Sample
In Poland, the survey was conducted on a representative sample of the population, aged 18 years and older, put together, using the quota method (gender, age, profession) after stratification by region and by city size.

Timeline
The field studies were carried out between June 16th and June 25th 2020.

Method of data collection
Online survey
POLAND

INTEND TO GO ON HOLIDAYS IN 2020
81%
Vs Europe 81%

HOLIDAYS IN THEIR OWN COUNTRY 79%
Vs Europe 77%

HOLIDAYS ABROAD 31%
Vs Europe 35%

HOLIDAY PREFERENCES*
Beach holiday 27%

BUDGET* €759
Vs Europe €1,604

MODES OF TRANSPORTATION

SUMMER 2020
OWN CAR 71%
TRAIN 19%
PLANE 16%

TOTAL 2020-2021
OWN CAR 66%
TRAIN 17%
PLANE 21%

ACCOMODATION
HOTEL 35%
PRIVATE RENTALS 33%
GUEST-HOUSE 25%

INSURANCE COVERAGE
IN THE PAST 48%
Vs Europe 51%

IN THE FUTURE 54%
Vs Europe 51%

*For main leisure trip
© 2020 Ipsos
1. IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION
A1. Are you concerned about the following regarding COVID-19?
Base: All

- Concerned for health (81%)
  - One’s health / his/her family health

- Economic impact (38%)
  - Dismissed from his/her job / Decrease of work activity / Loss of a part of revenue

- Got sick / Impacted by COVID-19 (6%)
  - Oneself or family

A2. Which of the following has happened to you as a result of COVID-19?
Base: All

A3. Which of the following, if any, has happened to you as a result of COVID-19?
Base: All

© 2020 Ipsos
2. TRAVELLING IN A POST-COVID WORLD
INTENT TO TRAVEL IN 2020

POLAND

HOLIDAY PLANS IN 2020

81%
Will certainly or probably travel...

INCLUDING

36%
who will certainly travel...

European Average 81%

79%
...inside the country

31%
...abroad

34%
...inside the country

9%
...abroad

C2. If you are authorised to travel in 2020, will you travel to any of the following?
Base: All
Despite a great will to travel (i.e. previous page), a huge uncertainty remains regarding the future travels: many respondents don’t know if they are going to book holidays in the coming months, or don’t book anything.

### Has already booked | Intend to book | Don’t know yet
---|---|---
**SUMMER 2020**  
(July-August 2020)  
18 | 20 | 18  
38%  
**AUTUMN 2020**  
(September-November 2020)  
11 | 15 | 16  
26%  
**WINTER 2020-2021**  
(December 2020 - February 2021)  
6 | 13 | 13  
19%  
**Later in 2021**  
5 | 15 | 55  
20%
MAIN TRIP BUDGET IN 2020/2021

**AVERAGE IN POLAND**

€ 759

Vs European Average

€ 1,604

Vs Poland Summer Holiday Barometer 2019

€ 1,010

**DECREASED**

48%

**INCREASED**

20%

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

Exchange rate applied: 1 PLN = €0.225

C13. What do you consider as your full budget for your next main trip?
Base: Intend to travel in 2020/2021

REMINDER FROM 2019 HOLIDAY BAROMETER: What is your full budget for your next summer trip (when you take into account transportation, accomodations, food, leisure activities etc.)
Base: intend to go on Holiday this summer
© 2020 Ipsos
### MAIN TRIP BUDGET – DETAIL PER COUNTRY

<table>
<thead>
<tr>
<th>Country</th>
<th>Base</th>
<th>Summer Holiday Barometer 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>€2,171</td>
<td>€2,131</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>€2,155</td>
<td>€2,151</td>
</tr>
<tr>
<td>Austria</td>
<td>€2,108</td>
<td>€2,627</td>
</tr>
<tr>
<td>Belgium</td>
<td>€1,788</td>
<td>€2,242</td>
</tr>
<tr>
<td>Germany</td>
<td>€1,583</td>
<td>€2,467</td>
</tr>
<tr>
<td>France</td>
<td>€1,522</td>
<td>€2,201</td>
</tr>
<tr>
<td>Italy</td>
<td>€1,377</td>
<td>€1,757</td>
</tr>
<tr>
<td>Spain</td>
<td>€1,347</td>
<td>€1,798</td>
</tr>
<tr>
<td>China</td>
<td>€1,053</td>
<td>€1,010</td>
</tr>
<tr>
<td>Poland</td>
<td>€759</td>
<td>€1,010</td>
</tr>
<tr>
<td>Thailand</td>
<td>€733</td>
<td></td>
</tr>
</tbody>
</table>

Exchange rate applied: 1 USD = €0.888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0.029
## Holiday Preferences in 2020 for the Main Leisure Trip

<table>
<thead>
<tr>
<th>Type of Trip</th>
<th>TOTAL IN POLAND</th>
<th>EUROPEAN AVERAGE</th>
<th>YOUNG (&lt;30 YO)</th>
<th>55-64 YO</th>
<th>SINGLE TRAVELLERS</th>
<th>TWO PEOPLE TRAVELLING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach holiday</td>
<td>27%</td>
<td>29%</td>
<td>35%</td>
<td>17%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Visit to friends and family</td>
<td>17%</td>
<td>20%</td>
<td>13%</td>
<td>22%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Touring holidays</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>16%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>City break</td>
<td>14%</td>
<td>12%</td>
<td>22%</td>
<td>12%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>Countryside break</td>
<td>13%</td>
<td>14%</td>
<td>5%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**C6. Ideally, what kind of trip are you planning?**

**Base:** Those who have planned a main trip (in total)
HOLIDAY PREFERENCES PER PERIOD IN 2020 FOR THE MAIN LEISURE TRIP

SUMMER 2020

Beach Holiday* 34%
City break 15%
Countryside break / visit to friend and family 14%

AUTUMN 2020

Visit to friends and family 25%
Touring Holiday 23%
Beach holiday 15%

WINTER 2020-2021

Visit to friends and family 25%
Winter-ski holiday 30%
Beach holiday 14%

* in the summer Holiday Barometer, seaside was also the top destination for the Polish who intended to go on summer holidays

C6. Ideally, what kind of trip are you planning for SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021?
Base : Those who have planned a main trip (per period)
LOCATIONS OF TRIPS PLANNED FOR THE MAIN LEISURE TRIP IN 2020

Domestic trips
- SUMMER 2020: 70
- AUTUMN 2020: 47
- WINTER 2020-2021: 53
- TOTAL POLAND: 62%

Trips inside the EU
- SUMMER 2020: 18
- AUTUMN 2020: 34
- WINTER 2020-2021: 21
- TOTAL POLAND: 23%

Trips outside the EU
- SUMMER 2020: 7
- AUTUMN 2020: 15
- WINTER 2020-2021: 10
- TOTAL POLAND: 9%

You don’t know yet
- SUMMER 2020: 5
- AUTUMN 2020: 4
- WINTER 2020-2021: 16
- TOTAL POLAND: 6%

C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:
Base: Those who have planned a main trip (per period)
REMINDER FROM 2019 HOLIDAY BAROMETER: Where are you thinking of going for your holidays this summer?
Base: Intend to go on Holiday this summer 2019

© 2020 Ipsos
### TRIPS’ DURATION IN 2020 FOR THE MAIN LEISURE TRIP IN 2020

**SUMMER 2020**
- A week-end (2 days): 7%
- A long week-end (3-4 days): 16
- 1 week: 40
- At least 2 weeks: 34
- You don’t know yet: 3

**AUTUMN 2020**
- A week-end (2 days): 4
- A long week-end (3-4 days): 23
- 1 week: 40
- At least 2 weeks: 31
- You don’t know yet: 2

**WINTER 2020-2021**
- A week-end (2 days): 3
- A long week-end (3-4 days): 22
- 1 week: 38
- At least 2 weeks: 24
- You don’t know yet: 13

**TOTAL POLAND**
- A week-end (2 days): 6%
- A long week-end (3-4 days): 18%
- 1 week: 40%
- At least 2 weeks: 32%
- You don’t know yet: 4%

---

C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?

*Base: Those who have planned a main trip (per period)*

© 2020 Ipsos
### Number of People Travelling Together for the Main Leisure Trip in 2020

<table>
<thead>
<tr>
<th></th>
<th>Summer 2020</th>
<th>Autumn 2020</th>
<th>Winter 2020-2021</th>
<th>Total Poland</th>
</tr>
</thead>
<tbody>
<tr>
<td>None, I will travel alone</td>
<td>6</td>
<td>8</td>
<td>10</td>
<td>6%</td>
</tr>
<tr>
<td>With 1 person</td>
<td>16</td>
<td>28</td>
<td>15</td>
<td>19%</td>
</tr>
<tr>
<td>With 2 people</td>
<td>27</td>
<td>30</td>
<td>30</td>
<td>28%</td>
</tr>
<tr>
<td>With at least 3 people</td>
<td>48</td>
<td>34</td>
<td>40</td>
<td>44%</td>
</tr>
<tr>
<td>You don’t know yet</td>
<td>3</td>
<td>5</td>
<td></td>
<td>3%</td>
</tr>
</tbody>
</table>

**C9. For your main leisure trip you would like to plan in summer 2020 / fall Autumn 2020 / Winter 2020-2021, what is the average number of people travelling with you?**

**Base:** Those who have planned a main trip (per period)

© 2020 Ipsos
### TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020

<table>
<thead>
<tr>
<th></th>
<th>SUMMER 2020</th>
<th>AUTUMN 2020</th>
<th>WINTER 2020-2021</th>
<th>TOTAL POLAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>32</td>
<td>40</td>
<td>37</td>
<td>35%</td>
</tr>
<tr>
<td>Private rentals</td>
<td>35</td>
<td>33</td>
<td>20</td>
<td>33%</td>
</tr>
<tr>
<td>A guest-house</td>
<td>25</td>
<td>26</td>
<td>22</td>
<td>25%</td>
</tr>
<tr>
<td>A camping</td>
<td>9</td>
<td>5</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
<td>10</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>None of the above</td>
<td>3</td>
<td>4</td>
<td>14</td>
<td>4%</td>
</tr>
<tr>
<td>You don’t know yet</td>
<td>10</td>
<td>4</td>
<td>14</td>
<td>9%</td>
</tr>
</tbody>
</table>

*(Holiday Barometer Poland Summer 2019)*

*C10. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:*

*Base: Those who have planned a main trip (per period)*

**REMINDER FROM 2019 HOLIDAY BAROMETER**: Regarding your accommodations during your summer trip in 2019, do you mostly intend to Base: Intend to go on Holiday this summer 2019

© 2020 Ipsos
## Modes of Transportation Preferred for the Main Leisure Trip in 2020

### Summer 2020
- My own car: 71%
- Plane: 16%
- Train: 19%
- Bus: 9%
- Bicycle: 7%
- Rented car: 5%
- Motorbike: 1%
- Private boat: 2%
- Cruise Ship: 3%

### Autumn 2020
- My own car: 51%
- Plane: 32%
- Train: 13%
- Bus: 13%
- Bicycle: 5%
- Rented car: 8%
- Motorbike: 4%
- Private boat: 2%
- Cruise Ship: 1%

### Winter 2020-2021
- My own car: 65%
- Plane: 22%
- Train: 14%
- Bus: 13%
- Bicycle: 12%
- Rented car: 5%
- Motorbike: 2%
- Private boat: 1%
- Cruise Ship: 1%

### Total Poland
- My own car: 66%
- Plane: 21%
- Train: 17%
- Bus: 11%
- Bicycle: 7%
- Rented car: 6%
- Motorbike: 2%
- Private boat: 2%
- Cruise Ship: 2%

---

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

© 2020 Ipsos
C6. Ideally, what kind of trip are you planning?

Base: Those who have planned their main leisure trip from March to December 2021

- Beach Holiday: 35%
- Visit to friends and family: 11%
- Touring holiday: 20%

HOLIDAY PREFERENCES FOR 2021 (FROM MARCH TO DECEMBER)
### TRENDS FOR 2021 (FROM MARCH TO DECEMBER)

**LOCATION**

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic trips</td>
<td>40</td>
</tr>
<tr>
<td>Trips inside the EU</td>
<td>34</td>
</tr>
<tr>
<td>Trips outside the EU</td>
<td>15</td>
</tr>
<tr>
<td>You don't know yet</td>
<td>11</td>
</tr>
</tbody>
</table>

**DURATION**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A week-end (2 days)</td>
<td>4</td>
</tr>
<tr>
<td>A long week-end (3-4 days)</td>
<td>16</td>
</tr>
<tr>
<td>1 week</td>
<td>39</td>
</tr>
<tr>
<td>2 weeks</td>
<td>20</td>
</tr>
<tr>
<td>3 weeks</td>
<td>14</td>
</tr>
<tr>
<td>4 weeks and more</td>
<td>4</td>
</tr>
<tr>
<td>You don't know yet</td>
<td>3</td>
</tr>
</tbody>
</table>

**TYPE OF LOCATION**

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A guest-house</td>
<td>25</td>
</tr>
<tr>
<td>A small hotel</td>
<td>21</td>
</tr>
<tr>
<td>A large hotel</td>
<td>20</td>
</tr>
<tr>
<td>A private rental flat</td>
<td>19</td>
</tr>
<tr>
<td>A private rental house</td>
<td>13</td>
</tr>
<tr>
<td>A resort</td>
<td>11</td>
</tr>
<tr>
<td>A camping</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
</tr>
<tr>
<td>None of the above</td>
<td>3</td>
</tr>
<tr>
<td>You don't know yet</td>
<td>12</td>
</tr>
</tbody>
</table>

**TRANSPORTATION**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My own car</td>
<td>52</td>
</tr>
<tr>
<td>Plane</td>
<td>36</td>
</tr>
<tr>
<td>Train</td>
<td>16</td>
</tr>
<tr>
<td>Bus</td>
<td>10</td>
</tr>
<tr>
<td>Bicycle</td>
<td>8</td>
</tr>
<tr>
<td>Rented car</td>
<td>7</td>
</tr>
<tr>
<td>Cruise Ship</td>
<td>6</td>
</tr>
<tr>
<td>Motorbike</td>
<td>4</td>
</tr>
<tr>
<td>Private boat</td>
<td>4</td>
</tr>
</tbody>
</table>

---

C7. Ideally, for your main leisure trip you would like to plan in 2021, are you planning:

C8. For your main leisure trip you would like to plan in 2021, what is the average trip duration you are considering?

C10. Ideally, for your main leisure trip you would like to plan in 2021, are you considering staying in:

C10bis. Why will you choose this mode of transportation? Is it because:

Base: Those who have planned their main leisure trip from March to December 2021
TOP 3 RISK-FREE BEHAVIORS

1. Avoid travelling to certain countries (76%)
2. Spend your holidays in your own country (74%)
3. Avoid crowded places (78%)

Avoid flying and going to airports (59%)
Avoid going on a cruise (55%)
Avoid amusement parks (52%)
Avoid staying at a hotel / resort (44%)
Travel only when COVID-19 tested (38%)

Avoid crowded places (78%)  
Avoid travelling to certain countries (76%)  
Spend your holidays in your own country (74%)
Favour close destinations you can come back from quickly (66%)
Avoid flying and going to airports (59%)
Avoid going on a cruise (55%)
Avoid taking the train and going to train stations (54%)
Avoid amusement parks (52%)
Avoid staying at a hotel / resort (44%)
Travel only when COVID-19 tested (38%)

TABLE

<table>
<thead>
<tr>
<th>Behavior</th>
<th>TOTAL POLAND</th>
<th>YOUNG (&lt;30 YO)</th>
<th>&gt; 65 YO</th>
<th>MAIN TRIP IN POLAND</th>
<th>MAIN TRIP IN EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoid crowded places</td>
<td>78%</td>
<td>70%</td>
<td>92%</td>
<td>83%</td>
<td>71%</td>
</tr>
<tr>
<td>Avoid travelling to certain countries</td>
<td>76%</td>
<td>73%</td>
<td>81%</td>
<td>84%</td>
<td>70%</td>
</tr>
<tr>
<td>Spend your holidays in your own country</td>
<td>74%</td>
<td>72%</td>
<td>80%</td>
<td>89%</td>
<td>47%</td>
</tr>
<tr>
<td>Favour close destinations you can come back from quickly</td>
<td>66%</td>
<td>59%</td>
<td>78%</td>
<td>70%</td>
<td>45%</td>
</tr>
<tr>
<td>Avoid flying and going to airports</td>
<td>59%</td>
<td>56%</td>
<td>63%</td>
<td>70%</td>
<td>34%</td>
</tr>
<tr>
<td>Avoid going on a cruise</td>
<td>55%</td>
<td>47%</td>
<td>66%</td>
<td>60%</td>
<td>43%</td>
</tr>
<tr>
<td>Avoid taking the train and going to train stations</td>
<td>54%</td>
<td>45%</td>
<td>56%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Avoid amusement parks</td>
<td>52%</td>
<td>40%</td>
<td>69%</td>
<td>53%</td>
<td>55%</td>
</tr>
<tr>
<td>Avoid staying at a hotel / resort</td>
<td>44%</td>
<td>29%</td>
<td>52%</td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>Travel only when COVID-19 tested</td>
<td>38%</td>
<td>35%</td>
<td>51%</td>
<td>35%</td>
<td>36%</td>
</tr>
</tbody>
</table>
## RISK-FREE BEHAVIOURS

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yes certainly</th>
<th>Yes probably</th>
<th>Non probably not</th>
<th>No certainly not</th>
<th>Don't know</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoid crowded places</td>
<td>41</td>
<td>37</td>
<td>11</td>
<td>5</td>
<td>6</td>
<td>78</td>
<td>16</td>
</tr>
<tr>
<td>Avoid travelling to certain countries</td>
<td>43</td>
<td>33</td>
<td>12</td>
<td>5</td>
<td>7</td>
<td>76</td>
<td>17</td>
</tr>
<tr>
<td>Spend your holidays in your own country</td>
<td>39</td>
<td>35</td>
<td>12</td>
<td>5</td>
<td>9</td>
<td>74</td>
<td>17</td>
</tr>
<tr>
<td>Favour close destinations you can come back</td>
<td>23</td>
<td>43</td>
<td>18</td>
<td>6</td>
<td>10</td>
<td>66</td>
<td>24</td>
</tr>
<tr>
<td>from quickly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoid flying and going to airports</td>
<td>31</td>
<td>28</td>
<td>23</td>
<td>9</td>
<td>9</td>
<td>59</td>
<td>32</td>
</tr>
<tr>
<td>Avoid going on a cruise</td>
<td>25</td>
<td>30</td>
<td>25</td>
<td>9</td>
<td>11</td>
<td>55</td>
<td>34</td>
</tr>
<tr>
<td>Avoid taking the train and going to train</td>
<td>22</td>
<td>32</td>
<td>28</td>
<td>9</td>
<td>9</td>
<td>54</td>
<td>37</td>
</tr>
<tr>
<td>stations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoid amusement parks</td>
<td>21</td>
<td>31</td>
<td>30</td>
<td>8</td>
<td>10</td>
<td>52</td>
<td>38</td>
</tr>
<tr>
<td>Avoid staying at a hotel / resort</td>
<td>17</td>
<td>27</td>
<td>37</td>
<td>10</td>
<td>9</td>
<td>44</td>
<td>47</td>
</tr>
<tr>
<td>Travel only when COVID-19 tested</td>
<td>13</td>
<td>25</td>
<td>32</td>
<td>14</td>
<td>16</td>
<td>38</td>
<td>46</td>
</tr>
</tbody>
</table>

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

Base: All
3. TRAVEL INSURANCE AND ASSISTANCE
INSURANCE COVERAGE

IN THE PAST...

48% Covered by a travel insurance

IN THE FUTURE...

54% Planned to purchase travel insurance

EUROPE

51%  

D1. During your trips in the past, were you generally covered by a travel insurance or assistance (travel cancellation reimbursement, medical assistance, repatriation)?

D4. For your future trips, are you planning to purchase travel insurance or assistance (travel cancellation reimbursement, medical assistance, repatriation)?

Base: All
WAYS OF GETTING TRAVEL INSURANCE

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

- Insurance company: 55%
  - Through an insurance agent: 24%
  - From a travel insurance company: 16%

- Travel agency: 35%
  - Through a travel agent: 19%
  - Through an OTA during the booking process: 11%

- Credit Card: 2%
- Employer: 2%
- Other: 1%
- Don’t know: 5%

D5. How are you planning to buy your travel insurance in future?  
Base: Will purchase travel insurance
© 2020 Ipsos
# TOP 3 TRAVEL INSURANCE COVERAGE

Thinking about your next trip, how important is it for you to have travel insurance coverage for each of the following?

**Base:** Those who planned to purchase travel insurance or assistance for their future trips

<table>
<thead>
<tr>
<th>Coverage</th>
<th>MAIN TRIP IN POLAND</th>
<th>MAIN TRIP IN EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency medical &amp; hospital expenses</td>
<td>96%</td>
<td>92%</td>
</tr>
<tr>
<td>Personal liability</td>
<td>90%</td>
<td>91%</td>
</tr>
<tr>
<td>Travel delay or cancellation</td>
<td>91%</td>
<td>80%</td>
</tr>
<tr>
<td>Adapted offers for the COVID pandemic</td>
<td>93%</td>
<td>82%</td>
</tr>
<tr>
<td>Special info on COVID status before departure and during the trip</td>
<td>95%</td>
<td>77%</td>
</tr>
<tr>
<td>Luggage and personal effects</td>
<td>86%</td>
<td>81%</td>
</tr>
<tr>
<td>Pre-trip medical and safety advice about destination</td>
<td>88%</td>
<td>81%</td>
</tr>
<tr>
<td>Teleconsultation with doctor</td>
<td>79%</td>
<td>69%</td>
</tr>
</tbody>
</table>

D7. Thinking about your next trip, how important is it for you to have travel insurance coverage for each of the following?

Base: Those who planned to purchase travel insurance or assistance for their future trips

© 2020 Ipsos
### IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWINGS

<table>
<thead>
<tr>
<th>Service</th>
<th>Very important</th>
<th>Quite important</th>
<th>Not very important</th>
<th>Not important at all</th>
<th>Don't know</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency medical &amp; hospital expenses</td>
<td>61</td>
<td></td>
<td>35</td>
<td>31</td>
<td>96</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Personal liability</td>
<td>41</td>
<td></td>
<td>50</td>
<td>8</td>
<td>91</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Travel delay or cancellation</td>
<td>43</td>
<td></td>
<td>47</td>
<td>7</td>
<td>90</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Adapted offers for the COVID pandemic</td>
<td>46</td>
<td></td>
<td>44</td>
<td>6</td>
<td>90</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Special info on COVID status before</td>
<td>41</td>
<td></td>
<td>47</td>
<td>9</td>
<td>88</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>departure and during the trip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luggage and personal effects</td>
<td>38</td>
<td></td>
<td>49</td>
<td>11</td>
<td>87</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Pre-trip medical and safety advice</td>
<td>39</td>
<td></td>
<td>46</td>
<td>11</td>
<td>85</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>about destination</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teleconsultation with doctor</td>
<td>28</td>
<td></td>
<td>49</td>
<td>18</td>
<td>77</td>
<td>21</td>
<td></td>
</tr>
</tbody>
</table>

D7. Thinking about your next trip, how important is it for you to have travel insurance coverage for each of the following?

Base: Those who planned to purchase travel insurance or assistance for their future trips.

© 2020 Ipsos
4. COVID RELATED PRODUCTS
TOP 3 COVID-19 RELATED SERVICES

WILLING TO PAY FOR AT LEAST ONE SERVICE

84%

Including

47% Certainly

FIRST 3 SERVICES

Coverage for repatriation if holiday location is closing borders/imposing lock down 69%

Coverage for trip extension 67%

COVID medical monitoring and support 62%

E1. Would you be willing to pay for the following additional services in your travel insurance COVID19-related services?
E2. Imagine you are not sick with COVID-19 but travelling in a COVID-19 affected country. Would you be interested in paying an extra fee for the following?

Base : All
FEELINGS OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLED

**Ability for your assistance company to geolocalise you if you are in need of medical assistance**

<table>
<thead>
<tr>
<th></th>
<th>Much safer</th>
<th>Quite safer</th>
<th>Not very safer</th>
<th>Not safer at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>36</td>
<td>43</td>
<td>8</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>No</td>
<td>79</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Ability to receive info / alerts specific to my location in dangerous situations e.g. terrorist attack**

<table>
<thead>
<tr>
<th></th>
<th>Much safer</th>
<th>Quite safer</th>
<th>Not very safer</th>
<th>Not safer at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>33</td>
<td>44</td>
<td>9</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>No</td>
<td>77</td>
<td>13</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Ability for you to name people who will receive information about your location either at specific times (on or in special circumstances (e.g. terrorist attack)**

<table>
<thead>
<tr>
<th></th>
<th>Much safer</th>
<th>Quite safer</th>
<th>Not very safer</th>
<th>Not safer at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>32</td>
<td>43</td>
<td>9</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>No</td>
<td>75</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

E4. Would you feel safer in your travels if the following services were enabled?
Base : All

© 2020 Ipsos
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.