

HOLIDAY BAROMETER AMONG EUROPEANS, NORTH AMERICANS, ASIANS & OCEANIANS

Ipsos/Europ Assistance survey

22nd edition



April 2023

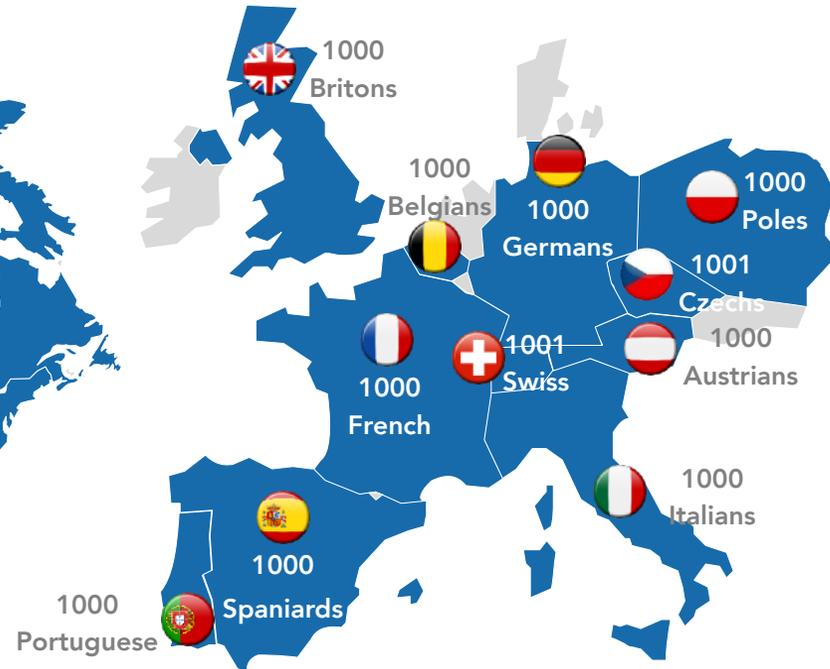


SCOPE OF THE SURVEY

American scope



European scope



Asian/Oceanian scope

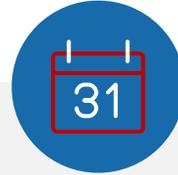


METHODOLOGY



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 March 20th and April 7th 2023



Method of data collection

Online survey in the 15 countries

READING NOTE: We present, in this report, two types of significant differences:

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

XX Significantly lower result in the country compared to EUROPE

Evolutions between 2023 and 2022 results

XX Significantly better result in 2023 compared to 2022

XX Significantly lower result in 2023 compared to 2022

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CURRENT STATE OF MIND & CONCERNS

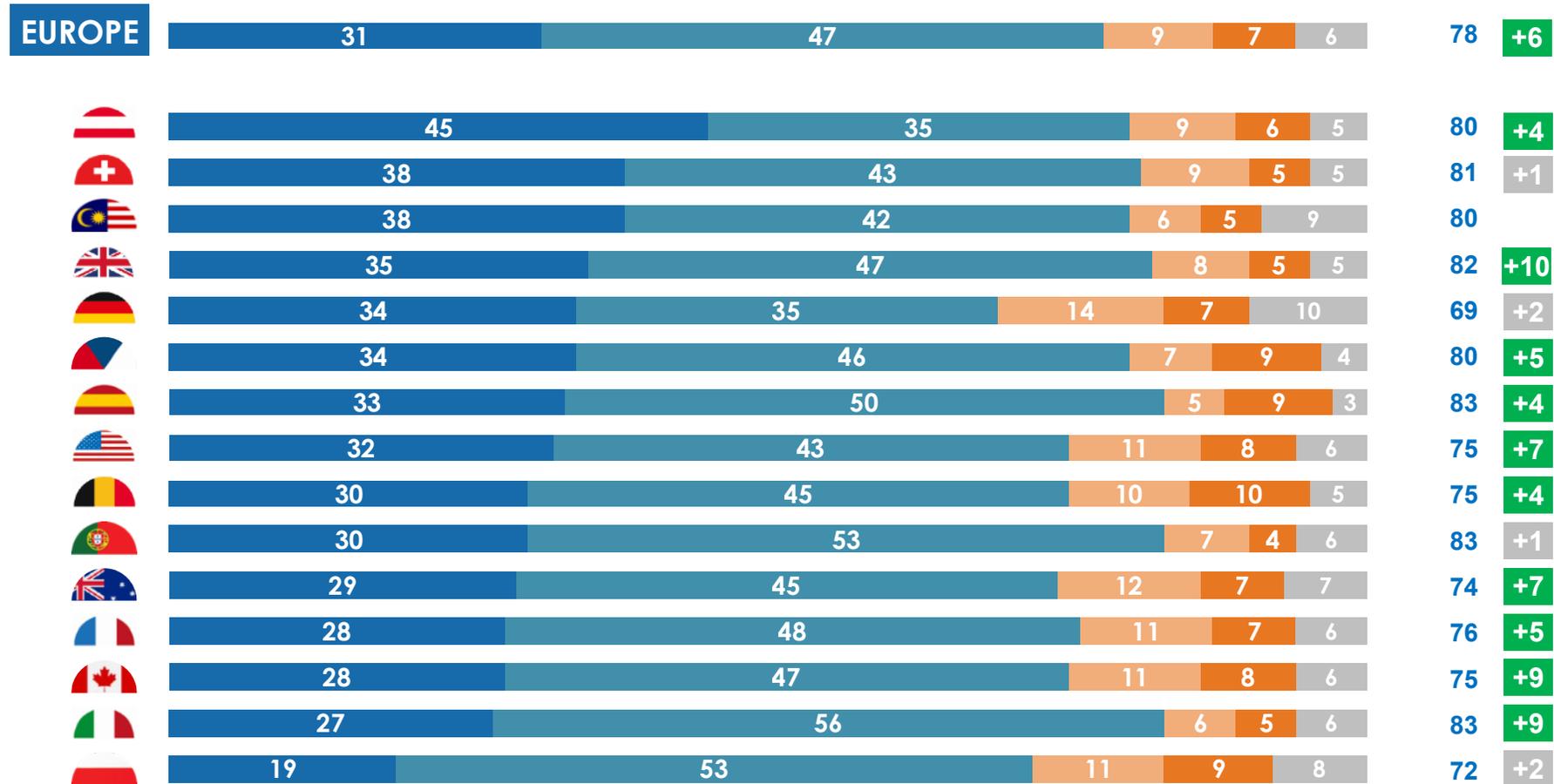
- Travel enthusiasm
- Main concerns regarding the global situation
- Main concerns when traveling
- Durable of Covid-19 on travel habits



ENTHUSIASM TO TRAVEL IS GROWING THIS YEAR

Travel enthusiasm (%)

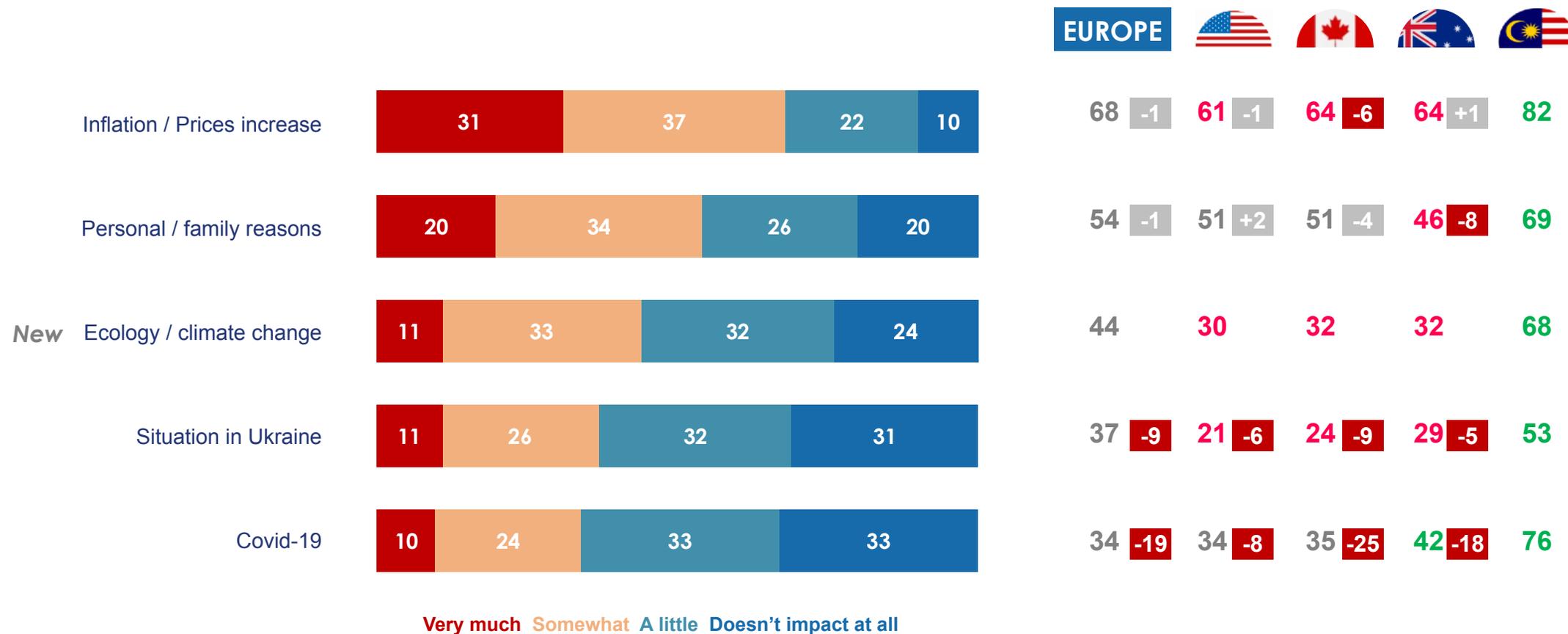
% "Really excited to travel"
+ "Happy to travel"



Really excited to travel Happy to travel Don't want to travel Don't care No opinion

INFLATION IS STILL THE MAIN REASON THAT NEGATIVELY IMPACTS ENTHUSIASM TO TRAVEL, WHILE IMPACT OF COVID-19 HAS DRASTICALLY DROPPED.

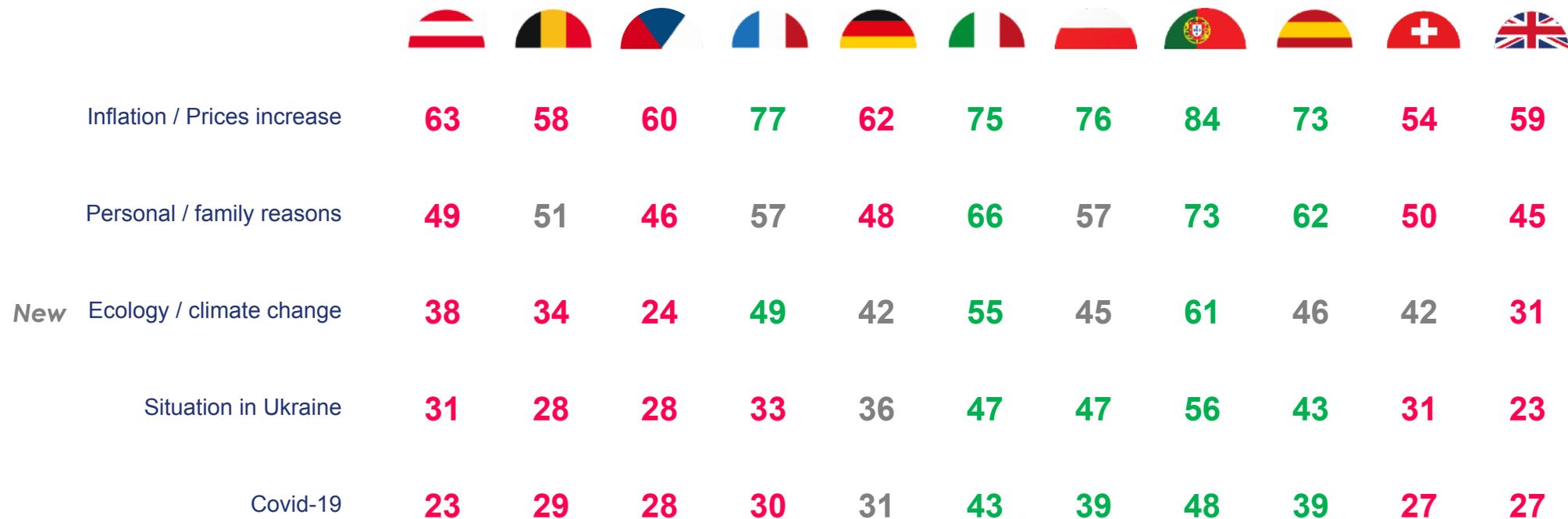
Issues impact - at least somewhat (%)



How do each of the following issues impact your enthusiasm and desire to travel this year?

INFLATION HAS A STRONGER IMPACT IN SOUTHERN EUROPEAN COUNTRIES (PORTUGAL, FRANCE, SPAIN, ITALY) AND POLAND.

Issues impact (1/2) - At least somewhat (%)



How do each of the following issues impact your enthusiasm and desire to travel this year?

INFLATION HAS A STRONGER IMPACT IN SOUTHERN EUROPEAN COUNTRIES (PORTUGAL, FRANCE, SPAIN, ITALY) AND POLAND.

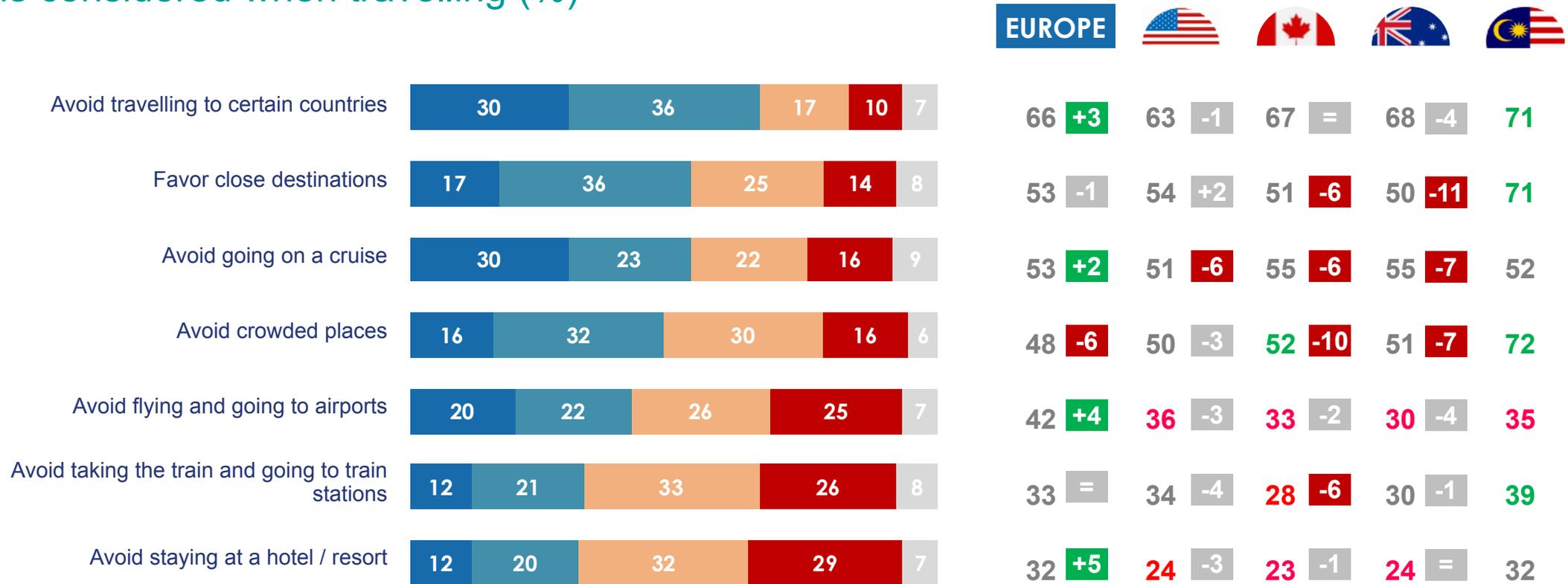
Issues impact (2/2) - At least somewhat (%) – evolution vs 2022 (%)

											
Inflation / Prices increase	-1	-4	-3	+5	-1	+1	-3	-1	-4	=	-1
Personal / family reasons	=	-3	-8	=	+2	+4	-5	-1	-1	-3	-1
New Ecology / climate change	-	-	-	-	-	-	-	-	-	-	-
Situation in Ukraine	-8	-15	-9	-10	-11	-10	-11	-2	-4	-5	-11
Covid-19	-21	-19	-9	-19	-20	-19	-11	-19	-22	-14	-23

How do each of the following issues impact your enthusiasm and desire to travel this year?

WHEN TRAVELLING, RESPONDENTS STILL PLAN TO AVOID CERTAIN COUNTRIES, AN INCREASING PHENOMENON FOR EUROPEAN TRAVELERS. CROWDED PLACES SEEM LESS AND LESS FEARED.

Actions considered when travelling (%)

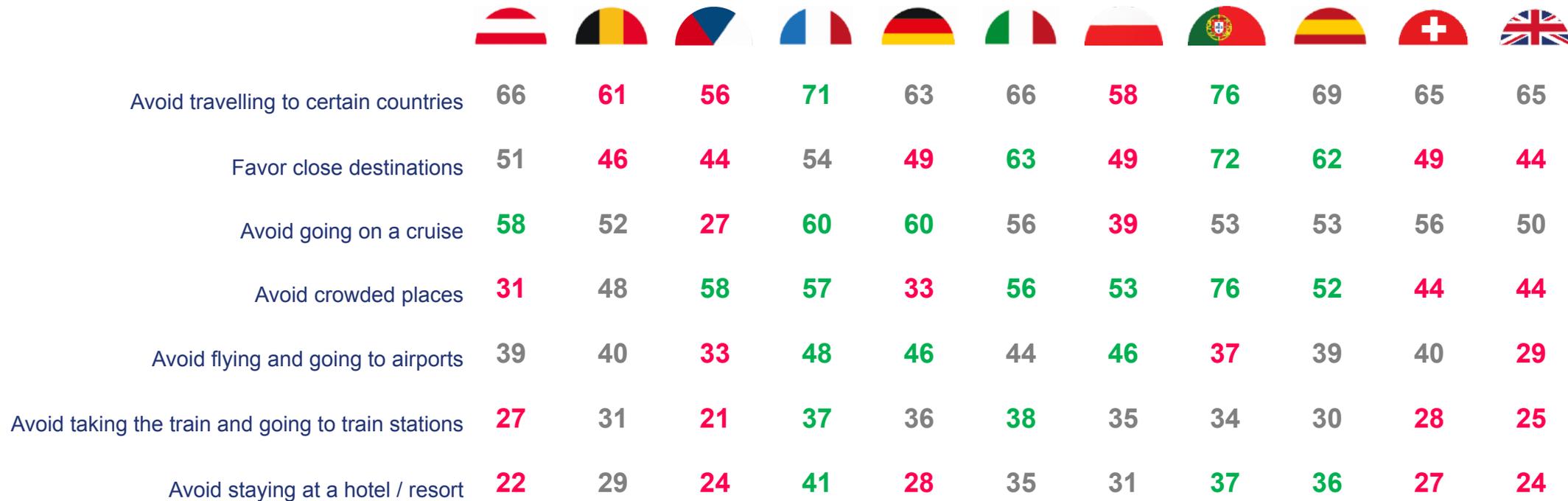


Yes, certainly Yes, probably No, probably not No, surely not Don't know

At a personal level, when travelling, do you intend to:

PORTUGUESE AND FRENCH TRAVELERS ARE THE MOST LIKELY TO CHOOSE THEIR DESTINATION COUNTRY CAREFULLY

Actions considered when travelling (%)



At a personal level, when travelling, do you intend to: Certainly + probably

CROWDED PLACES ARE STRONGLY LESS REDHIBITORY FOR GERMAN, ITALIAN AND BRITISH, AMONG OTHERS.

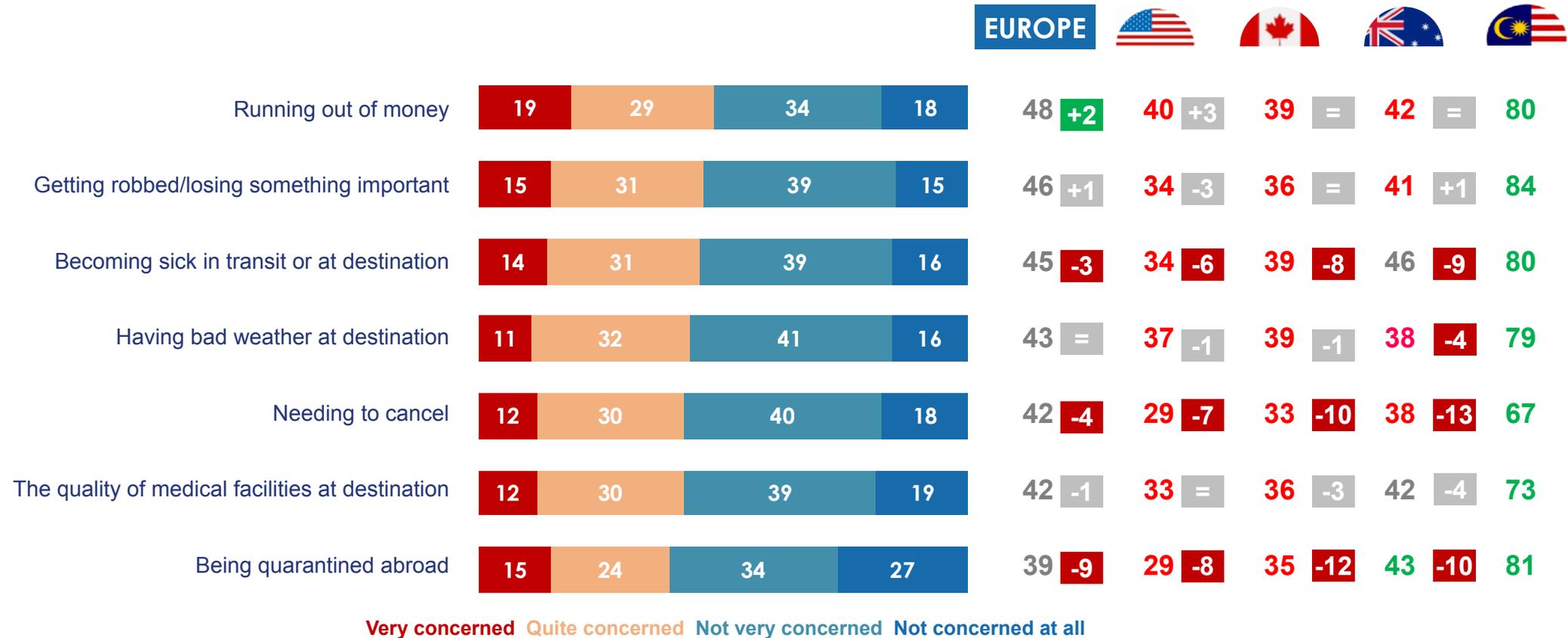
Actions considered when travelling – evolution vs 2022 (%)

											
Avoid travelling to certain countries	+1	+3	+4	+7	+1	-1	+7	+5	+2	+6	+2
Avoid crowded places	-9	-2	+7	+4	-12	-12	+4	+1	-7	+7	-10
Favor close destinations	-4	-4	-2	+1	-5	+1	+5	+3	-1	-1	-8
Avoid going on a cruise	=	+7	+4	+5	+3	+1	+7	+5	+3	+6	-5
Avoid flying and going to airports	+3	+3	+4	+7	+5	+1	+10	+2	+2	+6	-6
Avoid taking the train and going to train stations	-1	+1	+2	+5	+1	-4	+5	-2	-1	+3	-3
Avoid staying at a hotel / resort	=	+5	+8	+11	+1	+5	+6	+9	+8	+5	+1

At a personal level, when travelling, do you intend to: Certainly + probably

FINANCIAL ISSUES APPEAR TO BE A DRAG ON TRAVELING THIS YEAR, A POSSIBLE CONSEQUENCE OF INFLATION.

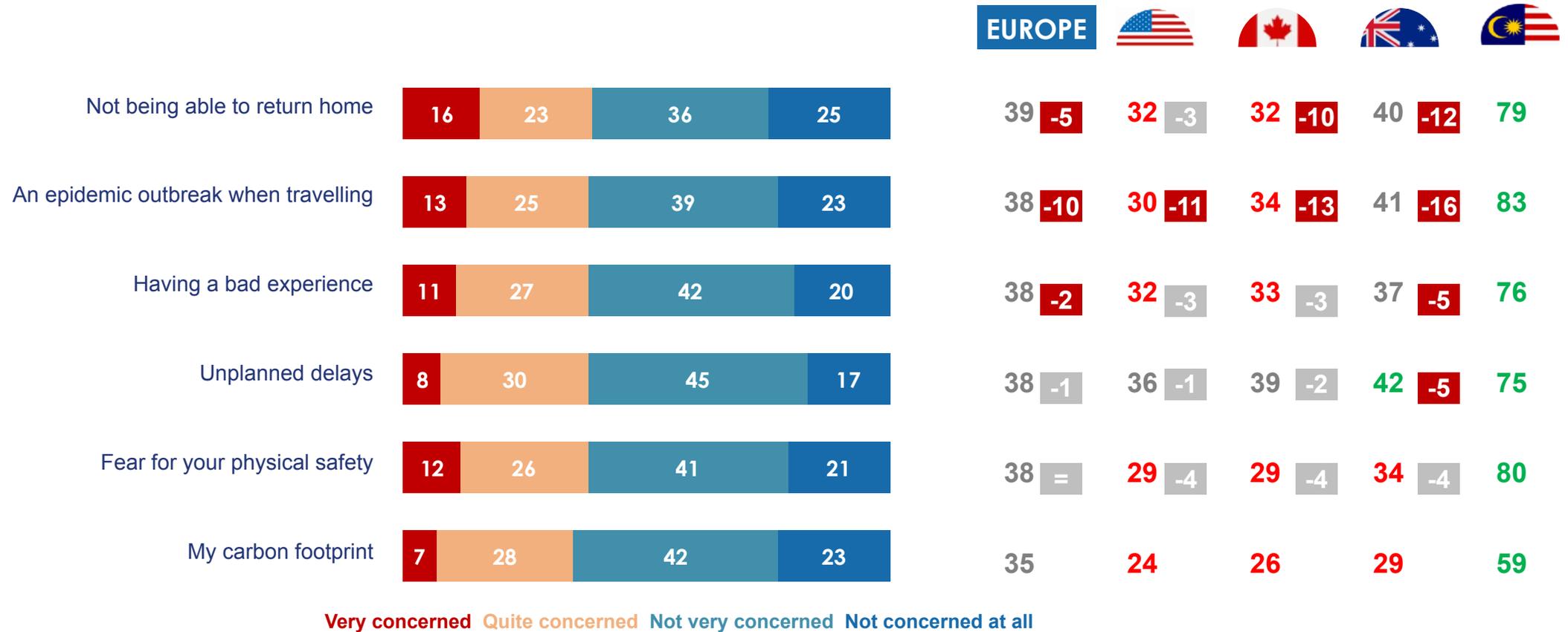
Main concerns regarding next trip (1/2) (%)



Are you concerned about the following for your next trip?

THE FEAR OF COVID IS FADING AWAY: BEING QUARANTINED ABROAD AND EPIDEMIC OUTBREAKS ARE OF FAR LESS CONCERN TO THE PUBLIC.

Main concerns regarding next trip (2/2) (%)



Are you concerned about the following for your next trip?

THESE CONCERNS DIVIDE THE SURVEYED COUNTRIES IN TWO BLOCKS. PEOPLE FROM ITALY, POLAND, PORTUGAL AND SPAIN ARE MORE WORRIED ABOUT ALL POTENTIAL ISSUES...

Main concerns regarding next trip (1/2) (%)



Are you concerned about the following for your next trip? Very + quite concerned

...WHILE TRAVELERS FROM AUSTRIA, GERMANY, BELGIUM, SWITZERLAND AND UK ARE RELATIVELY SERENE ON ALL SUBJECTS.

Main concerns regarding next trip (2/2) (%)



Are you concerned about the following for your next trip? Very + quite concerned

IN THE UK AND BELGIUM, ALL CONCERNS TURN OUT TO BE LESS IMPORTANT THIS YEAR.

Main concerns – evolution vs 2022 (%) – 1/2

											
Running out of money	-1	=	-3	+4	+4	+1	+3	-1	+1	=	-2
Getting robbed/losing something important	=	-7	-1	+2	+1	+4	=	+3	+1	+4	-3
Becoming sick in transit or at destination	-7	-9	-4	=	-2	+1	+2	-3	-3	=	-9
Having bad weather at destination	+1	-4	-2	=	+2	=	+1	+1	-1	-3	-1
Needing to cancel	-4	-9	=	-1	-3	+2	-3	-5	-2	-6	-11
The quality of medical facilities at destination	=	-3	+1	+4	-2	-3	+2	+1	-1	-1	-5
Being quarantined abroad	-12	-15	-3	-9	-12	-2	-3	-8	-4	-8	-16

Are you concerned about the following for your next trip? Very + quite concerned

IN THE UK AND BELGIUM, ALL CONCERNS TURN OUT TO BE LESS IMPORTANT THIS YEAR.

Main concerns – evolution vs 2022 (%) – 2/2

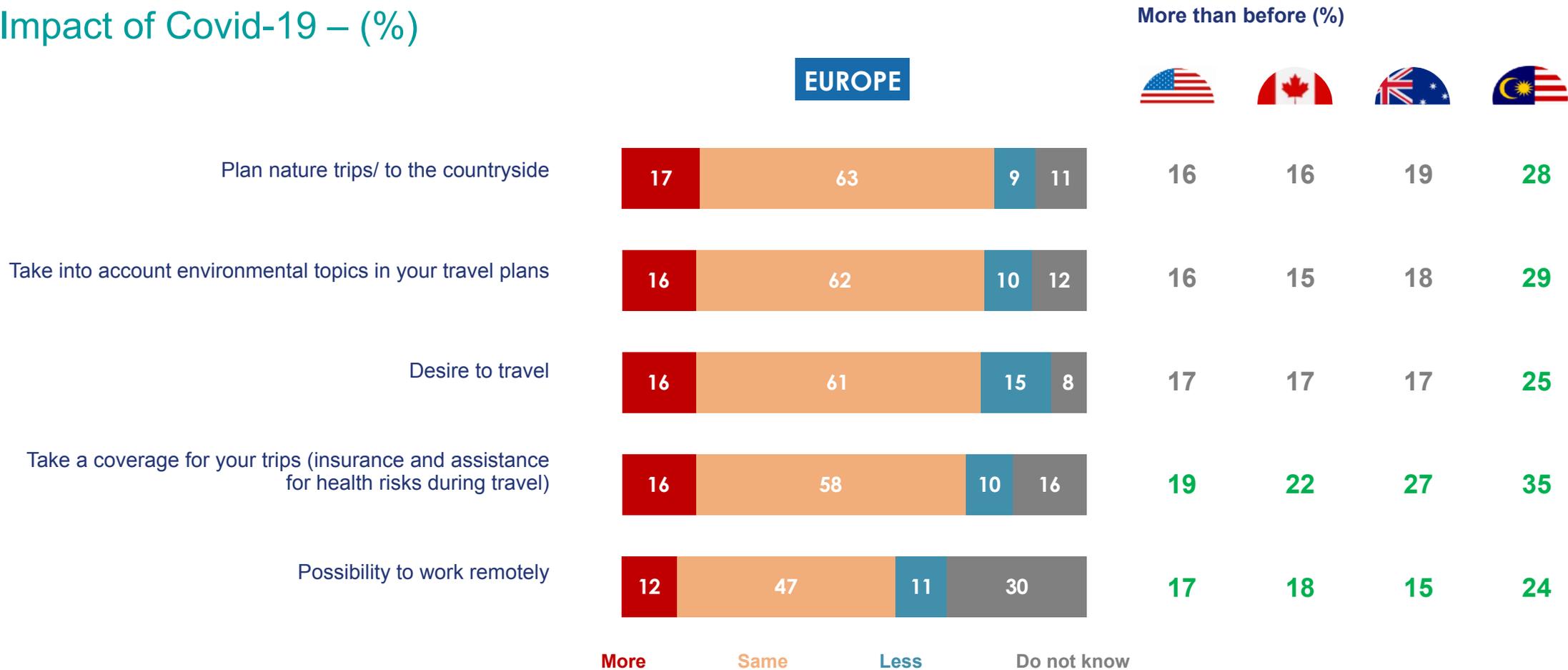
											
Not being able to return home	-5	-9	-2	-2	-5	-3	-1	-4	-4	-4	-13
An epidemic outbreak when travelling	-9	-15	-5	-12	-10	-8	-3	-12	-10	-7	-17
Having a bad experience	-4	-2	-1	+1	-1	-2	=	-1	-3	-3	-7
Unplanned delays	-2	-1	+1	+2	=	+3	-1	+7	=	-1	-7
Fear for your physical safety	-2	-4	-4	+2	+1	-2	+2	+3	=	=	-5
My carbon footprint	-	-	-	-	-	-	-	-	-	-	-

Are you concerned about the following for your next trip? Very + quite concerned

COVID-19 DOESN'T SEEM TO HAVE DURABLY IMPACTED TRAVEL HABITS.

★ *New question 2023*

Impact of Covid-19 – (%)



Considering the durable impact of the Covid-19 pandemic on your holiday habits, in the future, would you say you will...

IN PORTUGAL, RESPONDENTS HAVE CHANGED THEIR HABITS ON MORE DIMENSIONS. THE TREND IS THE OPPOSITE IN SEVERAL COUNTRIES SUCH AS GERMANY, AUSTRIA OR POLAND, AMONG OTHERS.

★ *New question 2023*

Impact of Covid-19 - More than before the Covid-19 pandemic – (%)

											
Plan nature trips/ to the countryside	20	11	13	17	15	18	14	24	19	13	18
Take into account environmental topics in your travel plans	14	11	7	17	12	21	13	24	21	12	15
Desire to travel	17	13	9	16	13	19	10	22	21	14	16
Take a coverage for your trips (insurance and assistance for health risks during travel)	16	14	14	16	15	16	15	17	17	14	20
Possibility to work remotely	11	9	9	13	9	12	12	21	10	10	15

Considering the durable impact of the Covid-19 pandemic on your holiday habits, in the future, would you say you will...

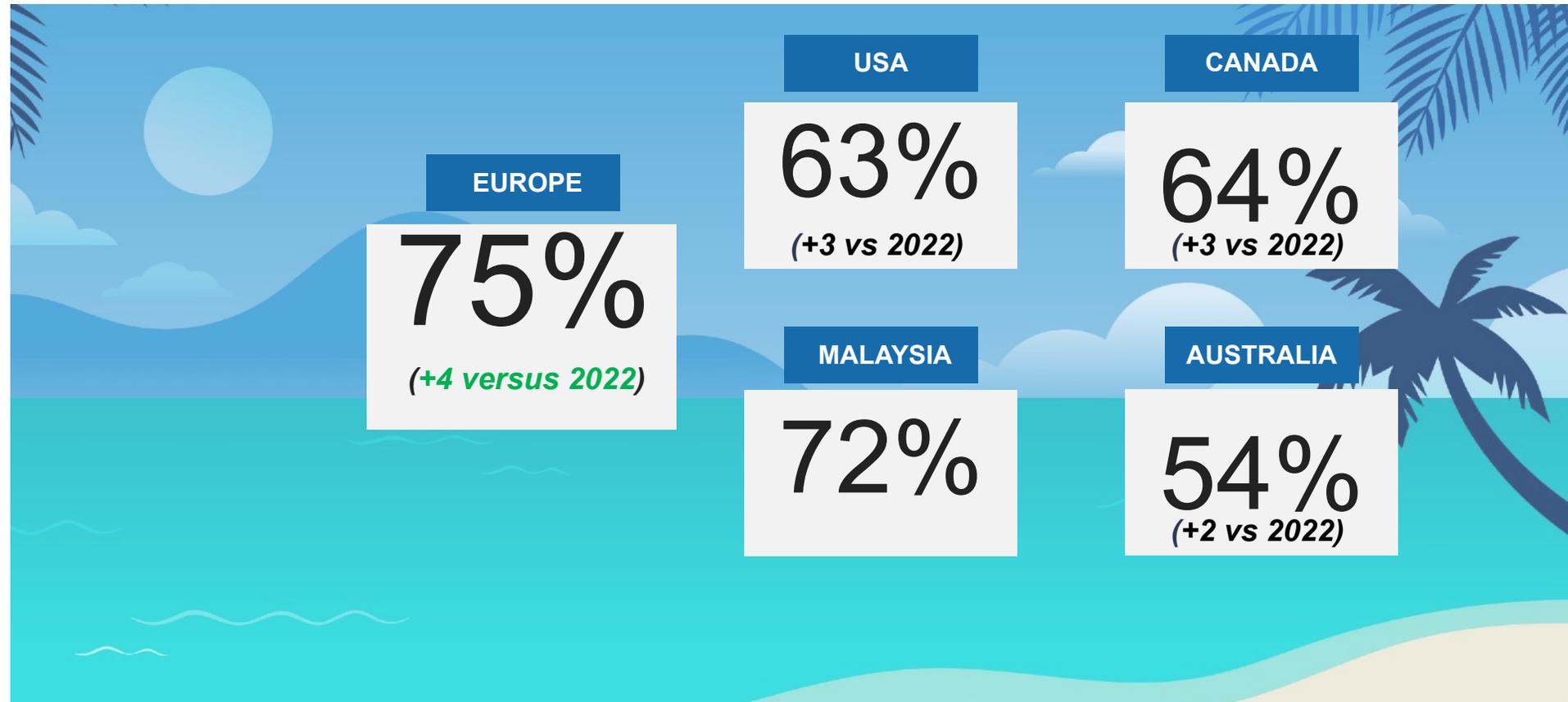
2023 SUMMER HOLIDAY PLANS

2

- Summer holiday plans
- Budget
- Adaptation of travel plans due to inflation context
- Summer trip duration

SUMMER PLANS CONTINUE TO INCREASE IN EUROPE, WITH 3 OUT OF 4 OF EUROPEANS PLANNING TO TRAVEL THIS YEAR.

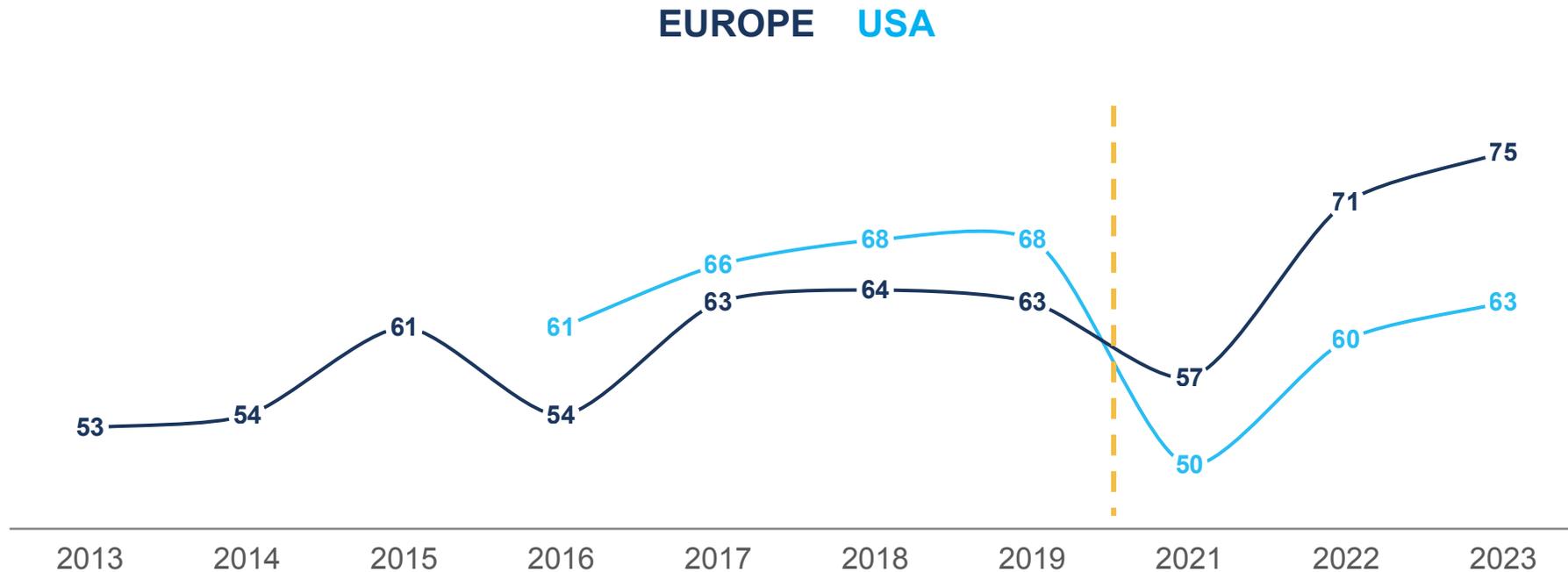
Summer holiday plans



Do you plan to go on a trip this summer, in other words between June and September? Several trips + only one trip

THE POSITIVE TREND IS STRONGER IN EUROPE THAN IN THE USA, WHERE HOLIDAY PLANS ARE STILL NOT BACK TO PRE-COVID LEVELS.

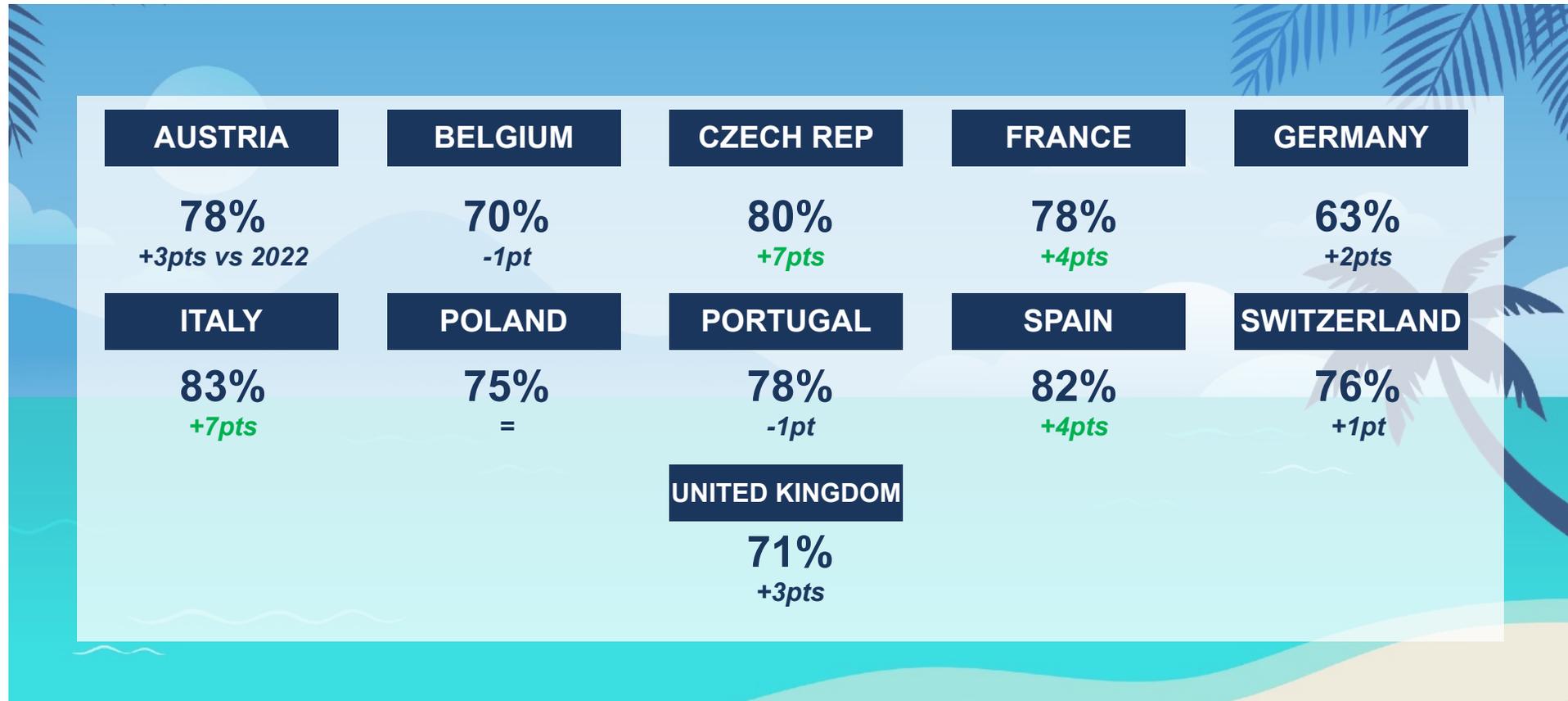
Evolution of holiday plans (%)



Do you plan to go on a trip this summer, in other words between June and September? Several trips + only one trip

IN DETAILS, SUMMER HOLIDAY PLANS HAVE PARTICULARLY BOUNCED BACK IN ITALY AND CZECH REPUBLIC, ALSO IN FRANCE AND SPAIN TO A LESSER EXTENT.

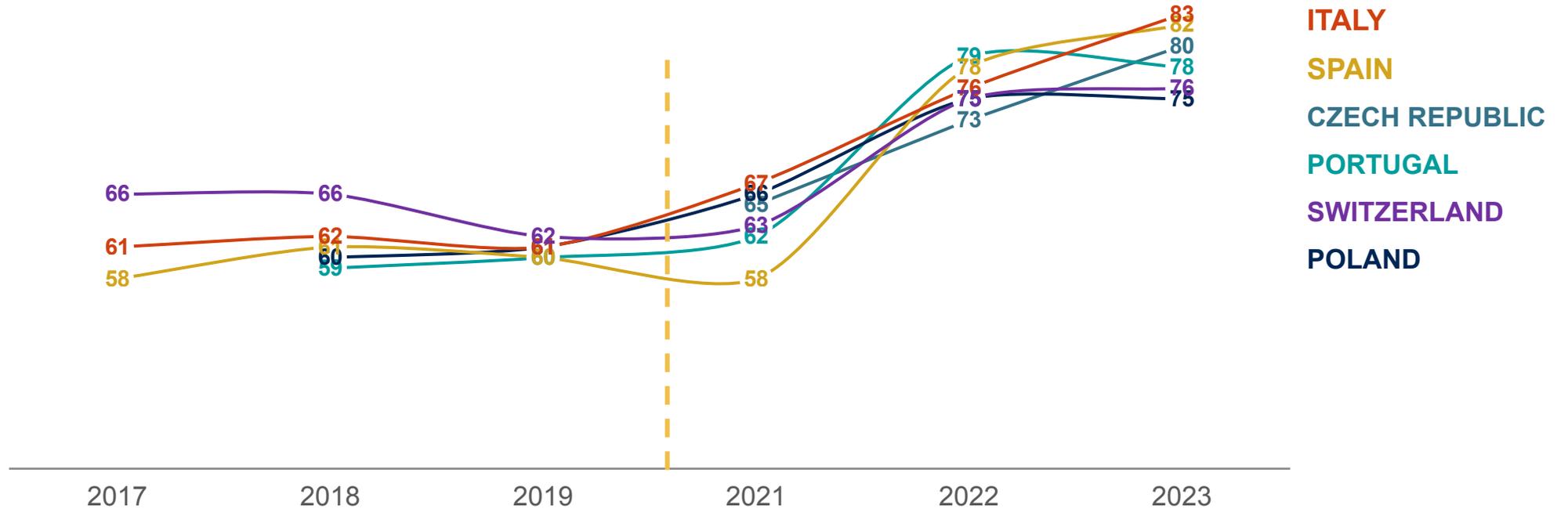
Summer holiday plans



Do you plan to go on a trip this summer, in other words between June and September? Several trips + only one trip

SPAIN SHOWS THE STRONGEST POSITIVE TREND ON HOLIDAY PLANS SINCE THE COVID-19 CRISIS.

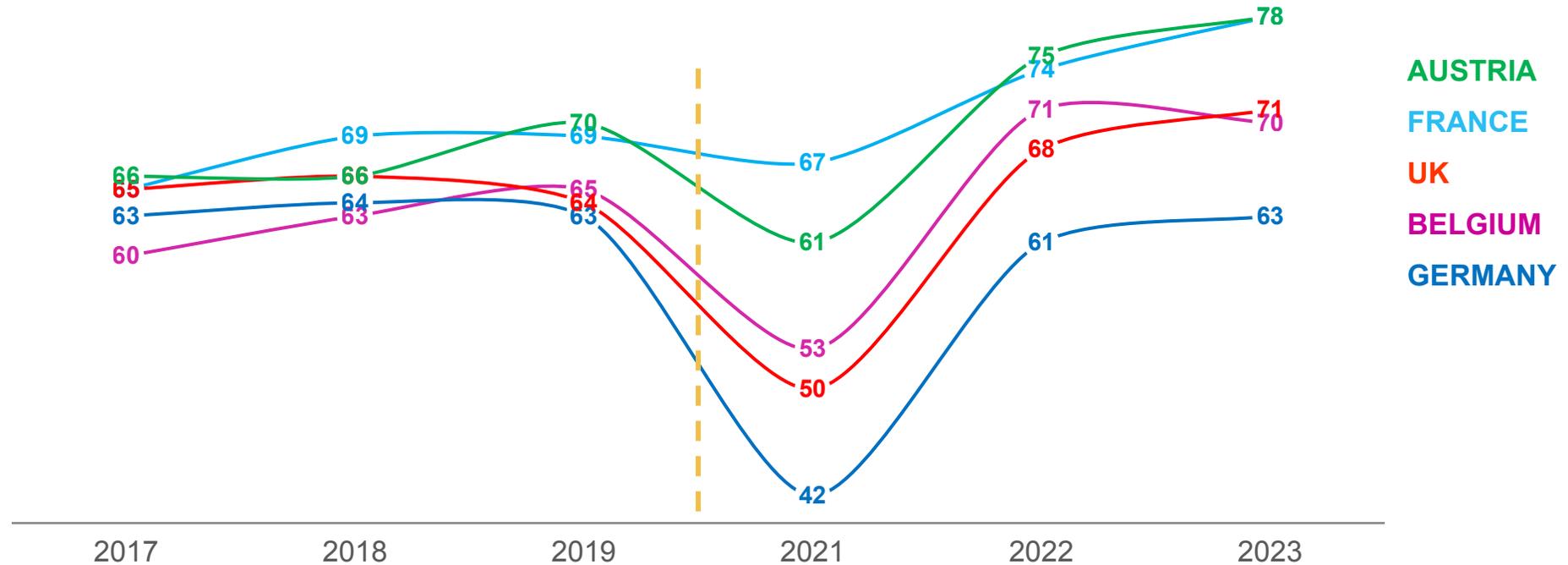
Summer holiday plans by European country (1/2) - (%)



Do you plan to go on a trip this summer, in other words between June and September? Several trips + only one trip

HOLIDAY PLANS ARE LESS WIDESPREAD IN THE UK, BELGIUM AND ESPECIALLY IN GERMANY.

Summer holiday plans by European country (2/2) - (%)



Do you plan to go on a trip this summer, in other words between June and September? Several trips + only one trip

FINANCIAL ISSUES ARE STILL THE MAIN REASON FOR NOT TRAVELING THIS YEAR, ON THE RISE

Main reasons not to travel in 2023 (%)

	EUROPE				
Couldn't afford it	47 +6	51 +6	50 +9	48 +5	45
Saving money	27 +1	37 +4	40 +6	32 +2	44
Will go at another time of the year	18 +4	19 -2	19 +5	28 +3	19
Want to enjoy a staycation	15 +1	18 +2	14 -5	9 +4	14
My health condition	11 +1	9 +2	9 +3	9 +2	10

And why are you not going on a trip this summer? (Question asked to those who are not going to travel)

THE EUROPEAN HOLIDAY BUDGET CONTINUES TO GROW THIS YEAR.

Summer holiday budget



What is your full budget for your next summer trip/trip between June and September (when you take into account transportation, accommodations, food, leisure activities, etc.)?

IN DETAILS, THIS INCREASE IS MAINLY DRIVEN BY SWITZERLAND, POLAND, CZECH REPUBLIC AND GERMANY.

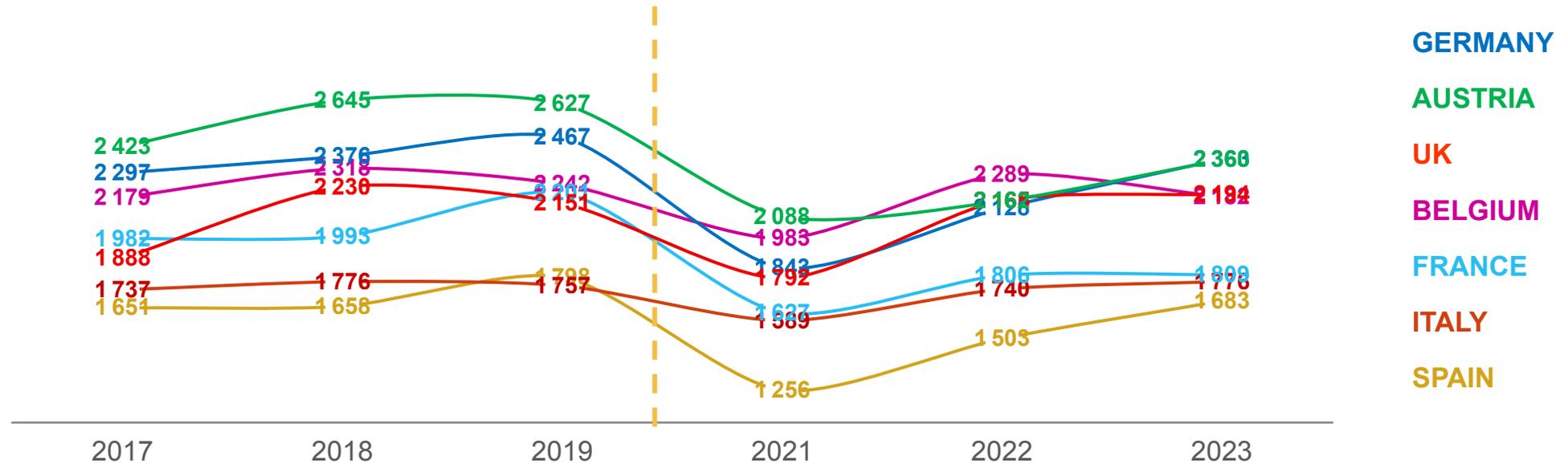
Summer holiday budget



What is your full budget for your next summer trip/trip between June and September (when you take into account transportation, accommodations, food, leisure activities, etc.)?

THE BELGIAN HOLIDAY BUDGET IS THE ONLY ONE THAT DECLINES THIS YEAR

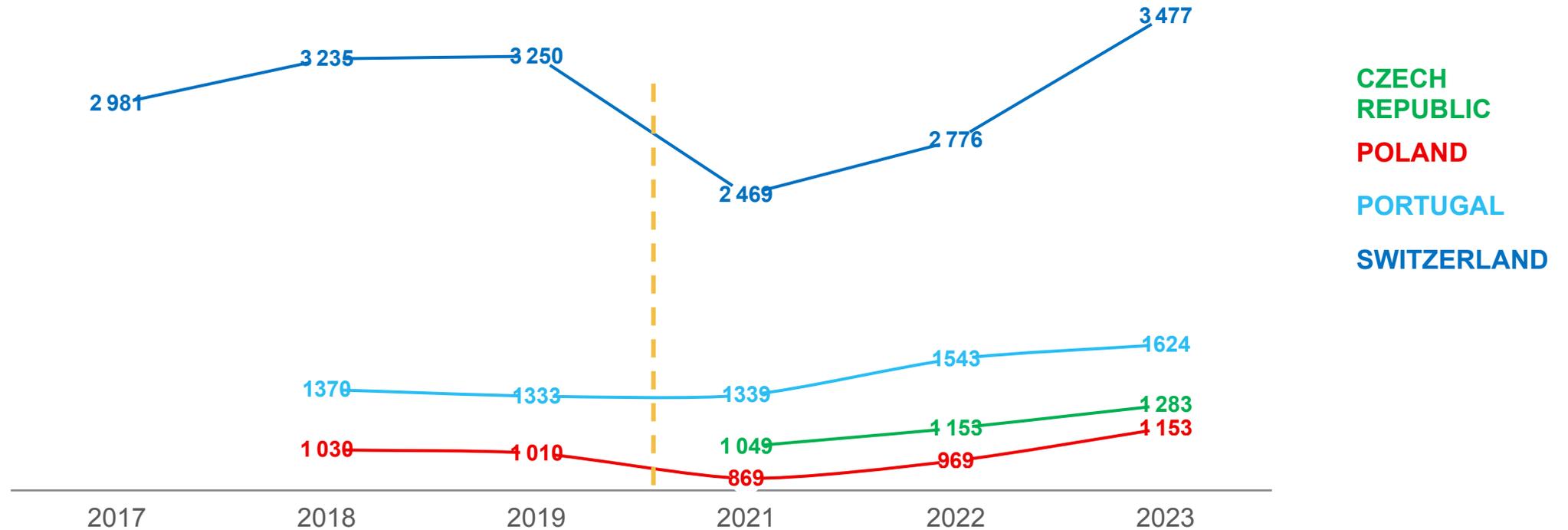
Summer holiday budget by European country (1/2) - (€)



What is your full budget for your next summer trip/trip between June and September (when you take into account transportation, accommodations, food, leisure activities, etc.)?

A VERY STRONG INCREASE OF HOLIDAY BUDGET IN SWITZERLAND

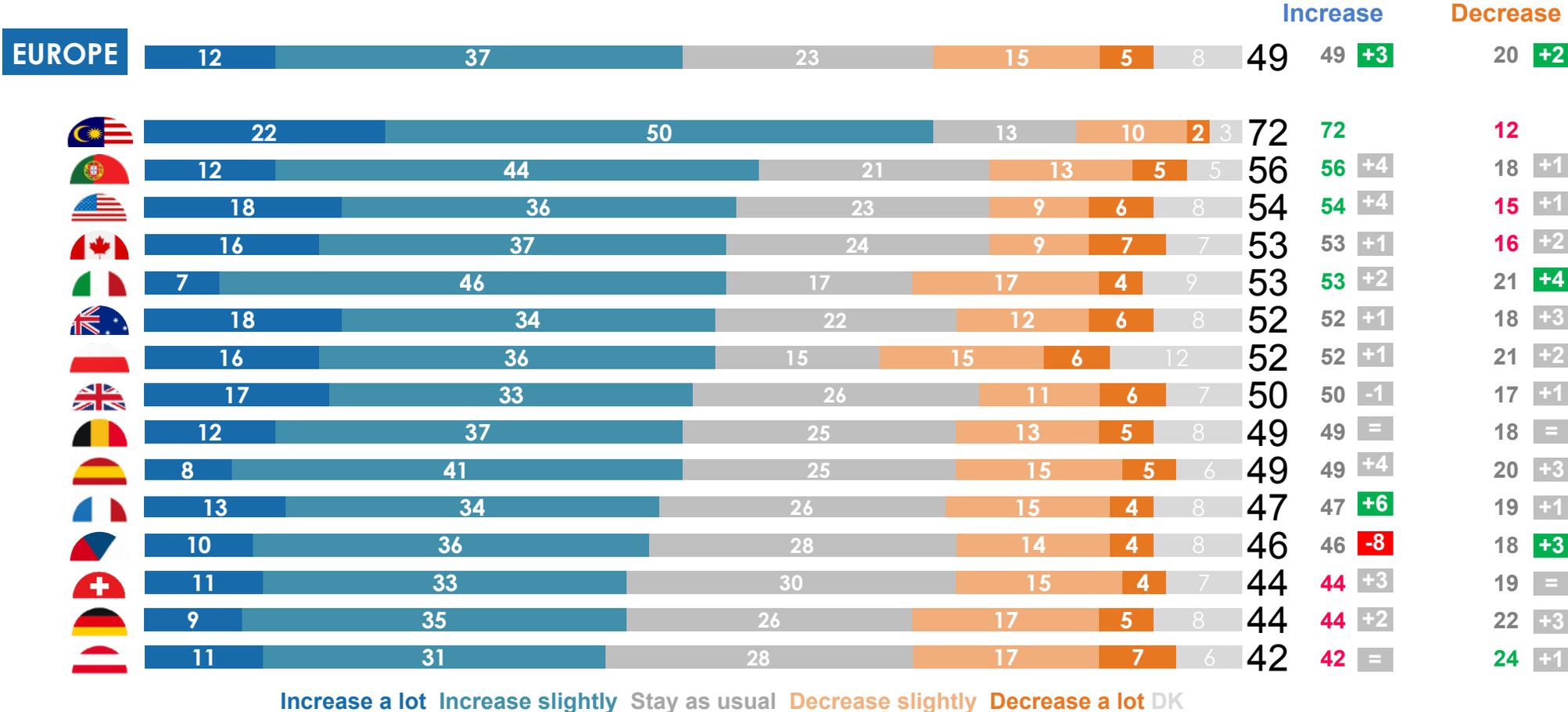
Summer holiday budget by European country (2/2) - (€)



What is your full budget for your next summer trip/trip between June and September (when you take into account transportation, accommodations, food, leisure activities, etc.)?

AN OVERALL TREND TO INCREASE HOLIDAY BUDGET COMPARED TO LAST YEAR

Evolution of holiday budget (%)



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

ABOUT ONE THIRD OF EUROPEANS WILL PAY MORE ATTENTION TO ACCOMMODATION BUDGET AND ALSO LOOK FOR LAST MINUTE DEALS.

Adaptation of travel plans due to inflation context (Yes - %)

★ *New question 2023*

	EUROPE				
Taking a cheaper mean of accommodation	34	29	32	30	54
Looking for last minute special deals	32	37	33	36	44
Reducing my budget spent on food, visits and activities	29	32	30	31	35
Reducing the number of destinations	29	26	27	23	36
Choosing a closer destination	27	27	27	23	49
Taking a cheaper mean of transportation	25	26	25	28	52
Reducing my trip duration	23	24	22	24	37

Given the economic context of inflation, will you adapt your travel plans by:

FOR MOST COUNTRIES, A REDUCION OF ACCOMMODATION BUDGET WILL BE THE FIRST ADAPTATION THEY WILL MAKE.

★ *New question 2023*

Adaptation of travel plans due to inflation context (Yes - %)

											
Taking a cheaper mean of accommodation	32	26	32	37	30	42	36	46	36	25	27
Looking for last minute special deals	29	23	24	30	27	38	31	40	40	26	29
Reducing my budget spent on food, visits and activities	26	21	21	32	27	31	27	34	32	23	30
Reducing the number of destinations	27	26	22	31	26	33	34	41	34	21	23
Choosing a closer destination	21	24	21	29	25	33	27	36	32	20	21
Taking a cheaper mean of transportation	25	20	23	23	22	30	28	35	31	20	20
Reducing my trip duration	18	17	16	26	20	28	23	29	27	17	18

Given the economic context of inflation, will you adapt your travel plans by:

AN AVERAGE DURATION AROUND 2 WEEKS FOR EUROPE, AUSTRALIA AND CANADA, WHILE HOLIDAYS ARE SHORTER IN THE USA AND MALAYSIA.

Summer holiday duration

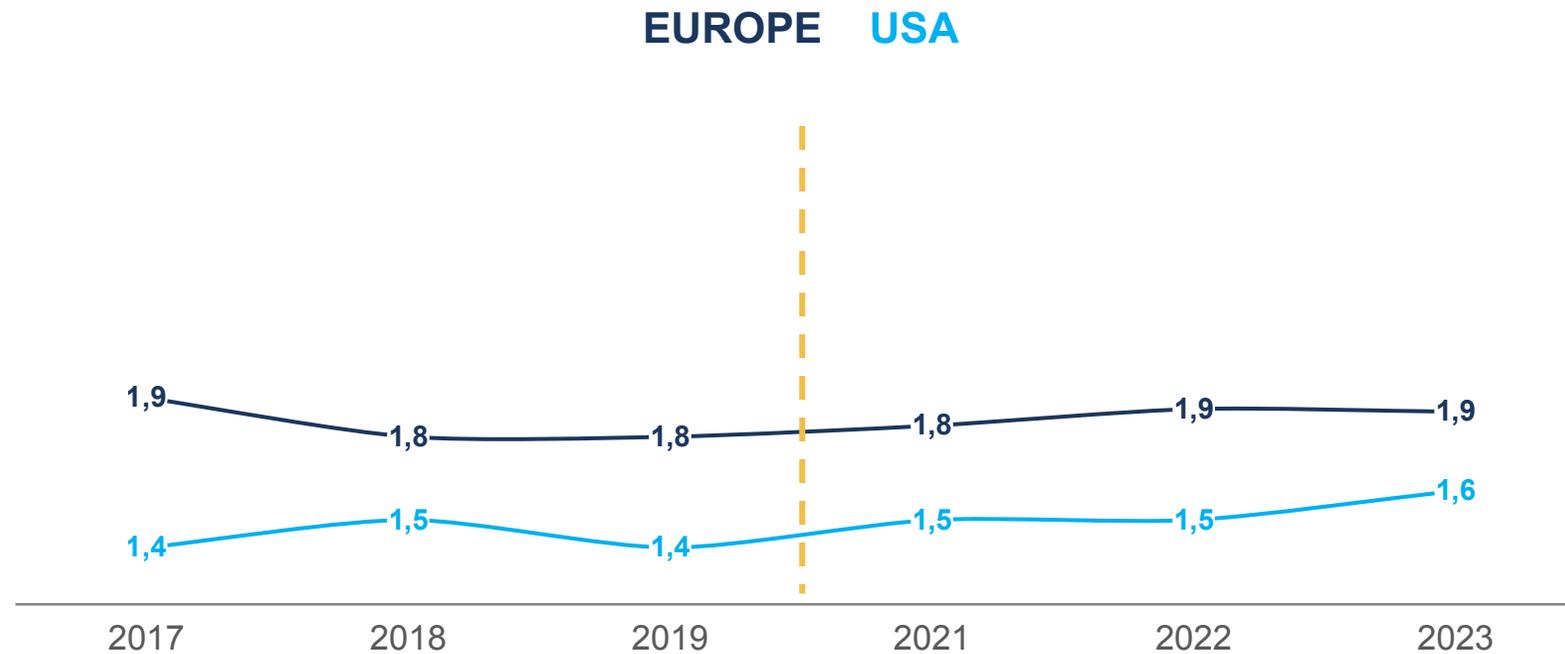
(weeks on average)



In total, how long will you be away on a trip this summer?

HOLIDAY DURATION IS RATHER STABLE OVER THE YEARS, FOR EUROPE AND USA

Evolution of holiday duration
(weeks on average)

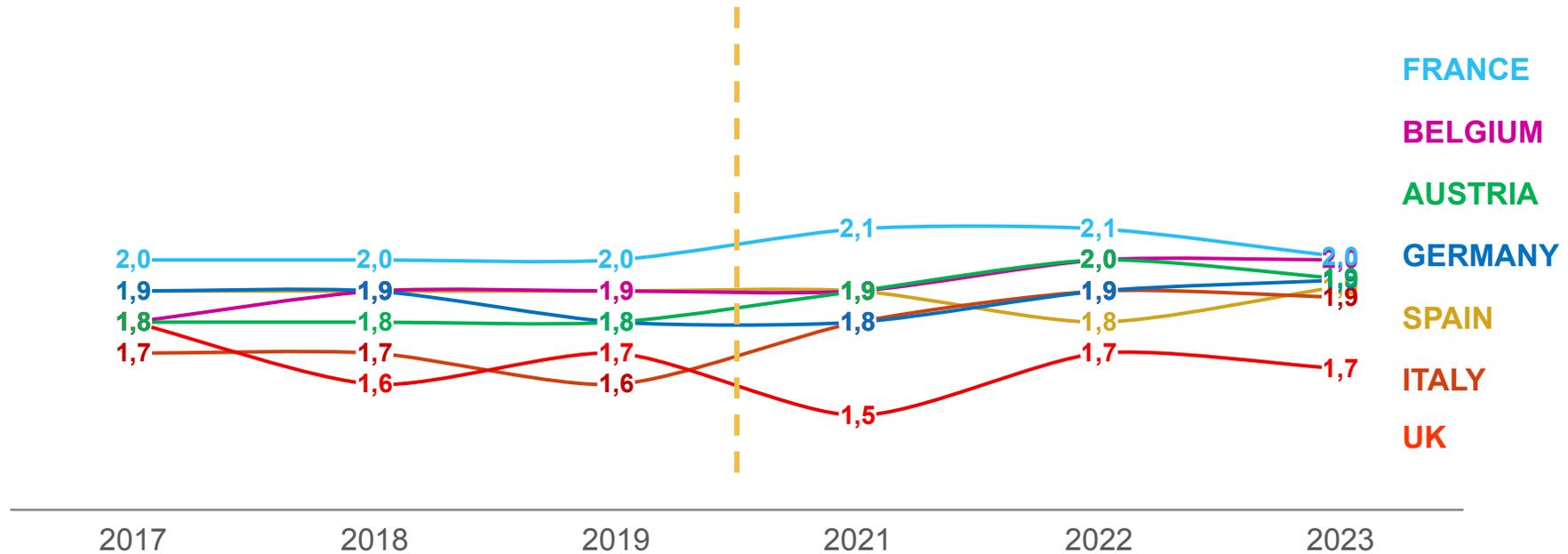


In total, how long will you be away on a trip this summer?

IN EUROPE, THE UK SHOWS THE LOWEST HOLIDAY DURATION.

Evolution of holiday duration by European country (1/2)

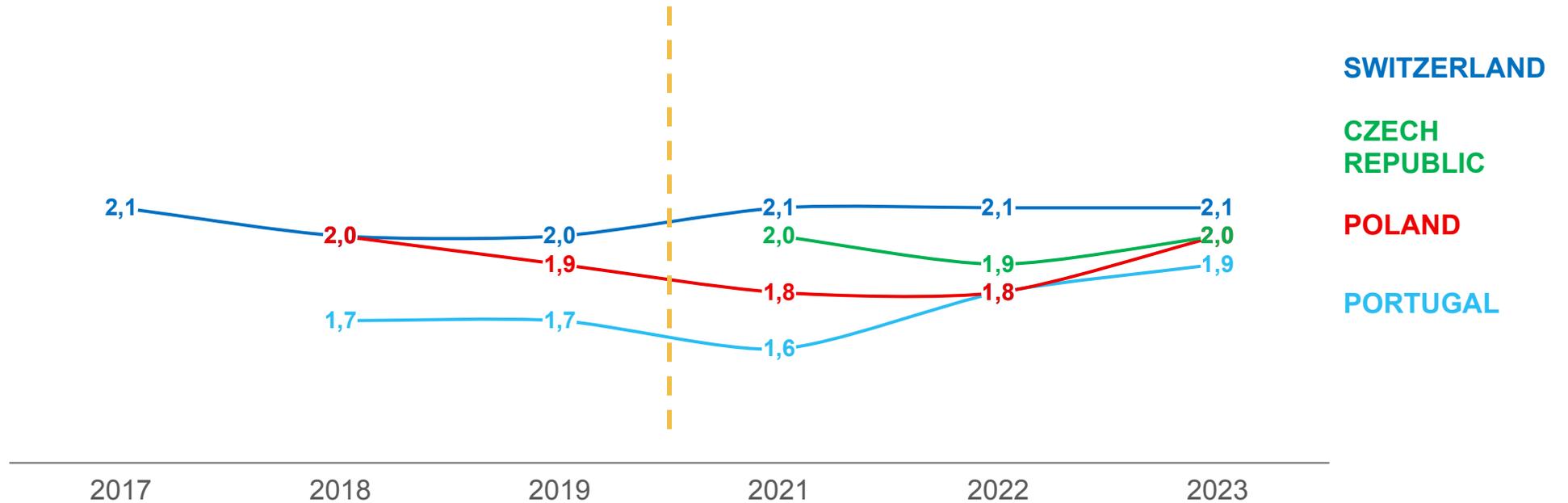
(weeks on average)



In total, how long will you be away on a trip this summer?

AN INCREASE OF HOLIDAY DURATION IN PORTUGAL.

Evolution of holiday duration by European country (2/2)
(weeks on average)



In total, how long will you be away on a trip this summer?

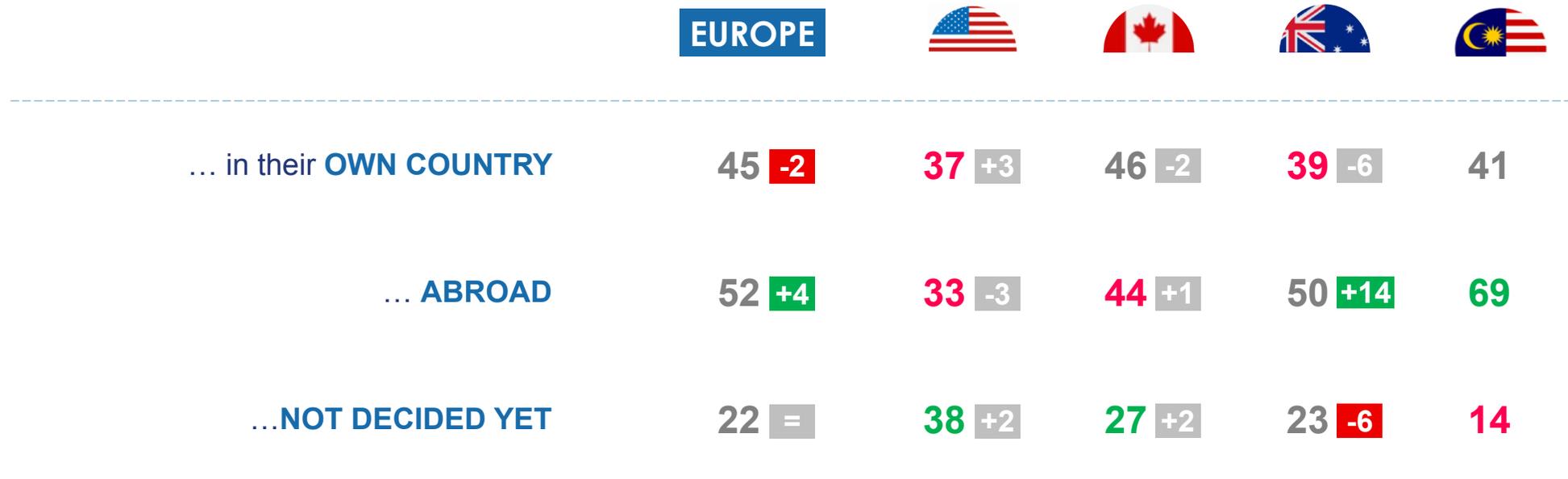
FAVORITE DESTINATIONS

- Summer destinations (country)
- Summer holiday preferences
- Choice criteria for destination

3

INTENTION TO TRAVEL ABROAD INCREASES IN EUROPE AND AUSTRALIA

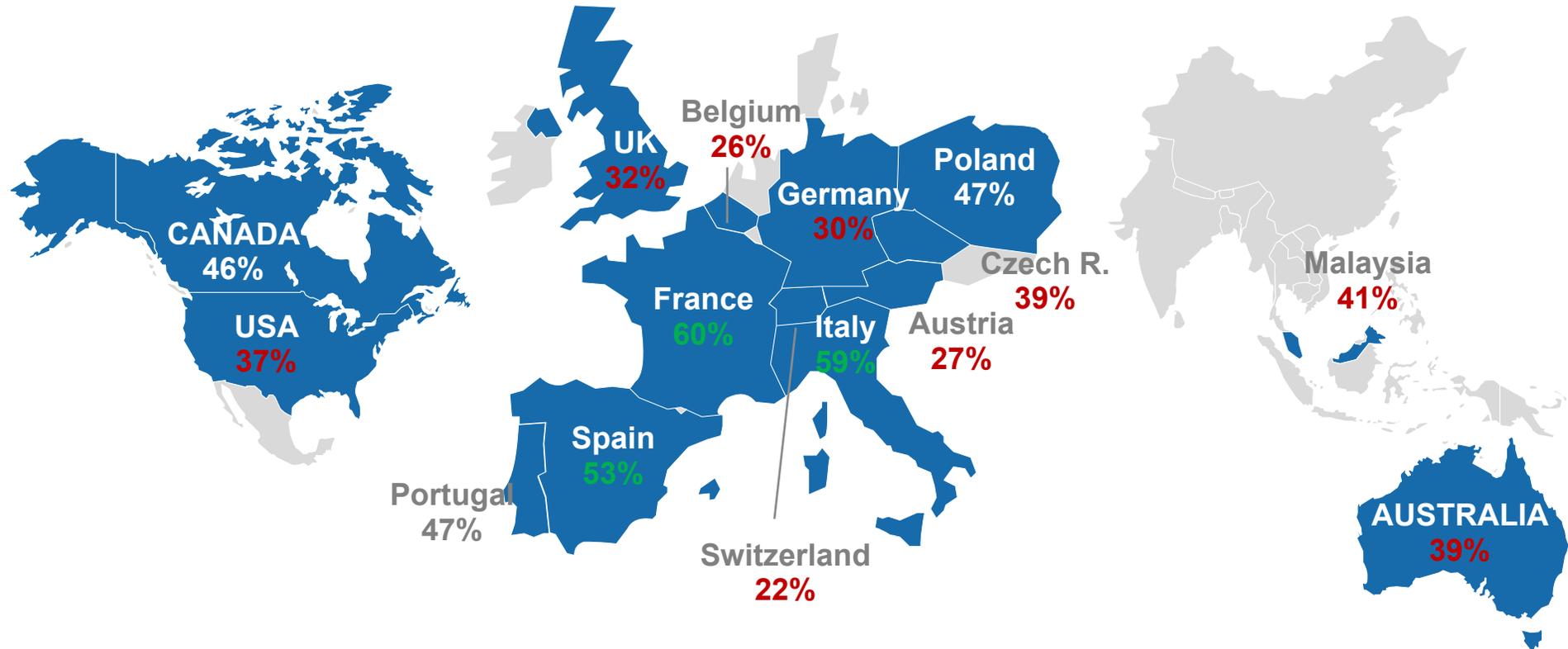
2023 Holiday plans (%)



Where do you plan to go on a trip this summer ?

FRENCH, ITALIAN AND SPANISH HOLIDAYMAKERS ARE THE MOST LIKELY TO STAY IN THEIR OWN COUNTRY DURING SUMMER.

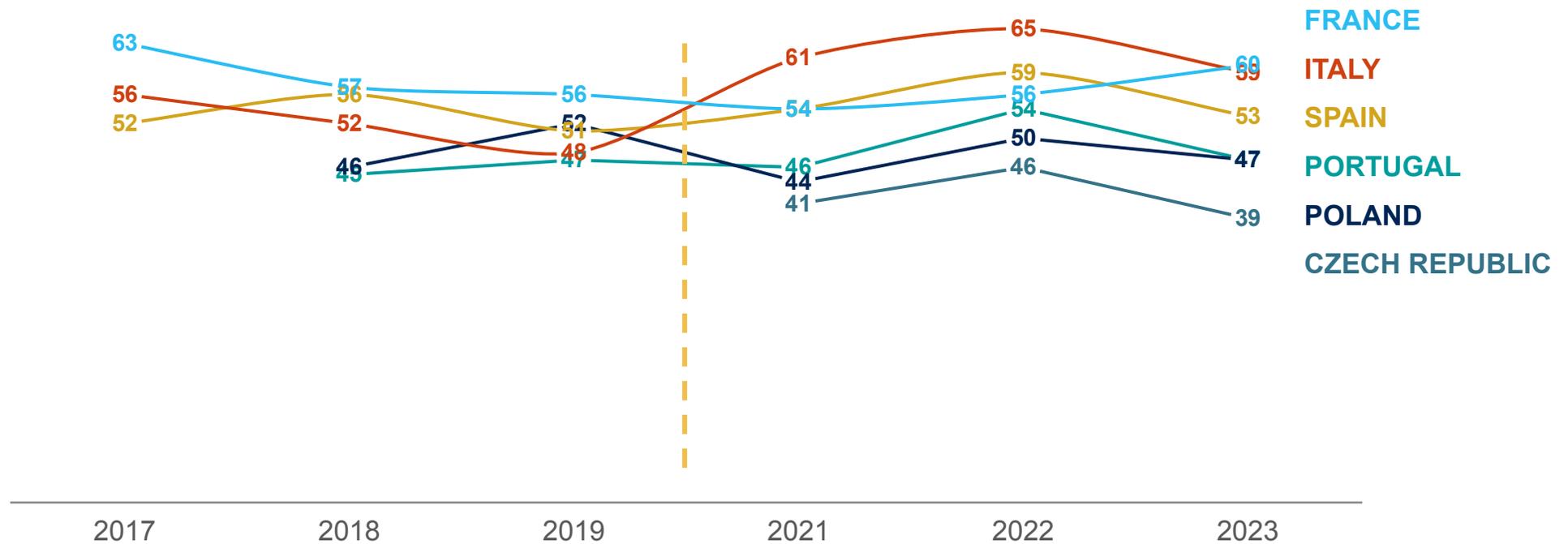
Holiday plans in one's own country this summer



Where do you plan to go on a trip this summer?

APART FROM FRANCE, WHERE STAYING IN THEIR OWN COUNTRY CONTINUES TO PROGRESS AMONG HOLIDAYMAKERS, OTHER COUNTRIES SHOW A DECREASE, GETTING ALMOST BACK TO PRE-COVID SCORES.

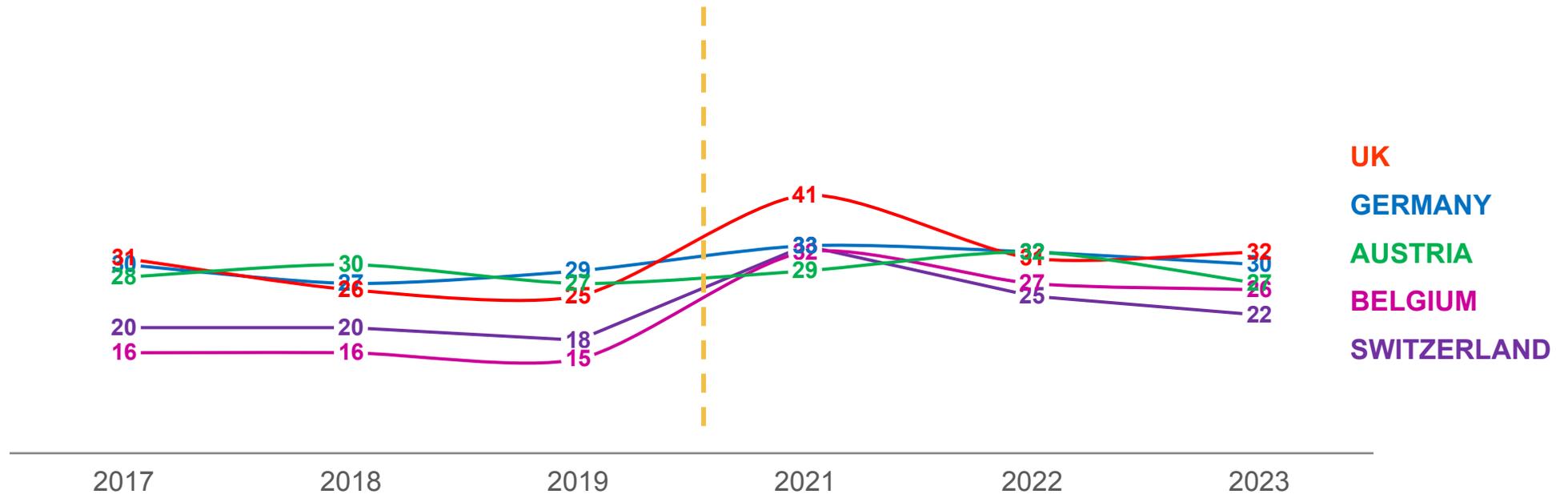
Holiday destination in own country by European country (%)



Where do you plan to go on a trip this summer?

IN COUNTRIES WHERE HOLIDAYMAKERS USUALLY TRAVEL ABROAD A LOT, A STABILIZATION OF THOSE WHO WILL STAY IN THEIR COUNTRY.

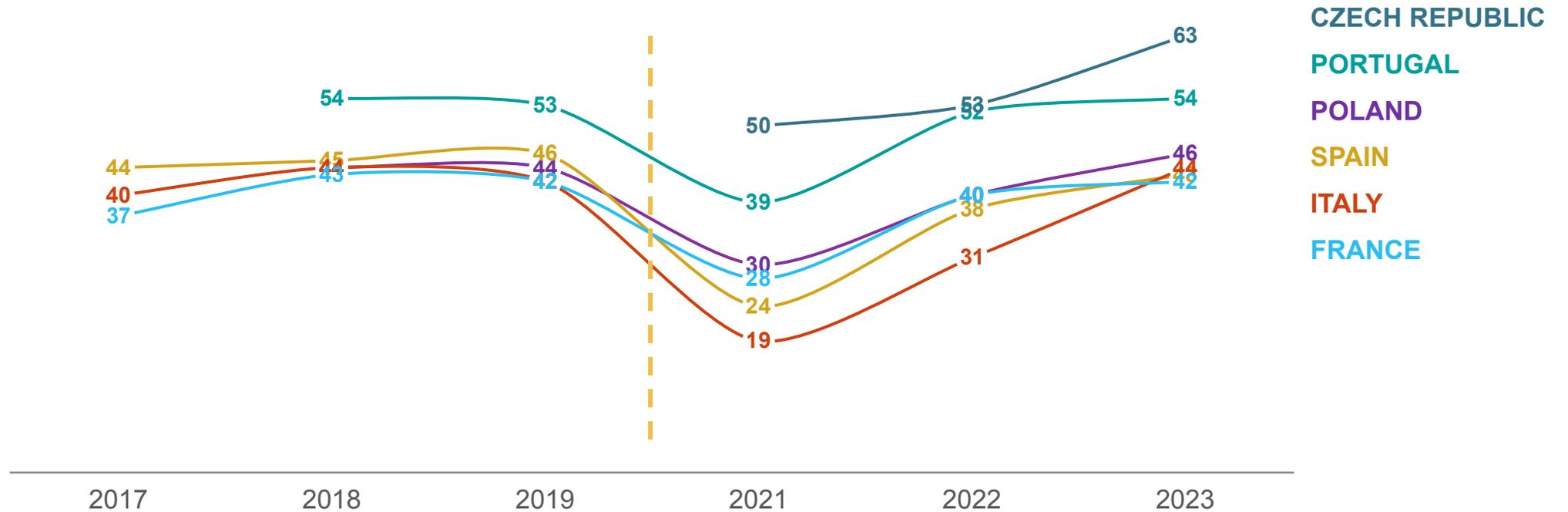
Holiday destination in own country by European country (%)



Where do you plan to go on a trip this summer?

A STRONG INCREASE OF INTENTIONS TO TRAVEL ABROAD AMONG CZECH, POLISH AND ITALIAN HOLIDAYMAKERS.

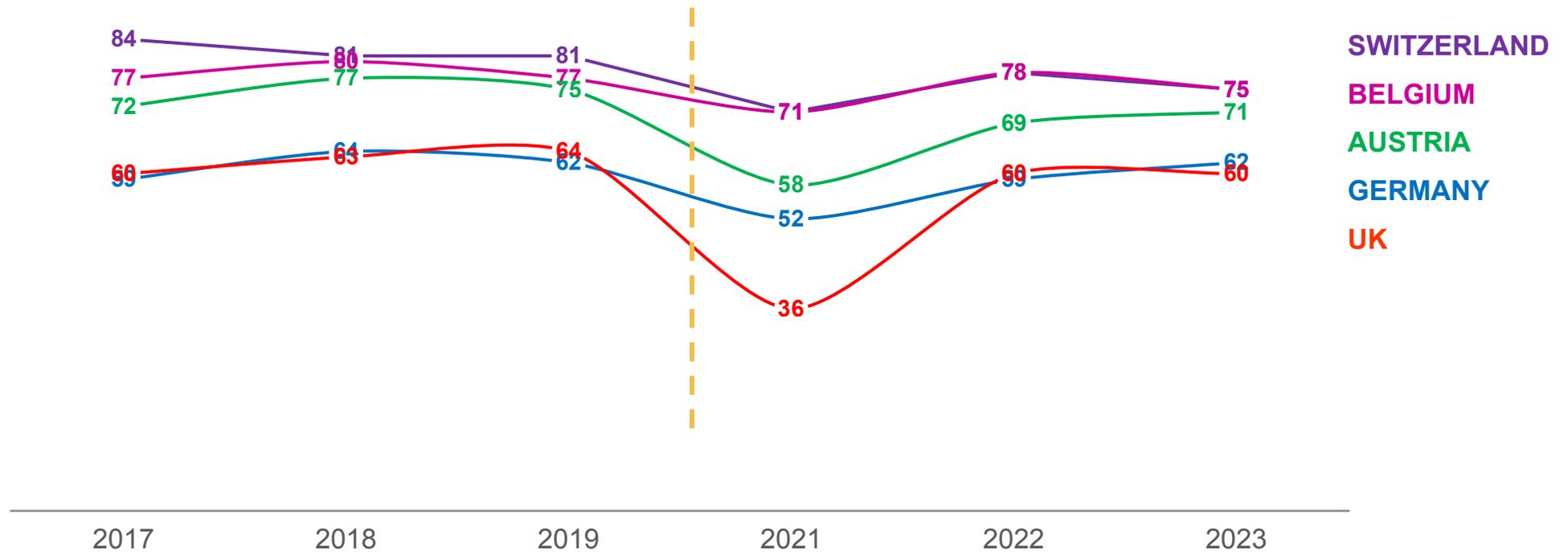
Holiday destination “Abroad” by European country (%)



Where do you plan to go on a trip this summer?

A STABILIZATION OR EVEN DECREASE OF INTENTIONS TO TRAVEL ABROAD AMONG SWISS, BELGIAN AND BRITISH HOLIDAYMAKERS.

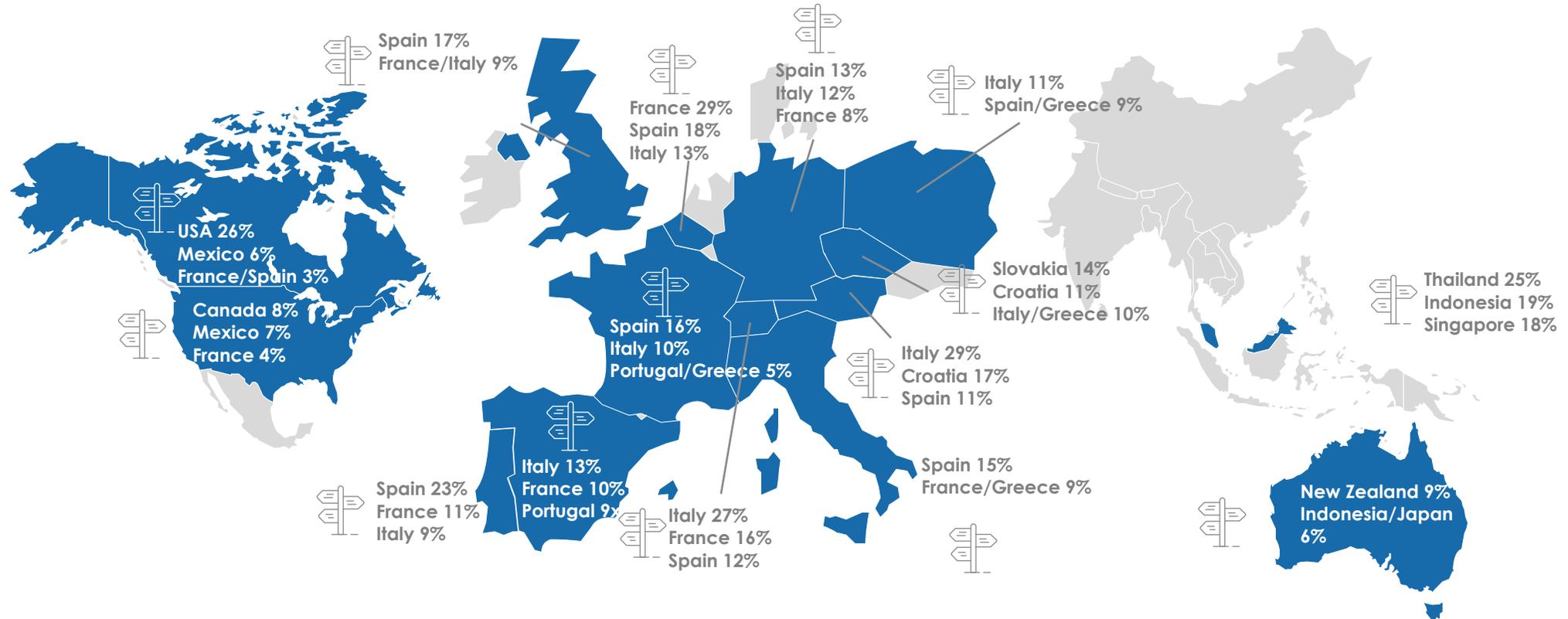
Holiday destination “Abroad” by European country (%)



Where do you plan to go on a trip this summer?

WHEN THEY TRAVEL ABROAD, RESPONDENTS MOSTLY CHOOSE NEIGHBORING COUNTRIES. ITALY, FRANCE AND SPAIN ARE STILL THE MOST ATTRACTIVE DESTINATIONS IN EUROPE.

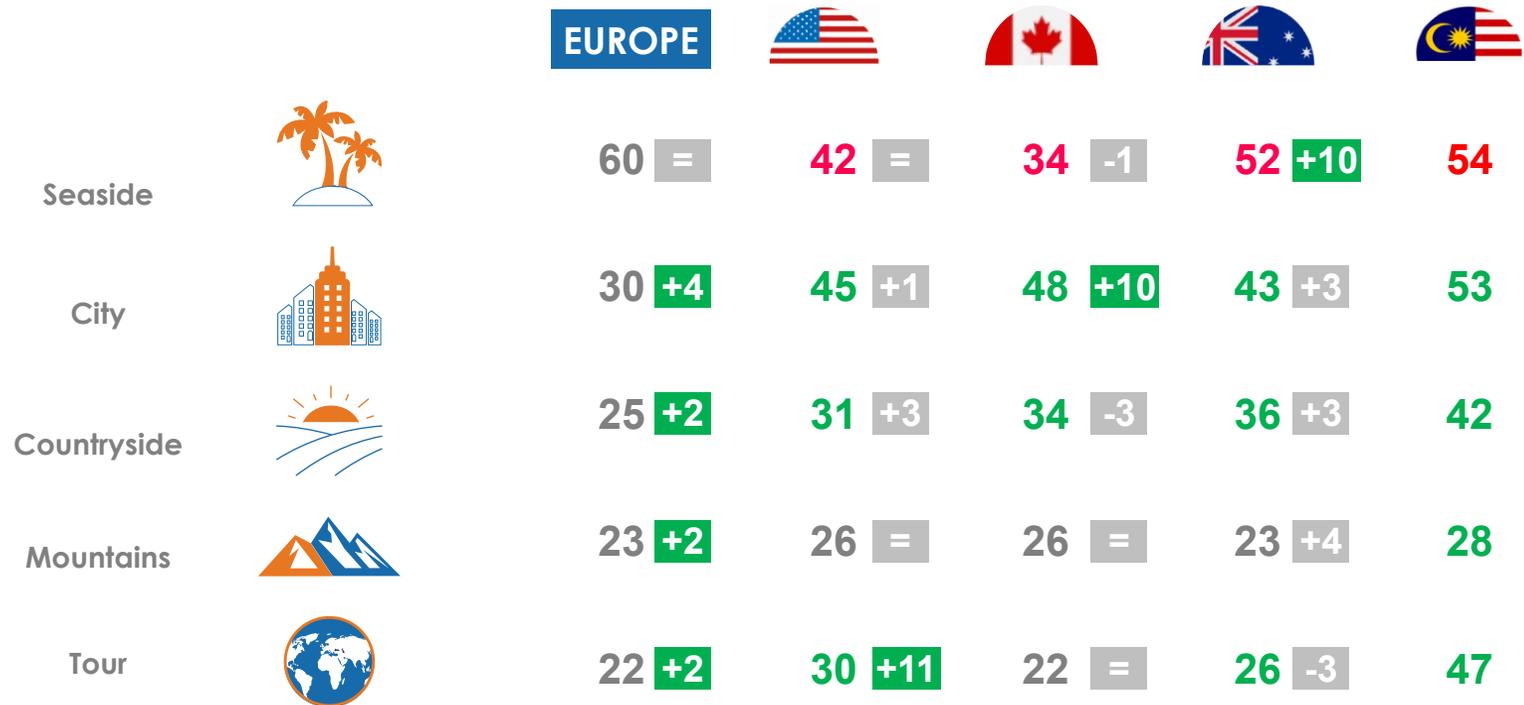
Foreign destinations planned this summer



Where do you plan to go on a trip this summer?

THE SEASIDE REMAINS THE MOST POPULAR CHOICE FOR THE SUMMER HOLIDAYS, BUT CITIES HAVE GAINED IN ATTRACTIVITY.

Summer holiday preferences (%)



For your summer trip do you intend to go mainly...

CITIES AS HOLIDAY DESTINATION PARTICULARLY PROGRESS IN PORTUGAL, THE UK AND GERMANY.

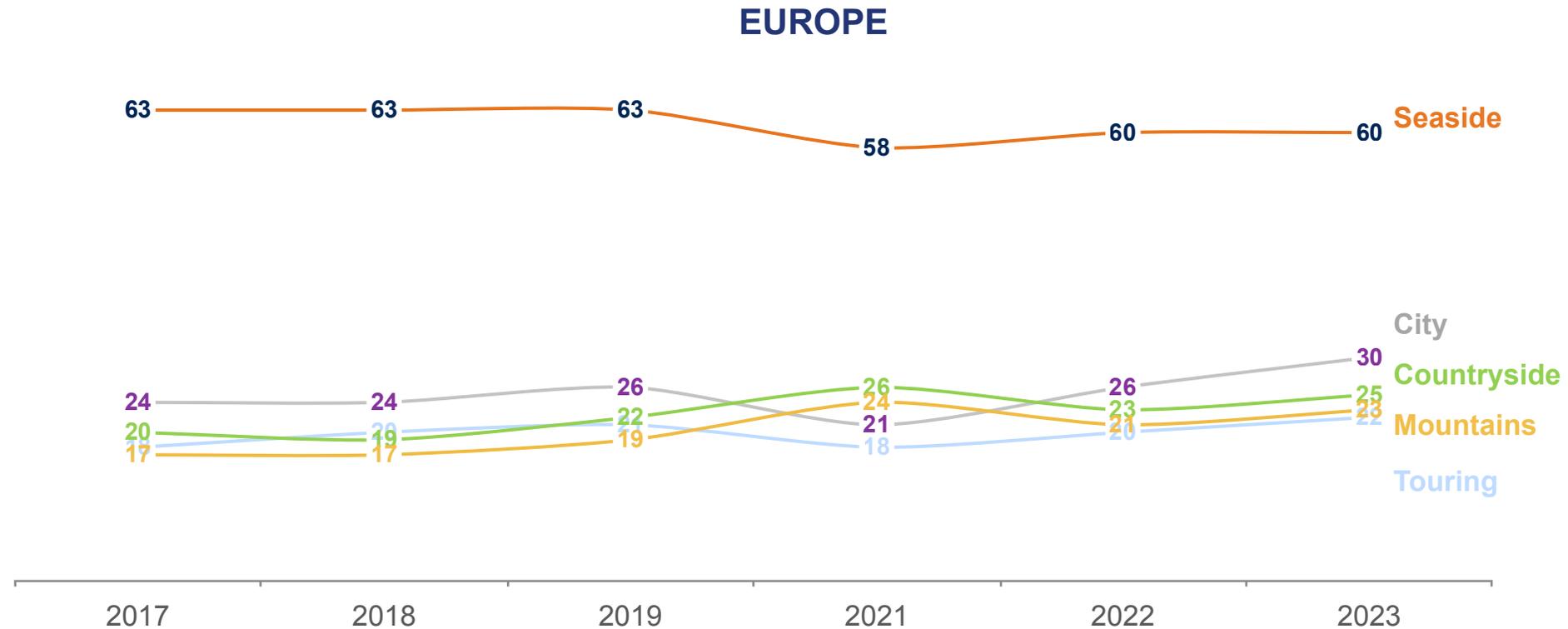
Summer holiday preferences (%)

												
Seaside		61 +2	56 +1	48 +5	65 =	58 +1	63 -3	61 +4	59 +1	60 -4	58 -2	57 +3
City		25 -1	25 -1	31 +2	20 +2	29 +6	26 +5	22 +1	39 +8	44 +5	32 +4	39 +7
Countryside		28 +3	26 +4	33 -3	24 -2	27 +2	11 +1	20 +1	26 +2	21 -3	27 +3	39 +6
Mountains		19 -3	19 -1	28 =	23 +3	21 +3	21 +1	34 -1	19 +2	25 =	20 =	17 +3
Tour		19 -3	22 +3	23 -2	18 +2	25 +5	22 =	30 +2	13 +3	15 -1	25 +4	25 +5

For your summer trip, do you intend to go mainly...

CITIES AS HOLIDAY DESTINATION ARE NOW MORE ATTRACTIVE THAN COUNTRYSIDE, MOUNTAINS AND TOURING.

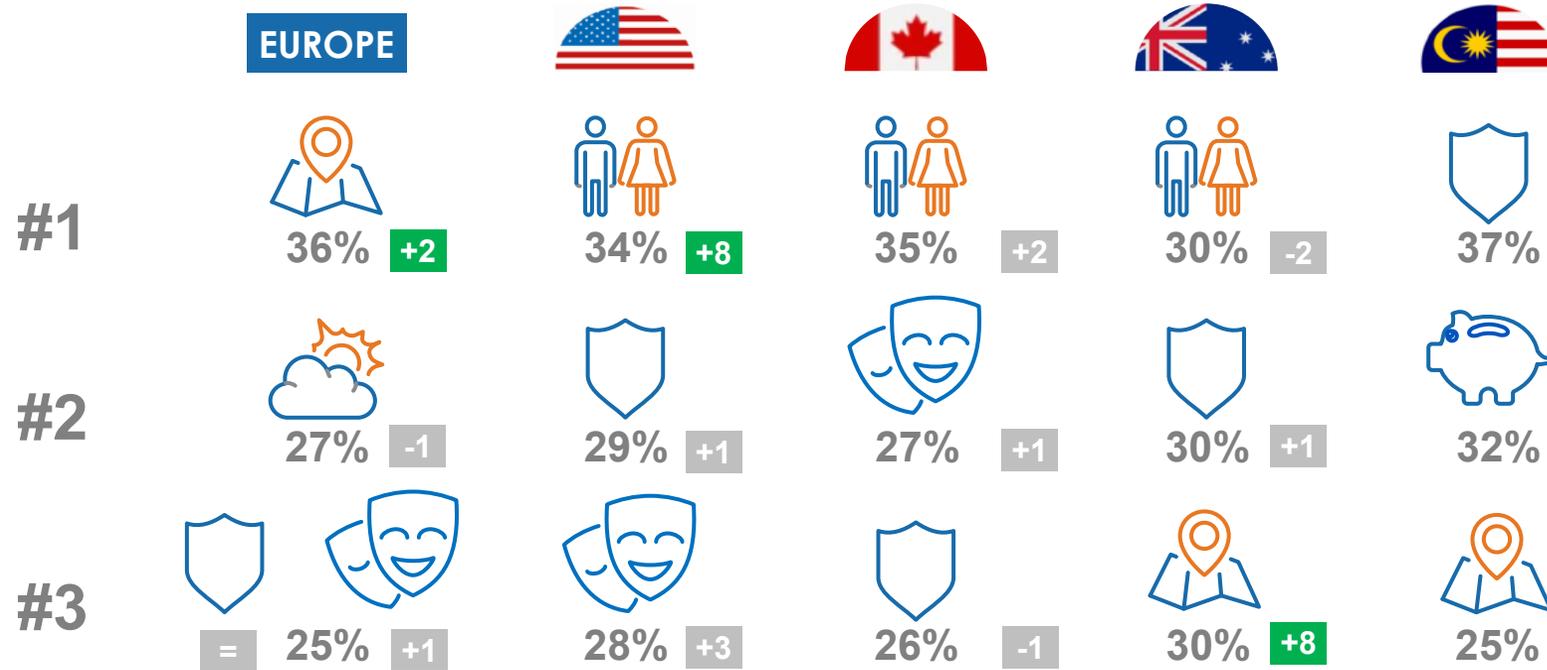
Summer holiday preferences (%)



For your summer trip, do you intend to go mainly...

WHEN THEY CHOOSE THEIR SUMMER DESTINATION, EUROPEAN TRAVELERS OFTEN TURN TO FAMILIAR PLACES. WEATHER IS THE 2ND MOST IMPORTANT CRITERIA.

Motivations for the choice of destination



What motivated you to pick summer destination?
(To those who already chose their destination)

 Already been there

 Has friends there

 Safe destination

 Weather

 Activities

 Found a good deal

BUDGET IS THE KEY CHOICE CRITERIA IN EUROPE AND THE USA, INCRASINGLY THIS YEAR. TO BE NOTED, A PROGRESSION OF ATTENTION PAID TO VARIOUS RISKS...

Factors that play an 'essential' role in choosing a destination 1/2

	TOP4 2023				
	EUROPE				
My intended budget	53 +3	56 +8	49 -3	52 +4	54
The climate	47 =	40 -1	35 -1	32 -3	40
Opportunities for leisure or cultural activities	45 +3	48 -1	45 +2	48 +2	44
The quality of on-site tourist infrastructures	38 =	34 -3	30 -2	30 -3	44
Travel time to my trip destination	36 +3	39 +3	32 +2	34 -1	37
The risk of a terrorist attack	35 +3	34 +6	30 +2	31 +1	58
The risk of a personal attack	35 +4	36 +2	32 +1	37 +4	56
Health risks (other than COVID)	30 =	30 -2	28 -4	28 -5	54
The risk of a natural disaster	29 +4	23 -5	21 -3	27 =	54
The risks of social unrest	28 +3	28 =	23 =	25 -1	46

For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination:

...HOWEVER THE FEAR OF CORONAVIRUS DECREASES THIS YEAR, BUT APPEARS MORE PRESENT IN MALAYSIANS' HOLIDAYMAKERS MINDS.

Factors that play an 'essential' role in choosing a destination 2/2

	EUROPE				
The political climate in the destination country	28 +1	24 -2	25 -2	28 +2	38
The quality of the internet access	24 +2	30 +1	23 -2	26 =	47
Your ability to speak the destination country's language	23 =	28 -5	25 =	28 +2	32
The risk of a coronavirus infection	23 -5	27 -2	22 -13	28 -7	54
The economic situation in the destination country	22 +2	26 +1	22 +1	21 =	35
The war in Ukraine	21 -2	18 -2	13 -4	17 -6	36
New The economic context in my country	21	23	22	23	38
The ecological footprint of the trip	19 +2	17 -3	18 +3	16 -2	29
The exchange rates of the destination country's currency	17 =	21 -4	24 +2	22 +2	44

For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination:

2023 SUMMER HOLIDAYS ORGANIZATION

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

4

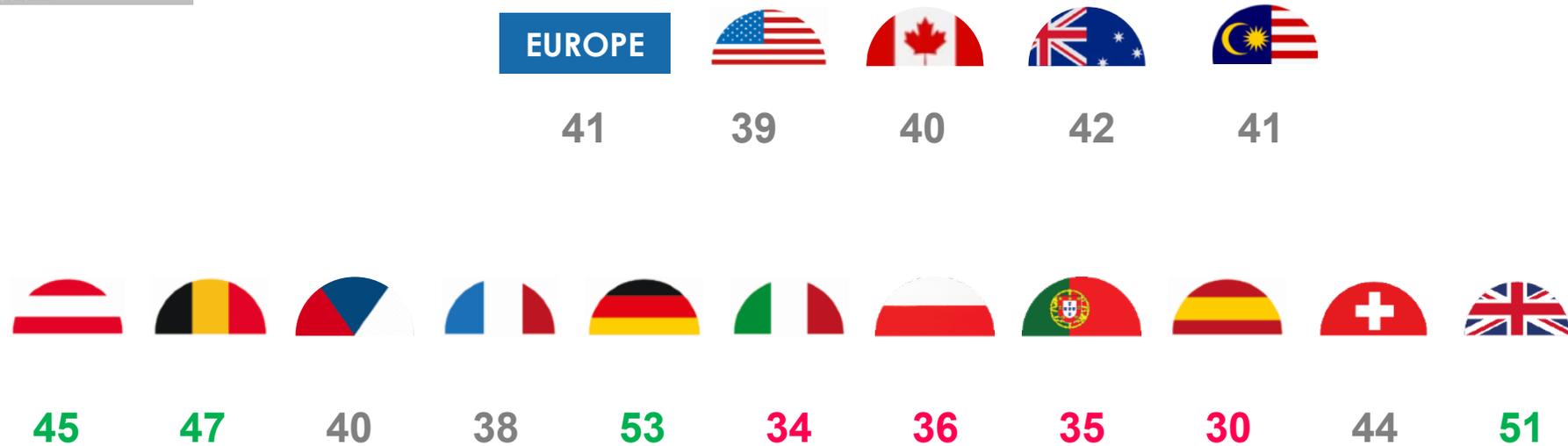


ALMOST TWO THIRDS OF TRAVELERS, WHATEVER THE ZONE, HAVEN'T BOOKED THEIR TRIP YET

Summer holiday reservation (%)

NB : Interviews were conducted one month earlier this year vs 2022.

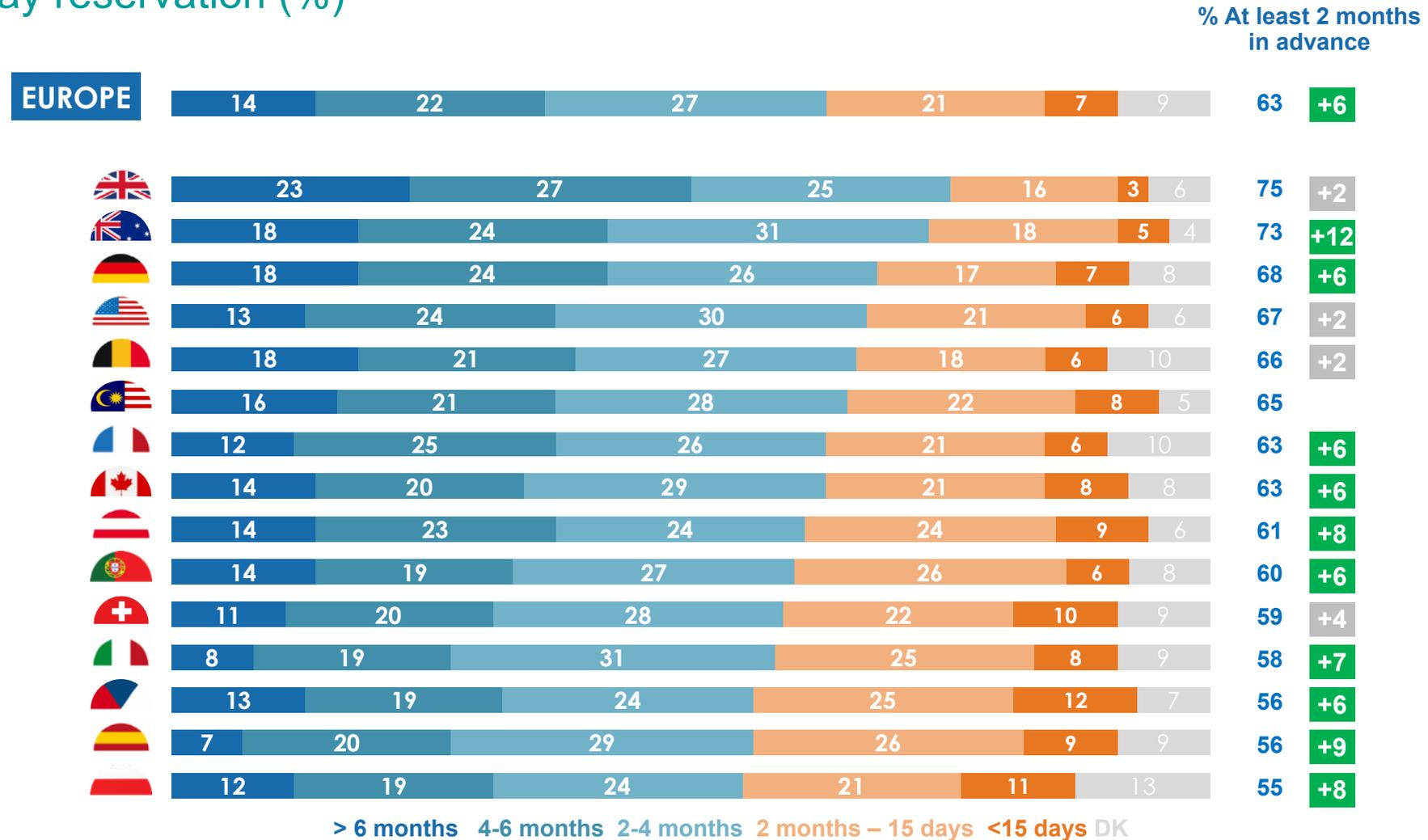
Hence, we do not present évolutions for this question.



Have you already made reservations for your summer trip(s)? Yes already booked everything + already booked part of my trip

LAST MINUTE PLANS APPEAR LESS WIDESPREAD THIS YEAR.

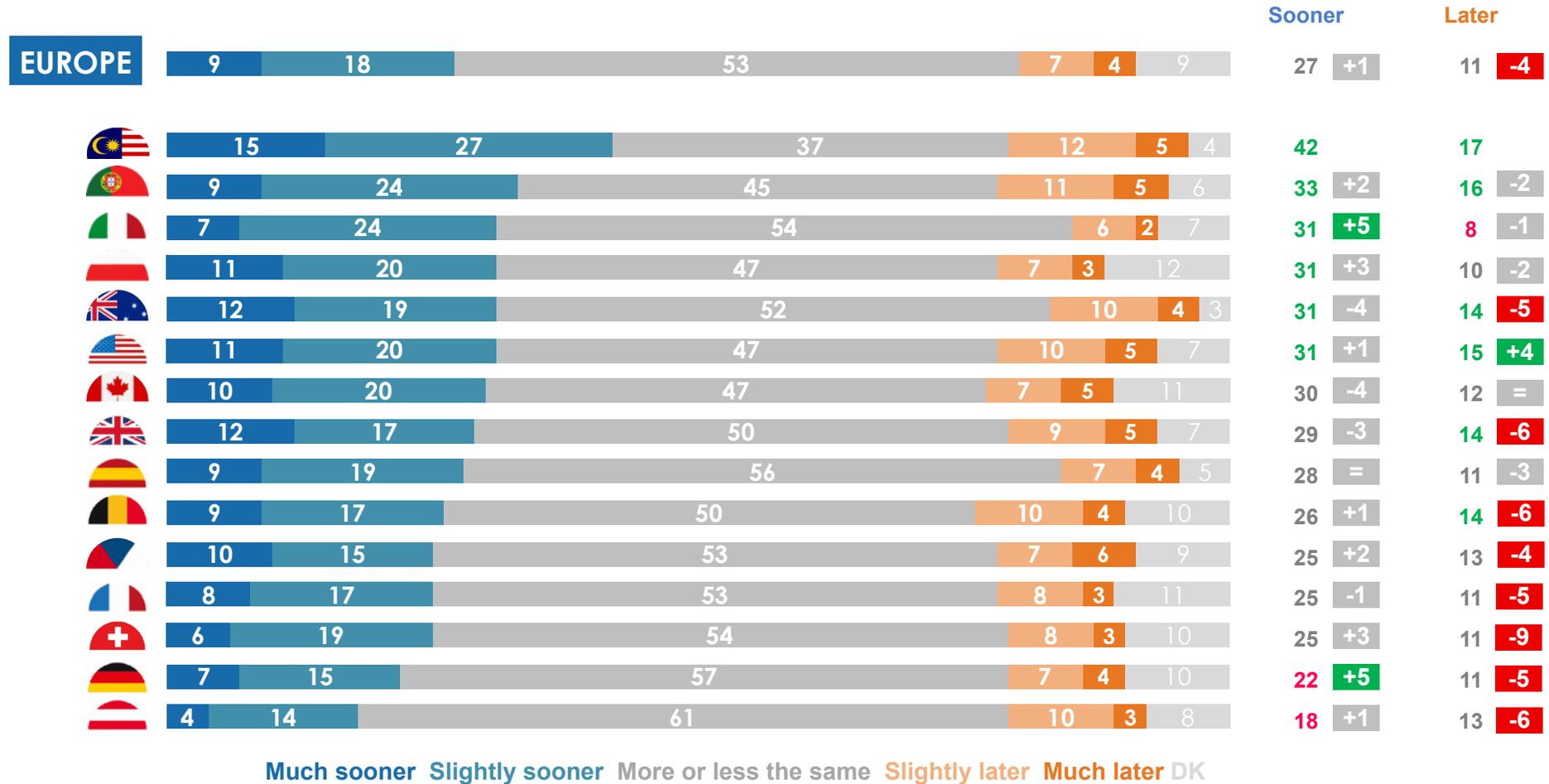
Summer holiday reservation (%)



How much in advance have you planned, or do you plan to book your trip?

1 EUROPEAN OUT OF 4 HAS OR WILL BOOK SOONER THIS YEAR.

Summer holiday reservation (%)



Compared to last year, would you say that you have booked or that you plan to book your trip :

MOST OF THE TIME, SUMMER HOLIDAYS IS THE PERFECT TIME TO FOCUS ON IMMEDIATE FAMILY (PARTNERS AND CHILDREN).

Travel partners (%)

	EUROPE				
Your partner	67 +2	59 +4	58 +1	57 -1	43
Your children	34 +1	38 +4	29 +3	26 =	37
Your friends	18 =	21 =	22 +3	20 +4	23
On your own	11 =	16 -1	19 +3	20 +3	21
Your parents	9 =	12 =	10 =	11 +3	24
Your siblings	7 =	12 -1	10 =	10 +4	21
New Your grandchildren	5	6	3	2	3
New Your grandparents	1	1	1	1	3

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

MOST OF THE TIME, SUMMER HOLIDAYS IS THE PERFECT TIME TO FOCUS ON IMMEDIATE FAMILY IN EVERY COUNTRY

Travel partners (%)

											
Your partner	64 <small>-1</small>	64 <small>+4</small>	67 <small>-1</small>	67 <small>+3</small>	65 <small>-1</small>	67 <small>=</small>	69 <small>+5</small>	68 <small>+2</small>	69 <small>=</small>	60 <small>-1</small>	68 <small>+6</small>
Your children	28 <small>-1</small>	33 <small>+2</small>	39 <small>-2</small>	39 <small>+2</small>	25 <small>=</small>	33 <small>=</small>	43 <small>+5</small>	41 <small>+4</small>	39 <small>+5</small>	30 <small>-1</small>	31 <small>-2</small>
Your friends	19 <small>=</small>	16 <small>=</small>	24 <small>=</small>	14 <small>-1</small>	18 <small>+2</small>	23 <small>-1</small>	20 <small>-1</small>	10 <small>-5</small>	17 <small>=</small>	19 <small>-1</small>	18 <small>-1</small>
On your own	15 <small>+4</small>	11 <small>+1</small>	10 <small>-2</small>	9 <small>-3</small>	14 <small>-1</small>	10 <small>+2</small>	10 <small>+1</small>	11 <small>+1</small>	8 <small>-2</small>	14 <small>=</small>	12 <small>+1</small>
Your parents	9 <small>+1</small>	11 <small>=</small>	8 <small>-1</small>	9 <small>=</small>	8 <small>=</small>	7 <small>=</small>	10 <small>+1</small>	10 <small>-1</small>	10 <small>-1</small>	10 <small>=</small>	11 <small>-1</small>
Your siblings	5 <small>=</small>	7 <small>-1</small>	6 <small>-1</small>	7 <small>=</small>	6 <small>-1</small>	6 <small>=</small>	7 <small>-1</small>	8 <small>+1</small>	8 <small>+1</small>	8 <small>+1</small>	10 <small>+2</small>
<i>New</i> Your grandchildren	5	7	8	7	3	4	7	7	4	5	4
<i>New</i> Your grandparents	2	2	2	2	2	1	1	1	1	2	1

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

IF EUROPEANS STILL PREFER TO USE THEIR CAR TO GO TO THEIR HOLIDAY DESTINATION, THIS HABIT IS DECREASING WHILE THE PLANE REGAINS IN POPULARITY.

Transportation (%)

	EUROPE				
Personal car	50 -5	49 +1	48 -1	29 -10	32
Plane	37 +4	44 +1	42 +2	57 +9	55
Train	16 +1	5 -2	8 =	16 +6	18
Bus	8 +1	5 -1	6 +2	10 +2	13
Boat	5 +1	4 -1	3 =	5 +1	4
Rental car through an agency	4 =	12 +1	9 -3	13 +1	17
Rental car between private individuals	3 =	6 -1	5 +1	9 +3	11
Carpooling	3 =	5 -3	6 +2	3 =	7
Camper van	3 =	4 -1	4 -1	4 -1	4
Bike	2 -1	3 -1	2 -1	4 =	3
Motorbike	2 =	3 -1	3 +1	4 +1	7

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

PERSONAL CAR IS THE PREFERRED TRANSPORTATION MODE ACROSS EUROPE, ESPECIALLY IN FRANCE AND AUSTRIA. PLANE IS PARTICULARLY APPRECIATED IN PORTUGAL, SWITZERLAND AND THE UK.

Transportation (%)

											
Personal car	56 -4	50 +2	53 -7	66 -2	47 -7	50 -8	51 -6	46 -5	51 -8	41 -2	36 -2
Plane	38 +6	37 =	33 +6	24 +2	39 +6	35 +5	31 +4	48 +7	37 +3	44 +1	54 +3
Train	15 -1	12 +1	17 =	13 -2	15 +1	17 +1	18 =	10 +2	16 +1	19 +2	18 +4
Bus	8 +3	5 =	14 -3	4 =	10 +5	7 +2	13 +2	9 +3	8 -1	7 =	6 -1
Boat	3 +1	3 -1	2 =	4 +1	5 =	8 +2	2 +1	2 -1	5 +2	6 +1	5 -1
Rental car through an agency	2 +1	4 +1	2 +1	3 =	4 +2	6 +2	3 +1	5 =	5 =	5 =	5 -1
Rental car between private individuals	2 =	3 =	1 -1	3 =	3 =	4 +2	2 +1	4 +1	3 +1	4 =	4 +1
Carpooling	2 =	3 =	3 =	3 =	5 +2	3 +1	1 =	2 -1	4 =	3 +1	2 =
Camper van	3 -1	3 +1	3 +2	3 +1	5 =	2 -1	2 -1	2 -1	2 +1	6 +3	2 -2
Bike	2 =	3 =	4 =	1 -1	3 -1	3 =	2 =	1 =	1 -1	4 +1	2 -1
Motorbike	2 =	2 +1	1 -1	2 +1	2 =	2 -2	1 -1	1 =	2 +1	4 +2	1 -1

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

A MAJORITY OF TRAVELERS CHOOSE THEIR MODE OF TRANSPORTATION BY CONVENIENCE, THEN COMES HABIT TO A LESSER EXTENT THOUGH.

Criteria of choice of transportation mode (%)

	EUROPE				
It is the most convenient way to reach my destination	64 +2	63 +6	63 -1	68 =	68
I am used to taking this mode of transportation	38 =	38 -2	32 -5	31 =	40
It is more affordable for me	28 +3	40 +1	35 =	30 +4	43
<i>New</i> It is more environmentally friendly	9	10	10	11	25
There is less risk for COVID-19 infection	8 -3	12 =	10 -6	9 -6	16

Why will you choose this mode of transportation? Is it because:

HOTEL IS STILL THE MOST POPULAR ACCOMMODATION AMONG HOLIDAYMAKERS. THIS IS EVEN MORE THE CASE IN MALAYSIA.

Preferred type of accommodation (%)

	EUROPE				
Hotel	47 <small>+1</small>	56 <small>+4</small>	48 <small>+2</small>	51 <small>=</small>	61
Rental of a house or apartment	30 <small>=</small>	20 <small>=</small>	17 <small>+1</small>	25 <small>+3</small>	30
Friends'/family's houses or in your holiday home	21 <small>=</small>	25 <small>-2</small>	34 <small>+5</small>	24 <small>-1</small>	25
A bed & breakfast	15 <small>+1</small>	12 <small>=</small>	12 <small>-2</small>	16 <small>-1</small>	23
Camping	10 <small>=</small>	13 <small>-1</small>	17 <small>-3</small>	10 <small>=</small>	15
Boat (e.g. cruise)	5 <small>=</small>	10 <small>=</small>	7 <small>+2</small>	9 <small>+1</small>	11
Go on a road trip in a camper van/caravan	5 <small>+1</small>	9 <small>-1</small>	8 <small>=</small>	11 <small>+2</small>	13

Regarding your accommodations during your summer trip in 2023, do you mostly intend to:

FOR EUROPEAN TRAVELERS, HOTEL IS EVEN MORE APPRECIATED IN AUSTRIA, GERMANY, SPAIN, SWITZERLAND AND THE UK.

Preferred type of accommodation (%)

											
Hotel	61 +4	46 -1	49 +1	30 +1	54 +4	46 +2	48 -2	43 +2	51 -4	52 +6	51 +3
Rental of a house or apartment	22 -1	34 +5	14 -1	40 +1	27 -6	29 =	23 =	31 +1	30 =	25 -1	30 +2
Friends'/family's houses or in your holiday home	15 -2	18 =	19 -2	26 -3	17 +3	16 -5	24 +2	25 =	24 =	24 -4	20 +3
A bed & breakfast	11 -1	8 -1	32 -1	5 =	11 -1	31 +8	16 -1	21 =	11 -1	13 +2	14 =
Camping	8 =	11 +4	14 -1	17 -2	11 +3	6 =	6 =	6 -1	5 -1	11 +1	10 =
Boat (e.g. cruise)	4 =	3 -1	4 +1	2 -1	7 +1	4 -1	5 +2	3 +1	4 =	6 +1	9 +2
Go on a road trip in a camper van/caravan	3 =	5 =	4 +1	5 =	6 +1	3 =	4 +1	3 =	4 =	8 +4	6 +1

Regarding your accommodations during your summer trip in 2023, do you mostly intend to:

TWO CRITERIA ARE EQUALLY IMPORTANT IN THE CHOICE OF TRANSPORTATION MODE: HABIT AND BUDGET, THE LATTER PROGRESSING THIS YEAR.

Criteria of choice of accommodation (%)

	EUROPE				
I am used to taking this mode of accommodation	46 <small>-1</small>	46 <small>+2</small>	42 <small>=</small>	43 <small>-2</small>	44
It is more affordable for me	42 <small>+4</small>	46 <small>+6</small>	45 <small>-1</small>	43 <small>+3</small>	50
For all the services and activities proposed	27 <small>+2</small>	29 <small>+1</small>	26 <small>+2</small>	32 <small>+6</small>	36
It's a safe / well-protected accommodation	24 <small>+1</small>	31 <small>+1</small>	29 <small>-2</small>	34 <small>+4</small>	40
<i>New</i> It is more environmentally friendly	10	14	11	13	27
There is less risk for COVID-19 infection	7 <small>-4</small>	9 <small>-4</small>	11 <small>-5</small>	10 <small>-5</small>	16

Why will you choose this mode of accommodation? Is it because:

IDEALLY, HOLIDAYMAKERS WOULD LIKE TO SPEND A RELAXING SUMMER WITH THEIR LOVED ONES. DISCOVERY OF NEW CULTURES COMES THIRD, IN PROGRESSION THIS YEAR.

Ideal activities during summer holidays (%)

	EUROPE				
Rest, have peace of mind	54 -2	47 -2	47 =	48 +2	51
Come together as a family, or with friends	47 +2	48 +4	46 -1	41 -2	56
Discover new cultures, enjoy a total change of scenery	44 +3	43 +6	39 +3	47 +6	40
Take time to read, learn new things	11 =	12 -5	11 -1	13 +1	14
Enjoy my home	11 -1	14 -1	18 +2	12 -2	13
Do sports (such as hiking, climbing...)	11 +1	9 -2	13 +2	7 -1	8
Have new friendly or romantic encounters	11 =	13 +2	13 +1	13 =	10

When you think of THE IDEAL summer vacation in 2023, what would you primarily want to do?

PORTUGUESE AND SPANISH LARGELY PRIORITIZE REST WHILE CZECH AND POLISH ARE THE MOST WILLING TO SPEND TIME WITH FRIENDS AND FAMILY.

Ideal activities during summer holidays (%)

											
Rest, have peace of mind	50	55	57	57	51	55	51	63	60	53	51
Come together as a family, or with friends	50	48	55	48	48	48	57	40	36	42	44
Discover new cultures, enjoy a total change of scenery	37	38	38	40	34	47	38	57	54	41	55
Take time to read, learn new things	8	14	6	13	9	8	11	11	12	11	14
Enjoy my home	14	16	10	12	17	8	10	6	7	13	9
Do sports (such as hiking, climbing...)	14	8	18	15	11	10	11	10	11	12	8
Have new friendly or romantic encounters	13	10	7	8	12	17	13	6	11	13	8

When you think of THE IDEAL summer vacation in 2023, what would you primarily want to do?

IN THE COMING SUMMER, TRAVELERS WILL ACTUALLY HAVE REST AND SPEND TIME WITH THEIR FAMILY AND FRIENDS, WHILE DISCOVERING NEW CULTURES INCREASES.

Actual activities during summer holidays (%)

	EUROPE				
Rest, have peace of mind	38 =	30 -2	33 =	30 =	42
Come together as a family, or with friends	37 +2	38 +4	38 -2	32 +3	42
Discover new cultures, enjoy a total change of scenery	25 +4	22 +2	19 +3	30 +9	34
Enjoy my home	15 -1	23 +3	24 =	17 -3	12
Take time to read, learn new things	9 =	11 -2	9 -1	11 +1	10
Do sports (such as hiking, climbing...)	9 +1	10 +1	11 +2	6 -1	6
Have new friendly or romantic encounters	7 +1	7 =	6 =	7 -1	8

And what do you think you will ACTUALLY be mainly doing for the summer vacation in 2023?

ITALIAN, PORTUGUESE AND SPANISH HOLIDAYMAKERS WILL MOSTLY SPEND TIME RELAXING WHILE THE AUSTRIANS WILL FOCUS ON FAMILY TIME.

Actual activities during summer holidays (%)

											
Relax	35 <small>-2</small>	40 <small>+3</small>	42 <small>=</small>	39 <small>+2</small>	33 <small>-4</small>	42 <small>=</small>	37 <small>=</small>	44 <small>-2</small>	47 <small>-1</small>	34 <small>-6</small>	33 <small>+2</small>
Family time	42 <small>+3</small>	37 <small>+1</small>	43 <small>=</small>	35 <small>+2</small>	39 <small>+1</small>	34 <small>-3</small>	39 <small>+5</small>	36 <small>+3</small>	31 <small>+1</small>	37 <small>-2</small>	38 <small>+2</small>
Discover cultures	21 <small>+2</small>	20 <small>+1</small>	22 <small>+2</small>	22 <small>=</small>	19 <small>+3</small>	28 <small>+4</small>	20 <small>+4</small>	32 <small>+2</small>	30 <small>+6</small>	25 <small>+4</small>	31 <small>+4</small>
Enjoy home	19 <small>-3</small>	21 <small>-1</small>	15 <small>-1</small>	13 <small>=</small>	19 <small>-2</small>	8 <small>-2</small>	15 <small>=</small>	14 <small>+2</small>	10 <small>-3</small>	14 <small>=</small>	17 <small>-2</small>
Read, learn	8 <small>-1</small>	13 <small>+1</small>	5 <small>-1</small>	12 <small>+2</small>	8 <small>-1</small>	8 <small>+1</small>	9 <small>=</small>	11 <small>+3</small>	10 <small>-1</small>	9 <small>=</small>	10 <small>=</small>
Do sports	11 <small>=</small>	9 <small>+1</small>	17 <small>+2</small>	11 <small>=</small>	10 <small>+1</small>	8 <small>+1</small>	9 <small>-1</small>	7 <small>-1</small>	8 <small>=</small>	12 <small>+3</small>	6 <small>+1</small>
Make new acquaintances	7 <small>+1</small>	7 <small>-2</small>	5 <small>+1</small>	6 <small>=</small>	7 <small>+1</small>	12 <small>+3</small>	6 <small>-1</small>	2 <small>-2</small>	7 <small>+1</small>	10 <small>+4</small>	5 <small>-1</small>

And what do you think you will ACTUALLY be mainly doing for the summer vacation in 2023?

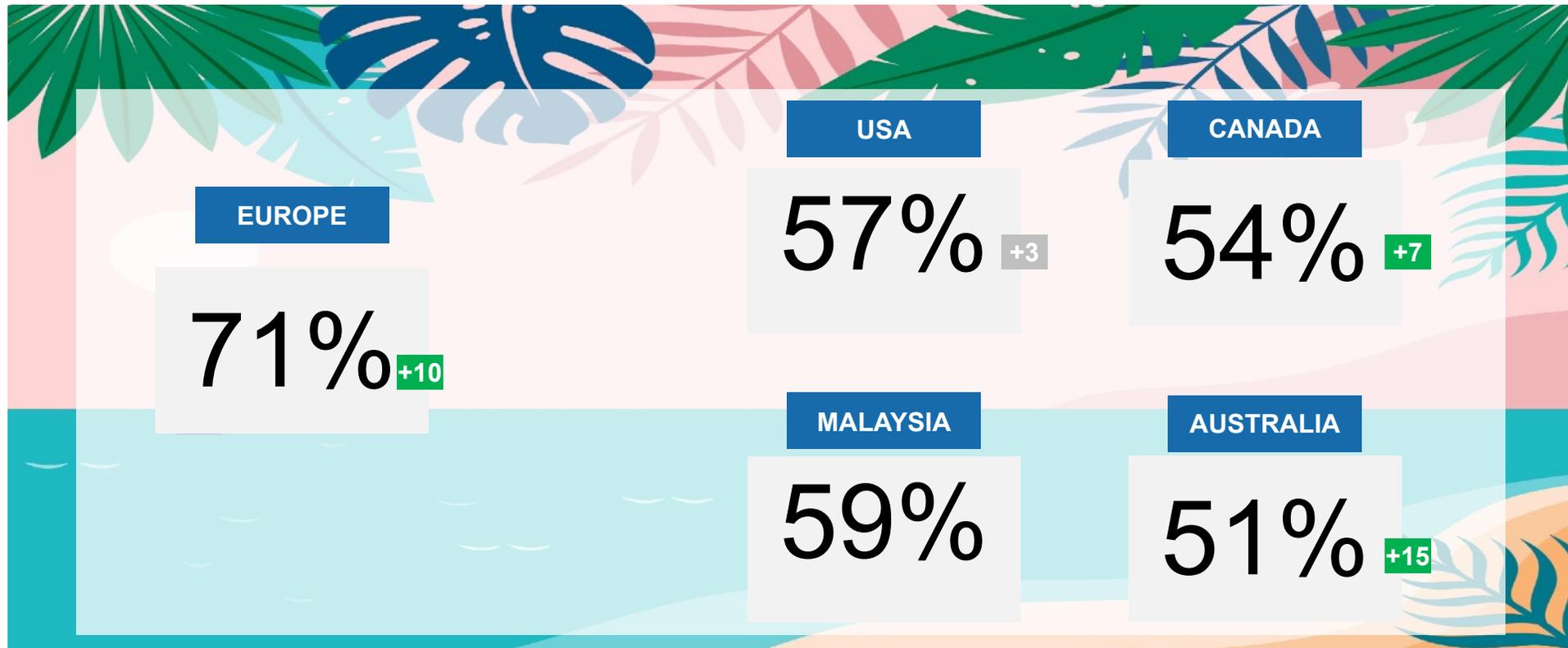
BACK TO 2022 SUMMER HOLIDAYS

5

- Summer travels
- Destinations

MORE THAN 2 OUT OF 3 EUROPEANS WENT ON TRIPS LAST SUMMER.

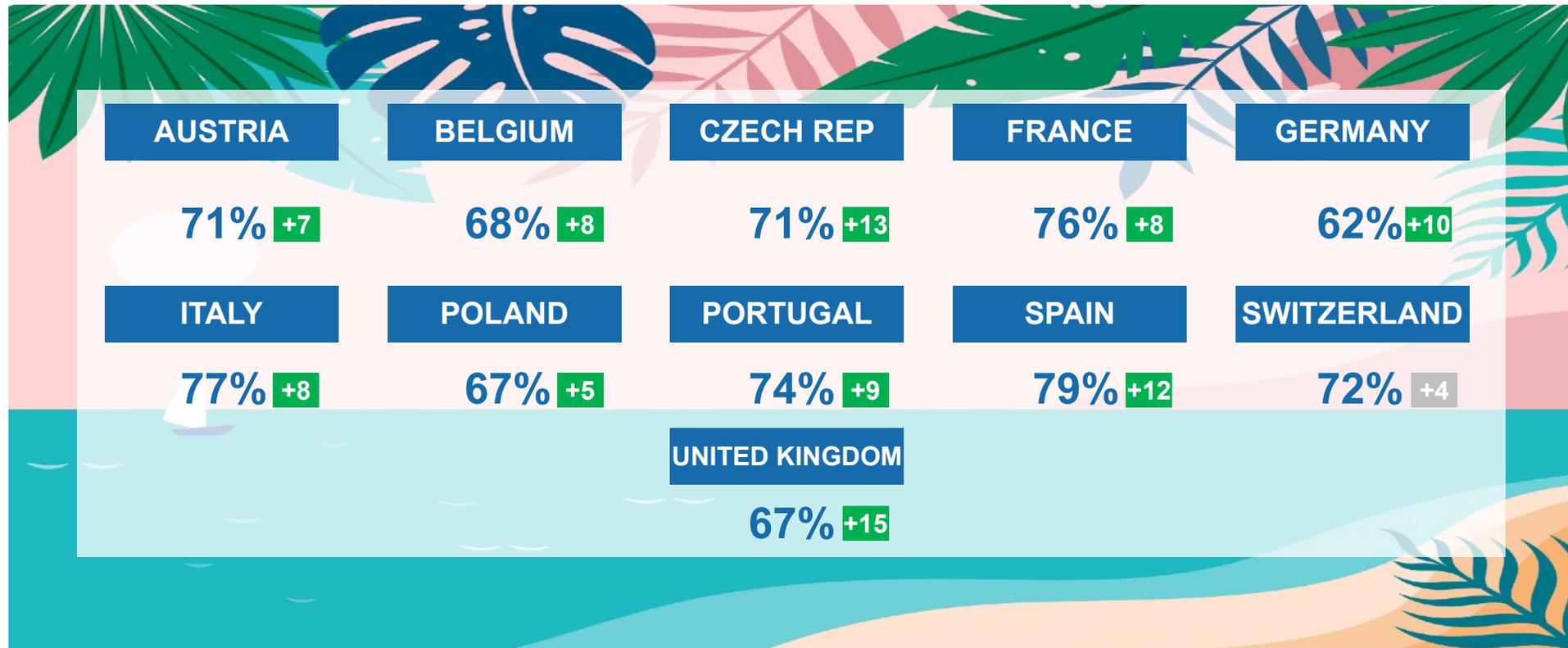
Summer holiday trips in 2022



Did you go on a trip last summer, in other words between June and September 2022? By going on a trip we mean a stay of 4 nights or more away from home, and excluding business trips.

IN EUROPE, SPANIARDS, FRENCH AND ITALIANS WERE THE ONES WHO WENT ON VACATION THE MOST LAST SUMMER.

Summer holiday trips in 2022



Did you go on a trip last summer, in other words between June and September 2022? By going on a trip we mean a stay of 4 nights or more away from home and excluding business trips.

MOST EUROPEAN HOLIDAYMAKERS SPENT THEIR VACATIONS IN THEIR OWN COUNTRY IN 2022.

2022 summer destination (%)

	EUROPE				
...inside their OWN COUNTRY /STATE	49 +2	33 +3	36 -3	42 +9	44
...abroad, IN SAME CONTINENT (Europe, North America, Asia, Oceania)	30 +10	31 +1	21 +13	11 +6	23
...abroad, ANYWHERE ELSE IN THE WORLD	8 +4	8 +2	8 +3	10 +8	6

And did you take...

EUROPEAN HOLIDAYMAKERS FROM FRANCE, ITALY, POLAND AND SPAIN TENDED TO STAY IN THEIR HOME COUNTRY. GOING TO BORDER COUNTRIES IS MORE FREQUENT IN AUSTRIA, BELGIUM, CZECH REPUBLIC AND SWITZERLAND.

2022 summer destination (%)



	Austria	Belgium	Czech Republic	France	Germany	Italy	Poland	Portugal	Spain	Switzerland	United Kingdom
...inside their OWN COUNTRY /STATE	27	24	40	60	34	61	53	52	65	25	43
...abroad, IN SAME CONTINENT (Europe, North America, Asia, Oceania)	49	49	39	23	33	28	24	31	22	54	32
...abroad, ANYWHERE ELSE IN THE WORLD	10	8	8	7	9	6	6	9	7	12	11

And did you take...

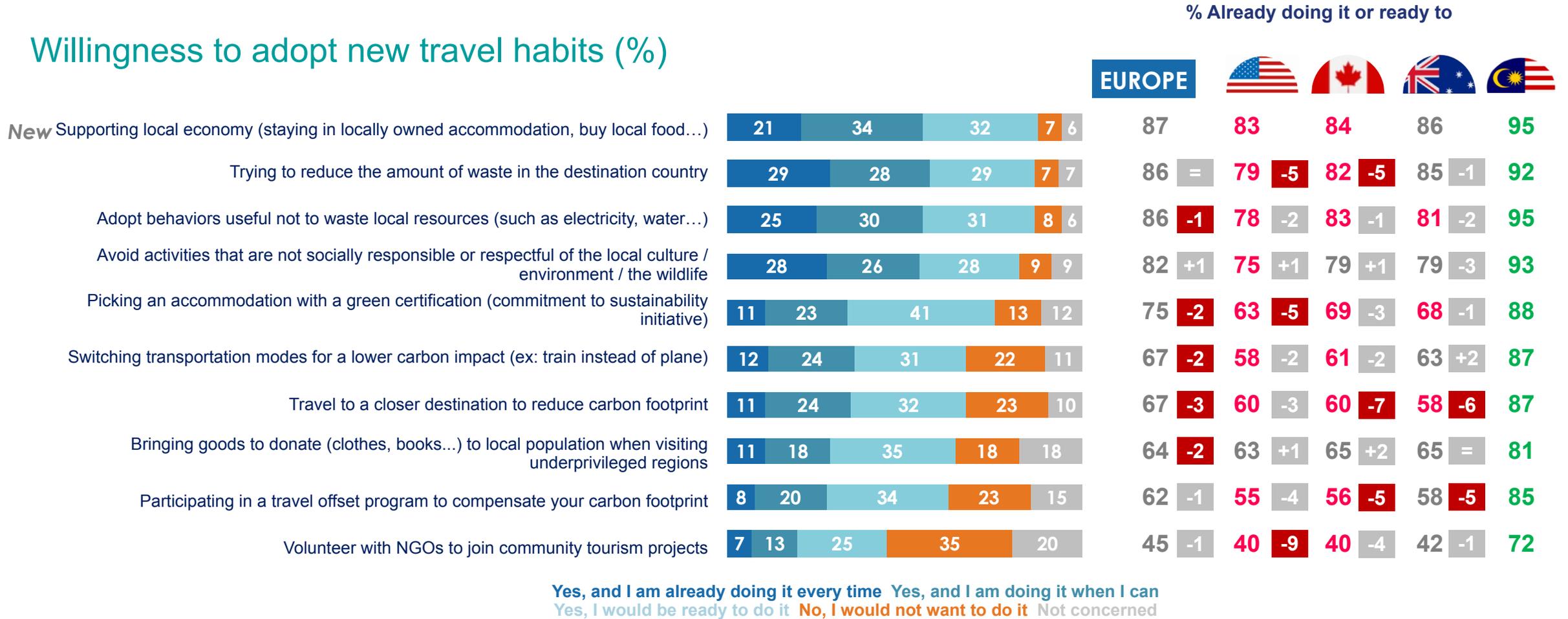
NEW TRAVEL PRACTICES

- Sustainable travel
- Workation

6

SUSTAINABLE TRAVEL HABITS ARE ALREADY INTEGRATED BY TRAVELERS, ESPECIALLY WHEN IT COMES TO SUPPORTING LOCAL ECONOMY, RESPECTING LOCAL CULTURES AND BE AWARE OF WASTE.

Willingness to adopt new travel habits (%)



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?

ITALIAN, PORTUGUESE AND SPANISH ARE THE MOST EAGER TO ADOPT SUSTAINABLE TRAVEL HABITS.

Willingness to adopt new travel habits (%) - Already doing it or ready to

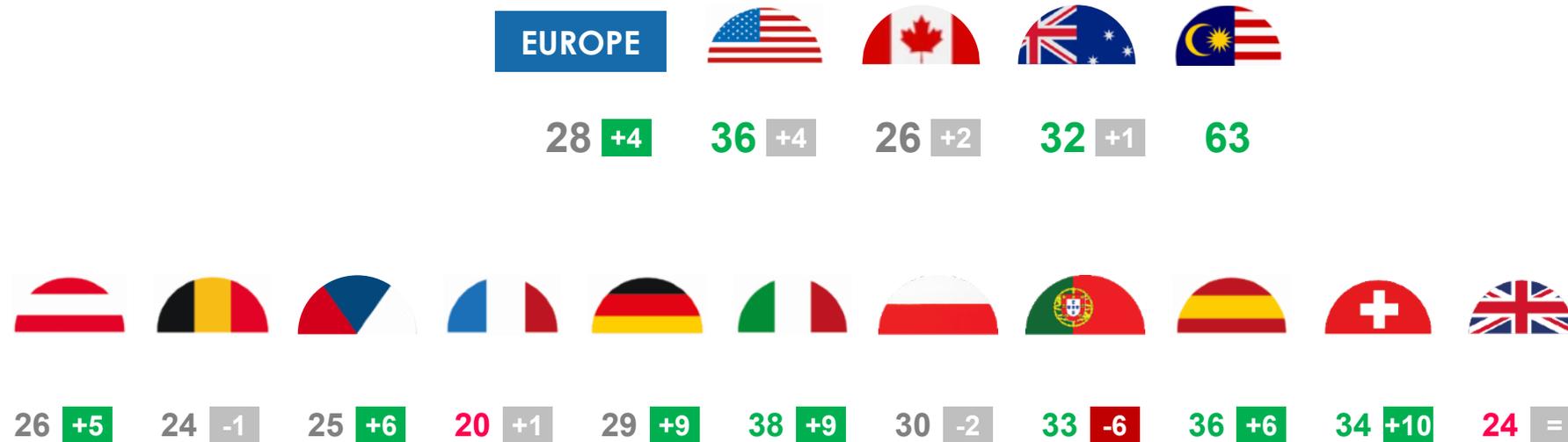


	Poland	Belgium	France	Germany	Italy	Poland	Portugal	Spain	Switzerland	United Kingdom	
New Supporting local economy (staying in locally owned accommodation, buy local food...)	86	82	84	86	85	92	86	93	90	86	
Trying to reduce the amount of waste in the destination country	87 +3	84 +6	79 =	87 +1	86 +3	91 +2	84 -5	93 -1	88 -1	87 +4	83 -1
Adopt behaviors useful not to waste local resources (such as electricity, water...)	85 +1	83 +2	61 -1	89 -1	83 -1	92 -1	86 -1	94 -2	90 -2	85 +1	82 =
Avoid activities that are not socially responsible or respectful of the local culture / environment / the wildlife	79 +1	80 +4	76 +12	80 +1	76 =	89 =	81 +3	91 =	87 -1	80 +1	80 +1
Picking an accommodation with a green certification (commitment to sustainability initiative)	70 =	67 -2	62 -1	73 -2	70 =	86 =	75 -3	87 -3	81 -6	72 +2	68 -3
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	58 -2	60 -1	56 -1	64 =	58 -3	82 +2	67 -1	76 -2	77 -3	64 +4	56 -11
Travel to a closer destination to reduce carbon footprint	55 -4	63 -1	57 +1	69 =	60 -3	80 -1	67 -4	77 -6	73 -5	64 +2	56 -9
Bringing goods to donate (clothes, books...) to local population when visiting underprivileged regions	55 -1	56 -4	56 =	67 =	56 +2	79 +3	68 -1	77 -4	69 -6	66 +4	51 -9
Participating in a travel offset program to compensate your carbon footprint	47 -2	49 =	43 +2	54 -1	52 +1	79 +3	71 -1	76 -3	72 -2	54 =	56 -5
Volunteer with NGOs to join community tourism projects	37 -3	35 -5	36 +2	36 -1	44 +3	58 +1	54 -2	57 -6	51 -2	45 +5	34 -5

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?

WHILE HYBRID WORKING IS NOW DEEPLY IMPLANTED, WORKATION INTENTIONS CONTINUE TO GROW THIS YEAR : MORE THAN 1 ACTIVE EUROPEAN OUT OF 4 CONSIDERS DOING IT, AND 1 OUT OF 3 IN THE USA OR AUSTRALIA.

Workation intention among active people (%)



Do you intend to work from a holiday location this summer (workation)? Question asked to active people

MORE THAN HALF OF WORKATION INTENDERS PLAN TO DO IT AT LEAST PARTLY FROM ABROAD.

★ *New question 2023*

Place for workation (%)

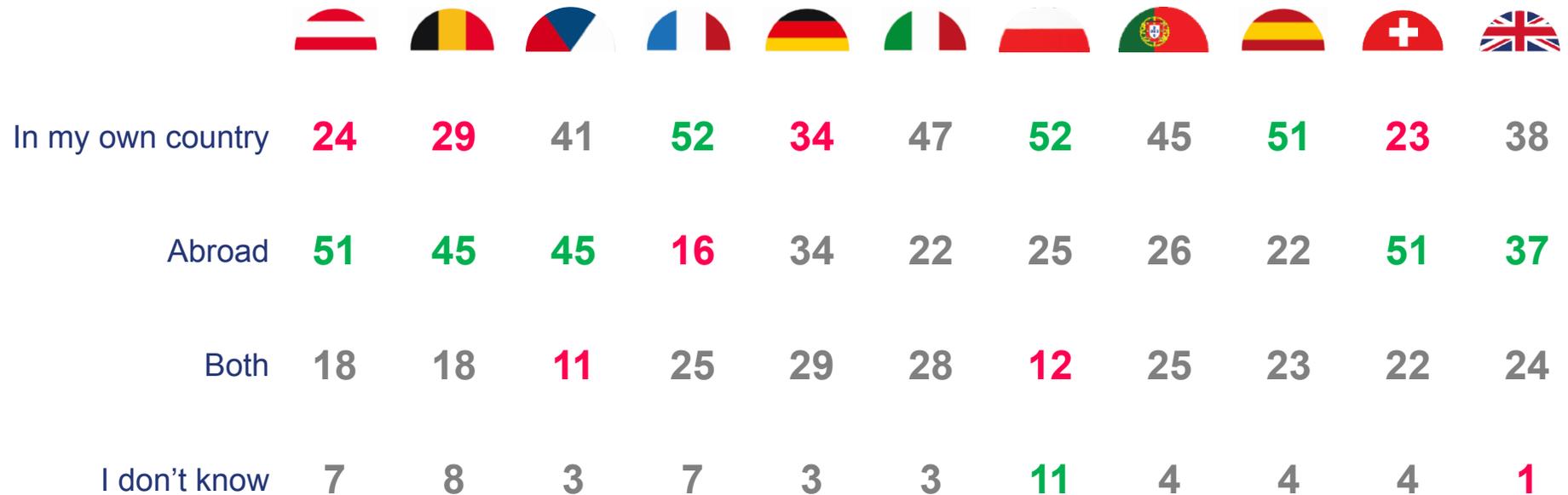
	EUROPE				
In my own country	43	56	52	48	51
Abroad	28	13	29	21	15
Both	24	23	14	25	31
I don't know	5	8	5	6	3

Where do you intend to spend your workation?

WORKERS FROM AUSTRIA, BELGIUM, CZECH REPUBLIC, SWITZERLAND AND THE UK ARE MORE COMFORTABLE WORKING FROM ABROAD

★ *New question 2023*

Place for workation (%)



Where do you intend to spend your workation?

WORKATION IS MAINLY USED AS A WAY TO EXTEND TIME ON HOLIDAY LOCATION : ARRIVING SOONER OR STAYING LONGER - TWO OPTIONS THAT ARE EQUALLY CONSIDERED. CHANGING INITIAL HOLIDAY PLANS IS LESS COMMON.

★ *New question 2023*

Organization for workation (%)

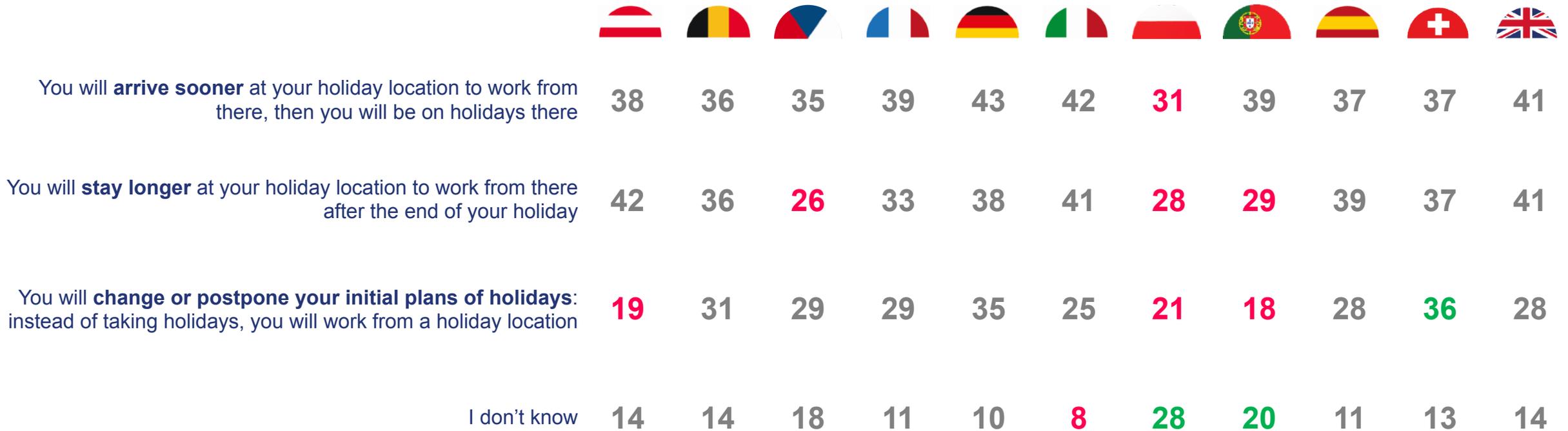
	EUROPE				
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	39	41	39	36	50
You will stay longer at your holiday location to work from there after the end of your holiday	37	32	33	34	36
You will change or postpone your initial plans of holidays : instead of taking holidays, you will work from a holiday location	28	27	28	33	23
I don't know	13	15	16	15	10

Among the following situation(s) which one(s) apply to the workation you plan to do this summer / between June and September?

IN SWITZERLAND, IT IS MORE COMMON TO CHANGE INITIAL PLANS AND COMPLETELY REPLACE VACATIONS WITH WORK.

★ *New question 2023*

Organization for workation (%)



Among the following situation(s) which one(s) apply to the workation you plan to do this summer / between June and September?

WORKATION IS NOT RESERVED TO A SPECIFIC TYPE OF ACCOMMODATION : IT CAN HAPPEN IN RENTAL HOUSES, HOTELS OR RELATIVES / VACATION HOMES EQUALLY.

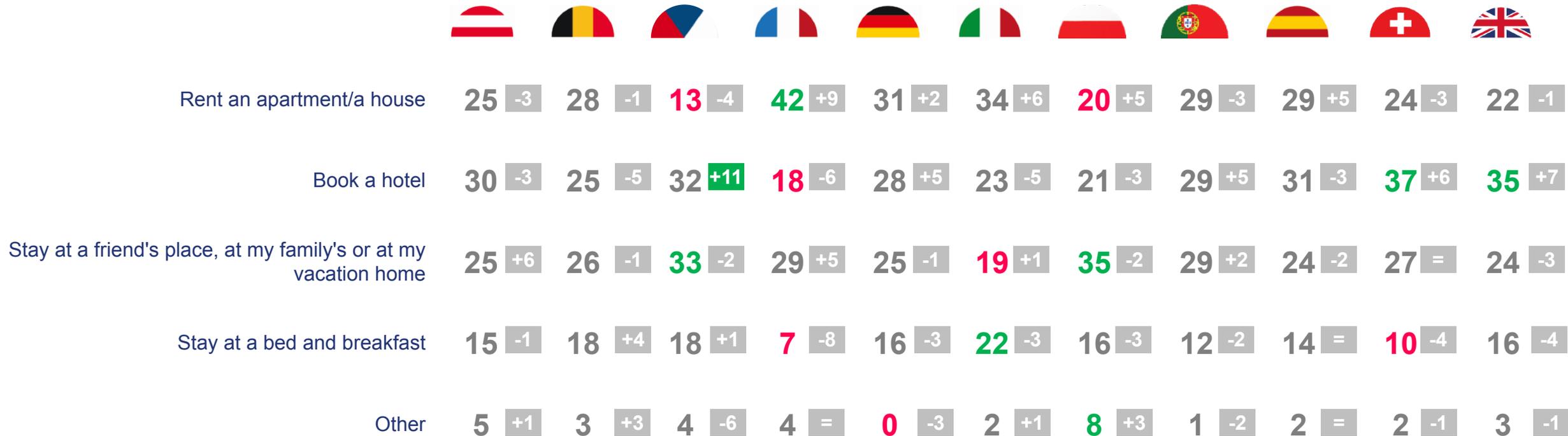
Preferred accommodation for workation (%)

	EUROPE				
Rent an apartment / a house	29 +3	22 +2	21 =	23 +6	20
Book a hotel	27 =	42 +5	29 -5	38 +3	45
Stay at a friend's place, at my family's or at my vacation home	26 =	25 +2	33 +9	23 -5	21
Stay at a bed and breakfast	15 -3	9 -9	13 -2	14 -3	13
Other	3 =	2 =	4 -2	2 -1	1

For your workation, do you mostly intend to: Question asked to those who intend to work from a holiday location

THE FRENCH ARE MORE LIKELY TO RENT AN APARTMENT FOR WORKATION INSTEAD OF WORKING FROM A HOTEL.

Preferred accommodation for workation (%)



For your workation, do you mostly intend to: Question asked to those who intend to work from a holiday location



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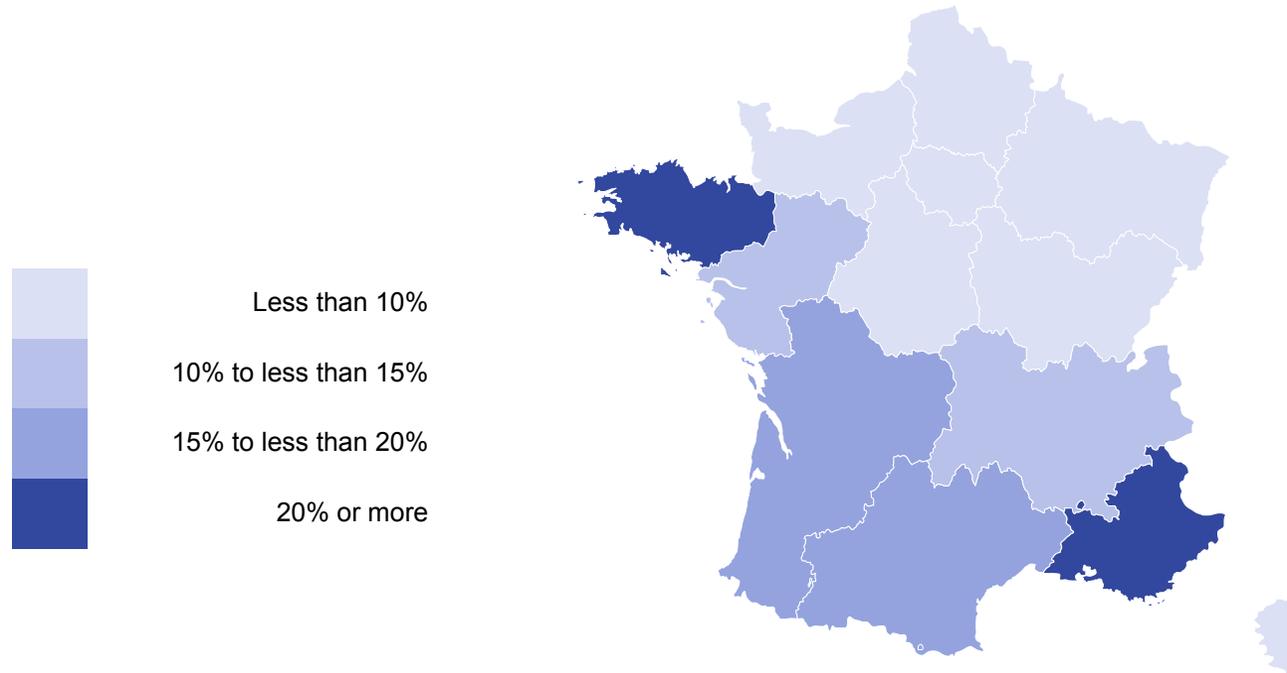


APPENDICES



PACA AND BRETAGNE ARE THE MOST ATTRACTIVE REGIONS FOR FRENCH HOLIDAYMAKERS WHO INTEND TO TRAVEL WITHIN THEIR OWN COUNTRY

Most attractive French regions



You have indicated that your travel destination will be France. In which region(s) will you be travelling? – France Only

WE'RE HERE TO HELP

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