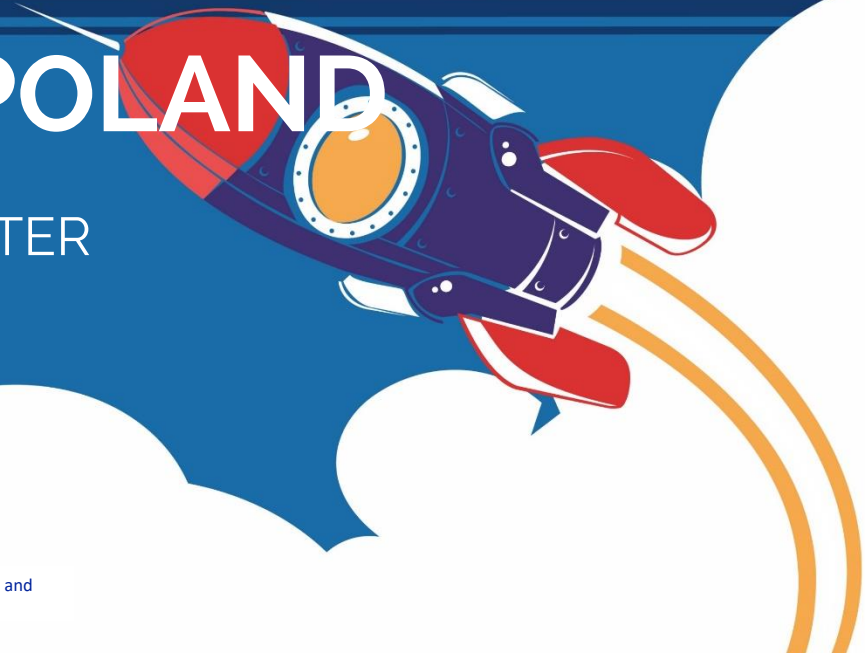


# Future of Travel – POLAND

IPSOS / EUROP ASSISTANCE BAROMETER

7th JULY, 2020 



# METHODOLOGY POLAND



## 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%**

**PLANE 21%**

**TRAIN 17%**

## 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%*

# 1.

## IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION



# CONTEXT



## CONCERNED FOR HEALTH

One's health / his/her family health

81%

A1. Are you concerned about the following regarding COVID-19?

Base : All

## ECONOMIC IMPACT

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

38%

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

Base : All

## GOT SICK / IMPACTED BY COVID-19

Oneself or family

6%

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

Base : All

# 2.

## TRAVELLING IN A POST-COVID WORLD



# INTENT TO TRAVEL IN 2020



POLAND



European  
Average

81%

HOLIDAY PLANS IN 2020

81%

Will *certainly or probably* travel...

INCLUDING

36%

who will *certainly* travel...

79%  
...inside the country



31%  
...abroad



34%  
...inside the country



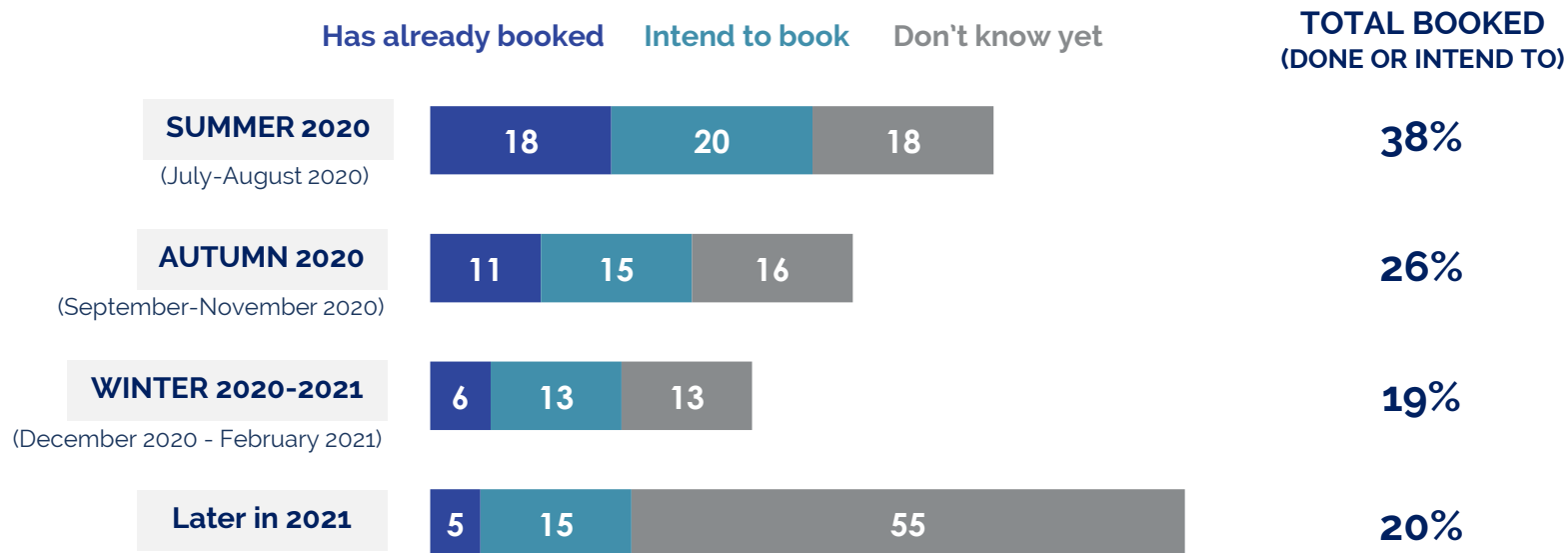
9%  
...abroad



# INTENT TO TRAVEL PER PERIOD



*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***



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



# MAIN TRIP BUDGET IN 2020/2021



AVERAGE  
IN POLAND

€ 759

*Vs European Average*



€ 1,604

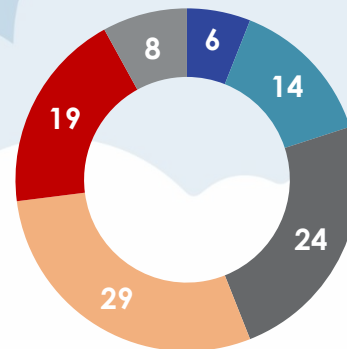
*Vs Poland Summer  
Holiday Barometer 2019*

€ 1,010

*Exchange rate applied : 1 PLN = €0,225*

DECREASED  
48%

INCREASED  
20%



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

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












C12. How might your budget for your main leisure trip change? Will it:  
Base : Intend to travel in 2020/2021

## MAIN TRIP BUDGET – DETAIL PER COUNTRY

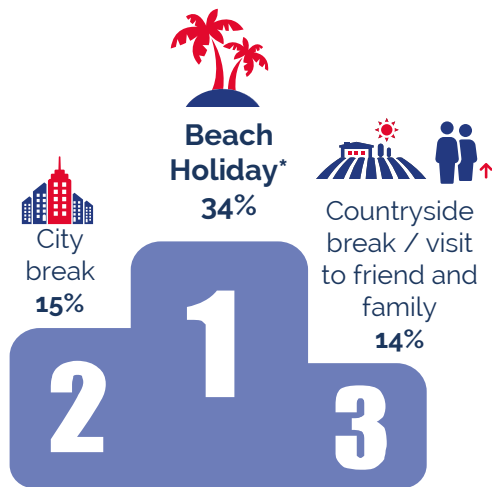
<b>USA</b> <b>€2 171</b> <i>Vs Summer Holiday Barometer 2019</i> <b>€2 131</b>	<b>UNITED KINGDOM</b> <b>€2 155</b> <b>€2 151</b>	<b>AUSTRIA</b> <b>€2 108</b> <b>€2 627</b>	<b>BELGIUM</b> <b>€1 788</b> <b>€2 242</b>	<b>GERMANY</b> <b>€1 583</b> <b>€2 467</b>	<b>FRANCE</b> <b>€1 522</b> <b>€2 201</b>
<b>ITALY</b> <b>€1 377</b> <b>€1 757</b>	<b>SPAIN</b> <b>€1 347</b> <b>€1 798</b>	<b>CHINA</b> <b>€1 053</b>	<b>POLAND</b> <b>€759</b> <b>€1 010</b>	<b>THAILAND</b> <b>€733</b>	

Exchange rate applied : 1 USD = €0,888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0,029

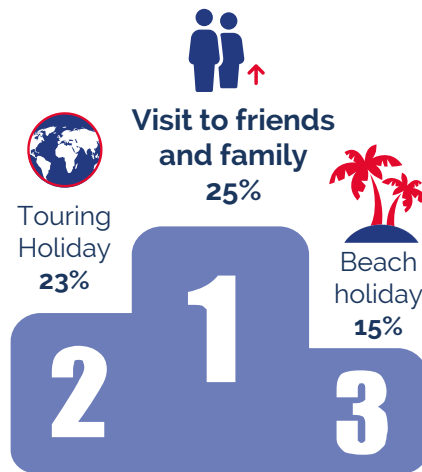
# HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP

		 TOTAL IN POLAND	 EUROPEAN AVERAGE	 YOUNG (<30 YO)	 55-64 YO	 SINGLE TRAVELLERS	 TWO PEOPLE TRAVELLING
	Beach holiday	27%	29%	35%	17%	24%	20%
	Visit to friends and family	17%	20%	13%	22%	24%	26%
	Touring holidays	15%	12%	12%	16%	10%	12%
	City break	14%	12%	22%	12%	24%	15%
	Countryside break	13%	14%	5%	14%	10%	10%

# HOLIDAY PREFERENCES PER PERIOD IN 2020 FOR THE MAIN LEISURE TRIP



SUMMER 2020



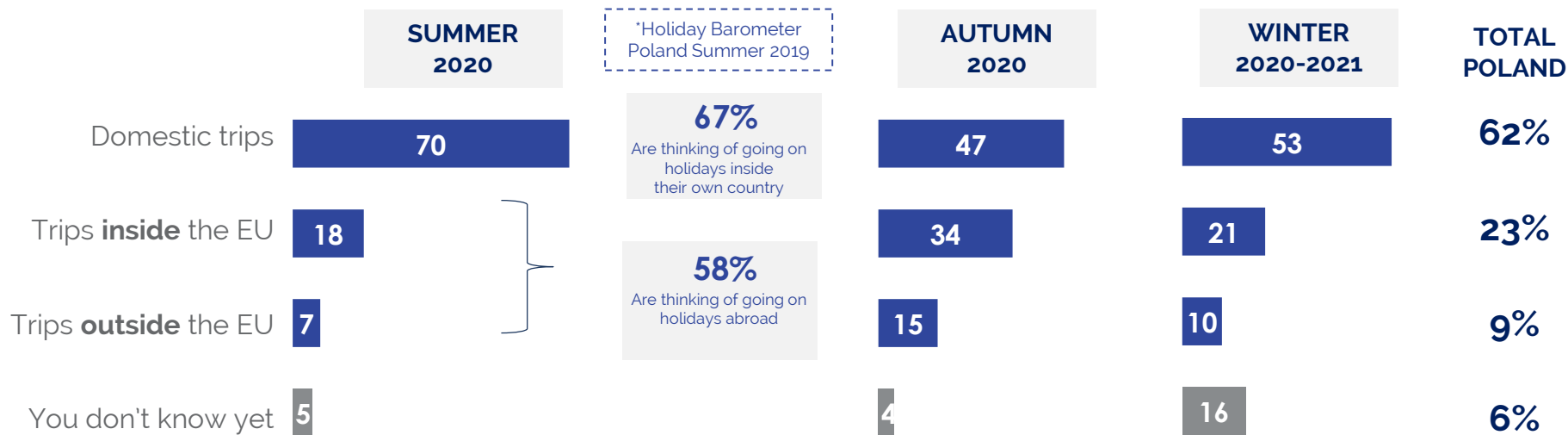
AUTUMN 2020



WINTER 2020-2021

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

# LOCATIONS OF TRIPS PLANNED FOR THE MAIN LEISURE TRIP IN 2020



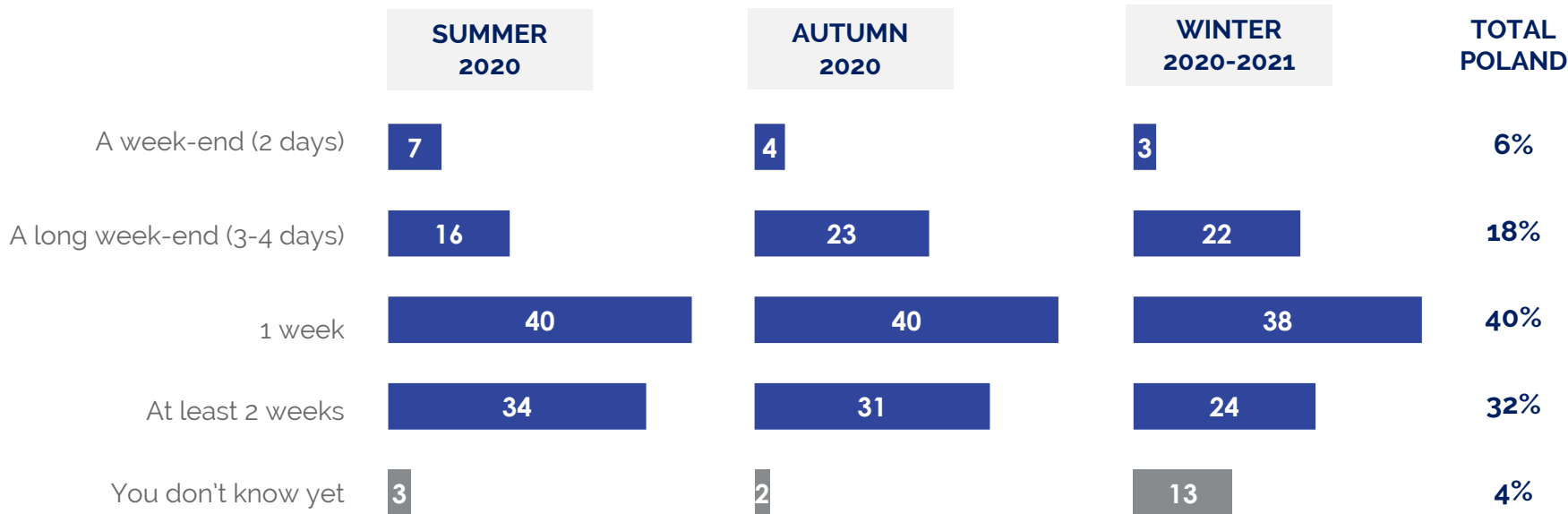
C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:

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 ?

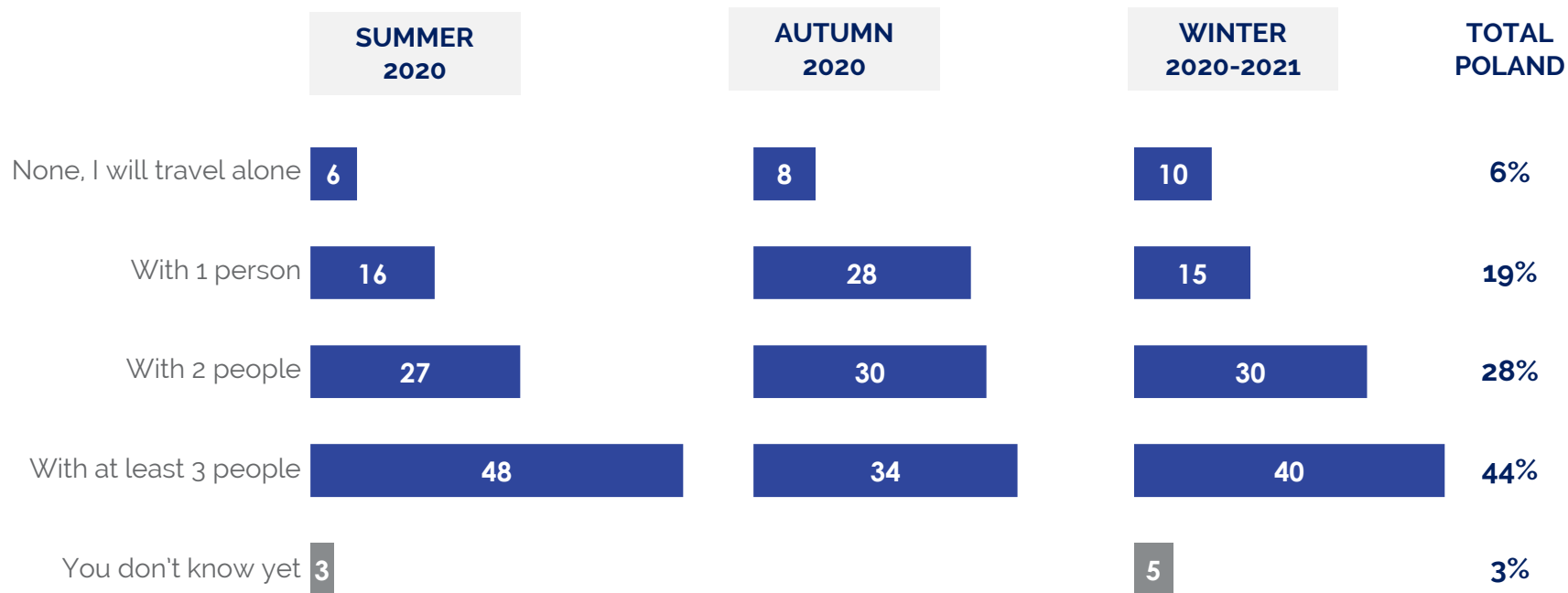
Base: Intend to go on Holiday this summer 2019

# TRIPS' DURATION IN 2020 FOR THE MAIN LEISURE TRIP IN 2020



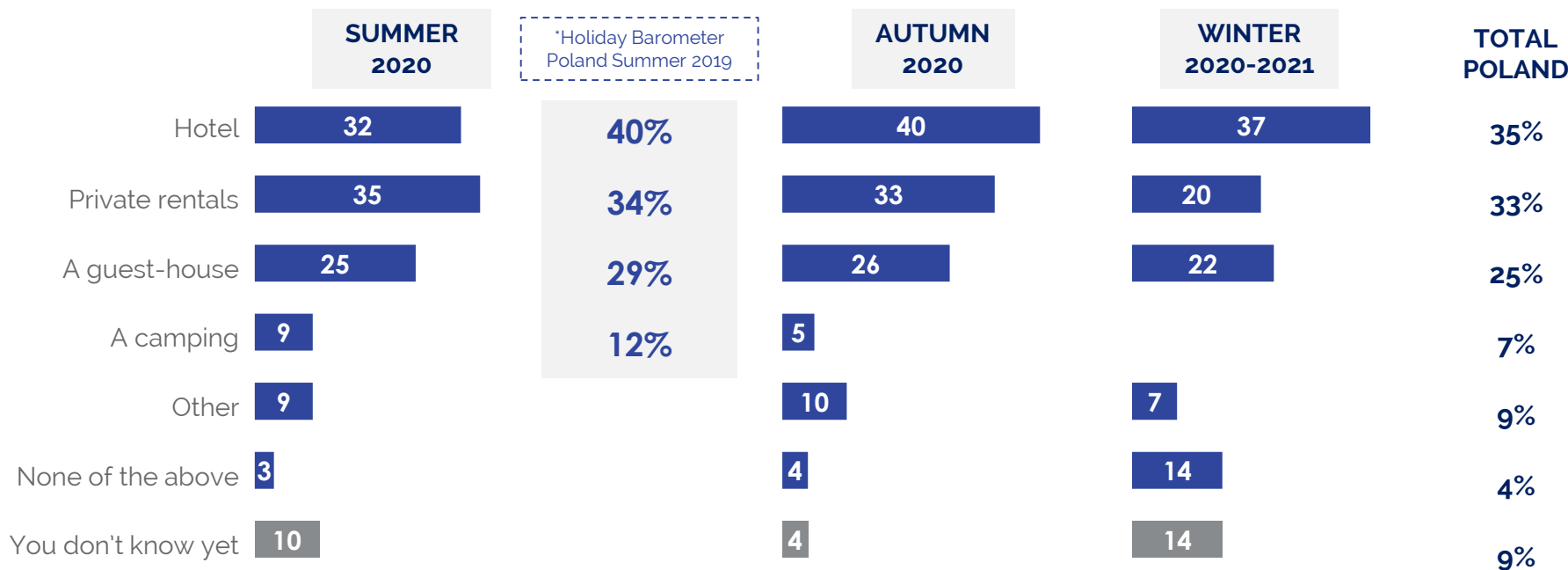
C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?  
Base : Those who have planned a main trip (per period)

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



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)

# TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020



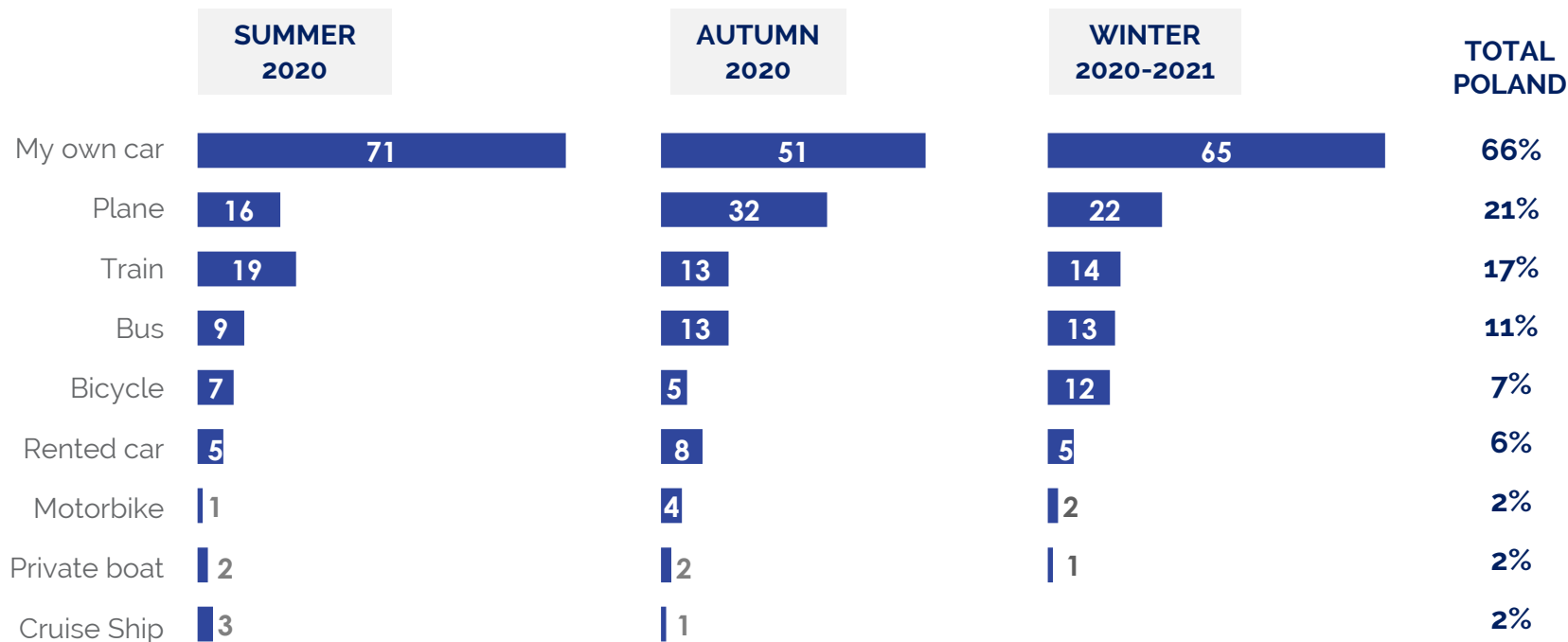
C10. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:  
Base : Those who have planned a main trip (per period)

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

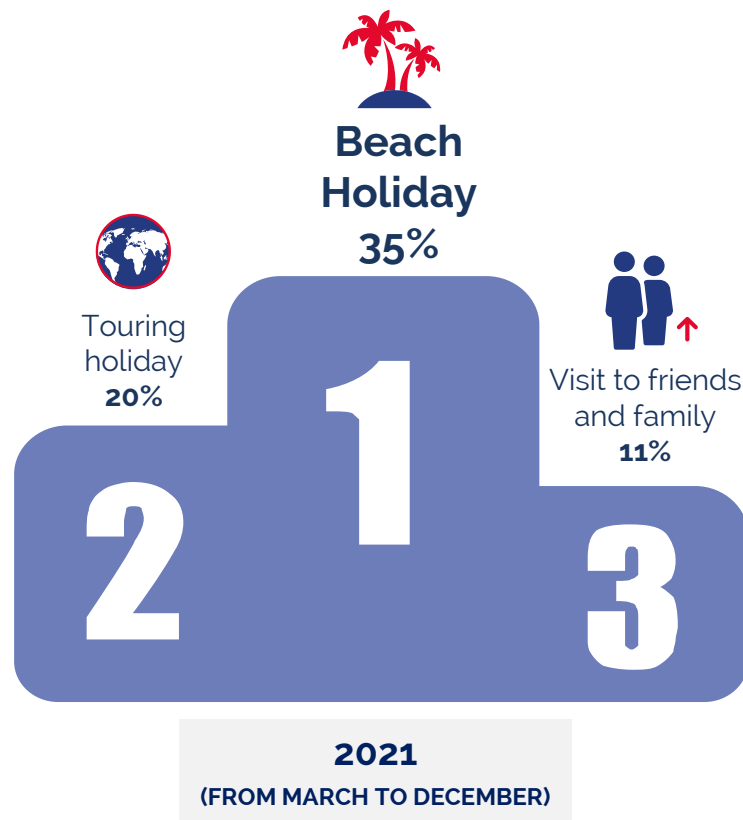
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# MODES OF TRANSPORTATION PREFERRED FOR THE MAIN LEISURE TRIP IN 2020



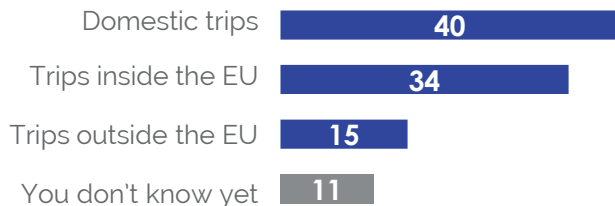
# HOLIDAY PREFERENCES FOR 2021 (FROM MARCH TO DECEMBER)



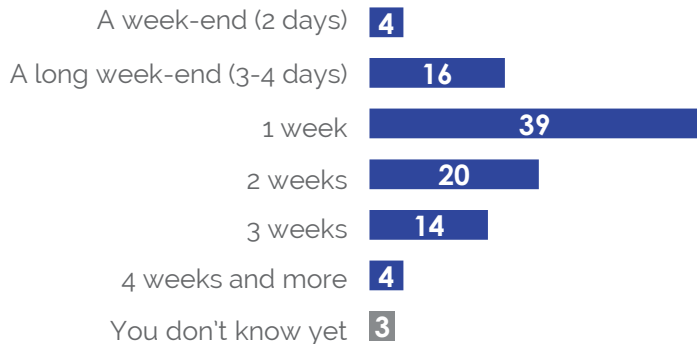
# TRENDS FOR 2021 (FROM MARCH TO DECEMBER)



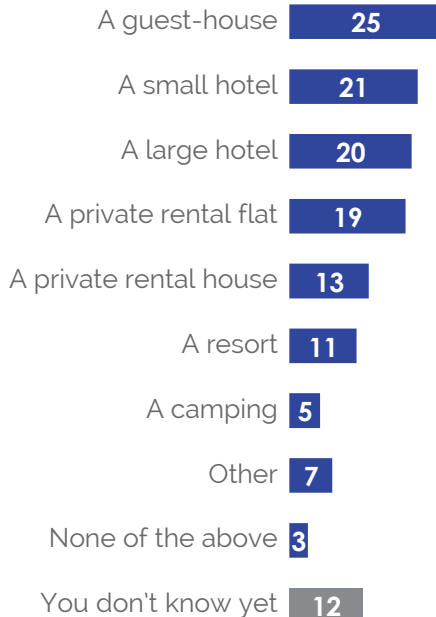
## LOCATION



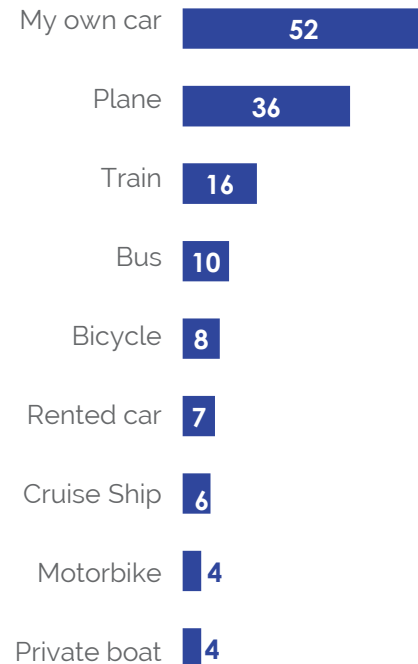
## DURATION



## TYPE OF LOCATION



## TRANSPORTATION

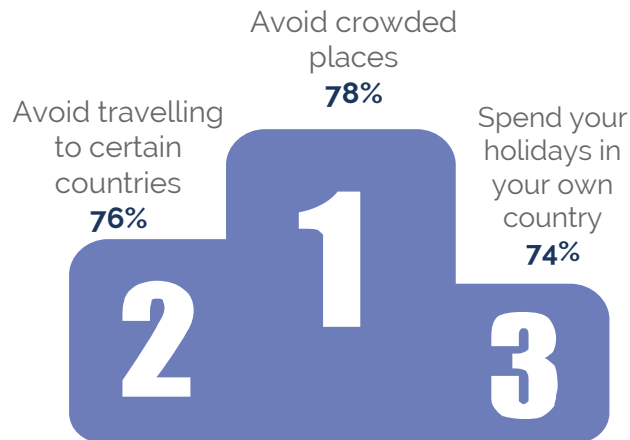


C7. Ideally, for your main leisure trip you would like to plan in 2021, are you planning:  
 C8. For your main leisure trip you would like to plan in 2021, what is the average trip duration you are considering?  
 C10. Ideally, for your main leisure trip you would like to plan in 2021, are you considering 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

GAME CHANGERS



# TOP 3 RISK-FREE BEHAVIORS



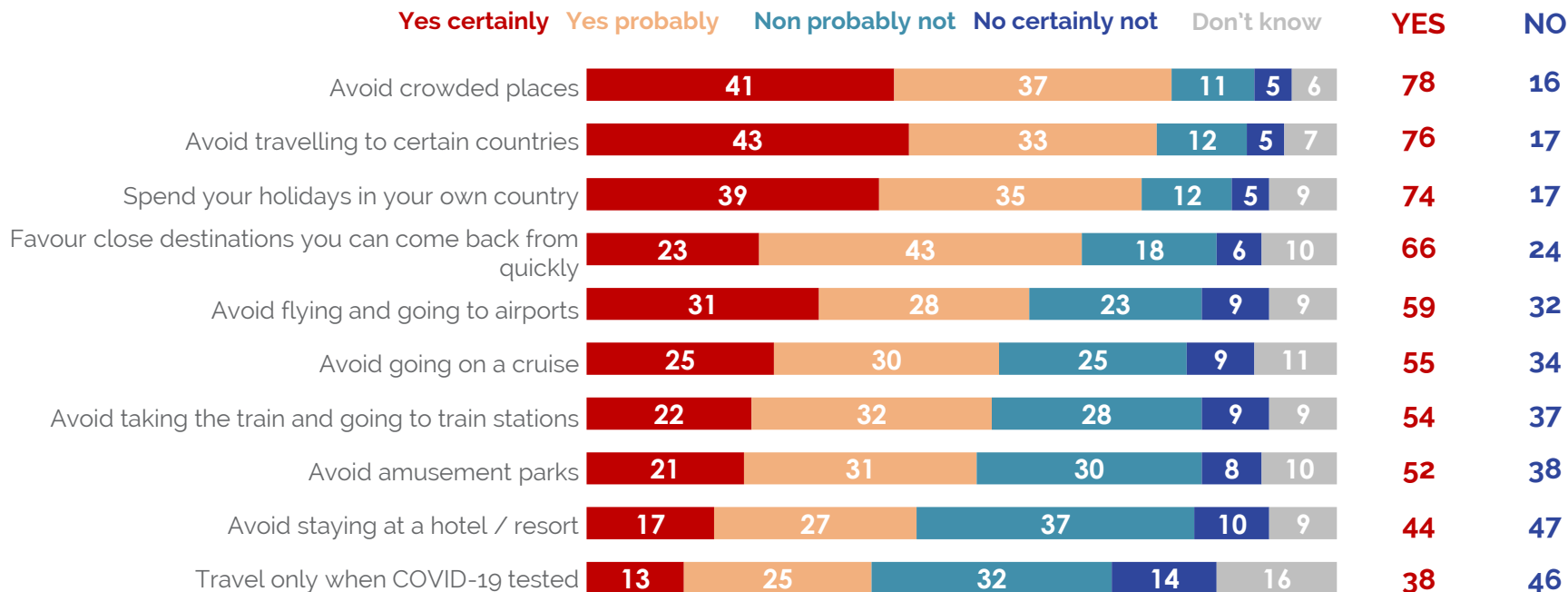
	TOTAL POLAND	YOUNG (<30 YO)	> 65YO	MAIN TRIP IN POLAND	MAIN TRIP IN EU
Avoid crowded places	78%	70%	92%	83%	71%
Avoid travelling to certain countries	76%	73%	81%	84%	70%
Spend your holidays in your own country	74%	72%	80%	89%	47%
Favour close destinations you can come back from quickly	66%	59%	78%	70%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

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

Base : All

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# RISK-FREE BEHAVIOURS



# 3.

## TRAVEL INSURANCE AND ASSISTANCE



# INSURANCE COVERAGE

IN THE PAST...

**48%**

Covered by  
a travel insurance

**EUROPE**

**51%**

IN THE FUTURE...

**54%**

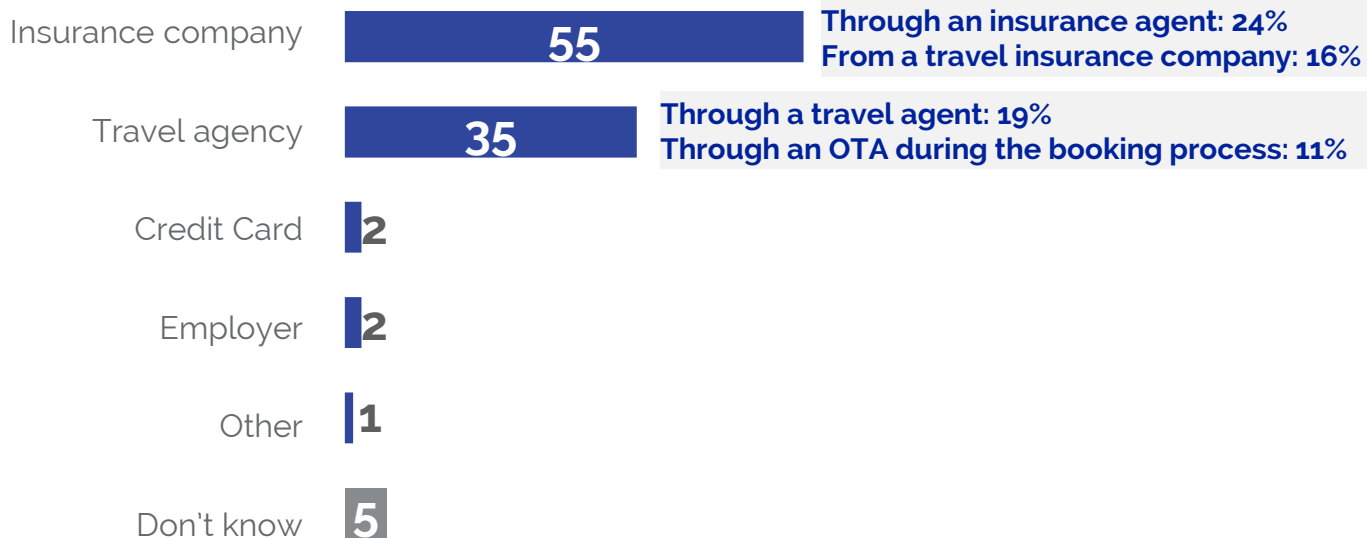
Planned to purchase  
travel insurance

**EUROPE**

**51%**

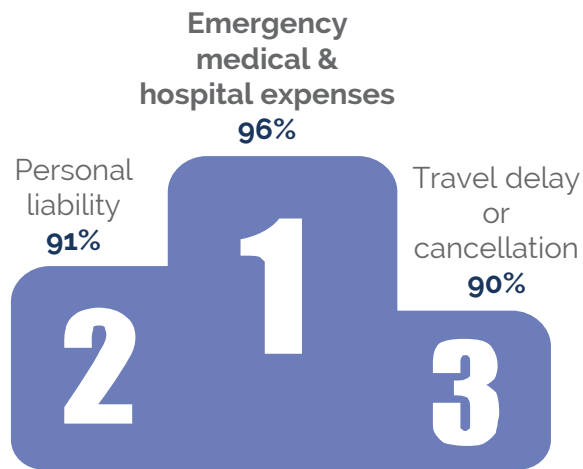
# WAYS OF GETTING TRAVEL INSURANCE

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



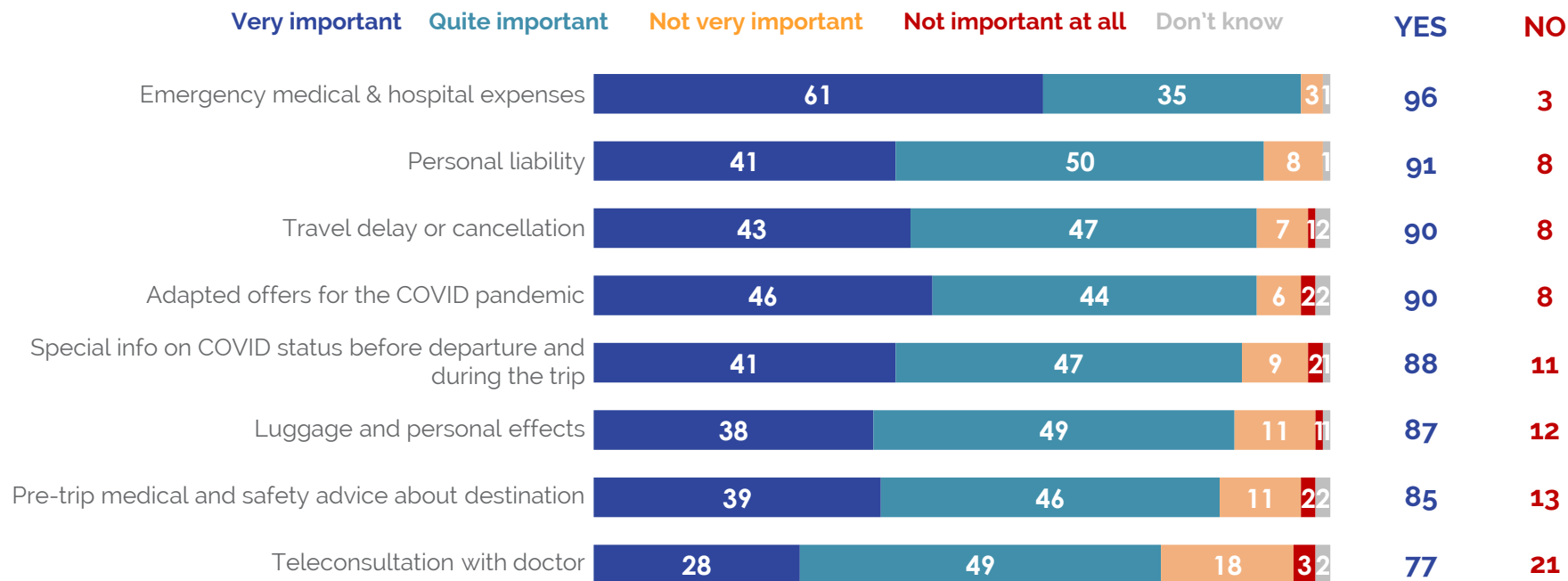


# TOP 3 TRAVEL INSURANCE COVERAGE



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

# IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWINGS



# 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%



# FEELINGS OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLED



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# GAME CHANGERS

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