FACTUM

Global Travel Resilience: Demand Holds Firm Amid Economic and Geopolitical Pressures

Nearly Three-Quarters (74%) of Global Citizens Plan Summer Travel

Toronto, On, May 20, 2026 — Despite ongoing geopolitical uncertainty and rising economic pressures, global travel demand remains resilient. Nearly three-quarters (74%) of global citizens plan to take a summer holiday, according to an Allianz Partners Global Travel Confidence Index survey conducted by Ipsos.

While 77% of travelers express concern about rising travel costs, the intention to travel remains strong, underscoring the continued importance of vacations for wellbeing and personal renewal.

Where the World Is Headed: Domestic Travel Leads the Way

Travel patterns in 2026 show a clear shift toward closer-to-home destinations. More than two in five (42%) global travelers plan to vacation within their own country. Among these domestic trips, 31% favor coastal, countryside, or mountain destinations, while 19% opt for city breaks.

Domestic travel is particularly prevalent in India (60%), China (59%), the United States (51%), Spain (49%), and France (41%). In contrast, travelers in Switzerland (61%), the Netherlands (55%), Great Britain (42%), and Germany (41%) are more likely to travel abroad.

Notably, 41% of respondents in France indicate they do not plan to travel this summer, a higher share than in other surveyed markets.

Experience Remains Central: Travelers Seek Meaningful Activities

Beyond destination choices, travelers are increasingly motivated by meaningful experiences. More than half (54%) of global travelers plan to attend concerts, festivals, or performing arts events during their trips, while 41% intend to attend sporting events.

Additionally, over one-third (36%) are considering cruises, river journeys, or expedition-style travel, highlighting a continued preference for immersive and activity-rich holidays.

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The Cost Equation: Travel Adjusts but Endures

Rising costs are reshaping travel decisions, but not diminishing demand. The desire to travel remains deeply rooted: 82% of global travelers say they "desperately need a holiday," and 86% continue to prioritize taking at least one annual vacation. Rather than opting out, consumers are adjusting their behaviour. A majority (61%) report cutting non-essential spending in other areas, while nearly half (47%) are scaling back elements of their trips to make travel more affordable.

Spending expectations nonetheless remain substantial. The anticipated global average spend is €1,572* per person, with wide variation across markets. Switzerland leads at €2,580, followed by the United States (€2,261) and China (€2,221). Mid-tier markets include the Netherlands (€1,752), Great Britain (€1,489), and Germany (€1,431), while France (€991), Italy (€986), and Spain (€952) fall toward the lower end, alongside India (€800).

Global Uncertainty Shapes Travel Decisions

Uncertainty continues to shape decision-making. Half of global travelers (51%) report reconsidering destinations in response to border controls and travel advisories, while concerns about geopolitical instability are cited by 72%. Personal safety also weighs heavily, with two-thirds (66%) expressing concern about risks such as crime, scams, or terrorism.

Operational risks add another layer of complexity. Delays and cancellations concern 59% of travelers, while 57% worry about falling ill abroad and 56% about medical emergencies. Practical disruptions—such as lost luggage (52%) or missing travel documents (50%)—further contribute to a heightened sense of vulnerability. These concerns are especially pronounced among younger travelers, who consistently report higher levels of anxiety than their older counterparts across health, safety, and logistical risks.

Travel Insurance: Supporting Confidence in an Uncertain Environment

In this environment, travel insurance has taken on an increasingly central role in enabling confidence. Among those who choose to purchase coverage, motivations are consistent: 85% cite peace of mind and protection against unforeseen disruption, while 84% value the ability to recover costs from cancellations. Insurance is often integrated early into the travel process, with 42% of travelers purchasing coverage at the time of booking.

Purchasing patterns show a preference for direct engagement, with 31% buying insurance from insurers themselves, followed by online travel platforms and agencies (both 13%). Banks, airlines, and comparison websites play smaller roles. At the same time, a meaningful minority remains without coverage: 20% of travelers do not plan to purchase insurance, and a further 13% are undecided.

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** Currency conversions to Euros were conducted as of April 2026*

About the Study

These are the findings of an Ipsos survey conducted on behalf of Allianz Partners that was fielded between March 20 and April 14, 2026. A total of n=11,010 adults over 18 participated in the survey conducted by Ipsos on its Global Advisor online platform. The sample includes China (n=1001), France (n=1001), Germany (n=1001), Great Britain (n=1001), India (n=1001), Italy (n=1001), the Netherlands (n=1001), Spain (n=1001), Switzerland (n=1001), and the United States (n=2001). Quotas and weighting were used to ensure the sample's composition reflects that of the population according to census parameters. Overall, the survey has a credibility interval of +/- 1.1 per cent 19 times out of 20. However, due to differences in sample sizes, the credibility interval is larger for individual countries; for example, +/- 3.8% for countries with a sample size of 1001, and +/- 2.7% for the United States with a sample size of 2001 of what the results would have been had all adults 18+ been surveyed.

The samples from China and India predominantly represent urban, educated, and/or affluent groups rather than the general population. Therefore, the survey results from these countries should be interpreted as reflecting the perspectives of the more 'connected' segments of their societies. These 'connected' individuals generally have greater access to technology, information, and global communication networks, and are more engaged with digital platforms and international trends.

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ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

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