Summer holiday plans among Europeans, Americans and Asians

IPSOS/EUROP ASSISTANCE SURVEY
18TH EDITION
SCOPE OF THE 2018 SURVEY

American scope
1000 Americans
1000 Brazilians

European scope
1000 British
1000 Belgians
1000 French
1000 Portuguese
1000 Spanish
1000 Italians
1000 Germans
1000 Swiss
1000 Austrians
1000 Polish

Asian scope
2000 Chinese
2000 Indians
2000 Indians
2000 Indians
2000 Indians

14 COUNTRIES
16,000 INTERVIEWS
THE METHODOLOGY

Samples
In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older (aged 16 and up in Brazil), 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 27 March and 19 April 2018

Method of data collection
Online survey in the 14 countries
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   - P.24

4. HOLIDAY ACCOMODATION  
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5. CITIES OF DREAMS, DREAMS OF CITIES  
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   - P.45

7. TRAVELLING THE WORLD: A COLLECTIVE IMAGINATION  
   - P.51
1. SUMMER HOLIDAY PLANS
Summer holiday plans are quite stable in 2018 among Americans and Europeans, and almost at the same level for China and India.

**Summer Holiday Plans**

**Europe**
- USA: 68% (+2 versus 2017)
- Brazil: 68% (+2 versus 2017)
- China: 67%
- India: 64%

United States and Brazil saw an increase of 2% in their summer holiday plans compared to 2017. China and India maintained almost the same level of plans as in 2017.
CONSOLIDATING A POSITIVE TREND SINCE 2016

EVOLUTION OF HOLIDAY PLANS (%)

EUROPE  USA  BRAZIL  CHINA  INDIA

64  60  53  61  61  63  64  68  67  64

HOLIDAY PLANS: STABLE OR INCREASING IN ALL EUROPEAN COUNTRIES IN 2018

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)

FRANCE
AUSTRIA
SWITZERLAND
UNITED KINGDOM
GERMANY
BELGIUM
ITALY
SPAIN
POLAND
PORTUGAL

GAME CHANGERS
BRAZILIANS ANTICIPATE THE MOST THEIR HOLIDAYS, CHINESE PEOPLE THE LEAST.
IN EUROPE, NORTHERN COUNTRIES ANTICIPATE MORE THAN SOUTHERN COUNTRIES.

**ANTICIPATION OF BOOKING/ PAYMENT FOR A TRIP**

<table>
<thead>
<tr>
<th>Country</th>
<th>More Than 4 Months in Advance</th>
<th>Less Than 4 Months in Advance</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>Germany</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Belgium</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Sweden</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>Denmark</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Spain</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>France</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>Italy</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>Portugal</td>
<td>33%</td>
<td>67%</td>
</tr>
<tr>
<td>Brazil</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>United States</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>India</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>China</td>
<td>19%</td>
<td>81%</td>
</tr>
</tbody>
</table>

© 2017 Ipsos
THE AVERAGE BUDGET IS OVERALL STABLE IN EUROPE AND THE USA VS 2017, HOWEVER IT IS INCREASING IN BRAZIL

SUMMER HOLIDAY BUDGET

EUROPE

€1,957 -2% vs 2017

HOLIDAY BUDGET IN THE EURO ZONE
(Excluding United Kingdom, Switzerland and Poland)

€2,004 +1% VS 2017

USA

$ 2,643 -1%

(€2,163)

BRAZIL

R$ 5,209 +18%

(€1,238)

CHINA

¥ 15,707

(€2,035)

INDIA

₹ 181,626

(€2,234)

Exchange rate applied
1 GBP = €1.14
1 PLN = €0.24
1 USD = €0.82
1 INR = €0.012
1 CHF = €0.84
1 BRL = €0.24
1 CNY = €0.13

GAME CHANGERS
IN EUROPE MOST HOLIDAY BUDGETS ARE STABLE, EXCEPT FOR THE UK, SWITZERLAND, AUSTRIA AND BELGIUM - ALL INCREASING

**SUMMER HOLIDAY BUDGET**

<table>
<thead>
<tr>
<th>Country</th>
<th>Budget</th>
<th>Change</th>
<th>2016 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>CHF 3,235</td>
<td>+9%</td>
<td>(€2,710)</td>
</tr>
<tr>
<td>Austria</td>
<td>€2,645</td>
<td>+9%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>€2,376</td>
<td>+3%</td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td>€2,318</td>
<td>+6%</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>£1,955</td>
<td>+23%</td>
<td>(€2,230)</td>
</tr>
<tr>
<td>France</td>
<td>€1,993</td>
<td>+1%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>€1,776</td>
<td>+2%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>€1,658</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>€1,370</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>Zł 4,324</td>
<td></td>
<td>(€1,030)</td>
</tr>
</tbody>
</table>

Exchange rate applied:
- 1 GBP = €1.14
- 1 PLN = €0.24
- 1 USD = €0.82
- 1 INR = €0.012
- 1 BRL = €0.24
- 1 CNY = €0.13
EXCEPT FOR FRANCE, SWITZERLAND AND BRAZIL, THE SUMMER HOLIDAY DURATION REMAINS BELOW 2 WEEKS AFTER A GREAT DECREASE LAST YEAR

Weeks on average

EUROPE: 1.8 week on average (=)

- France: 2.0 -0.1
- Switzerland: 2.0
- Spain: 1.9 +0.1
- Germany: 1.9
- Belgium: 1.9 +0.1
- Poland: 1.9
- Hungary: 1.8 +0.1
- Sweden: 1.7
- United Kingdom: 1.7
- Italy: 1.6 -0.2

- Brazil: 2.2
- United States: 1.5 +0.1
- India: 1.3
- China: 1.3
2. FAVORITE DESTINATIONS AND CHOICE CRITERIA
HOLIDAYS IN ONE'S OWN COUNTRY CONTINUE TO DOMINATE, BUT DECREASINGLY IN FRANCE

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER
SPAIN, FRANCE AND ITALY ARE EUROPEANS’ TOP 3 FAVORITE DESTINATION

FOREIGN DESTINATIONS PLANNED THIS SUMMER

Spain 26% (first)
France 18%
Italy 11%
Portugal 8%
Croatia 23%
Germany 11%
Greece 14%

Spain 34%
France 34%
Italy 12%
Austria 14%
Croatia 29%
Germany 11%
Greece 14%

Thailand 21%
USA 11%
Japan 15%
Australia 12%
Singapore 12%
Thailand 15%
India 8%
THE SEASIDE IS STILL THE MOST ATTRACTIVE DESTINATION FOR THE EUROPEANS

SUMMER HOLIDAY PREFERENCES

EUROPE

61% 57% 65% 64% 70% 57% 67% 62% 59% 58%
**THIS YEAR, ITALY SAW A RENEWED INTEREST IN TOURING TO DISCOVER NEW PLACES**

### SUMMER HOLIDAY PREFERENCES

<table>
<thead>
<tr>
<th></th>
<th>City</th>
<th>Countryside</th>
<th>Mountains</th>
<th>Tour</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>15%</strong></td>
<td>18%</td>
<td>23%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>29%</strong></td>
<td>40%</td>
<td>22%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>18%</strong></td>
<td>18%</td>
<td>23%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>40%</strong></td>
<td>22%</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>23%</strong></td>
<td>20%</td>
<td>25%</td>
<td>18%</td>
<td>34%</td>
</tr>
</tbody>
</table>

**GAME CHANGERS**

- **22% +5**

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TOURING IS ALSO VERY APPRECIATED AMONG THE NON-EUROPEAN COUNTRIES. IN THE U.S. AND BRAZIL, URBAN DESTINATIONS ARE ALMOST AS WELL LIKED AS THE SEASIDE.

**HOLIDAY PREFERENCES FOR JUNE TO SEPTEMBER**

<table>
<thead>
<tr>
<th>Destination</th>
<th>US</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>43%</td>
<td>43%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seaside</td>
<td>28%</td>
<td>23%</td>
<td>53%</td>
<td>28%</td>
</tr>
<tr>
<td>Mountains</td>
<td>24%</td>
<td>31%</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>Countryside</td>
<td>24%</td>
<td>40%</td>
<td>42%</td>
<td>47%</td>
</tr>
</tbody>
</table>
EUROPEANS TEND TO RETURN TO DESTINATIONS THEY ALREADY VISITED. THE WEATHER AND THE ACTIVITIES AVAILABLE ARE ALSO IMPORTANT FOR THEM.

REASON THAT MOTIVATED THE CHOICE OF THE DESTINATION

<table>
<thead>
<tr>
<th>Reason</th>
<th>France</th>
<th>United Kingdom</th>
<th>Germany</th>
<th>Spain</th>
<th>Italy</th>
<th>Belgium</th>
<th>Austria</th>
<th>Switzerland</th>
<th>Poland</th>
<th>Portugal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already been there</td>
<td>29%</td>
<td>38%</td>
<td>42%</td>
<td>22%</td>
<td>29%</td>
<td>41%</td>
<td>44%</td>
<td>40%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Activities</td>
<td>24%</td>
<td>23%</td>
<td>27%</td>
<td>22%</td>
<td>19%</td>
<td>27%</td>
<td>24%</td>
<td>23%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Weather</td>
<td>22%</td>
<td>16%</td>
<td>14%</td>
<td>21%</td>
<td>18%</td>
<td>20%</td>
<td>19%</td>
<td>21%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Has friends there</td>
<td>22%</td>
<td>18%</td>
<td>21%</td>
<td>18%</td>
<td>19%</td>
<td>21%</td>
<td>18%</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good deal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
VISITING FRIENDS AND FAMILY IS A MAJOR MOTIVATION FOR THE AMERICANS. ASIAN HOLIDAYMAKERS GIVE IMPORTANCE TO OTHERS’ RECOMMENDATIONS.

<table>
<thead>
<tr>
<th>Reason</th>
<th>USA</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already been there</td>
<td>27%</td>
<td>21%</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Activities</td>
<td>22%</td>
<td>15%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>Weather</td>
<td>22%</td>
<td>14%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Has friends there</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recommendation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**GAME CHANGERS**

<table>
<thead>
<tr>
<th>Already been there</th>
<th>Activities</th>
<th>Weather</th>
<th>Has friends there</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>27%</td>
<td>22%</td>
<td>22%</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>21%</td>
<td>15%</td>
<td>23%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>22%</td>
<td>14%</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IN TERMS OF RISKS, ASIAN HOLIDAYMAKERS ARE MORE ATTENTIVE TO INSECURITY (ATTACKS, HEALTH, NATURAL DISASTERS,…) WHEN CHOOSING THEIR DESTINATION

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>Europe</th>
<th>RANK VS 2017</th>
<th>RANK 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget you intend to allocate</td>
<td>52%</td>
<td>=</td>
<td>2</td>
</tr>
<tr>
<td>Climate</td>
<td>48%</td>
<td>+1</td>
<td>3</td>
</tr>
<tr>
<td>Risk of an attack</td>
<td>42%</td>
<td>-1</td>
<td>4</td>
</tr>
<tr>
<td>Opportunities for leisure or cultural activities</td>
<td>42%</td>
<td>+1</td>
<td>1</td>
</tr>
<tr>
<td>Health risks</td>
<td>37%</td>
<td>+1</td>
<td>7</td>
</tr>
<tr>
<td>Risk of personal attacks (theft, assault, etc.)</td>
<td>36%</td>
<td>-2</td>
<td>5</td>
</tr>
<tr>
<td>Quality of on-site tourist infrastructures</td>
<td>33%</td>
<td>+3</td>
<td>8</td>
</tr>
<tr>
<td>Risk of infection with the Zika virus</td>
<td>32%</td>
<td>=</td>
<td>12</td>
</tr>
</tbody>
</table>

**GAME CHANGERS**

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<table>
<thead>
<tr>
<th>FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION</th>
<th>EUROPE</th>
<th>RANK VS 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Political situation in the destination country</td>
<td>30%</td>
<td>-2</td>
</tr>
<tr>
<td>Travel time to the holiday location</td>
<td>29%</td>
<td>+2</td>
</tr>
<tr>
<td>Risk of social unrest</td>
<td>28%</td>
<td>-2</td>
</tr>
<tr>
<td>Risk of natural disaster</td>
<td>27%</td>
<td>-1</td>
</tr>
<tr>
<td>Ability to speak the language of the destination country</td>
<td>19%</td>
<td>+1</td>
</tr>
<tr>
<td>Economic situation in the destination country</td>
<td>16%</td>
<td>-1</td>
</tr>
<tr>
<td>Quality of internet access</td>
<td>13%</td>
<td>+1</td>
</tr>
<tr>
<td>Exchange rate of the currency in the destination country</td>
<td>13%</td>
<td>-1</td>
</tr>
</tbody>
</table>

EUROPE

RANK VS 2018

1. Political situation in the destination country
2. Travel time to the holiday location
3. Risk of social unrest
4. Risk of natural disaster
5. Ability to speak the language of the destination country
6. Economic situation in the destination country
7. Quality of internet access
8. Exchange rate of the currency in the destination country

GAME CHANGERS
THE POLITICAL SITUATION IN THE UK (BREXIT) AND THE U.S (TRAVEL BAN) MAY HAVE AN IMPACT ON THE CONSIDERATION TO VISIT, ESPECIALLY AMONG THE NON-EUROPEANS

WOULD RECONSIDER VISITING THE UK

- 56% (Spain)
- 54% (Portugal)
- 59% (India)
- 62% (Brazil)
- 78% (China)

WOULD RECONSIDER VISITING THE US

- 51% (Spain)
- 56% (Portugal)
- 60% (India)
- 81% (Brazil)
3. ACTIVITIES OF HOLIDAYMAKERS
THIS YEAR AGAIN, EUROPEANS PLAN TO SPEND QUALITY FAMILY TIME AND TO ENJOY A RELAXING SUMMER HOLIDAY.

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

- **54%**: Relax, have peace of mind
- **44%**: Come together as a family, with your spouse or with friends
- **43%**: Discover new cultures, enjoy a total change of scenery
- **15%**: Enjoy your home
- **11%**: Take time to read, learn new things
- **10%**: Make new friendly or romantic acquaintances
- **10%**: Play sports (rambling, mountain climbing, etc.)
Chinese are distinctive for having a more active approach to their holidays.

Activities planned during summer holidays:

- Come together as a family, with your spouse or with friends: 48% (USA), 42% (Brazil), 45% (India), 28% (China)
- Relax, have peace of mind: 39% (USA), 43% (Brazil), 28% (India), 25% (China)
- Discover new cultures, enjoy a total change of scenery: 45% (USA), 33% (Brazil), 42% (India), 39% (China)
- Enjoy your home: 17% (USA), 20% (Brazil), 25% (India), 23% (China)
- Take time to read, learn new things: 12% (USA), 18% (Brazil), 19% (India), 31% (China)
- Make new friendly or romantic acquaintances: 10% (USA), 17% (Brazil), 14% (India), 14% (China)
- Play sports (rambling, mountain climbing, etc.): 12% (USA), 14% (Brazil), 9% (India), 30% (China)
MOST OF THE EUROPEANS WILL COMPLETELY DISCONNECT FROM WORK DURING THEIR HOLIDAYS

Concerning your work, do you think that during your holidays…?

Among those concerned

- **66%** - You will completely unplug from your job
- **20%** = You will still check your emails, but will not necessarily respond to them
- **10%** +1 You will answer emails and/or calls
- **4%** = You will continue to work, even if only from time to time
WHEN ON HOLIDAYS, NON-EUROPEANS ARE MORE CONNECTED TO THEIR WORK THAN EUROPEANS, EXCEPT FOR THE BRAZILIANS

Among the people concerned

WILL COMPLETELY UNPLUG FROM YOUR JOB

71% 70% 68% 66% 64% 64% 61% 59% 59% 58%

66% 55% 40% 40%

GAME CHANGERS
NON-EUROPEANS ARE ALSO MORE CONNECTED TO SOCIAL NETWORKS DURING THEIR HOLIDAYS. IT IS PARTICULARLY THE CASE FOR THE ASIAN HOLIDAYMAKERS

Among the people concerned

WILL USE GENERAL SOCIAL NETWORKS LESS THAN USUAL

56% 41% 40% 38% 31%

54% 38% 33% 33% 22%

General social networks
Photo-sharing social networks

GAME CHANGERS
4. HOLIDAY ACCOMODATION: MILLENIALS MORE INTO NEW WAYS TO TRAVEL
HOTELS REMAIN THE PREFERRED ACCOMMODATION FOR THE MAJORITY OF EUROPEANS HOLIDAYMAKERS FOR SUMMER HOLIDAYS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

- **48%** Hotel
- **32%** Rental of a house or apartment
- **21%** Free of charge with at friends’/family’s houses or in your holiday home
- **16%** A bed & breakfast
- **11%** Camping
- **6%** Boat (e.g. cruise)
- **4%** A motor home, camping trailer or mobile home

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FRANCE REMAINS AN OUTLIER WITH THE MAJORITY OF HOLIDAYMAKERS OPTING FOR SEASONAL RENTALS WHILE THE REST OF EUROPEANS PREFER HOTELS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

- FRANCE: 41%
- Italy: 47%
- Germany: 54%
- Austria: 61%
- Poland: 40%
- Belgium: 53%
- Spain: 55%
- Portugal: 44%
- Switzerland: 57%
- UK: 56%

- Hotels: 31%
- Seasonal rentals: 32%
- Bed & breakfast: 26%
- Apartments: 28%
- Villas: 32%
- Guesthouses: 35%
- Hostels: 31%
- Campsites: 28%
- Caravans: 27%
- Tents: 29%
- Campers: 22%
- Camping cars: 14%
INDIANS ARE MORE KEEN ON CRUISES THAN THE REST OF THE OTHER COUNTRIES

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

- **Brazil**: 61% Hotel, 36% Home, 21% Other
- **USA**: 55% Hotel, 30% Home, 19% Other
- **India**: 64% Hotel, 30% Home, 27% Other
- **China**: 69% Hotel, 40% Home, 34% Other
### Interest in Each of the Practices

<table>
<thead>
<tr>
<th>Practice</th>
<th>Europe</th>
<th>United States</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rental of a private individual's house or apartment</td>
<td>46% / 59%</td>
<td>38% / 59%</td>
<td>52% / 58%</td>
<td>48% / 55%</td>
<td>53% / 51%</td>
</tr>
<tr>
<td>Rental of a room in a private home</td>
<td>24% / 34%</td>
<td>20% / 37%</td>
<td>38% / 43%</td>
<td>48% / 55%</td>
<td>63% / 69%</td>
</tr>
<tr>
<td>Free home exchange between individuals</td>
<td>13% / 20%</td>
<td>16% / 29%</td>
<td>19% / 23%</td>
<td>34% / 44%</td>
<td>53% / 56%</td>
</tr>
</tbody>
</table>

**General Population / Millennials**

© 2017 Ipsos
MILLENIALS ARE ALSO MORE LIKELY TO HAVE ALREADY TESTED NEW KINDS OF ACTIVITIES WHEN TRAVELLING

When travelling, have you ever:

Done at least one of the following kinds of activities:
- Been camping in the wilderness
- Stayed at a local’s home
- Stayed in a cabin in the middle of nature
- Home exchange between individuals
- Hosted travellers in your home
- Eco-tourism
- Socially responsible tourism
- Travelled around the world

<table>
<thead>
<tr>
<th>General Population</th>
<th>53%</th>
<th>67%</th>
<th>70%</th>
<th>70%</th>
<th>74%</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUROPE</td>
<td>59%</td>
<td>83%</td>
<td>72%</td>
<td>81%</td>
<td>77%</td>
</tr>
<tr>
<td>Millenials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MILLENIALS MORE LIKELY TO POST A REVIEW OF SERVICES AFTER THEIR HOLIDAY THAN THE GENERAL POPULATION

<table>
<thead>
<tr>
<th>Service</th>
<th>General Population</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>A hotel</td>
<td>70%</td>
<td>76%</td>
</tr>
<tr>
<td>A rental</td>
<td>75%</td>
<td>82%</td>
</tr>
<tr>
<td>A tourist attraction</td>
<td>83%</td>
<td>87%</td>
</tr>
<tr>
<td>A restaurant</td>
<td>92%</td>
<td>95%</td>
</tr>
<tr>
<td>An airline</td>
<td>93%</td>
<td>96%</td>
</tr>
</tbody>
</table>

Has posted a review of these services after the holiday
ONLINE REVIEWS: 3RD DECISION-MAKING FACTOR IN ACCOMODATION, AND EVEN SECOND IN CHINA

<table>
<thead>
<tr>
<th>#1</th>
<th>Value for money 67%</th>
<th>Location 63%</th>
<th>Value for money 55%</th>
<th>Value for money 60%</th>
<th>Value for money 59%</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Location 52%</td>
<td>Value for money 57%</td>
<td>Location 46%</td>
<td>Location 48%</td>
<td>ONLINE REVIEWS 51%</td>
</tr>
<tr>
<td>#3</td>
<td>ONLINE REVIEWS 30%</td>
<td>ONLINE REVIEWS 33%</td>
<td>Promotional offers 34%</td>
<td>ONLINE REVIEWS 39%</td>
<td>Services 35%</td>
</tr>
</tbody>
</table>
5. CITIES OF DREAMS, DREAMS OF CITIES
A SHARED FASCINATION AMONG EUROPEANS AND AMERICANS WITH CITIES

CITIES THAT **EUROPEANS** WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

- **NEW YORK** 25%
- **PARIS** 16%
- **ROME** 15%
- **LONDON** 12%

CITIES THAT **AMERICANS** WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

- **NEW YORK** 15%
- **PARIS** 19%
- **ROME** 10%
- **LONDON** 19%
PARIS ENJOYS THE STRONGEST POWER OF ATTRACTION FOR THE BRAZILIANS, WHO ALSO DREAM OF VISITING SEVERAL CITIES OF THEIR OWN COUNTRY

CITIES THAT BRAZILIANS WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

- PARIS: 16%
- NEW YORK: 10%
- LONDON: 9%
- RIO DE JANEIRO: 9%
- FERNANDO DE NORONHA: 8%
- FORTALEZA: 7%
INDIANS ARE ALSO STRONGLY ATTRACTION BY PARIS

CITIES THAT INDIANS WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARIS</td>
<td>17%</td>
</tr>
<tr>
<td>LONDON</td>
<td>14%</td>
</tr>
<tr>
<td>NEW YORK</td>
<td>13%</td>
</tr>
<tr>
<td>NEW DELHI</td>
<td>7%</td>
</tr>
<tr>
<td>MUMBAI</td>
<td>6%</td>
</tr>
</tbody>
</table>
IN CHINA, PARIS ENJOYS THE STRONGEST POWER OF ATTRACTION FOR CHINESE PEOPLE, WHO ALSO DREAM OF VISITING THEIR CAPITAL

CITIES THAT CHINESE PEOPLE WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARIS</td>
<td>15%</td>
</tr>
<tr>
<td>BEIJING</td>
<td>14%</td>
</tr>
<tr>
<td>NEW YORK</td>
<td>9%</td>
</tr>
<tr>
<td>LONDON</td>
<td>8%</td>
</tr>
<tr>
<td>TOKYO</td>
<td>7%</td>
</tr>
<tr>
<td>SHANGHAI</td>
<td>7%</td>
</tr>
</tbody>
</table>
### TOP CITIES THAT PEOPLE DREAM OF VISITING IN EACH COUNTRY

<table>
<thead>
<tr>
<th>Country</th>
<th>Top Cities</th>
<th>Cities mentioned by at least 5% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>24</td>
<td>Rome</td>
</tr>
<tr>
<td>New York</td>
<td>26</td>
<td>Paris</td>
</tr>
<tr>
<td>New York</td>
<td>25</td>
<td>Sydney</td>
</tr>
<tr>
<td>New York</td>
<td>29</td>
<td>Tokyo</td>
</tr>
<tr>
<td>New York</td>
<td>27</td>
<td>Vienna</td>
</tr>
<tr>
<td>New York</td>
<td>25</td>
<td>Barcelona</td>
</tr>
<tr>
<td>New York</td>
<td>23</td>
<td>Los Angeles</td>
</tr>
<tr>
<td>New York</td>
<td>21</td>
<td>Stockholm</td>
</tr>
<tr>
<td>Paris</td>
<td>27</td>
<td>New York</td>
</tr>
<tr>
<td>New York</td>
<td>24</td>
<td>Tokyo</td>
</tr>
<tr>
<td>Rome</td>
<td>13</td>
<td>Milan</td>
</tr>
<tr>
<td>London</td>
<td>9</td>
<td>Sydney</td>
</tr>
<tr>
<td>Sydney</td>
<td>9</td>
<td>Tokyo</td>
</tr>
<tr>
<td>Tokyo</td>
<td>9</td>
<td>Sydney</td>
</tr>
<tr>
<td>Venice</td>
<td>8</td>
<td>Barcelona</td>
</tr>
<tr>
<td>Barcelona</td>
<td>8</td>
<td>Madrid</td>
</tr>
<tr>
<td>Barcelona</td>
<td>5</td>
<td>Moscow</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>5</td>
<td>Rio de Janeiro</td>
</tr>
<tr>
<td>Venice</td>
<td>7</td>
<td>Berlin</td>
</tr>
<tr>
<td>Barcelona</td>
<td>7</td>
<td>Moscow</td>
</tr>
<tr>
<td>Venice</td>
<td>7</td>
<td>Rio de Janeiro</td>
</tr>
<tr>
<td>Berlin</td>
<td>6</td>
<td>Amsterdam</td>
</tr>
<tr>
<td>Moscow</td>
<td>5</td>
<td>Prague</td>
</tr>
<tr>
<td>Kiev</td>
<td>5</td>
<td>Rome</td>
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<tr>
<td>Rio de Janeiro</td>
<td>5</td>
<td>Amsterdam</td>
</tr>
<tr>
<td>Berlin</td>
<td>5</td>
<td>Prague</td>
</tr>
<tr>
<td>Kiev</td>
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<td>Rome</td>
</tr>
<tr>
<td>Amsterdam</td>
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<td>Prague</td>
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<tr>
<td>Prague</td>
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<td>Rome</td>
</tr>
<tr>
<td>Los Angeles</td>
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<td>Tokyo</td>
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<tr>
<td>Stockholm</td>
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<td>Moscow</td>
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<tr>
<td>Prague</td>
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<td>Rome</td>
</tr>
<tr>
<td>Rio de Janeiro</td>
<td>5</td>
<td>Amsterdam</td>
</tr>
<tr>
<td>Prague</td>
<td>5</td>
<td>Rome</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>5</td>
<td>Stockholm</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>5</td>
<td>Prague</td>
</tr>
</tbody>
</table>

*Cities mentioned by at least 5% of respondents"
<table>
<thead>
<tr>
<th>Country</th>
<th>City</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>Paris</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>London</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>New York</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Rome</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Sydney</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>Las Vegas</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Tokyo</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Dublin</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>San Francisco</td>
<td>5</td>
</tr>
<tr>
<td>Brazil</td>
<td>Paris</td>
<td>16</td>
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<tr>
<td></td>
<td>New York</td>
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<td></td>
<td>London</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Rio de Janeiro</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Fernando de Noronha</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>Fortaleza</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Sao Paolo</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Gramado</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Rome</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Tokyo</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Natal</td>
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</tr>
<tr>
<td>India</td>
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<td>17</td>
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<tr>
<td></td>
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<tr>
<td></td>
<td>New York</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>New Delhi</td>
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</tr>
<tr>
<td></td>
<td>Mumbai</td>
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<tr>
<td></td>
<td>Bangalore</td>
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<tr>
<td></td>
<td>Cachemire</td>
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<tr>
<td>China</td>
<td>Paris</td>
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<tr>
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<td>Beijing</td>
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</tr>
<tr>
<td></td>
<td>New York</td>
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<tr>
<td></td>
<td>London</td>
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</tr>
<tr>
<td></td>
<td>Tokyo</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Shanghai</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Hong Kong</td>
<td>5</td>
</tr>
</tbody>
</table>

*Cities mentioned by at least 5% of respondents*
6. SPORTS COMPETITIONS TO TRAVEL TO
THE OLYMPIC GAMES AND SOCCER COMPETITIONS AS THE MOST ATTRACTIVE INTERNATIONAL SPORTS EVENTS TO ATTEND

#1
TOKYO 2020
FIFA WORLD CUP
TOKYO 2020
TOKYO 2020

#2
EURO 2020
SUPER BOWL
TOKYO 2020
TOKYO 2020

#3
MONACO GRAND PRIX
US OPEN
TOUR DE FRANCE
HAMBURG
EURO 2020
FIFA WORLD CUP

BUT COMPETITIONS TAKING PLACE LOCALLY ARE ALSO HIGHLY RANKED

<table>
<thead>
<tr>
<th>#1</th>
<th>EUROPE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tokyo 2020</td>
</tr>
<tr>
<td></td>
<td>Tokyo 2020</td>
</tr>
<tr>
<td></td>
<td>FIFA World Cup Russia 2018</td>
</tr>
<tr>
<td></td>
<td>FIFA World Cup Russia 2018</td>
</tr>
<tr>
<td></td>
<td>Tokyo 2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UEFA Euro 2020</td>
</tr>
<tr>
<td></td>
<td>LII Super Bowl</td>
</tr>
<tr>
<td></td>
<td>Tokyo 2020</td>
</tr>
<tr>
<td></td>
<td>Tokyo 2020</td>
</tr>
<tr>
<td></td>
<td>Basketball World Cup China 2019</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Monaco Grand Prix</td>
</tr>
<tr>
<td></td>
<td>FIFA World Cup Russia 2018</td>
</tr>
<tr>
<td></td>
<td>US Open</td>
</tr>
<tr>
<td></td>
<td>Tour de France</td>
</tr>
<tr>
<td></td>
<td>The Championships</td>
</tr>
</tbody>
</table>
FRANCE AND THE UK ALSO FAVOR COMPETITIONS TAKING PLACE LOCALLY

#1
- The 2020 Summer Olympic Games in Tokyo
- The 2020 European Football Championship
- The 2020 Summer Olympic Games in Tokyo
- The 2020 Summer Olympic Games in Tokyo
- The 2020 European Football Championship
- The 2018 Grand Prix Automobile de Monaco
- The 2020 European Football Championship
- The 2018 Grand Prix Automobile de Monaco
- The Tour de France

#2
- Roland Garros in Paris
- The 2020 Summer Olympic Games in Tokyo
- The 2018 FIFA Soccer World Cup in Russia
- The 2020 European Football Championship
- The 2018 Grand Prix Automobile de Monaco
- Roland Garros in Paris
- The 2018 Grand Prix Automobile de Monaco
- The 2020 European Football Championship
- The 2018 FIFA Soccer World Cup in Russia

#3
- The 2018 Grand Prix Automobile de Monaco
- The 2018 Grand Prix Automobile de Monaco
- The 2020 Summer Olympic Games in Tokyo
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 Grand Prix Automobile de Monaco
- The Tour de France
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2020 Summer Olympic Games in Tokyo
- The 2018 Grand Prix Automobile de Monaco
- The 2020 European Football Championship
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2020 Summer Olympic Games in Tokyo
**LOOKING SPECIFICALLY AT THE GRAND SLAM, THE SAME LOCAL PREFERENCE APPLIES**

<table>
<thead>
<tr>
<th>EUROC</th>
<th>USA</th>
<th>BRAZIL</th>
<th>INDIA</th>
<th>CHINA</th>
</tr>
</thead>
<tbody>
<tr>
<td>#5</td>
<td>#6</td>
<td>#11</td>
<td>#3</td>
<td>#6</td>
</tr>
<tr>
<td>#7</td>
<td>#10</td>
<td>#7</td>
<td>#8</td>
<td>#5</td>
</tr>
<tr>
<td>#10</td>
<td>#3</td>
<td>#8</td>
<td>#5</td>
<td>#8</td>
</tr>
<tr>
<td>#9</td>
<td>#5</td>
<td>#10</td>
<td>#4</td>
<td>#7</td>
</tr>
</tbody>
</table>

**AVERAGE RANK OF INTEREST**
IN EUROPE, THE EUROPEAN FOOTBALL CHAMPIONSHIP OF 2020 IS SHORTLY AHEAD OF THE FIFA WORLD CUP OF 2018 IN TERMS OF INTEREST AS A TRAVEL DESTINATION

INTEREST TO TRAVEL TO ATTEND THE COMPETITION

(%)
7. TRAVELLING THE WORLD: A COLLECTIVE IMAGINATION
THAILAND IS CONSIDERED AS THE MOST EXOTIC COUNTRY AND SOUTH AFRICA THE WILDEST

<table>
<thead>
<tr>
<th>Region</th>
<th>Cheapest to Visit</th>
<th>Most Exotic</th>
<th>Wildest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>Spain 10%</td>
<td>Thailand 13%</td>
<td>Australia 9%</td>
</tr>
<tr>
<td></td>
<td>Mexico 28%</td>
<td>Thailand 9%</td>
<td>Australia 15%</td>
</tr>
<tr>
<td></td>
<td>Brazil 19%</td>
<td>India – 13%</td>
<td>South Africa 15%</td>
</tr>
<tr>
<td></td>
<td>India 20%</td>
<td>India 11%</td>
<td>South Africa 24%</td>
</tr>
<tr>
<td></td>
<td>China – 21%</td>
<td>Thailand – 11%</td>
<td>USA 25%</td>
</tr>
<tr>
<td></td>
<td>Thailand – 19%</td>
<td>France – 9%</td>
<td></td>
</tr>
<tr>
<td>South America</td>
<td>Brazil 19%</td>
<td>Mexico 28%</td>
<td>Brazil 19%</td>
</tr>
<tr>
<td></td>
<td>China – 21%</td>
<td>India 11%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>South Africa 24%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© 2017 Ipsos
FRANCE IS CONSIDERED AS THE MOST ROMANTIC COUNTRY FOR THE NON-EUROPEANS, BUT FOR THE OTHER CRITERIA, EACH NATIONALITY CHOOSES ITS OWN COUNTRY

<table>
<thead>
<tr>
<th>Country</th>
<th>Most Welcoming</th>
<th>Most Romantic</th>
<th>Most Relaxing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>15%</td>
<td>39%</td>
<td>11%</td>
</tr>
<tr>
<td>Italy</td>
<td>13%</td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>USA</td>
<td>21%</td>
<td>48%</td>
<td>17%</td>
</tr>
<tr>
<td>Brazil</td>
<td>52%</td>
<td>49%</td>
<td>19%</td>
</tr>
<tr>
<td>India</td>
<td>26%</td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>China</td>
<td>35%</td>
<td></td>
<td>21%</td>
</tr>
</tbody>
</table>

Most welcoming: France – 21%
Most romantic: France – 49%
Most relaxing: China – 21%
ITALY IS CONSIDERED AS THE MOST GASTRONOMIC COUNTRY FOR THE EUROPEANS AND THE NORTH AMERICANS. THE OTHER NATIONALITIES CHOOSE THEIR OWN COUNTRY ON MOST CRITERIA

<table>
<thead>
<tr>
<th>Country</th>
<th>Most historical</th>
<th>Best food</th>
<th>Culturally rich</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>28%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Italy</td>
<td>18%</td>
<td>30%</td>
<td>18%</td>
</tr>
<tr>
<td>Brazil</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td>–</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Egypt</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Italy** has a strong presence in all categories, especially in the cultural richness category with 22%. However, Brazil and China also show significant scores in the best food category (41% and 59% respectively). India and China are the leaders in terms of the most historical category (64% and 62% respectively).
8. COUNTRY FACT SHEETS
FRANCE

HOLIDAY PLANS

HOLIDAY PLANS 69% (+4pts)
Vs Europe 64% (+1pt)

BUDGET €1,993 (+1%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY
57% (-6pts)

PREFERRED FOREIGN DESTINATIONS
Spain 16% (+4pts)
Italy 8% (-1pt)
Portugal 7% (+2pts)

ACCOMMODATION

Seasonal rentals 41% (-1pt)
Hotels 31% (+1pt)
Family & friends 31% (-6pts)

Check online reviews when choosing accommodation
22% (-5pts)

Posting a review online on a rental
57% (+5pts)

DREAM HOLIDAYS

Favorite cities to visit
New York, Rome, London

Favorite sports competition to attend
2020 Olympic Games in Tokyo

Most romantic country to visit
Italy

Most exotic country to visit
Thailand

(+XX / -XX) : Evolution vs 2017
## United Kingdom

### Holiday Plans

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holidays in their own country</td>
<td>26%</td>
<td>-5pts</td>
</tr>
<tr>
<td>Preferred foreign destinations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>18%</td>
<td>-3pts</td>
</tr>
<tr>
<td>France</td>
<td>11%</td>
<td>+2pts</td>
</tr>
<tr>
<td>Italy</td>
<td>10%</td>
<td>+2pts</td>
</tr>
<tr>
<td>Vs Europe</td>
<td>66%</td>
<td>+1pt</td>
</tr>
<tr>
<td>Budget</td>
<td>£1,955</td>
<td>+23%</td>
</tr>
<tr>
<td>Vs Europe</td>
<td>€1,957</td>
<td>-2%</td>
</tr>
</tbody>
</table>

### Accommodation

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>56%</td>
<td>+4pts</td>
</tr>
<tr>
<td>Seasonal rentals</td>
<td>27%</td>
<td>-6pts</td>
</tr>
<tr>
<td>Family &amp; friends</td>
<td>14%</td>
<td>-2pts</td>
</tr>
<tr>
<td>Check online reviews when choosing accommodation</td>
<td>37%</td>
<td>-2pts</td>
</tr>
<tr>
<td>Posting a review online on an hotel</td>
<td>65%</td>
<td>+4pts</td>
</tr>
</tbody>
</table>

### Dream Holidays

- **Favorite cities to visit**: New York, Rome, Sydney
- **Favorite sports competition to attend**: Wimbledon Championship in Europe
- **Most romantic country to visit**: Italy
- **Most exotic country to visit**: Thailand

(+XX / -XX) : Evolution vs 2017
HOLIDAY PLANS
HOLIDAY PLANS 64% (+1pt)
Vs Europe 64% (+1pt)

BUDGET €2,376 (+3%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY
27% (-3pts)

PREFERRED FOREIGN DESTINATIONS
Spain 15% (=)
Italy 14% (-2pts)
Austria 8% (+1pt)

ACCOMMODATION
ACCOMMODATION
Hotels 54% (+1pt)
Seasonal rentals 32% (-4pts)
Family & friends 12% (-2pts)

Check online reviews when choosing accommodation
22% (-4pts)

Posting a review online on an hotel
56% (+3pts)

DREAM HOLIDAYS
Favorite cities to visit
New York, Paris, London/Rome

Favorite sports competition to attend
2020 European Football Championship in Europe

Most romantic country to visit
Italy

Most exotic country to visit
Thailand

(+XX / -XX) : Evolution vs 2017
**SPAIN**

**HOLIDAY PLANS**

- **HOLIDAY PLANS 61% (+3pts)**
  - Vs Europe 64% (+1pt)

- **BUDGET €1,658 (=)**
  - Vs Europe €1,957 (-2%)

**HOLIDAYS IN THEIR OWN COUNTRY**

- 56% (+4pts)

**PREFERRED FOREIGN DESTINATIONS**

- France 12% (+2pts)
- Italy 10% (+1pt)
- Portugal 7% (=)

**ACCOMMODATION**

- **Hotels 55% (-2pts)**
- Seasonal rentals 35% (+3pts)
- Family & friends 25% (-2pts)

- Check online reviews when choosing accommodation 36% (+3pts)

- Posting a review online on an hotel 67% (+1pt)

**DREAM HOLIDAYS**

- Favorite cities to visit: New York, Paris, Rome
- Favorite sports competition to attend: 2020 Olympic Games in Tokyo
- Most romantic country to visit: France
- Most exotic country to visit: Thailand

(+XX / -XX) : Evolution vs 2017
ITALY

HOLIDAY PLANS

HOLIDAY PLANS 62% (+1pt)
Vs Europe 64% (+1pt)

BUDGET €1,776 (+2%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY 52% (-4pts)

PREFERRED FOREIGN DESTINATIONS
Spain 14% (+1pt)
Greece 9% (+3pts)
France 8% (=)

ACCOMMODATION

ACCOMMODATION
Hotels 47% (+2pts)
Seasonal rentals 32% (+1pt)
Bed & Breakfast 28% (+2pts)

Check online reviews when choosing accommodation 41% (+1pt)

Posting a review online on an hotel 69% (+4pts)

DREAM HOLIDAYS

Favorite cities to visit
New York, Paris, London/Tokyo

Favorite sports competition to attend
2020 Olympic Games in Tokyo

Most romantic country to visit
France

Most exotic country to visit
India

(+XX / -XX) : Evolution vs 2017

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HOLIDAY PLANS

HOLIDAY PLANS 63% (+3pts)
Vs Europe 64% (+1pt)

BUDGET €2,318 (+6%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY
16% (=)

PREFERRED FOREIGN DESTINATIONS
France 34% (+2pts)
Spain 19% (=)
Italy 12% (=)

ACCOMMODATION

ACCOMMODATION
Hotels 53% (=)
Seasonal rentals 32% (=)
Family & friends 19% (+1pt)

Check online reviews when choosing accommodation
23% (-4pts)

Posting a review online on an hotel
58% (-4pts)

DREAM HOLIDAYS

Favorite cities to visit
New York, Rome, Barcelona

Favorite sports competition to attend
2020 European Football Championship in Europe

Most romantic country to visit
Italy

Most exotic country to visit
Thailand

(+XX / -XX) : Evolution vs 2017
AUSTRIA

HOLIDAY PLANS

- HOLIDAY PLANS 66% (=)
  Vs Europe 64% (+1pt)

- BUDGET €2,645 (+9%)
  Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY

- 30% (+2pts)

PREFERRED FOREIGN DESTINATIONS

- Italy 29% (+4pts)
- Croatia 23% (+4pts)
- Germany 11% (+1pt)

ACCOMMODATION

- Hotels 61% (-1pt)
- Seasonal rentals 26% (+2pts)
- Bed & Breakfast 17% (+2pts)

- Check online reviews when choosing accommodation 27% (-2pts)
- Posting a review online on an hotel 59% (=)

DREAM HOLIDAYS

- Favorite cities to visit
  New York, Paris, London

- Favorite sports competition to attend
  2018 Grand Prix Automobile de Monaco

- Most romantic country to visit
  France

- Most exotic country to visit
  Thailand

(+XX / -XX) : Evolution vs 2017
HOLIDAY PLANS

SWITZERLAND

HOLIDAY PLANS 66% (=)
Vs Europe 64% (+1pt)

BUDGET CHF 3,235 (+9%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY 20% (=)

PREFERRED FOREIGN DESTINATIONS
Italy 25% (=)
Spain 19% (-1pt)
France 18% (-1pt)

ACCOMMODATION

ACCOMMODATION

HOTELS 57% (+3pts)
Seasonal rentals 28% (-1pt)
Family & friends 22% (-1pt)

Check online reviews when choosing accommodation 28% (=)

Posting a review online on an hotel 65% (-3pts)

(+XX / -XX) : Evolution vs 2017

DREAM HOLIDAYS

Favorite cities to visit
New York, London/Paris, Tokyo

Favorite sports competition to attend
2020 European Football Championship in Europe

Most romantic country to visit
Italy

Most exotic country to visit
Thailand

(+XX / -XX) : Evolution vs 2017
**POLAND**

**HOLIDAY PLANS**

- **HOLIDAY PLANS 60%**
  - Vs Europe 64% (+1 pt)

- **BUDGET** Zł 4,324
  - Vs Europe €1,957 (-2%)

**HOLIDAYS IN THEIR OWN COUNTRY**

- 45%

**PREFERRED FOREIGN DESTINATIONS**

- Spain 9%
- Italy 8%
- Greece 7%

**ACCOMMODATION**

- **ACCOMMODATION**
  - Hotels 40%
  - Seasonal rentals 28%
  - Bed & Breakfast 27%

- Check online reviews when choosing accommodation
  - 32%

- Posting a review online on an hotel
  - 61%

**DREAM HOLIDAYS**

- **Favorite cities to visit**
  - Paris, Rome, New York

- **Favorite sports competition to attend**
  - 2020 European Football Championship in Europe

- **Most romantic country to visit**
  - Italy

- **Most exotic country to visit**
  - Thailand
## PORTUGAL

### HOLIDAY PLANS

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday plans</td>
<td>59%</td>
</tr>
<tr>
<td>Vs Europe</td>
<td>64% (+1pt)</td>
</tr>
<tr>
<td>Budget</td>
<td>€1,370</td>
</tr>
<tr>
<td>Vs Europe</td>
<td>€1,957 (-2%)</td>
</tr>
</tbody>
</table>

### HOLIDAYS IN THEIR OWN COUNTRY

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>26%</td>
</tr>
<tr>
<td>Italy</td>
<td>10%</td>
</tr>
<tr>
<td>France</td>
<td>9%</td>
</tr>
</tbody>
</table>

### PREFERRED FOREIGN DESTINATIONS

- Spain: 26%
- Italy: 10%
- France: 9%

### DREAM HOLIDAYS

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorite cities to visit</td>
<td>New York, Paris, London</td>
</tr>
<tr>
<td>Favorite sports competition to attend</td>
<td>2020 European Football Championship in Europe</td>
</tr>
<tr>
<td>Most romantic country to visit</td>
<td>Italy</td>
</tr>
<tr>
<td>Most exotic country to visit</td>
<td>Brazil</td>
</tr>
</tbody>
</table>

### ACCOMMODATION

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>44%</td>
</tr>
<tr>
<td>Family &amp; friends</td>
<td>31%</td>
</tr>
<tr>
<td>Seasonal rentals</td>
<td>29%</td>
</tr>
</tbody>
</table>

- Check online reviews when choosing accommodation: 21%
- Posting a review online on an hotel: 65%
## UNITED STATES

### HOLIDAY PLANS

<table>
<thead>
<tr>
<th>HOLIDAY PLANS 68% (+2pts)</th>
<th>Vs Europe 64% (+1pt)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUDGET</strong> $2,643 (-1%)</td>
<td>Vs Europe €1,957 (-2%)</td>
</tr>
</tbody>
</table>

### HOLIDAYS IN THEIR OWN COUNTRY

- 46% (+5pts)

### PREFERRED FOREIGN DESTINATIONS

- Canada 6% (-2pts)
- Mexico 4% (-3pts)
- Bahamas 3% (=) – France 3% (+1pt)
- Italy 3% (-2pts)

(+XX / -XX) : Evolution vs 2017

### ACCOMMODATION

<table>
<thead>
<tr>
<th>ACCOMMODATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hotels</strong> 55% (-2pts)</td>
</tr>
<tr>
<td>Family &amp; friends 30% (-2pts)</td>
</tr>
<tr>
<td>Seasonal rentals 19% (+1pt)</td>
</tr>
</tbody>
</table>

Check online reviews when choosing accommodation

- 33% (+2pts)

Posting a review online on an hotel

- 66% (-2pts)

### DREAM HOLIDAYS

<table>
<thead>
<tr>
<th>Favorite cities to visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>London/Paris, New York, Rome</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Favorite sports competition to attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020 Olympic Games in Tokyo</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most romantic country to visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most exotic country to visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thailand</td>
</tr>
</tbody>
</table>

INDEX: Ipsos' proprietary index of travelers’ extra spending

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HOLIDAY PLANS

HOLIDAY PLANS 68% (+2pts)
Vs Europe 64% (+1pt)

BUDGET R$ 5,209 (+18%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY 33% (-1pts)

PREFERRED FOREIGN DESTINATIONS
Argentina 11% (+1pt)
Italy 6% (+1pt)
Chile 5% (+2pts) – France 5% (=)
Portugal 5% (=) – Salvador 5% (3pts)

ACCOMMODATION

ACCOMMODATION
Hotels 61% (+2pts)
Family & friends 36% (+1pt)
Seasonal rentals 21% (=)

Check online reviews when choosing accommodation 26% (-2pts)
Posting a review online on an hotel 75% (+4pts)

DREAM HOLIDAYS

Favorite cities to visit

Favorite sports competition to attend
2018 FIFA Soccer World Cup in Russia

Most romantic country to visit
France

Most exotic country to visit
India
INDIA

HOLIDAY PLANS

HOLIDAY PLANS 64%
Vs Europe 64% (+1pt)

BUDGET ₹ 181,626
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY 25%

PREFERRED FOREIGN DESTINATIONS
Australia – Singapore 12%
Thailand 8%
USA – Malaysia 7%

ACCOMMODATION

ACCOMMODATION
Hotels 64%
Go on a boat/a cruise 30%
Bed & Breakfast 27%

Check online reviews when choosing accommodation 39%

Posting a review online on an hotel 86%

DREAM HOLIDAYS

Favorite cities to visit

Favorite sports competition to attend
2018 FIFA Soccer World Cup in Russia

Most romantic country to visit
France

Most exotic country to visit
India

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CHINA

HOLIDAY PLANS

HOLIDAY PLANS 67%
Vs Europe 64% (+1pt)

BUDGET ￥15,707
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY
32%

PREFERRED FOREIGN DESTINATIONS
Japan 21%
Thailand 15%
USA 11%

ACCOMMODATION

ACCOMMODATION
Hotels 69%
Seasonal rentals 40%
Bed & Breakfast 34%

Check online reviews when choosing accommodation
51%

Posting a review online on an hotel
88%

DREAM HOLIDAYS

Favorite cities to visit
Paris, Beijing, New York

Favorite sports competition to attend
2020 Olympic Games in Tokyo

Most romantic country to visit
France

Most exotic country to visit
Thailand

GAME CHANGERS