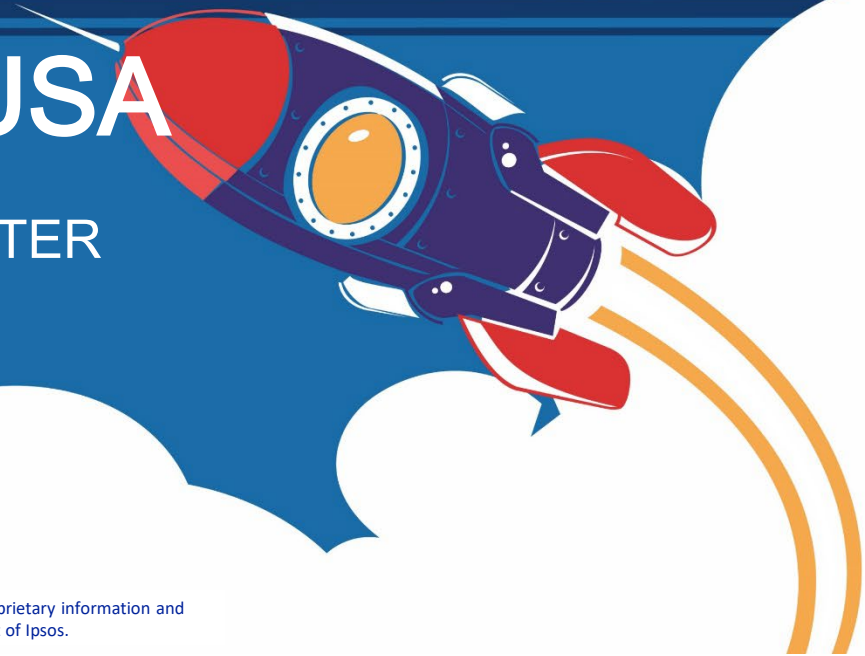


Future of Travel – USA

IPSOS/ EUROP ASSISTANCE BAROMETER

1ST JULY, 2020



METHODOLOGY



Sample

In the USA, 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 June 10th and June 20th 2020



Method of data collection

Online survey

UNITED STATES



INTEND TO GO ON HOLIDAYS IN 2020

73%

Vs Europe 81%

HOLIDAYS IN THEIR OWN COUNTRY **72%**

Vs Europe 77%

HOLIDAYS ABROAD **18%**

Vs Europe 35%

HOLIDAY PREFERENCES*

Visit to family and friends **36%** 

BUDGET* €2,171

Vs Europe €1,604

MODES OF TRANSPORTATION

SUMMER 2020

OWN CAR 72%

PLANE 23%

RENTED CAR 9%

TOTAL 2020-2021

OWN CAR 59%

PLANE 34%

RENTED CAR 14%

ACCOMODATION

HOTEL 47%

PRIVATE RENTALS 27%

CAMPING 10%

INSURANCE COVERAGE

IN THE PAST **25%**

Vs Europe 51%

IN THE FUTURE **35%**

Vs Europe 51%

1.

IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION



CONTEXT



CONCERNED FOR HEALTH

One's health / his/her family health

71%

ECONOMIC IMPACT

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

41%

GOT SICK / IMPACTED BY COVID-19

Oneself or family

15%

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

Base : All

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

Base : All

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

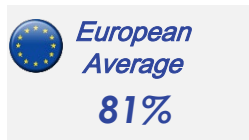
Base : All

2.

TRAVELLING IN A POST-COVID WORLD



INTENT TO TRAVEL IN 2020



HOLIDAY PLANS IN 2020

73%

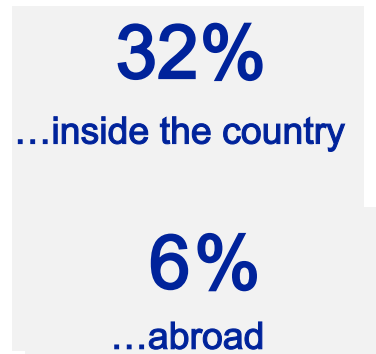
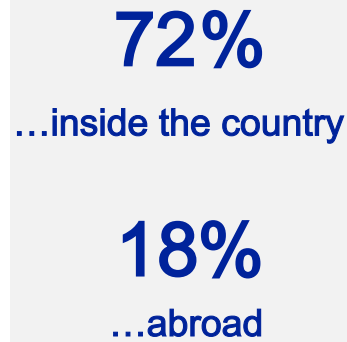
Will *certainly or probably* travel...

INCLUDING

33%

who will *certainly* travel...

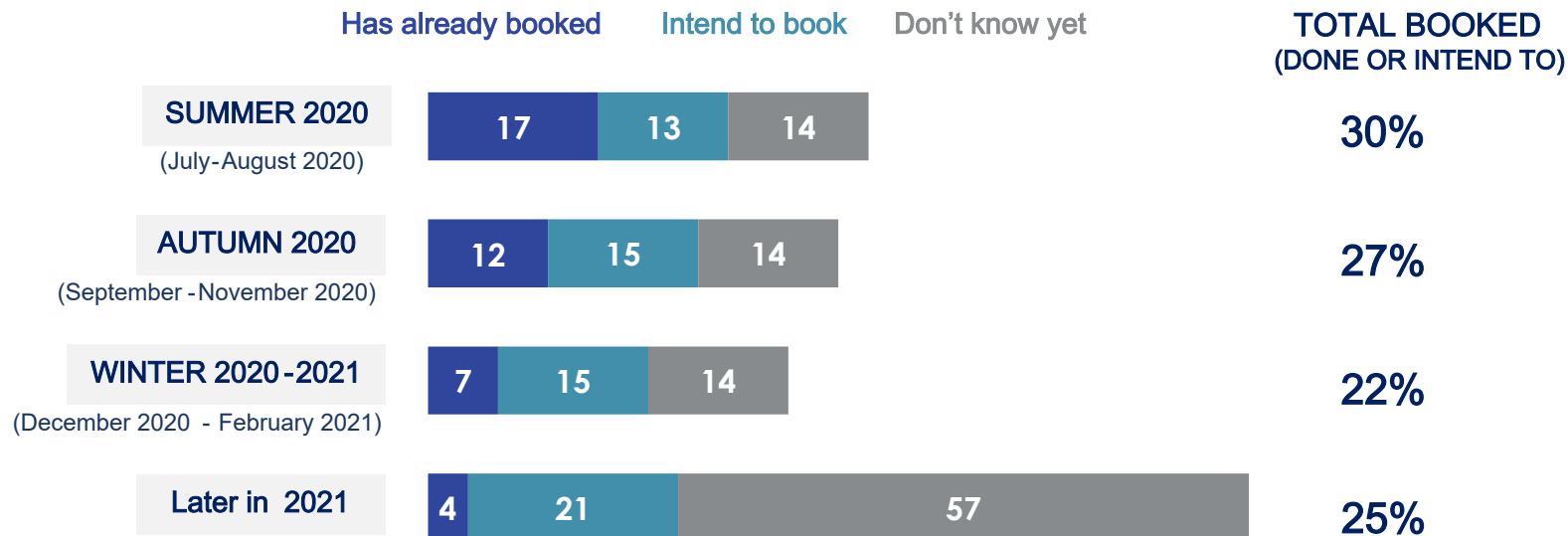
USA



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 THE USA

€ 2,171

Vs European Average

 € 1,604

*Vs USA Summer
Holiday Barometer 2019*

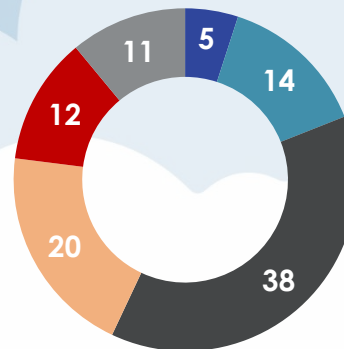
€ 2,131

Exchange rate applied : 1 USD = €0.88

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

DECREASED
32%

INCREASED
19%



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

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

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

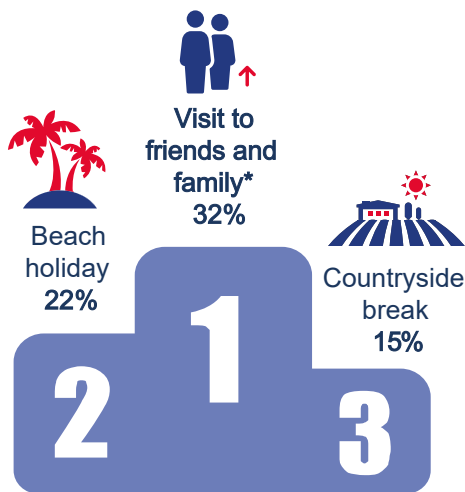
Exchange rate applied : 1 USD = €0,888, 1 GBP = €1.1, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0,029

HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP



		 TOTAL IN THE USA	 EUROPEAN AVERAGE	SINGLE TRAVELERS	2 PEOPLE TRAVELLING	AT LEAST 3 PEOPLE	GOT SICK
	Visit to friends and family	36%	20%	62%	37%	33%	38%
	Beach holidays	21%	29%	3%	15%	27%	14%
	Countryside break	12%	14%	4%	15%	11%	4%
	City break	8%	12%	2%	7%	8%	9%
	Touring holidays	4%	12%	2%	5%	5%	15%
	Cruise	3%	2%	2%	4%	3%	13%

HOLIDAY PREFERENCES PER PERIOD IN 2020 FOR THE MAIN LEISURE TRIP



SUMMER 2020



AUTUMN 2020

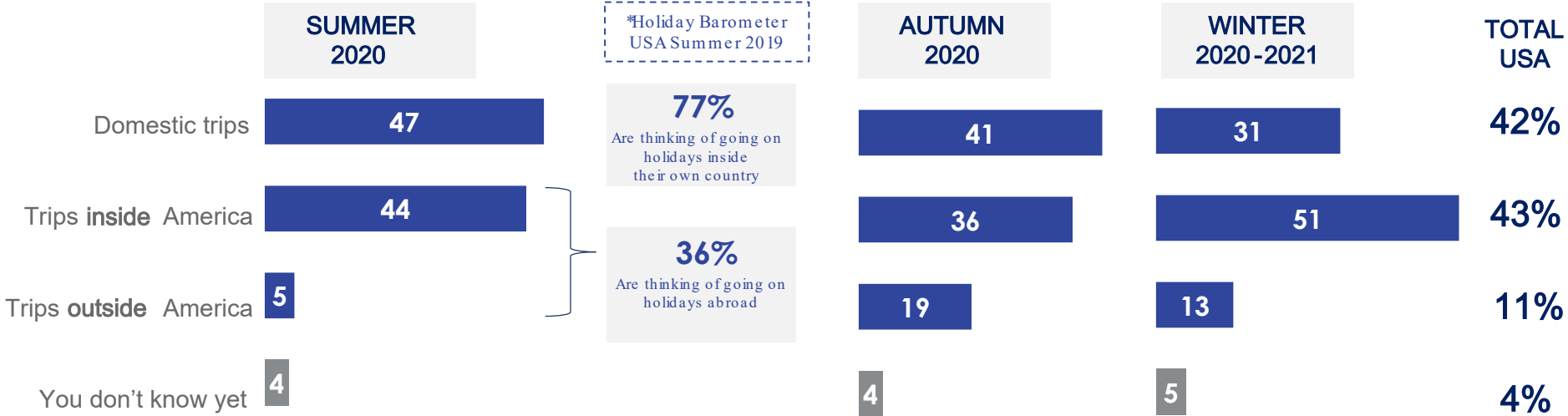


WINTER 2020-2021

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

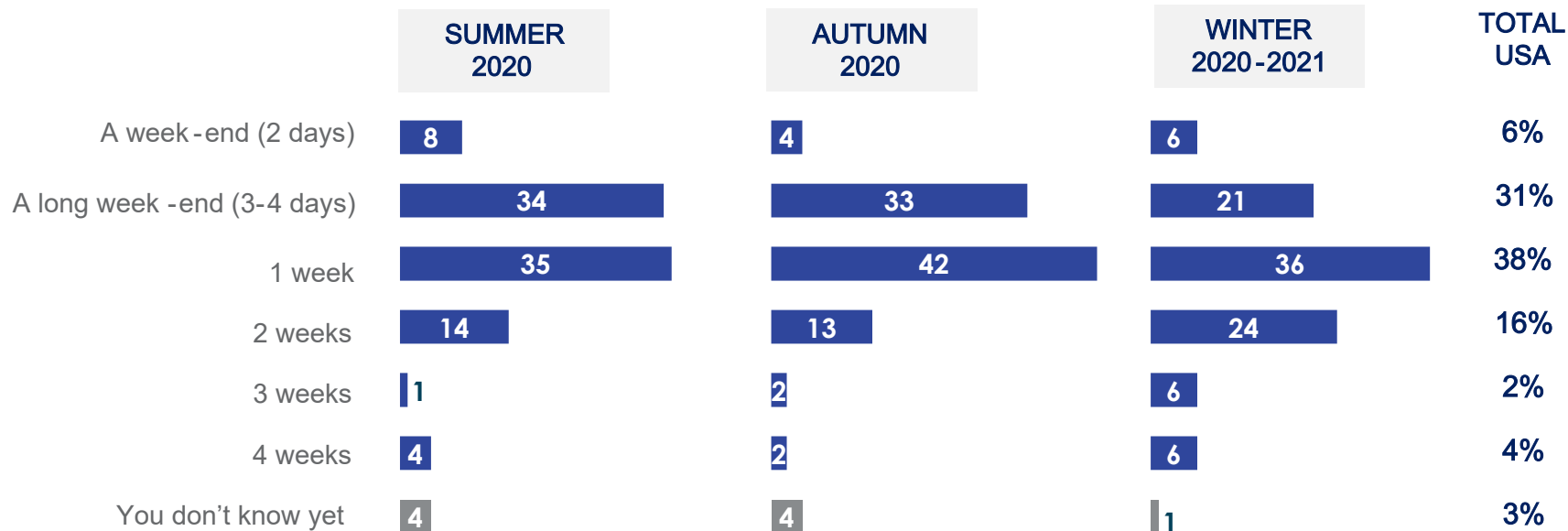
C6. Ideally, what kind of trip are you planning for SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021 ?
Base : Those who have planned a main trip (per period)

LOCATIONS OF TRIPS PLANNED FOR THE MAIN LEISURE TRIP IN 2020



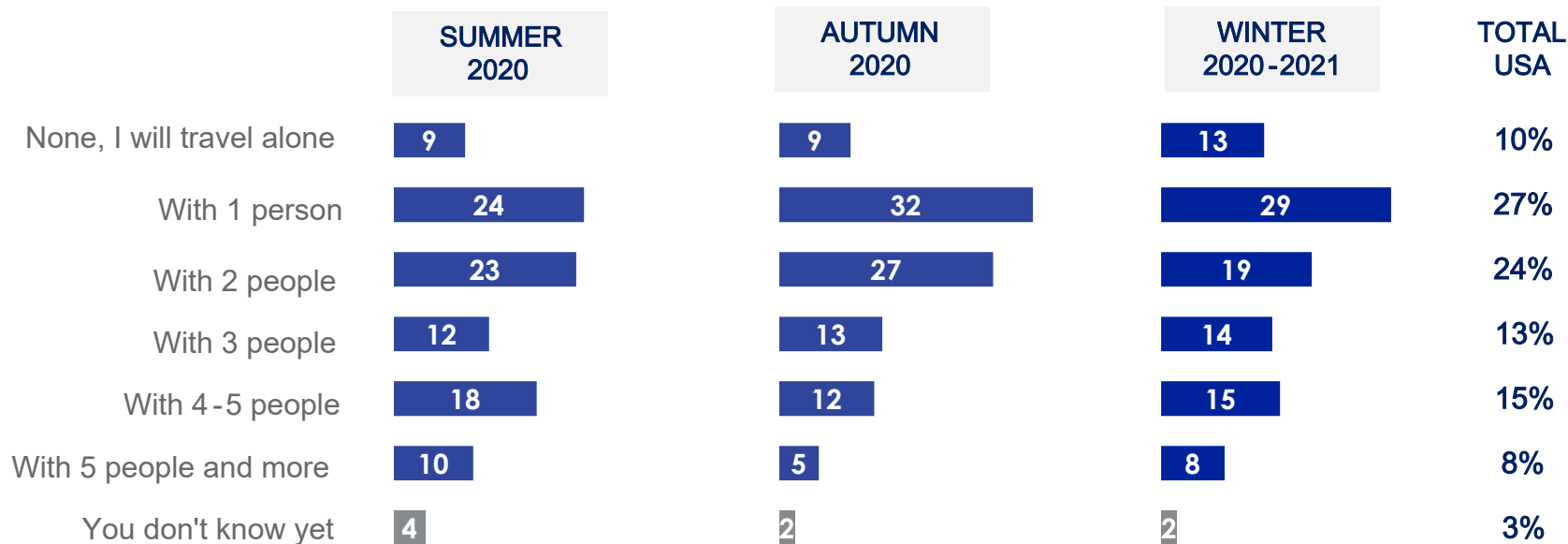
C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:
Base : Those who have planned a main trip (per period)
REMINDER FROM 2019 HOLIDAY BAROMETER : Where are you thinking of going for your holidays this summer ?
Base: Intend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

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



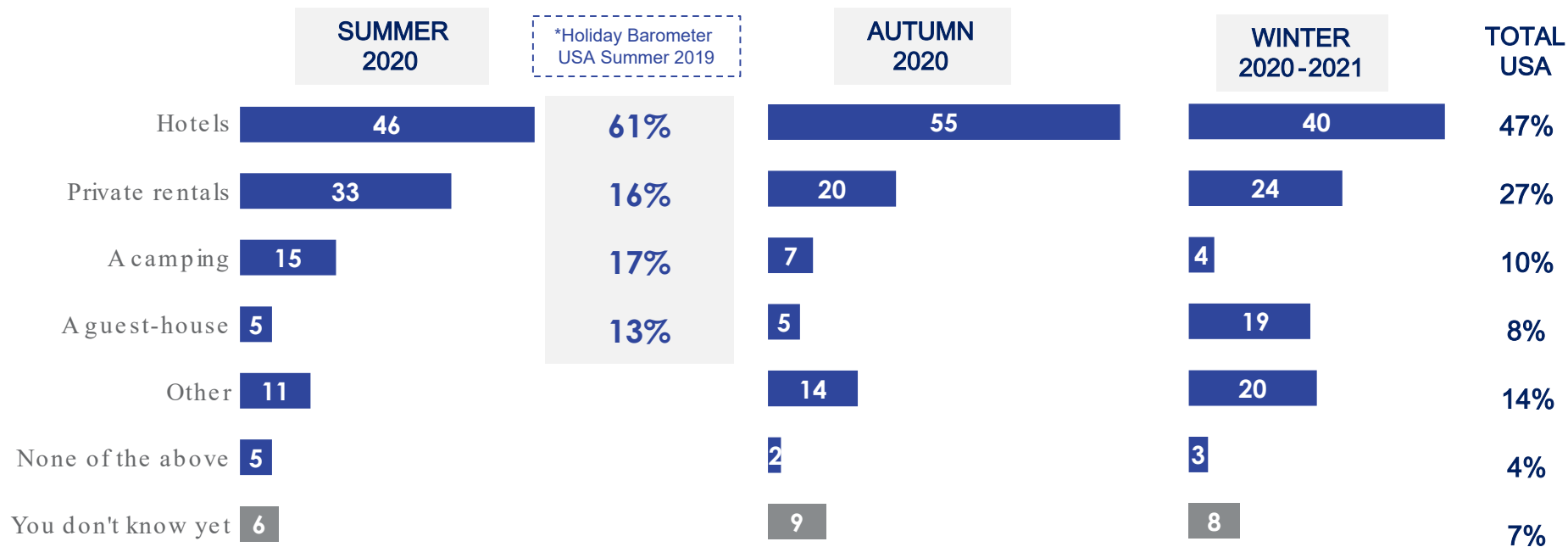
C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?
Base : Those who have planned a main trip (per period)

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)

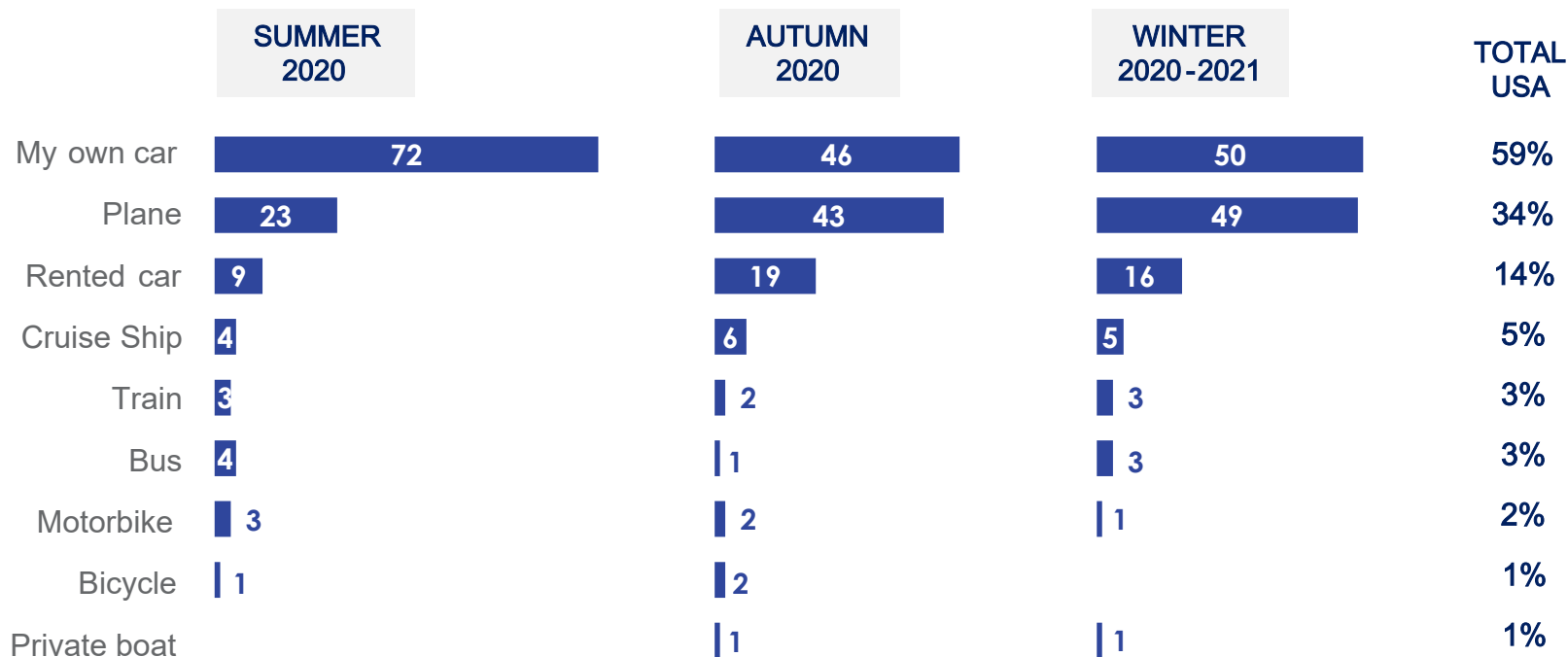
TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020



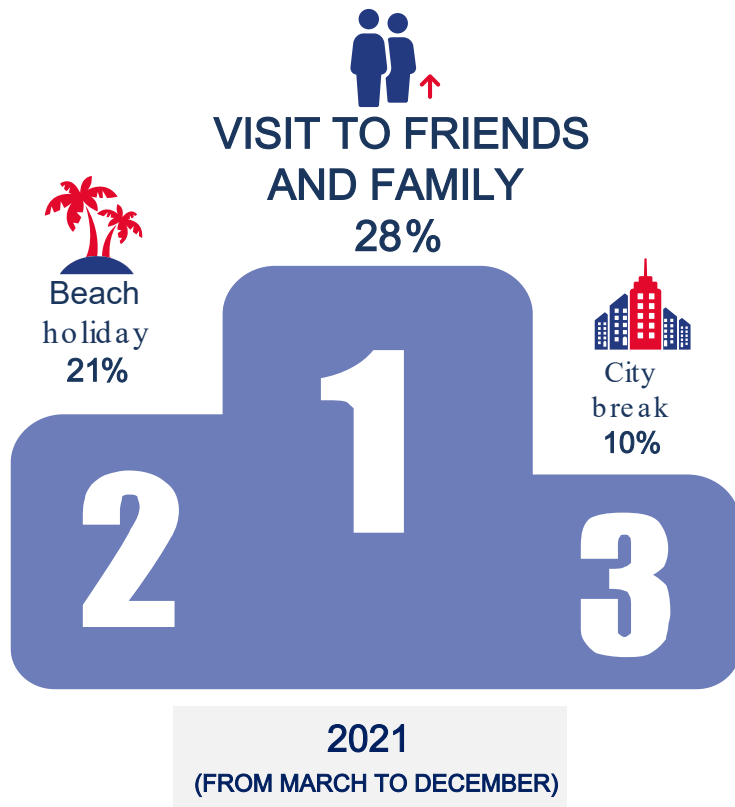
C10. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:
Base : Those who have planned a main trip (per period)

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

MODES OF TRANSPORTATION PREFERRED FOR THE MAIN LEISURE TRIP IN 2020



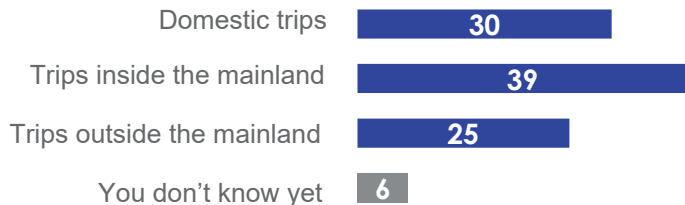
HOLIDAY PREFERENCES FOR 2021 (FROM MARCH TO DECEMBER)



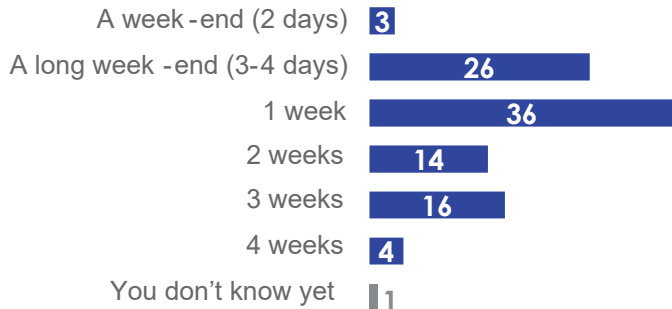
TRENDS FOR 2021(FROM MARCH TO DECEMBER)



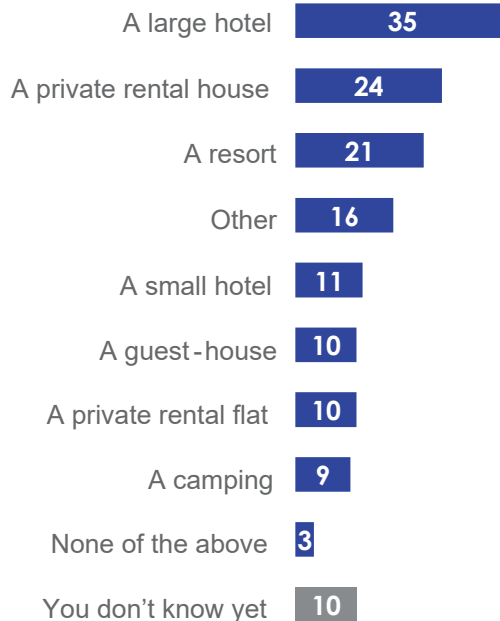
LOCATION



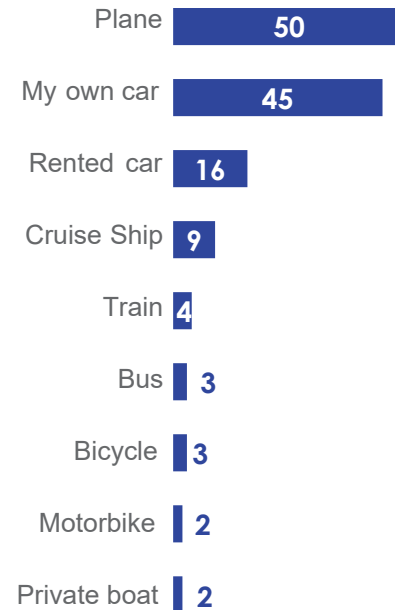
DURATION



TYPE OF LOCATION



TRANSPORTATION



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

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?

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

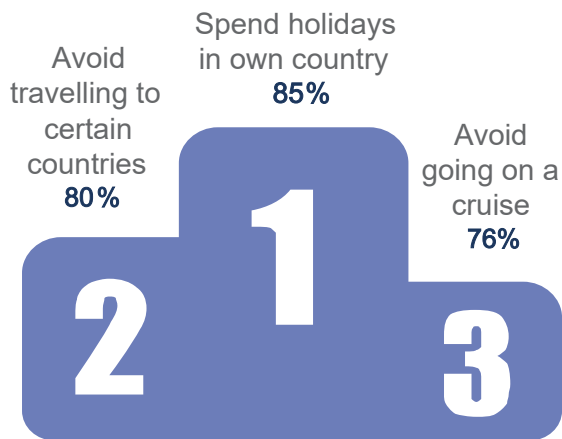
C10bis. Why will you choose this mode of transportation? Is it because:

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

GAME CHANGERS



TOP 3 RISK-FREE BEHAVIORS



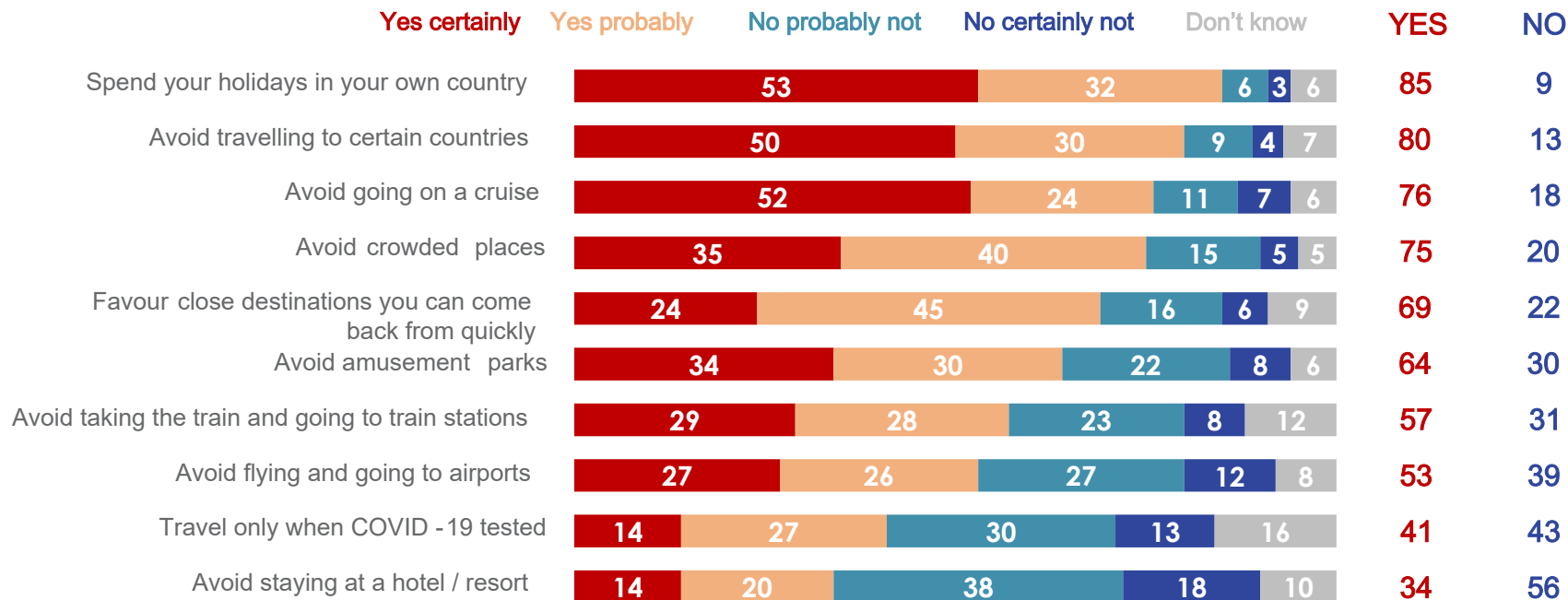
	TOTAL USA	YOUNG (<30 YO)	>65 YO	MAIN TRIP IN THE US	MAIN TRIP OUTSIDE AMERICA
Spend your holidays in your own country	85%	82%	88%	92%	44%
Avoid travelling to certain countries	80%	78%	91%	85%	63%
Avoid going on a cruise	76%	77%	82%	77%	61%
Avoid crowded places	75%	78%	80%	78%	62%
Favour close destinations you can come back from quickly	69%	67%	71%	73%	41%
Avoid amusement parks	64%	55%	76%	64%	58%
Avoid taking the train and going to train stations	57%	56%	65%	59%	41%
Avoid flying and going to airports	53%	56%	58%	53%	11%
Travel only when COVID-19 tested	41%	46%	50%	31%	31%
Avoid staying at a hotel / resort	34%	36%	34%	28%	15%

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...

25%

Covered by
a travel insurance

EUROPE

51%

IN THE FUTURE...

35%

Planned to purchase
travel insurance

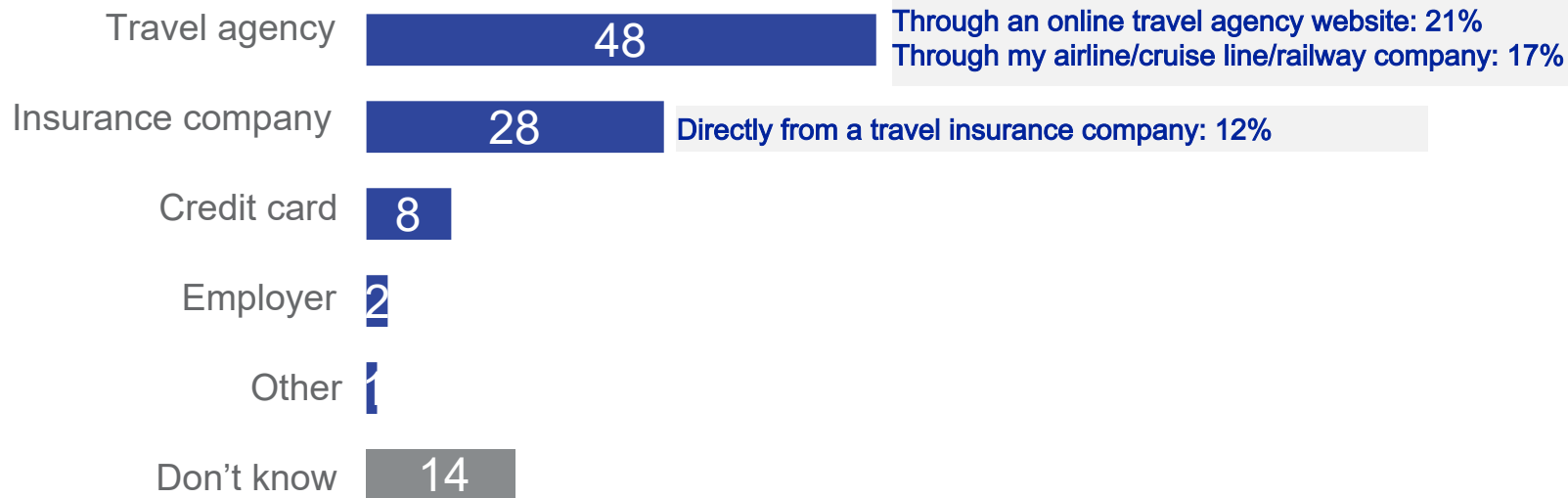
EUROPE

51%

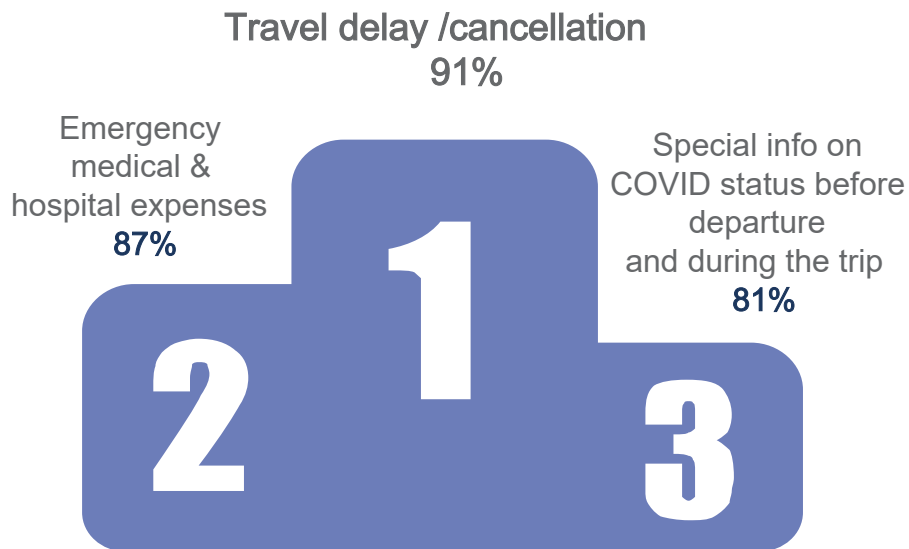
WAYS OF GETTING TRAVEL INSURANCE



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



TOP 3 TRAVEL INSURANCE COVERAGE



IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWINGS



Very important

Quite important

Not very important

Not important at all

Don't know

YES

NO

Travel delay or cancellation



91

8

Emergency medical & hospital expenses



87

11

Special info on COVID status before departure
and during the trip



81

17

Luggage and personal effects



79

18

Adapted offers for the COVID pandemic



79

14

Personal liability



78

15

Pre-trip medical and safety advice about
destination



75

22

Teleconsultation with doctor



59

36

4.

COVID RELATED PRODUCTS



TOP 3 COVID-19 RELATED SERVICES



WILLING TO PAY FOR AT
LEAST ONE SERVICE

78%

Including

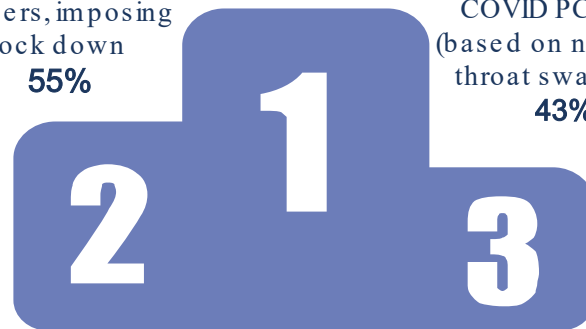
32% Certainly

FIRST 3 SERVICES

If sick, support for the
14 days after return
/ Coverage for
repatriation if holiday
location is closing
borders, imposing
lock down
55%

Coverage
for trip
extension
56%

COVID PCR test
(based on nose and
throat swab test)
43%



FEELINGS OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLED



Much safer

Quite safer

Not very safer

Not safer at all

Don't know

YES

NO

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



72

18

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



64

20

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)



62

24

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