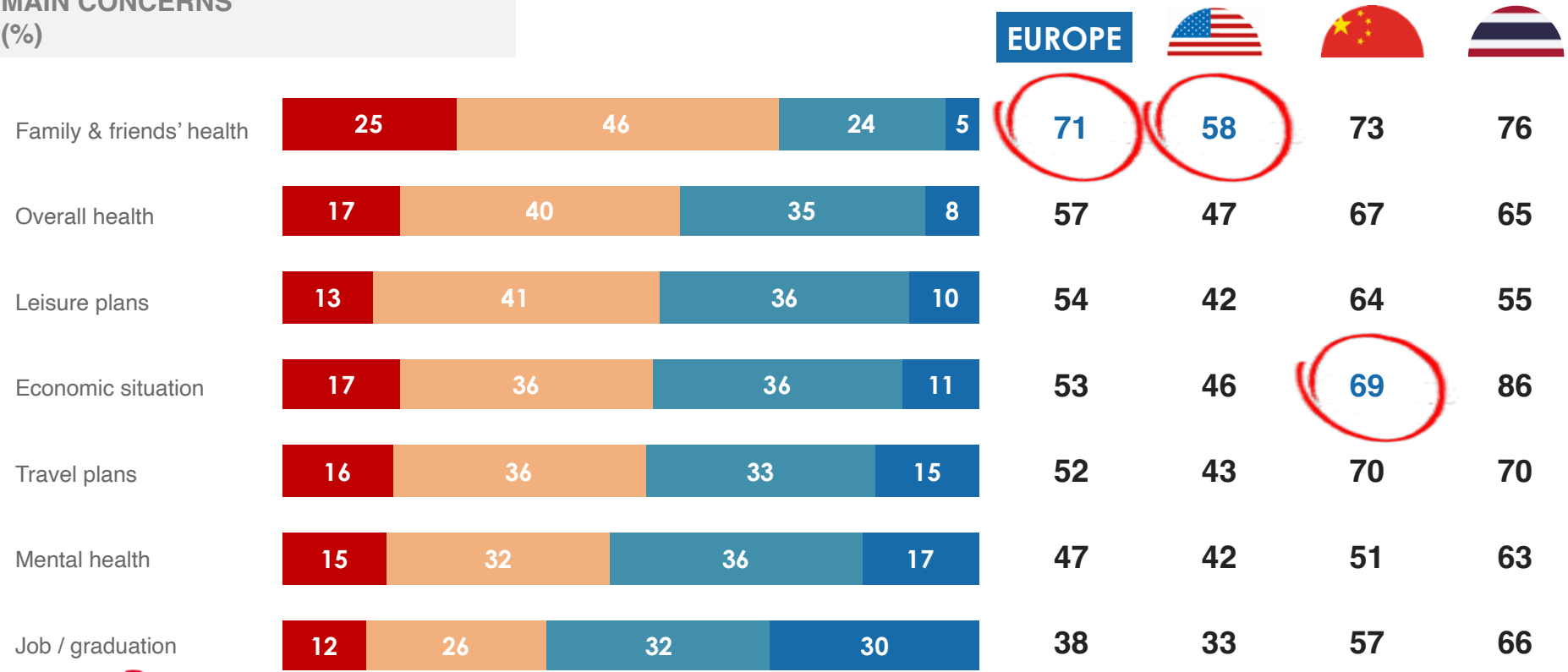
1. IMPACT OF COVID-19 ON PERSONAL SITUATION

An illustration of two people in a landscape. One person is standing and looking through binoculars, while the other is walking towards them. The background features stylized trees and a warm, yellowish-orange sky.

- > Main concerns
- > Activities missed due to COVID

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

MAIN CONCERNS (%)



Are you concerned about the following regarding COVID-19?

Very concerned Quite concerned Not very concerned Not concerned at all

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 A LOT DUE TO COVID (%)

	EUROPE	USA	CHINA	THAILAND
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 the following things, would you say that you are missing them a lot, a little, not at all (or you are not concerned)?

GAME CHANGERS

2.

BACK TO 2020 SUMMER HOLIDAYS

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

LAST SUMMER, LESS THAN HALF OF THE EUROPEANS AND THAI TOOK A TRIP DURING THE SUMMER. IT WAS THE CASE FOR ONLY 3 AMERICANS OUT OF 10

SUMMER HOLIDAY TRIPS IN 2020

EUROPE

41%

USA

29%

CHINA

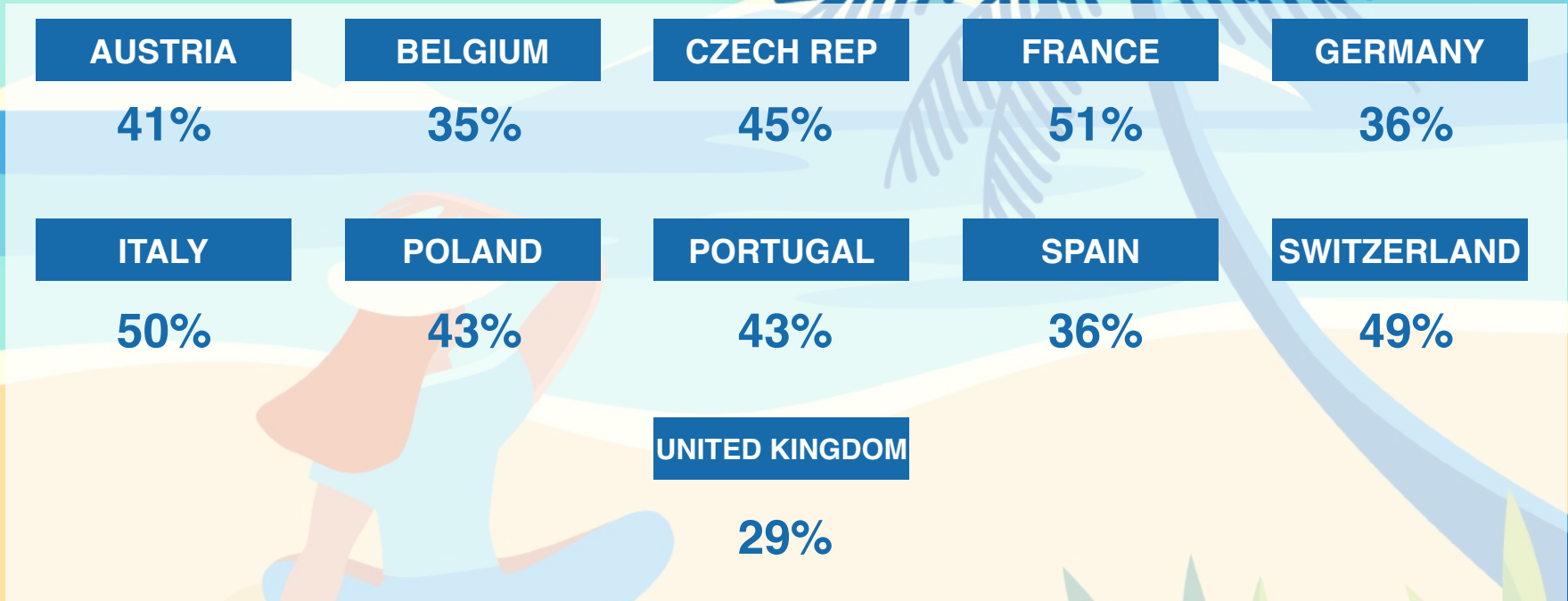
39%

THAILAND

44%




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%

3.

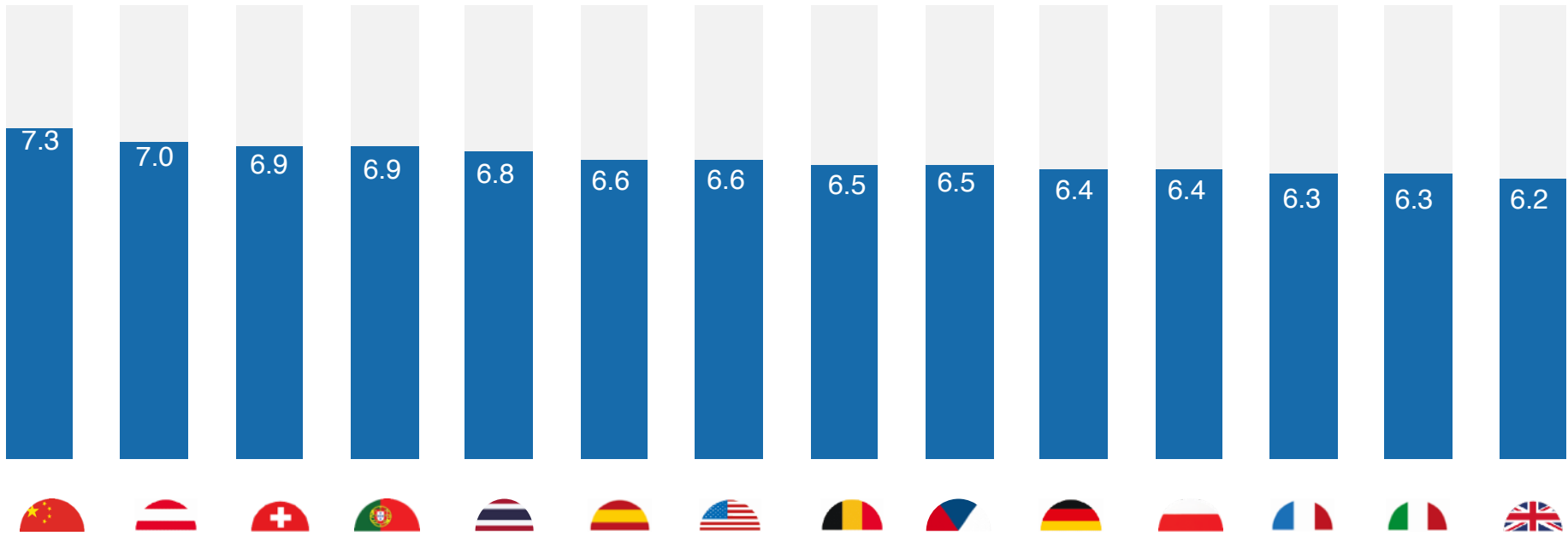
STATE OF MIND REGARDING NEXT TRIP



- > 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

GLOBALLY, THE RESPONDENTS ARE EXCITED TO TRAVEL AGAIN. IT'S MOSTLY THE CASE IN CHINA, AUSTRIA, SWITZERLAND AND PORTUGAL

EXCITEMENT FOR THE NEXT TRIP (MEAN /10)



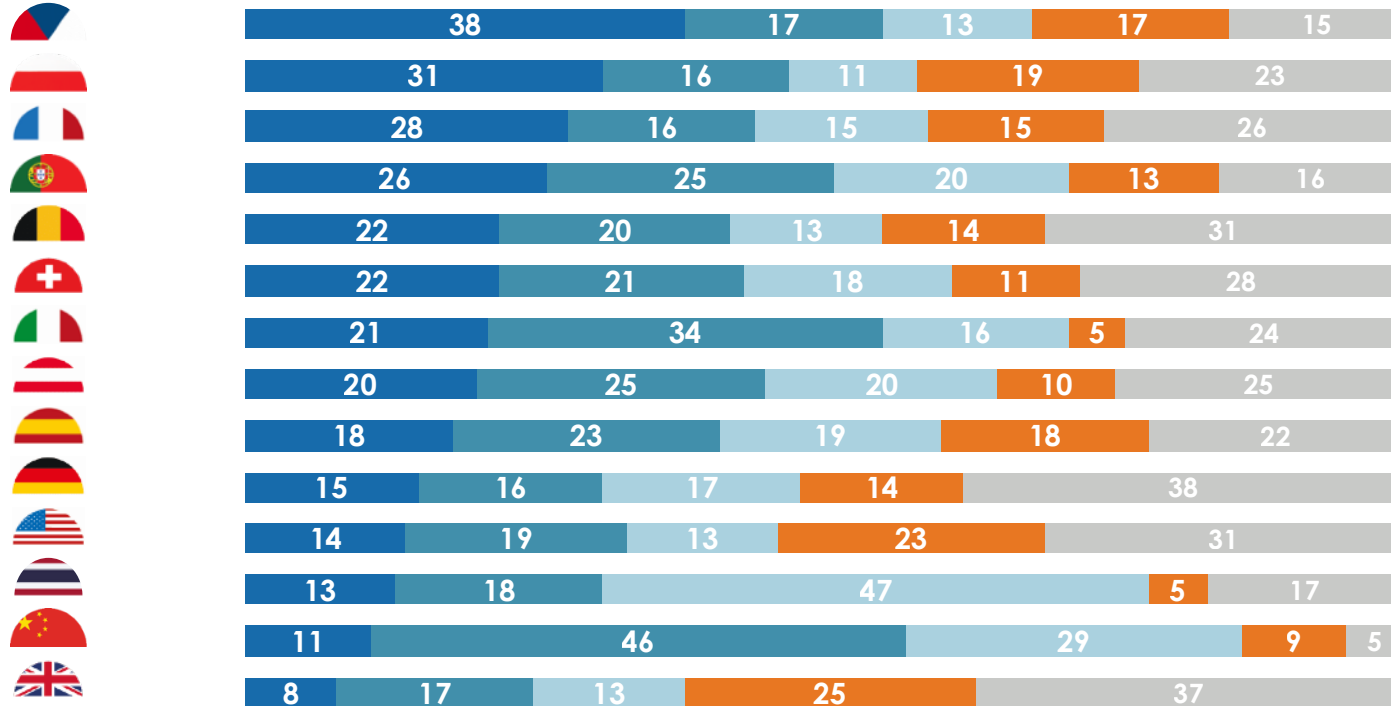
When thinking about your next trip, how would you qualify your feeling on a scale from 1 to 10, 1 means that you feel very anxious and 10 that you feel very excited?

IN ALMOST ALL COUNTRIES, HOLIDAY IS A BUDGET CATEGORY THEY DON'T WANT TO TOUCH OR WILL CUT SLIGHTLY. IT IS PARTICULARLY THE CASE IN THE CZECH REPUBLIC, POLAND AND FRANCE

FRANCE

IMPORTANCE OF HOLIDAY

BUDGET



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

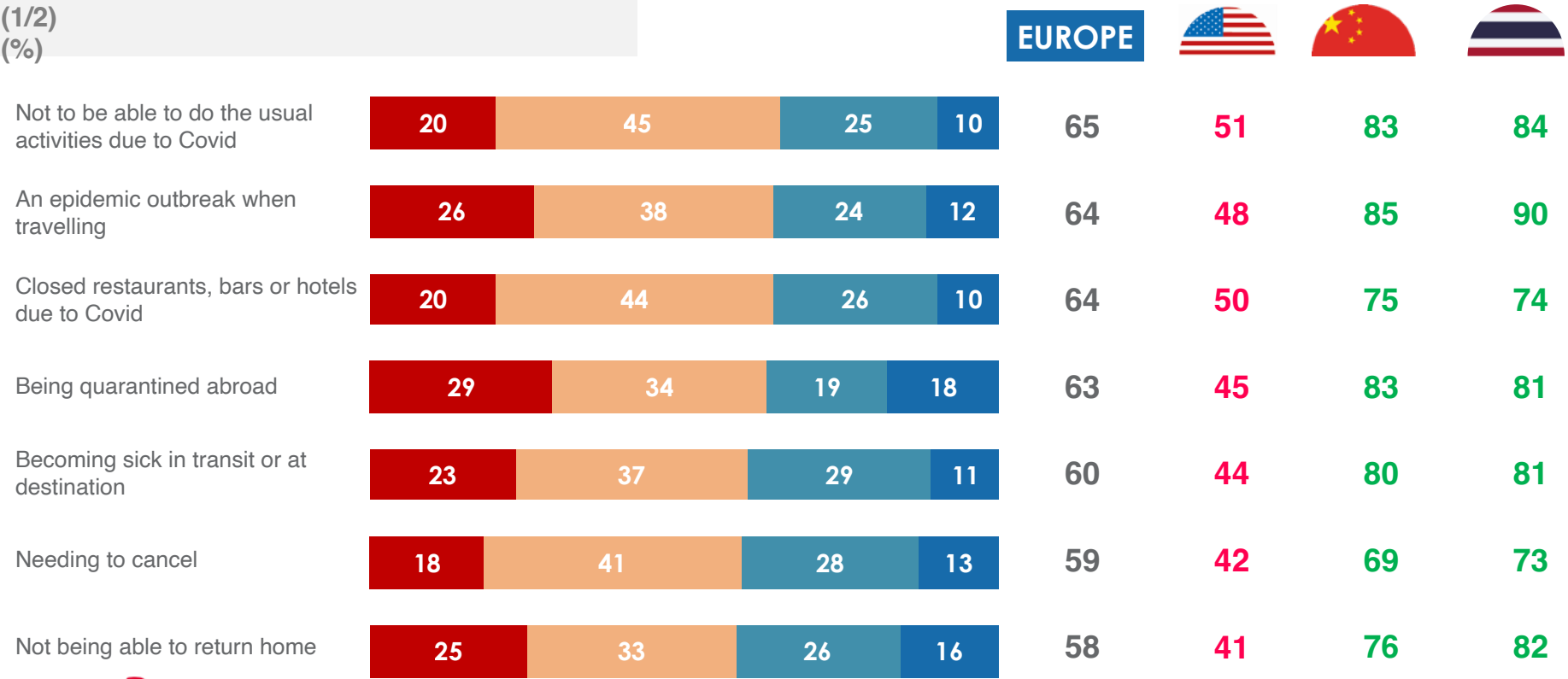
Don't want to touch Cut costs slightly Cut costs significantly Will do without None

GAME CHANGERS



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

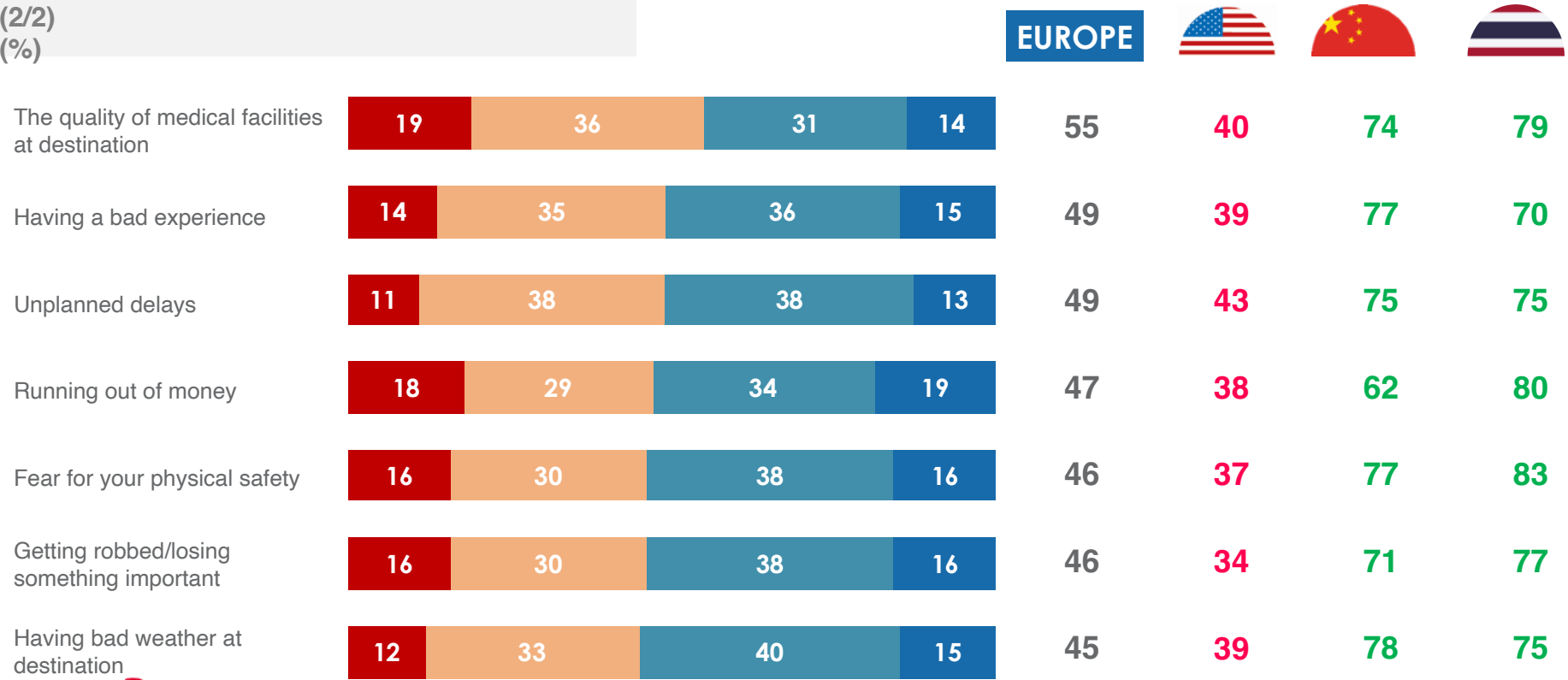
MAIN CONCERNS REGARDING NEXT TRIP
(1/2)
(%)



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

MAIN CONCERNS REGARDING NEXT TRIP

(2/2)
(%)



Are you concerned about the following for your next trip?

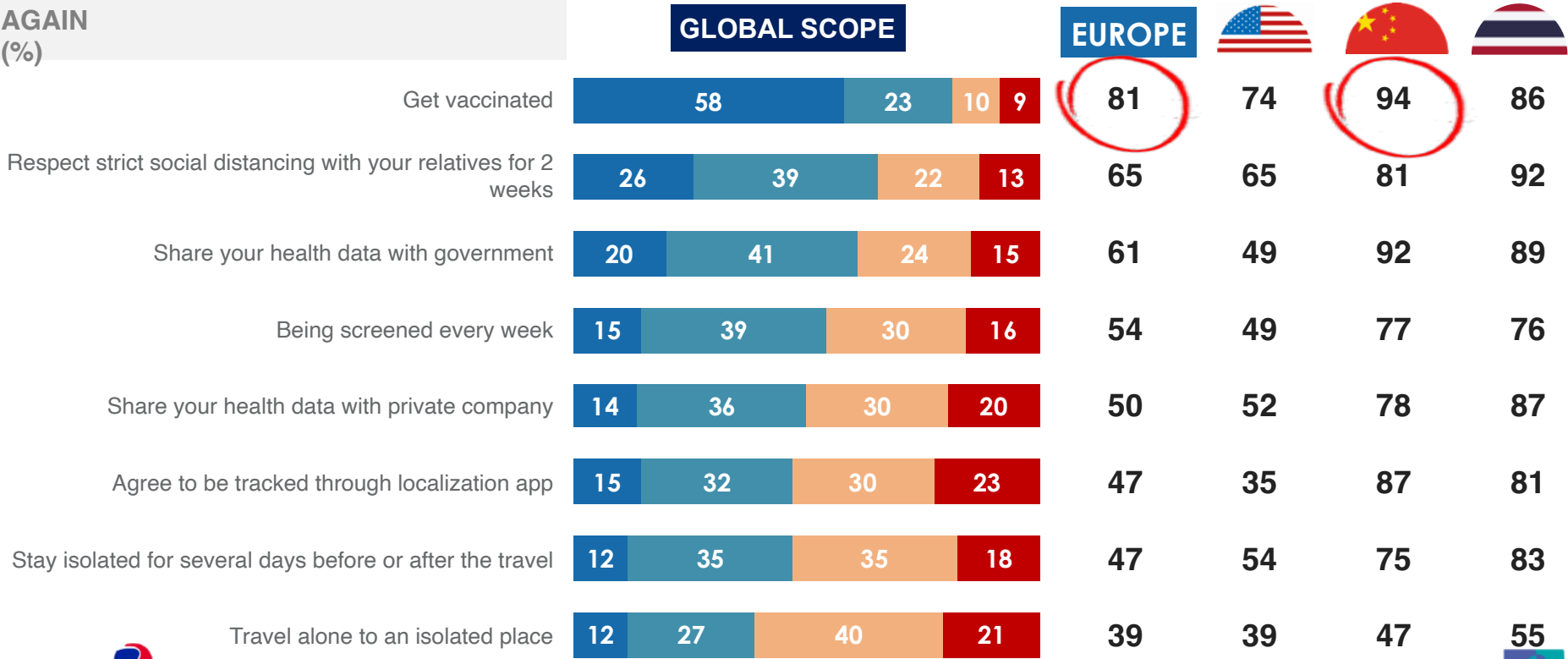
Very concerned Quite concerned Not very concerned Not concerned at all

GAME CHANGERS



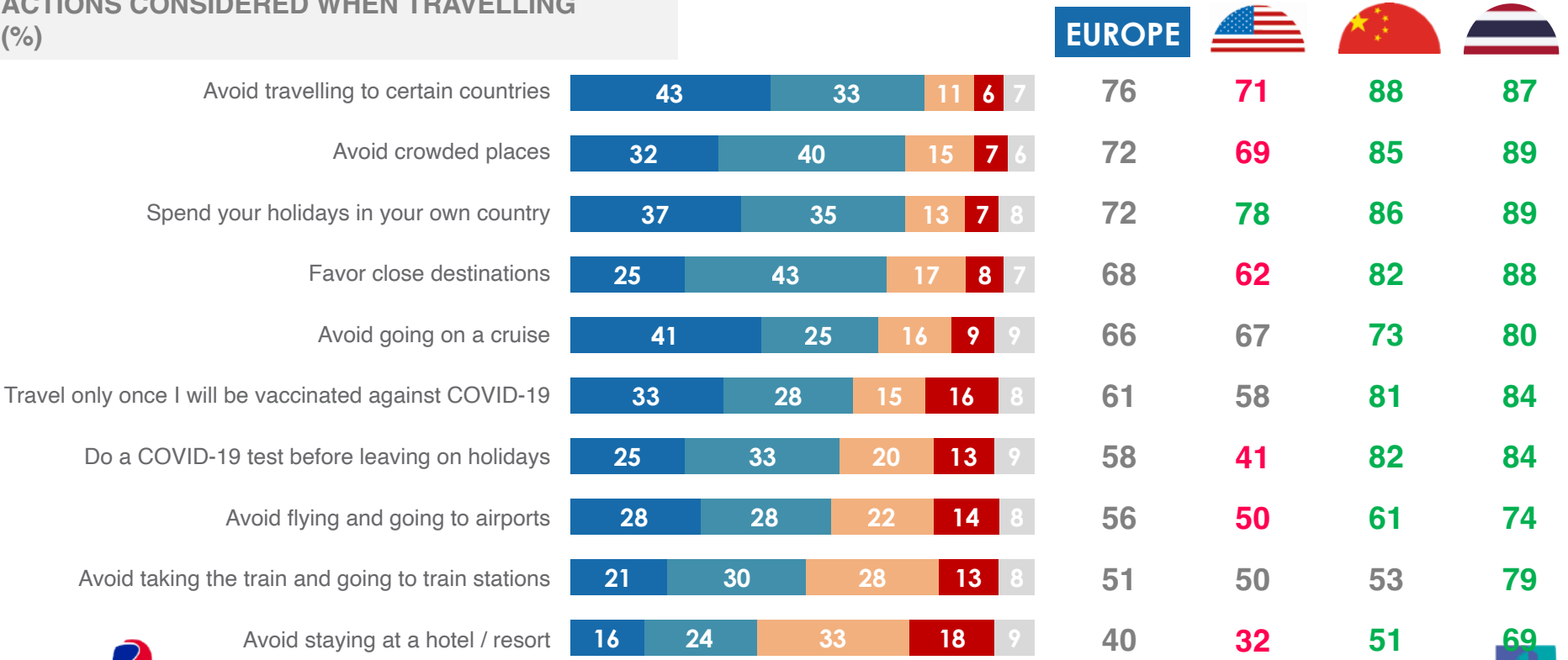
THE RESPONDENTS ARE MAINLY WILLING TO GET VACCINATED IN ORDER TO TRAVEL AGAIN. AMERICANS ARE MORE RESERVE ABOUT SHARING THEIR HEALTH DATA WITH THE GOVERNMENT AND BEING TRACKED THROUGH LOCALIZATION APPS

ACTIONS CONSIDERED TO TRAVEL AGAIN (%)



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)

ACTIONS CONSIDERED WHEN TRAVELLING (%)



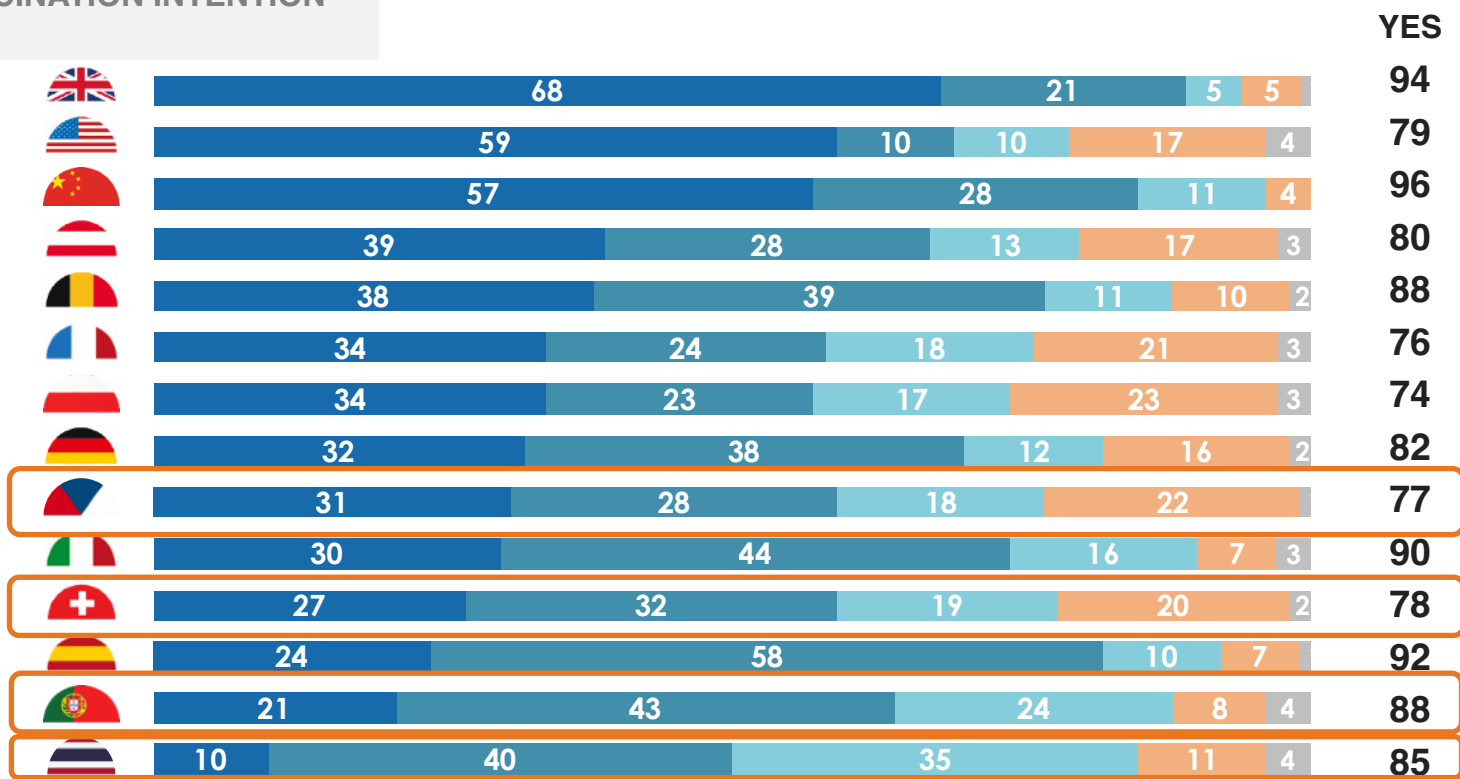
At a personal level, when travelling, do you intend to:
Yes, certainly **Yes, probably** **No, probably not** **No, surely not** **Don't know**

GAME CHANGERS



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 (%)



Are you personally going to get the COVID-19 vaccine?

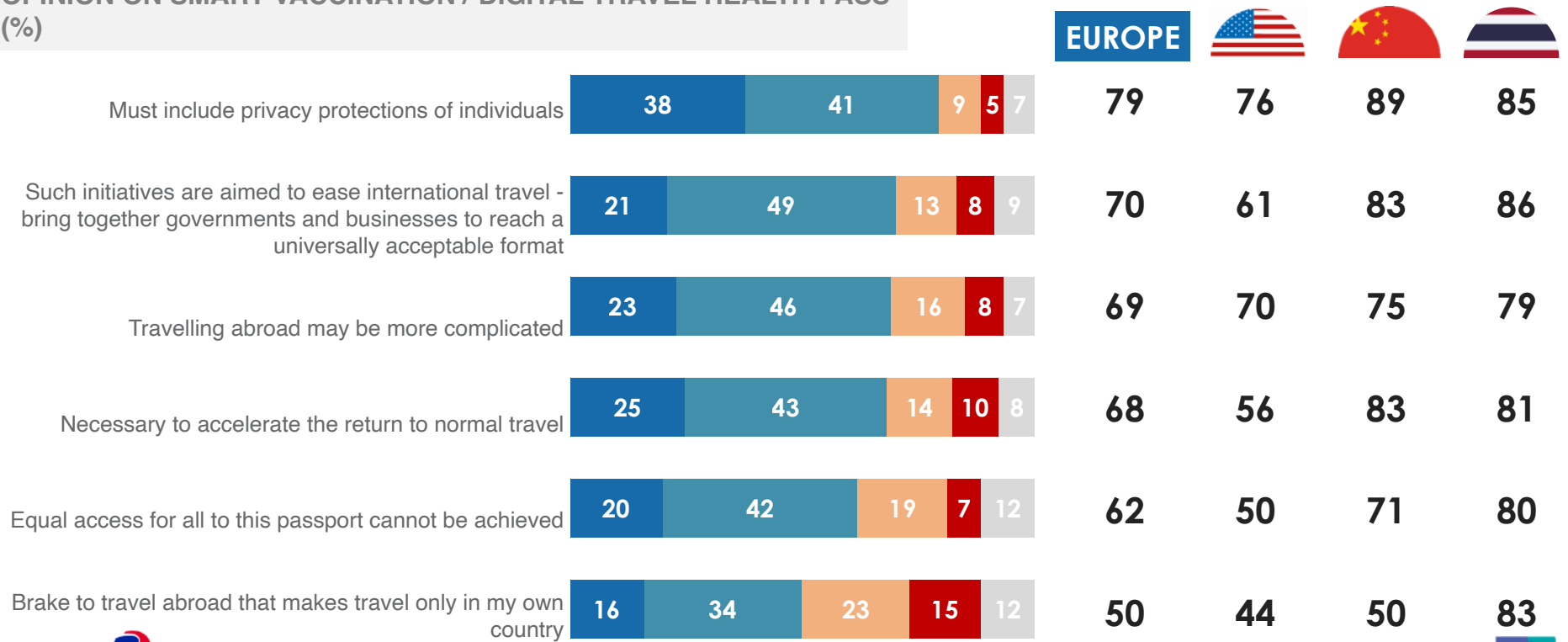
Already vaccinated Will get vaccinated ASAP Prefer to wait for a while No DK

GAME CHANGERS



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

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



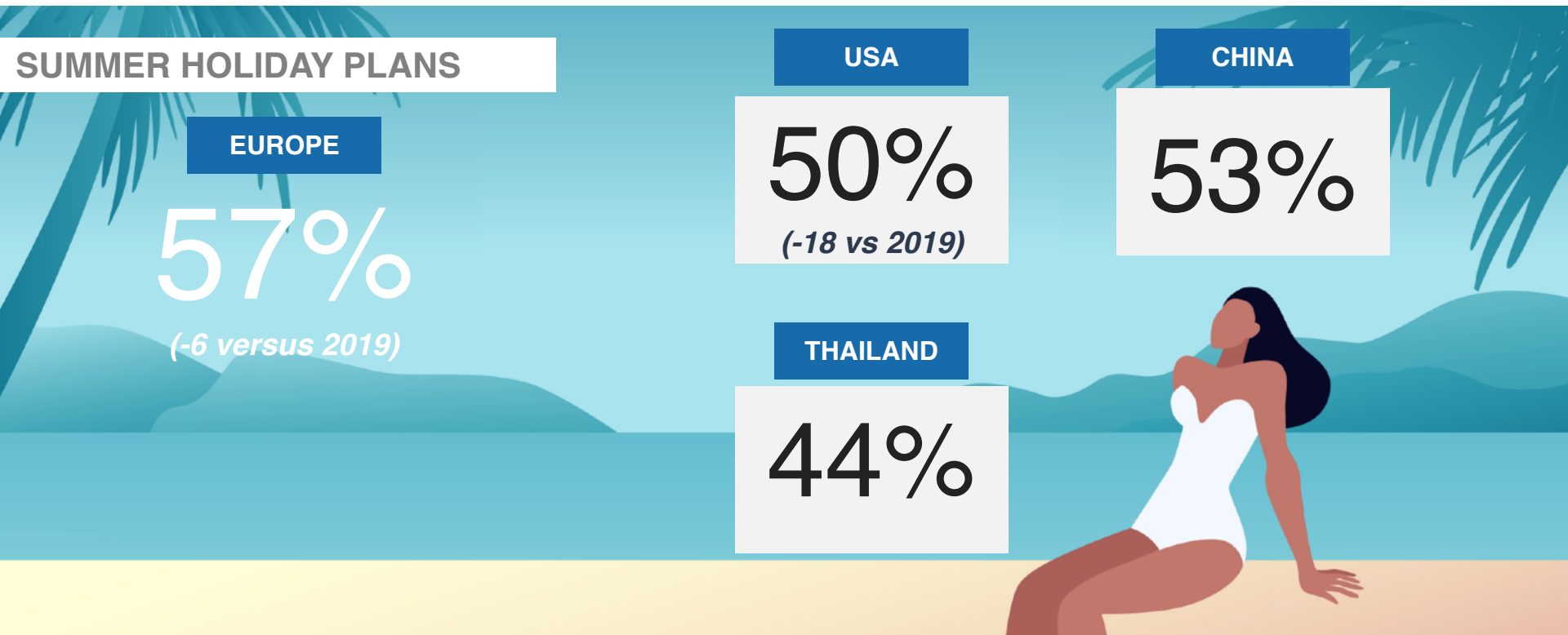
4.

2021 SUMMER HOLIDAY PLANS

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



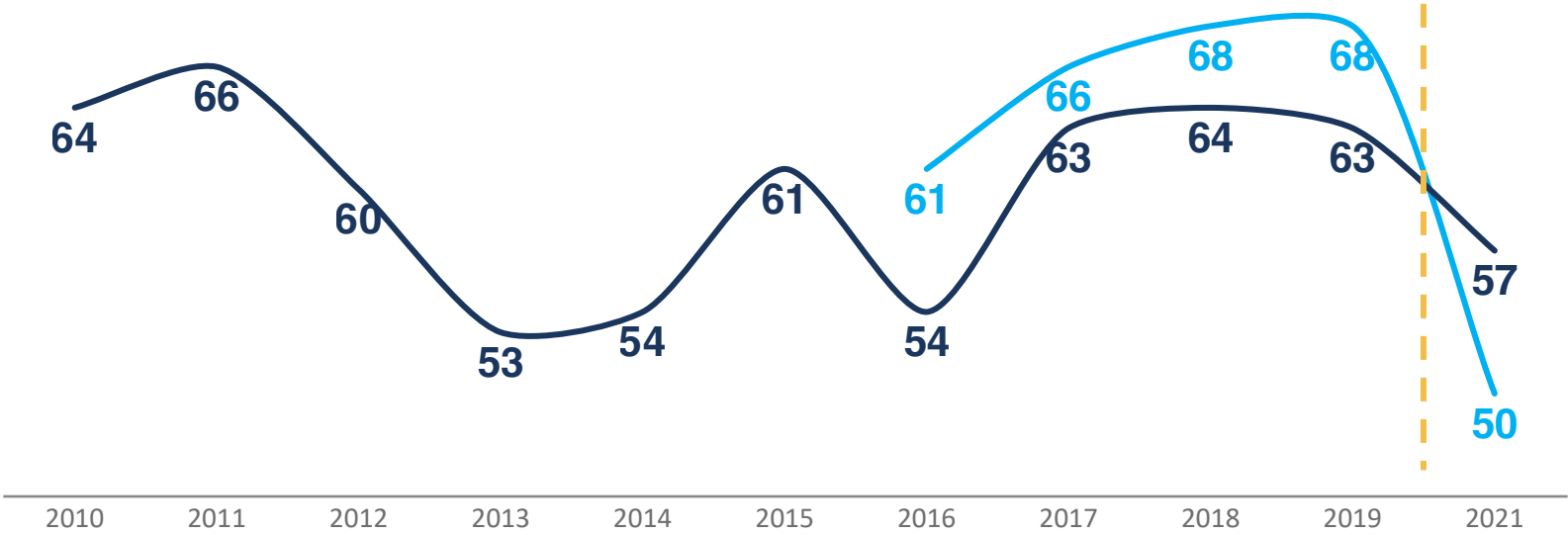
SUMMER PLANS ARE DECREASING COMPARED TO 2019, ESPECIALLY IN THE US



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

EVOLUTION OF HOLIDAY PLANS (%)

EUROPE USA



AMONG EUROPEANS, THE SITUATIONS ARE QUITE DIVERSE

SUMMER HOLIDAY PLANS

AUSTRIA

61%

-9pts vs 2019

BELGIUM

53%

-12pts

CZECH REP

65%

FRANCE

67%

-2pts

GERMANY

42%

-21pts

ITALY

67%

+6pts

POLAND

66%

+5pts

PORTUGAL

62%

+2pts

SPAIN

58%

-2pts

SWITZERLAND

63%

+1pt

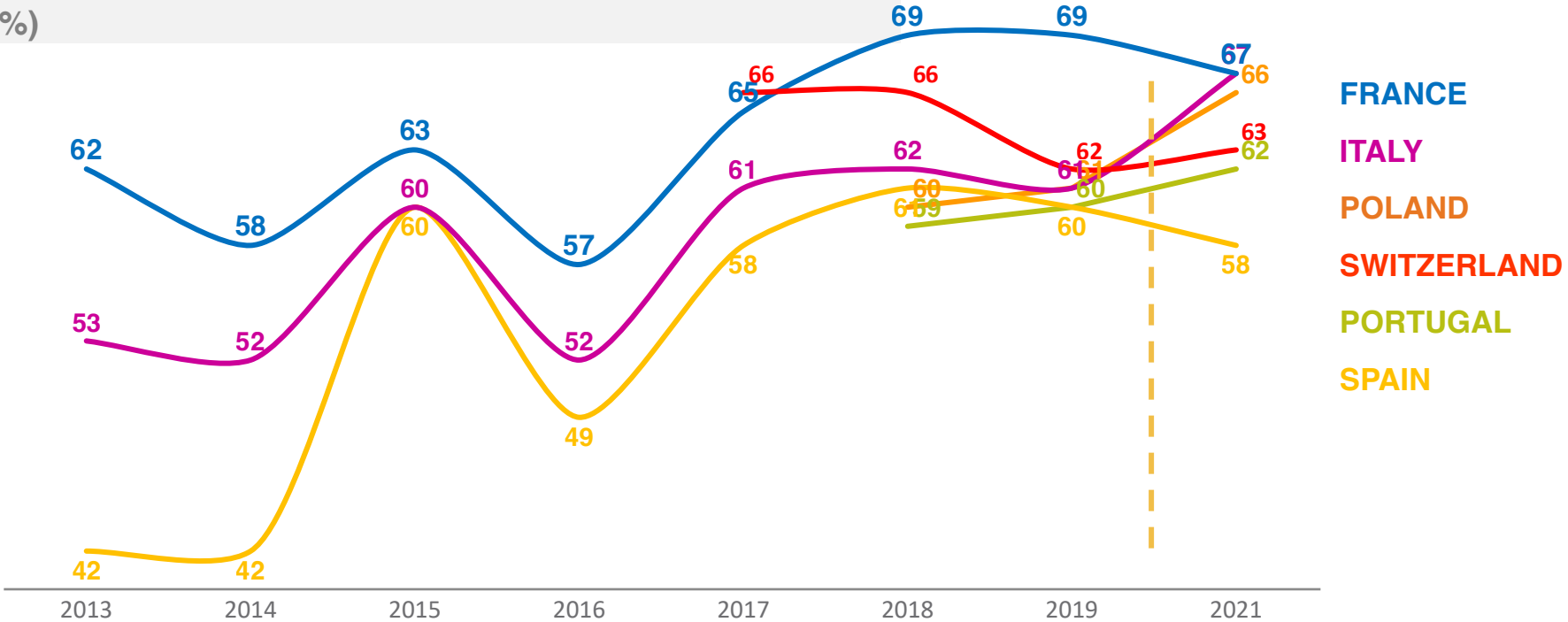
UNITED KINGDOM

50%

-14pts

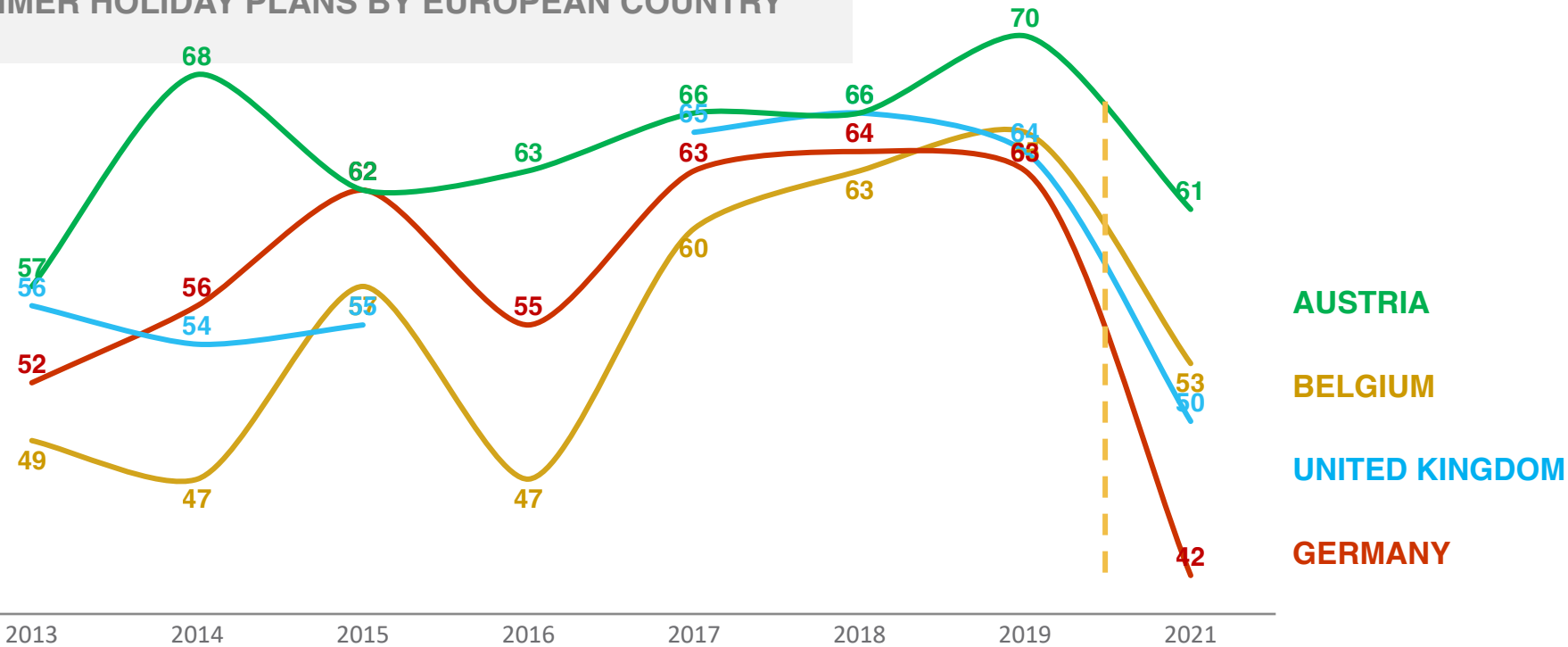
INTENT TO GO ON HOLIDAY REMAINS STABLE IN FRANCE, PORTUGAL, SPAIN AND SWITZERLAND. IT INCREASES SLIGHTLY IN ITALY AND POLAND

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
(%)

	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

€ 1,581

-23% vs 2019

Evolution calculated on same scope as 2019

USA

\$2 319

-2%

€1 901

CHINA

¥11 850

€1 522

THAILAND

฿53 400

€1 405

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

AUSTRIA

€2 088

-21%

BELGIUM

€1 983

-12%

CZECH REP

Kč 26 900

€1 056

FRANCE

€1 627

-26%

GERMANY

€1 843

-25%

ITALY

€1 589

-10%

POLAND

zł 3 950

-9%

€885

PORTUGAL

€1 339

=

SPAIN

€1 256

-30%

SWITZERLAND

CHF 2 713

-17%

€2 473

UNITED KINGDOM

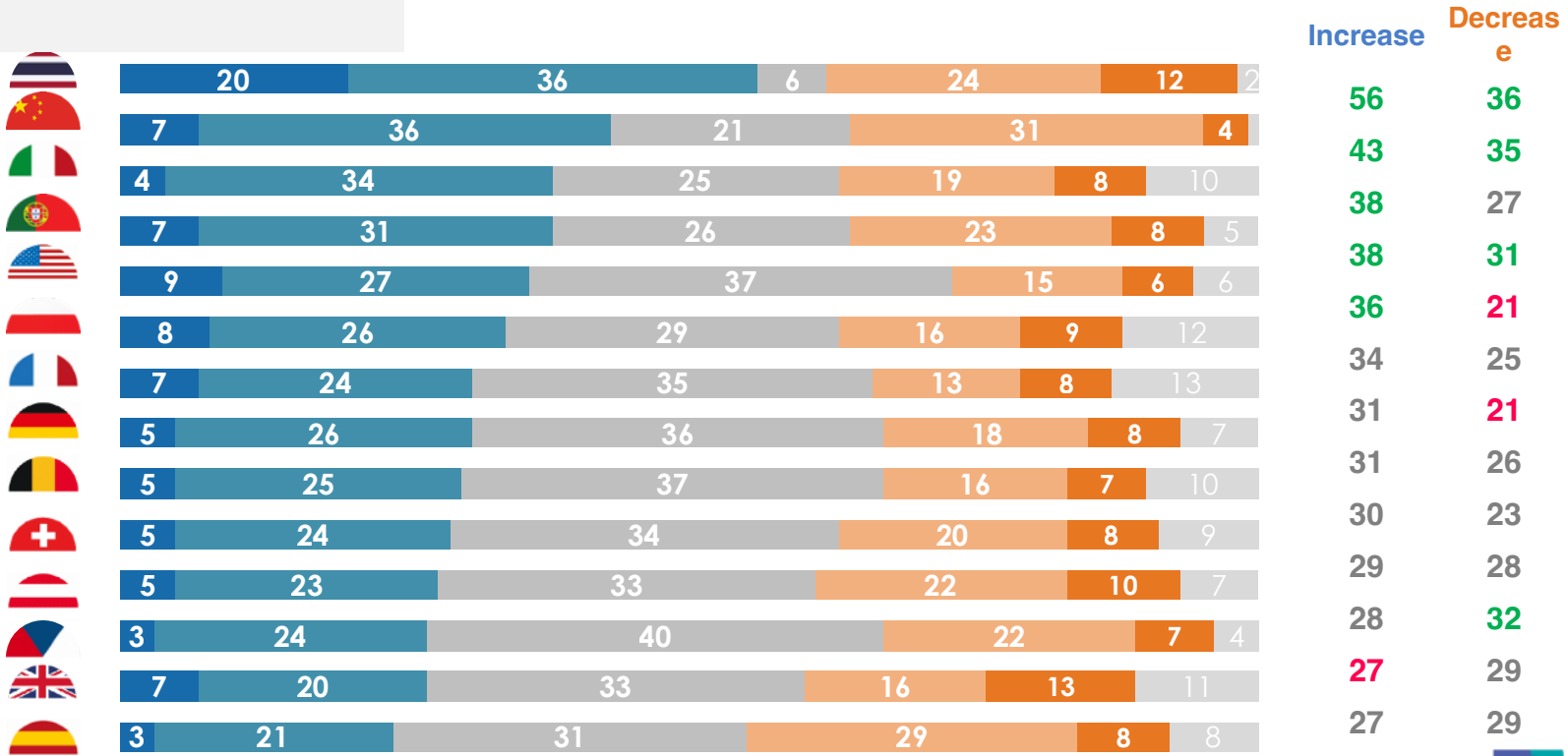
£1 543

-17%

€1 792

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 (%)



How might your budget for your summer trip change compared to what you usually spent for summer trip? Will it :




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

GAME CHANGERS



WITH A DOUBLED BUDGET, HOLIDAYMAKERS WOULD TRAVEL MORE FREQUENTLY AND LONGER

WHAT IF YOUR SUMMER HOLIDAY BUDGET WAS DOUBLED?

	EUROPE			
Would travel more frequently	28	25	22	9
Would travel longer	22	18	23	18
Would spend more on site	16	18	20	14
Would travel to other destinations	15	13	14	23
Would book better accommodation	11	12	12	13
Would improve transportation	4	6	4	12
Would bring more people with them	4	8	5	11

WITH A REDUCED BUDGET, HOLIDAYMAKERS WOULD SPEND LESS ON SITE, TRAVEL SHORTER AND BOOK CHEAPER ACCOMMODATION

WHAT IF YOUR SUMMER HOLIDAY BUDGET WAS REDUCED?

	EUROPE			
Would spend less on site	19	15	26	14
Would travel shorter	17	17	19	18
Would book a cheaper accommodation	16	10	15	18
Would sacrifice something else in my daily life	13	14	12	12
Would travel less frequently	11	14	10	11
Would travel to other destinations	9	6	3	6
Would visit family instead of paying for accommodation	9	14	4	9
Would switch to a cheaper transportation	4	5	10	8
Would bring less people with you	2	5	1	4

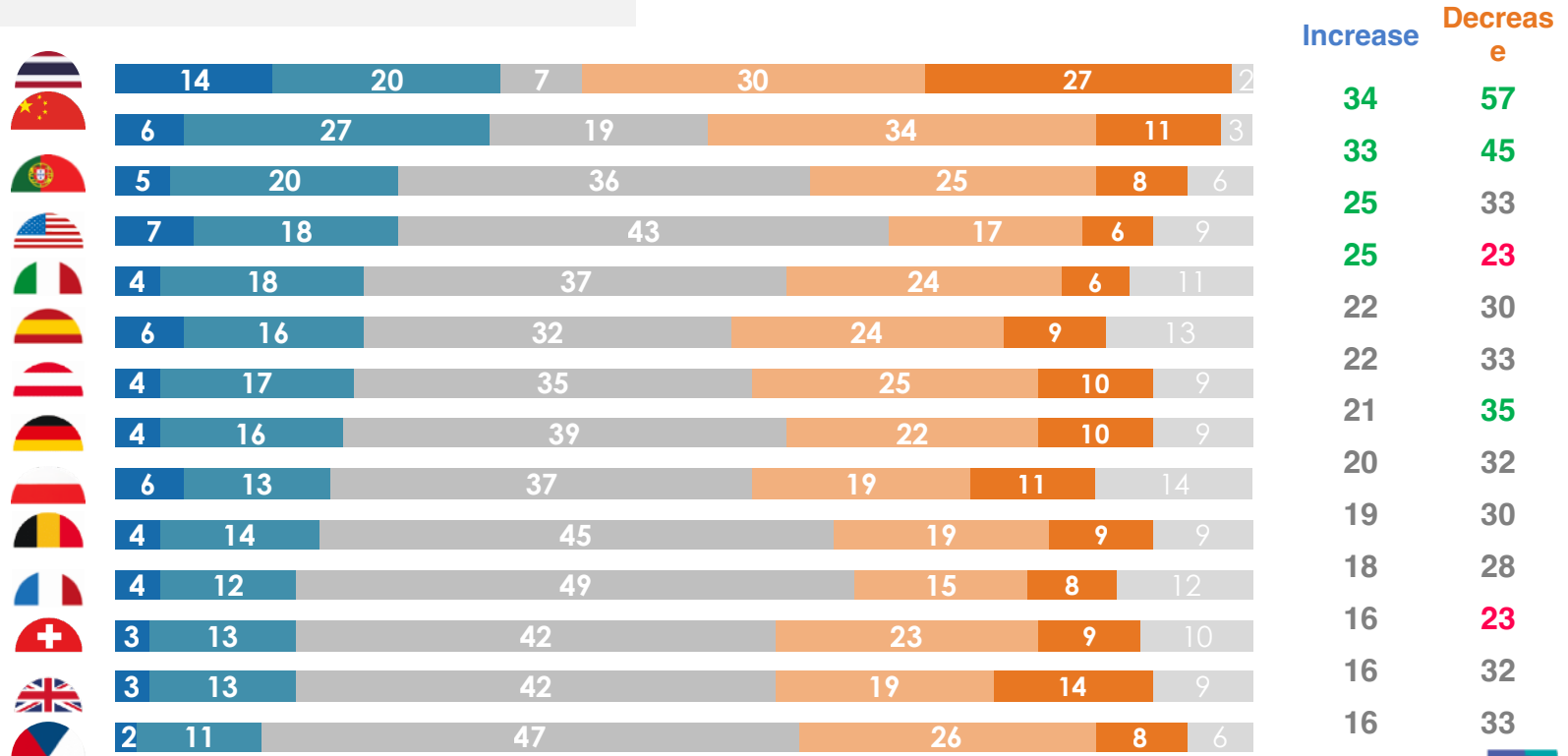
FRANCE, SWITZERLAND AND CZECH REPUBLIC ARE THE ONLY COUNTRIES TO TAKE 2 WEEKS OR MORE OF SUMMER HOLIDAYS

SUMMER HOLIDAY DURATION (weeks on average)



HOLIDAY MAKERS FROM THAILAND, CHINA AND AUSTRIA CONSIDER THE MOST THAT THEIR HOLIDAY DURATION WILL DECREASE THIS YEAR

EVOLUTION OF SUMMER HOLIDAY DURATION



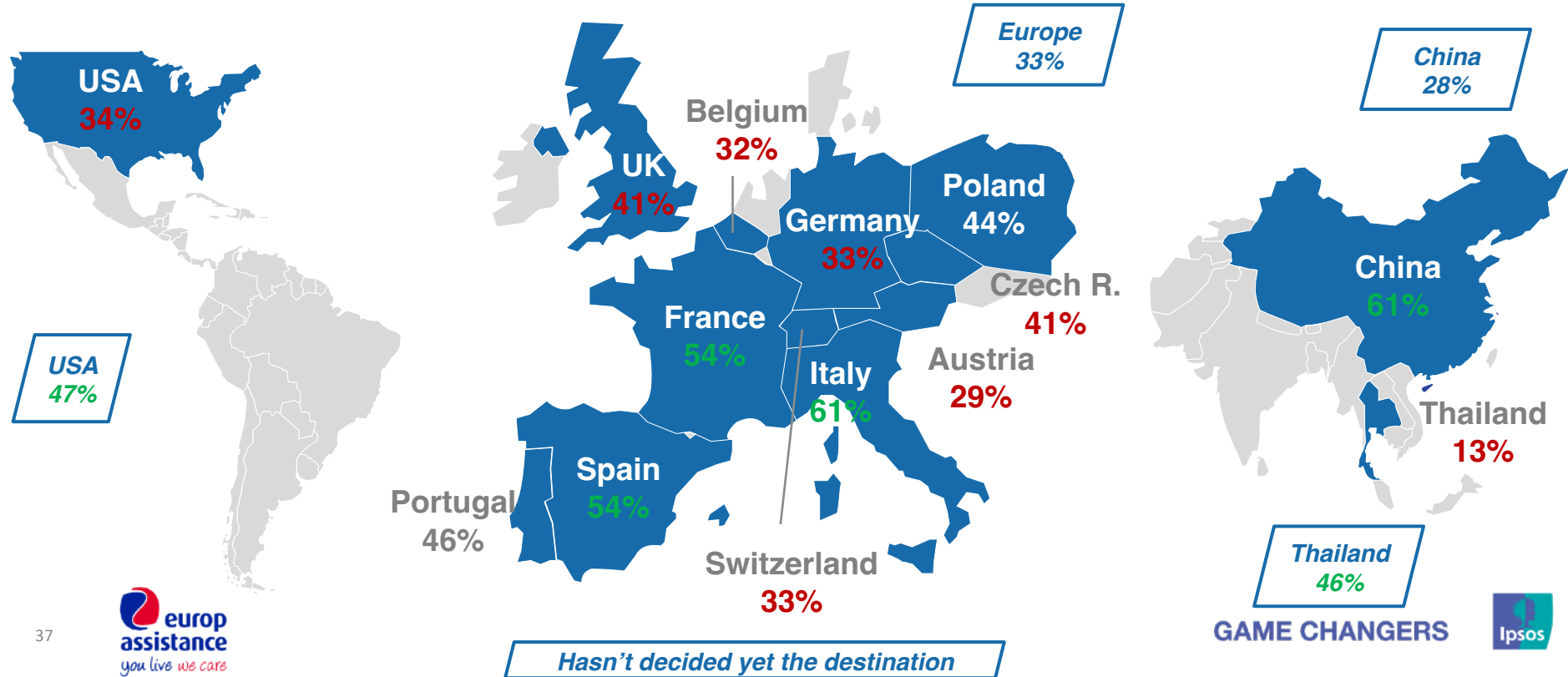
5.

FAVORITE DESTINATIONS

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

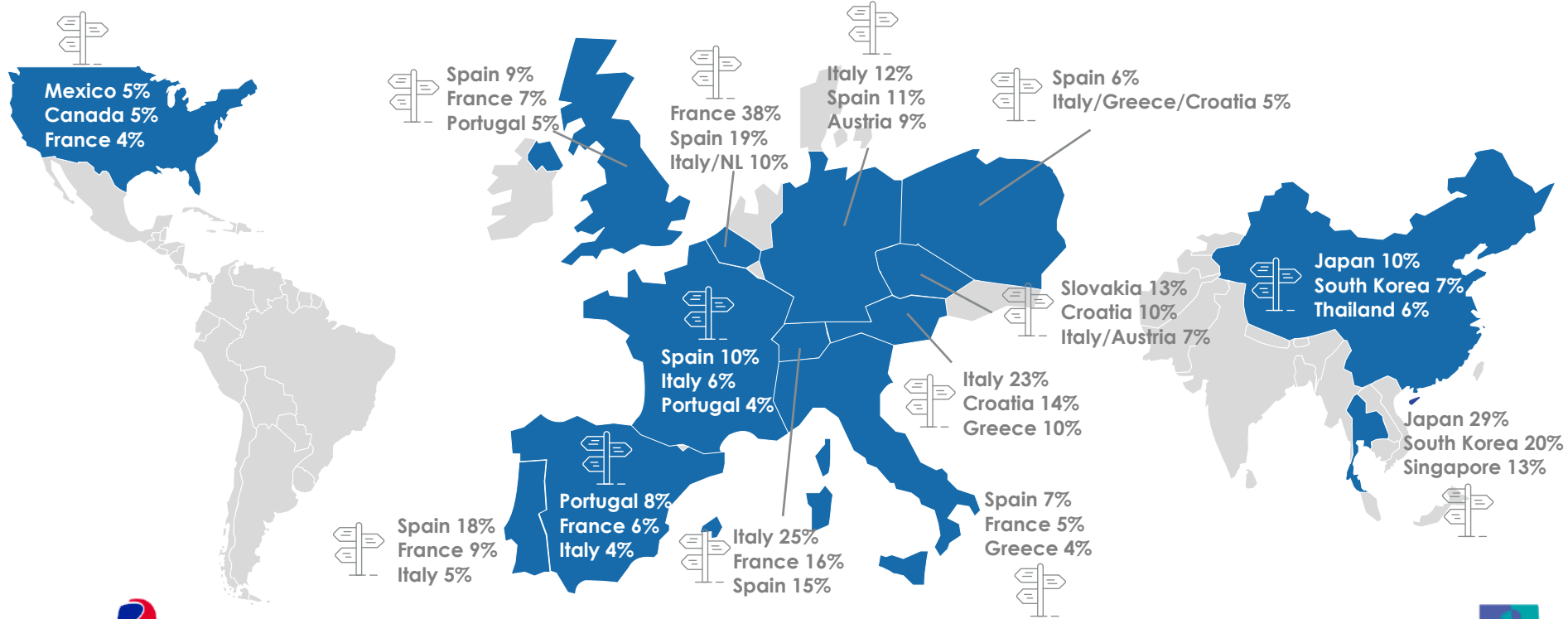
CHINESE, ITALIAN, FRENCH AND SPANISH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER. AMERICAN AND THAI ARE THE MOST UNDECISIVE

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



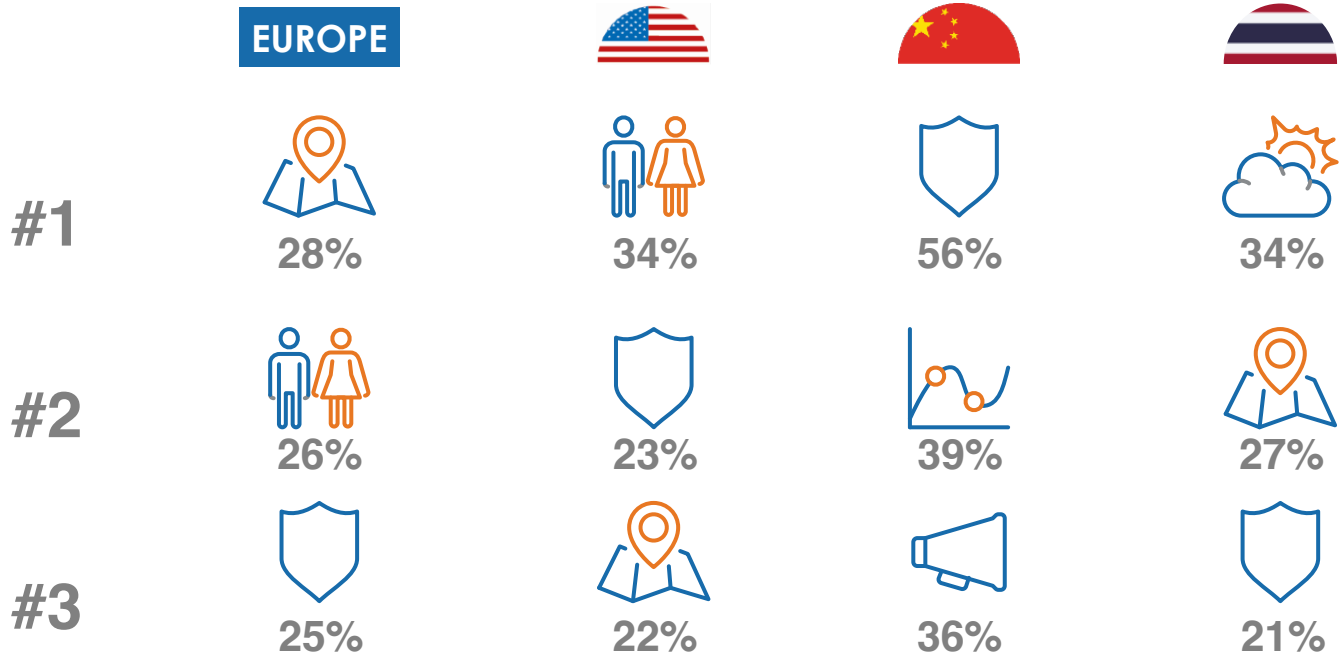
THE SEASIDE REMAINS THE MOST ATTRACTIVE DESTINATION FOR THE SUMMER HOLIDAYS;
 IN THE US, IT IS FOLLOWED VERY CLOSELY BY URBAN DESTINATIONS

SUMMER HOLIDAY PREFERENCES

	EUROPE			
	58	39	57	57
	26	24	32	34
	24	28	24	40
	21	35	38	29
	18	18	32	25

SECURITY AND ALREADY KNOWING THE DESTINATION ARE THE MOST IMPORTANT CRITERIA TO CHOSE THE DESTINATION. IN CHINA, COVID RELATED SECURITY IS VERY IMPORTANT



MOTIVATIONS FOR THE CHOICE OF DESTINATION



IF EUROPEANS CHOOSE THEIR DESTINATION ACCORDING THEIR BUDGET, AMERICANS TAKE MORE IN CONSIDERATION THE LEISURE AND CULTURAL OPPORTUNITIES AND ASIANS PRIORITIZE THE RISKS

FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION

RANK 2021

	EUROPE			
The budget you intend on allocating	44	#2	#7	#4
The climate	44	#3	#11	#5
The risk of a coronavirus infection	42	#4	#1	#1
Health risks (other than Covid)	39	#7	#2	#2
Opportunities for leisure or cultural activities	38	#1	#11	#17
The risk of a terrorist attack	35	#11	#4	#8
The quality of on-site tourist infrastructures	35	#10	#9	#8
The risk of a personal attack	33	#7	#3	#3
Travel time to my trip destination	29	#5	#10	#11
The risks of social unrest	27	#9	#5	#11

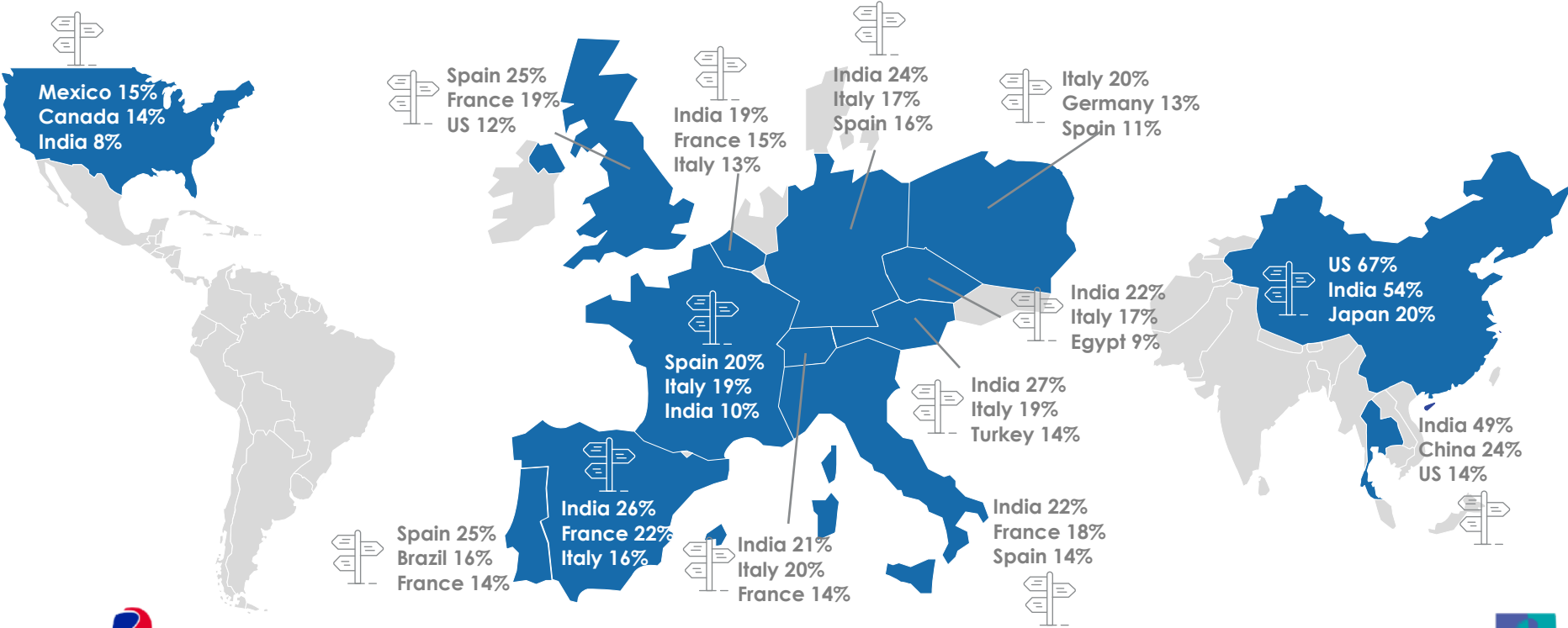
RISK OF A NATURAL DISASTER RANKS QUITE HIGH FOR ASIANS COMPARED TO OTHER COUNTRIES, AND SO DOES THE LANGUAGE FOR THE AMERICANS

FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION 2/2

		RANK 2021		
	EUROPE			
The political climate in the destination country	27	#11	#8	#11
The risk of a natural disaster	25	#15	#6	#5
Your ability to speak the destination country's language	20	#6	#15	#16
The quality of the internet access	20	#13	#13	#5
The economic situation in the destination country	18	#14	#17	#11
The ecological footprint of the trip	17	#17	#13	#8
The exchange rates of the destination country's currency	14	#15	#16	#15

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

GAME CHANGERS



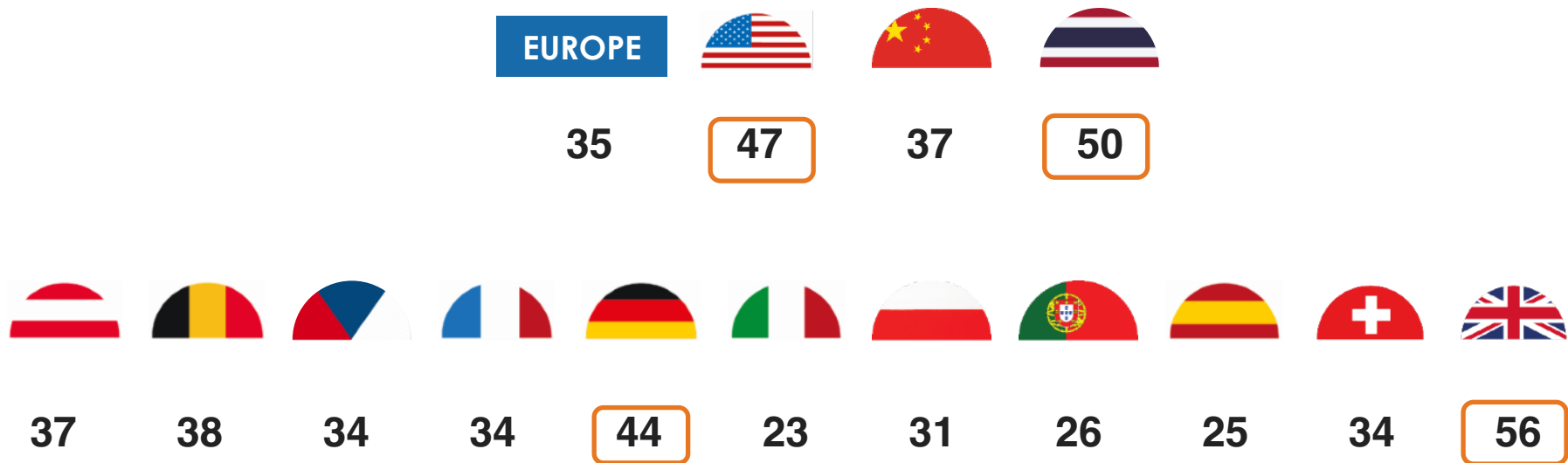
6.

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)




TRAVEL PARTNERS

	EUROPE			
Partner	66 -7	50 -17	64	29
Children	32	33	35	51
Friends	16	21	21	16
Alone	10	16	16	12
Parents	9	15	14	18
Extended family	8 +4	14 +6	7	19
Siblings	7	12	6	14

With whom do you plan on going on a trip this summer?

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

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




HOLIDAYMAKERS STILL DREAM OF ENJOYING A RELAXING SUMMER VACATION SURROUNDED BY THEIR FAMILY MEMBERS. THE CHINESE WOULD ALSO LIKE TO DISCOVER NEW CULTURES. THE THAI ALSO WANT TO ENJOY THEIR HOMES

IDEAL ACTIVITIES DURING SUMMER HOLIDAYS

	EUROPE			
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
Play sports (rambling, mountain climbing, etc.)	12	13	32	9
Make new friendly or romantic acquaintances	11	13	13	4
Take time to read, learn new things	9	14	27	10

HOLIDAYMAKERS WILL ACTUALLY TAKE TIME TO RELAX AND SPEND TIME WITH THEIR FAMILY MEMBERS. THEY WILL ALSO BE ENJOYING THEIR HOME, ESPECIALLY IN THAILAND

ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS

	EUROPE			
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
Take time to read, learn new things	10	14	28	15
Play sports (rambling, mountain climbing, etc.)	10	10	25	7
Make new friendly or romantic acquaintances	5	7	9	3

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

	EUROPE	USA	China	UK
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
44% vs 50%

54% vs 57%

BUDGET
1878€

1821€ vs €1556 1892€ vs

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 SUSTAINBLY

Accommodation
with a green certification

73% (vs 78%) 44% (vs 64%)

Bringing goods to donate

37% (vs 62%)
europe assistance
you live we care

57% (vs 70%)

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

HOW THEY FEEL ABOUT COVID AND ITS IMPACT

EUROPE



Already VACINATED
59%

71% vs 37% 89% vs

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%

GAME CHANGERS



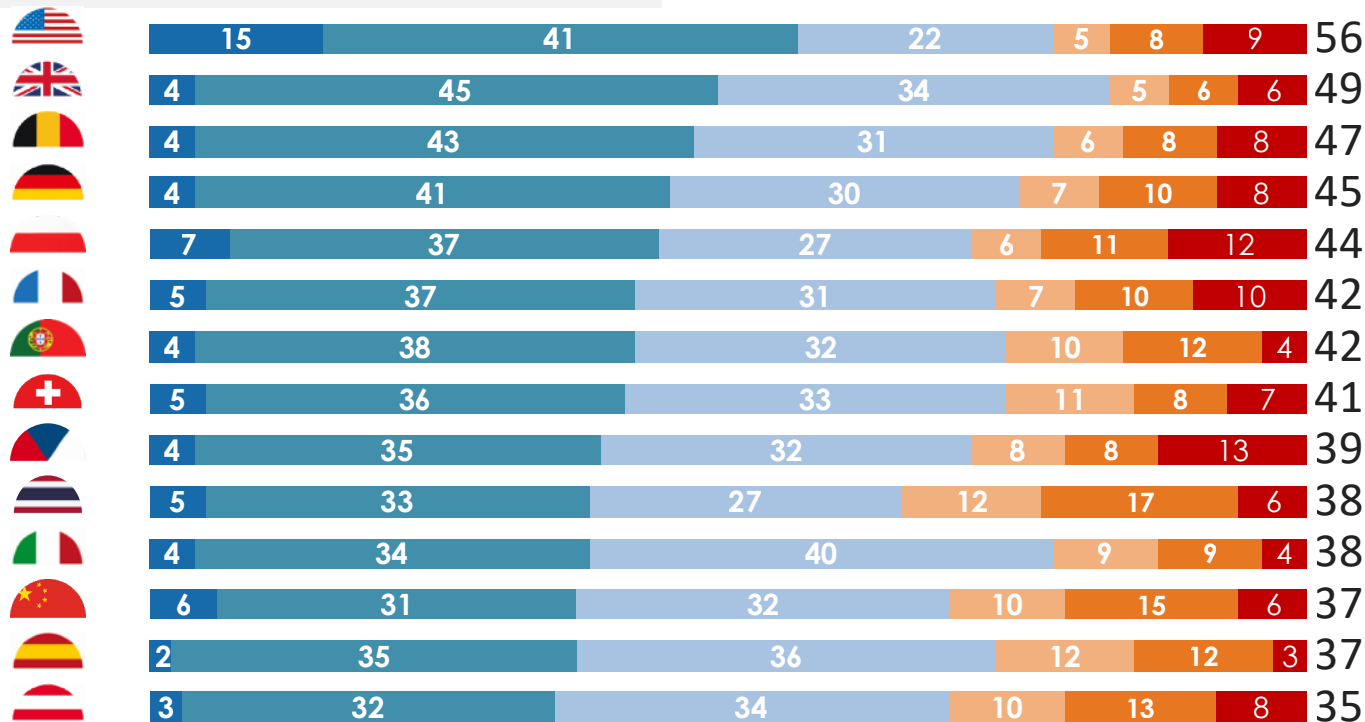
7.

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 (%)

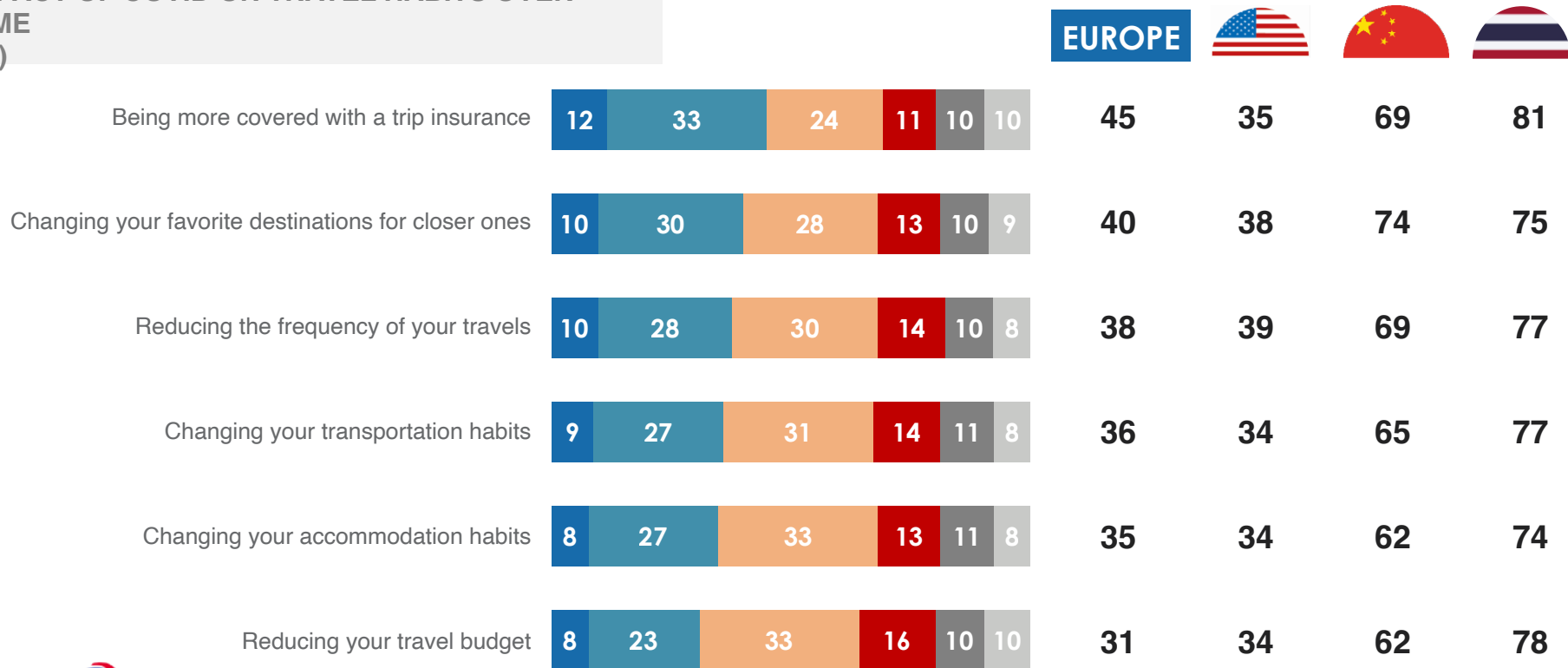


When do you think that we will be able to travel under "normal conditions" again, and without necessity of masks or tests?

2021 2022 2023 2024 After 2024 Never

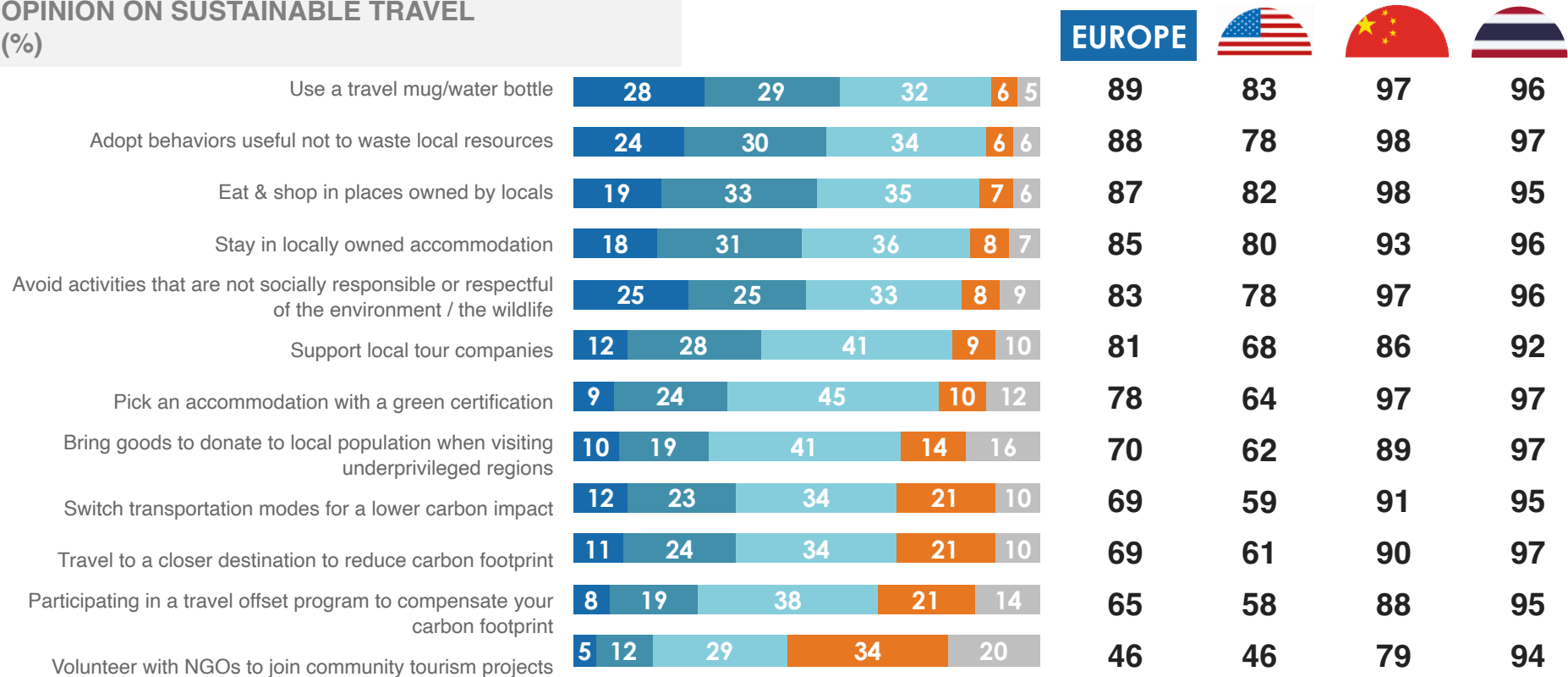
TRIP INSURANCES ARE AN INTERESTING OPTIONS TO TRAVEL PEACEFULLY. IT SEEMS EASIER / MORE ATTRACTIVE THAN REALLY CHANGING ITS TRAVEL HABITS (DESTINATIONS, TRANSPORTATION OR FREQUENCY).

IMPACT OF COVID ON TRAVEL HABITS OVER TIME (%)



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

OPINION ON SUSTAINABLE TRAVEL (%)

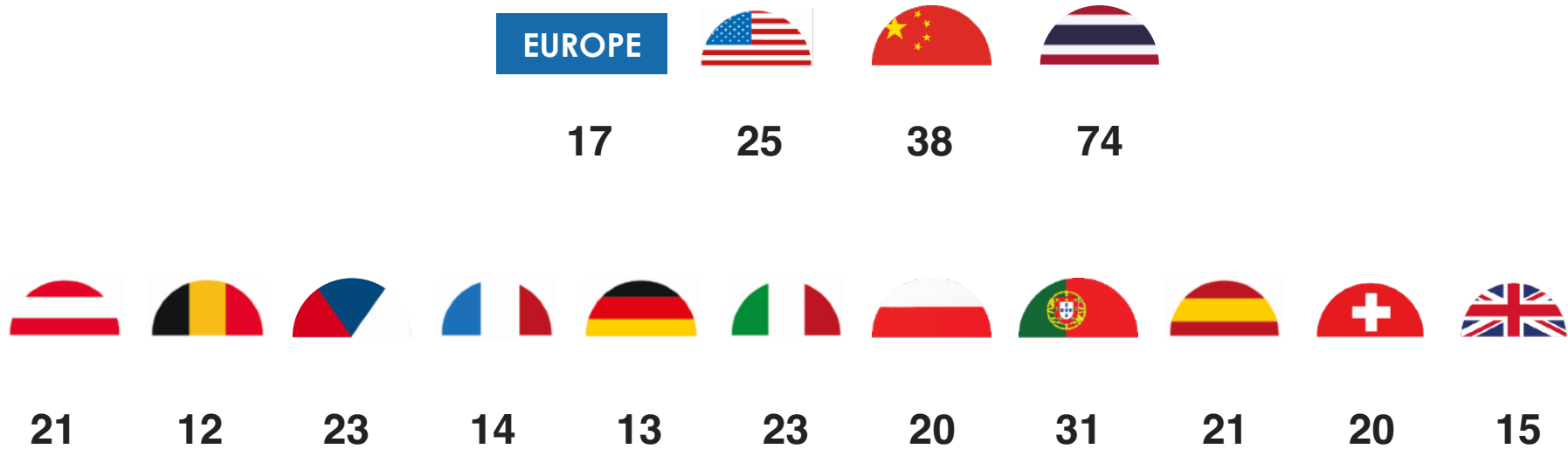


Yes, and I am already doing it every time **Yes, and I am doing it when I can**
Yes, I would be ready to do it **No, I would not want to do it** **Not concerned**

Sustainable travel is defined as trying to make a positive impact on the environment, society, and economy when going on a trip. Here are some initiatives for a more sustainable way of travelling. Would you be ready to adopt them?




WORKATION INTENTION IS PARTICULARLY HIGH AMONG ASIANS AND AMERICANS... AND PORTUGUESE

WORKATION INTENTION AMONG THE ACTIVES (%)



FOR WORKATION, EUROPEAN AND THAI HAVE RATHER TO STAY AT A RELATIVE'S OR AT THEIR VACATION HOME. AMERICANS AND CHINESE ARE ALSO INTERESTED BY BOOKING AN HOTEL

PREFERRED ACCOMMODATION FOR WORKATION

	EUROPE			
Stay at a friend's place, at my family's or at my vacation home	34	30	28	46
Rent an apartment/a house	27	19	21	9
Book a hotel	19	29	33	11
Stay at a bed and breakfast	17	20	17	31
Other	3	2	1	3



End of document

APPENDICES

CONTACTS

SARAH DUHAUTOIS
Research Associate Director
sarah.duhautois@ipsos.com
01 41 98 98 31



STEPHANIE STORNE
Senior Researcher
stephanie.storne@ipsos.com
01 41 98 93 48



This project has been designed according to Ipsos Quality standards.
It was reviewed and approved by: *Sarah Duhautois, Research Associate Director*

OUR COMMITMENT



Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** (www.syntec-etudes.com), French Union of Market Research companies
- **ESOMAR** (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.



Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards



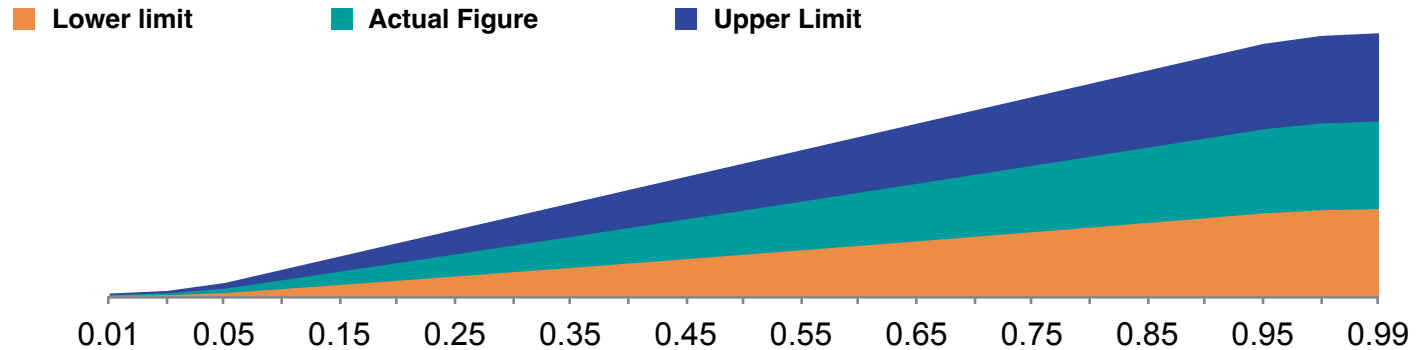
RELIABILITY OF RESULTS SPREADSHEET



In this instance, with regard to this study:

- Confidence interval: 95%
- Size of sample: 1000

The proportions observed are between :



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

RELIABILITY OF RESULTS : SELF COMPLETION ONLINE SURVEYS IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

SURVEY OVERVIEW

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary



ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Translation
- Scripting
- Sampling (IIS panel)
- Emailing
- Data collection
- Data Map

ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious 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. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg
IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.