

# Future of Travel – BELGIUM

IPSOS / EUROP ASSISTANCE BAROMETER

6th JULY, 2020 



# METHODOLOGY BELGIUM



## Sample

In Belgium, 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 12th and June 22nd 2020



## Method of data collection

Online survey

# BELGIUM



## INTEND TO GO ON HOLIDAYS IN 2020

**82%**

*Vs Europe 81%*

**HOLIDAYS IN THEIR OWN COUNTRY 69%**

*Vs Europe 77%*

**HOLIDAYS ABROAD 54%**

*Vs Europe 35%*

**HOLIDAY PREFERENCES\***

**Beach holidays\* 27%**



**BUDGET\* €1,788**

*Vs Europe €1,604*

## MODES OF TRANSPORTATION

**SUMMER 2020**

**OWN CAR 69%**

**PLANE 26%**

**TRAIN 11%**

**TOTAL 2020-2021**

**OWN CAR 60%**

**PLANE 32%**

**TRAIN 11%**

## ACCOMODATION

**HOTEL 43%**

**PRIVATE RENTALS 32%**

**CAMPING 11%**

## INSURANCE COVERAGE

**IN THE PAST 55%**

*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

74%

## ECONOMIC IMPACT

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

30%

## GOT SICK / IMPACTED BY COVID-19

Oneself or family

20%

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



BELGIUM

HOLIDAY PLANS IN 2020

82%

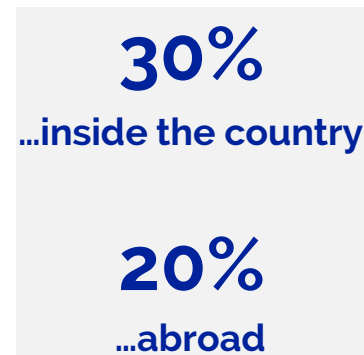
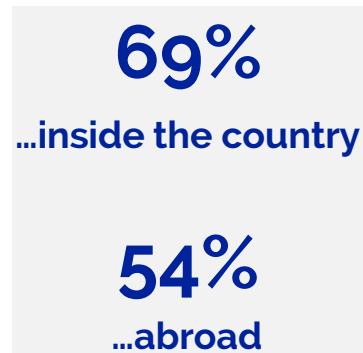
Will *certainly or probably* travel...



INCLUDING

40%

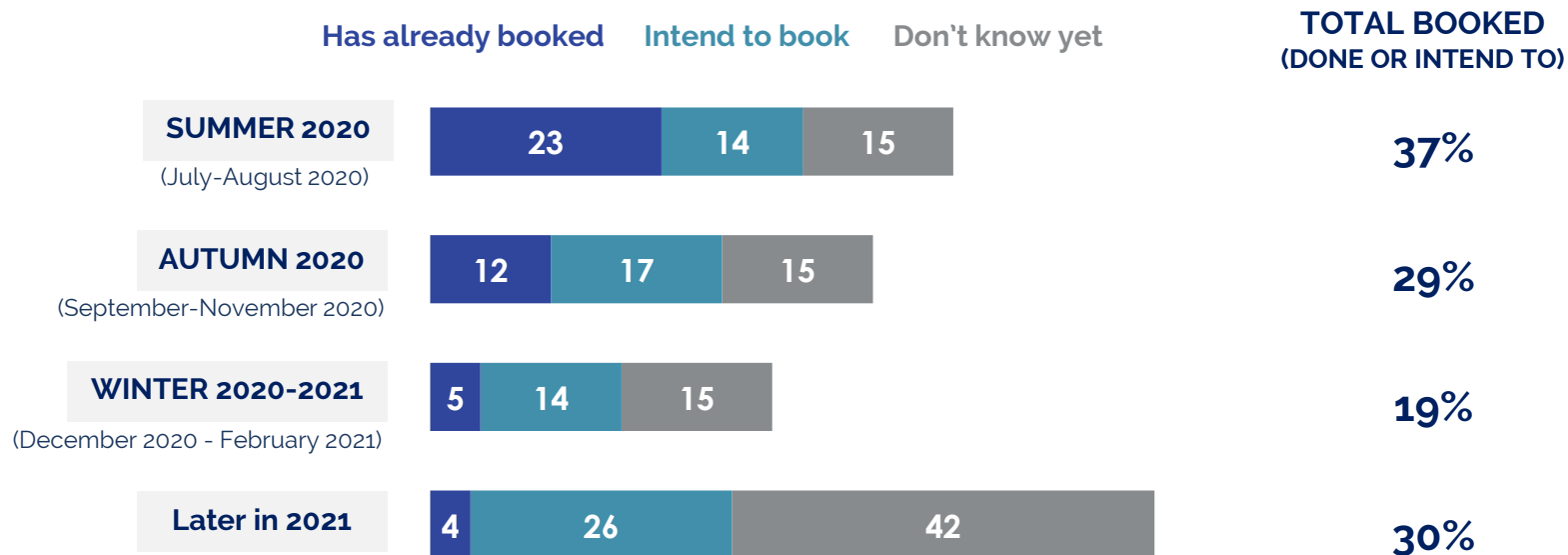
who will *certainly* travel...



# 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 BELGIUM

€ 1,788

*Vs European Average*

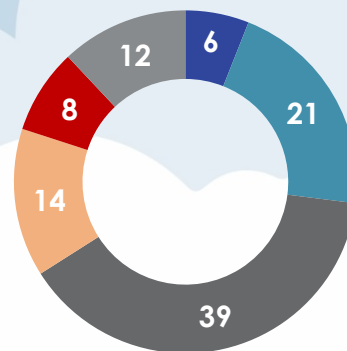
 € 1,604

*Vs Belgium Summer  
Holiday Barometer 2019*

€ 2,242

DECREASED  
19%

INCREASED  
24%



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>	

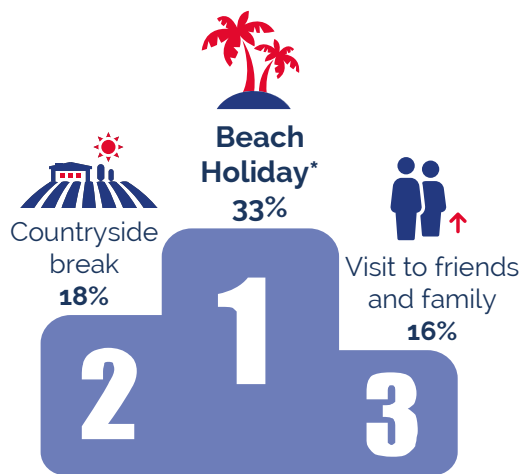
Exchange rate applied : 1 USD = €0,888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0,029

# HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP

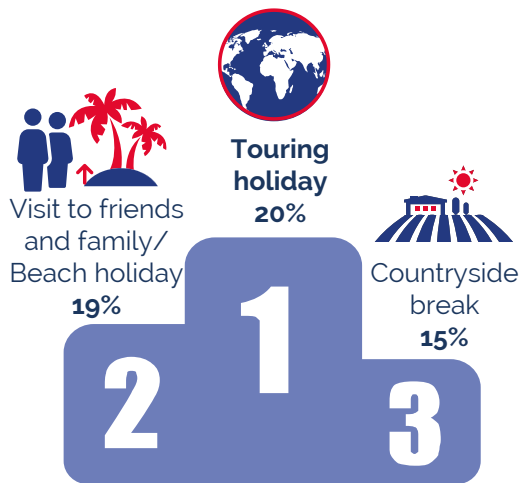


	 TOTAL IN BELGIUM	 EUROPEAN AVERAGE	<i>SINGLE TRAVELERS</i>	<i>2 PEOPLE TRAVELLING</i>	<i>AT LEAST 3 PEOPLE</i>
 Beach holidays	27%	29%	16%	24%	31%
 Visit to friends and family	18%	20%	33%	18%	15%
 Countryside break	15%	14%	8%	16%	17%
 Touring holidays	15%	12%	15%	16%	15%
 City break	11%	12%	16%	15%	8%

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



**SUMMER 2020**



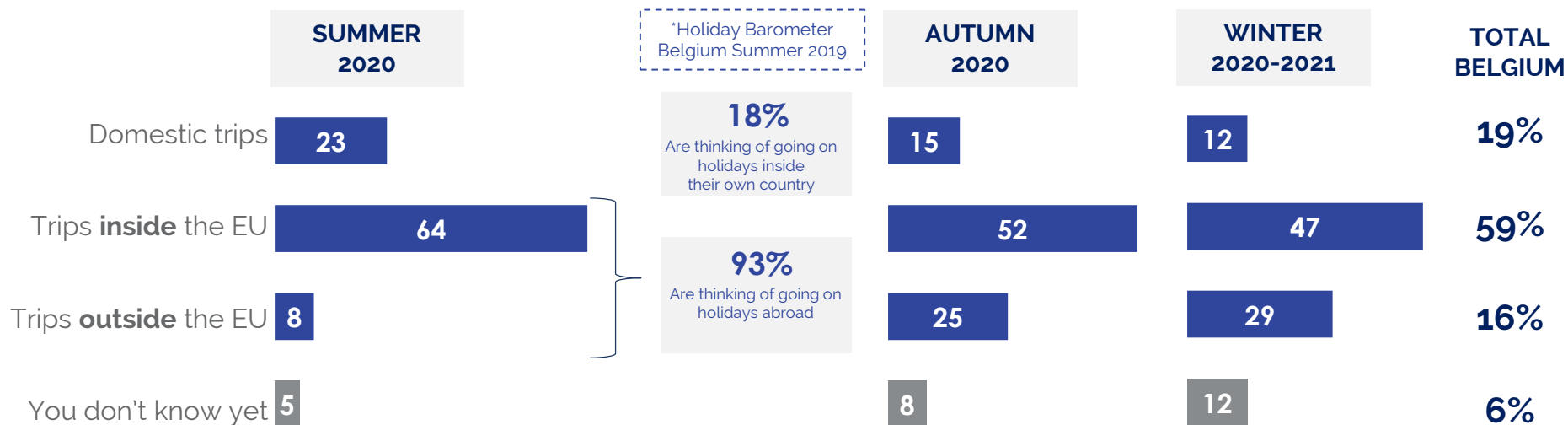
**AUTUMN 2020**



**WINTER 2020-2021**

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

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



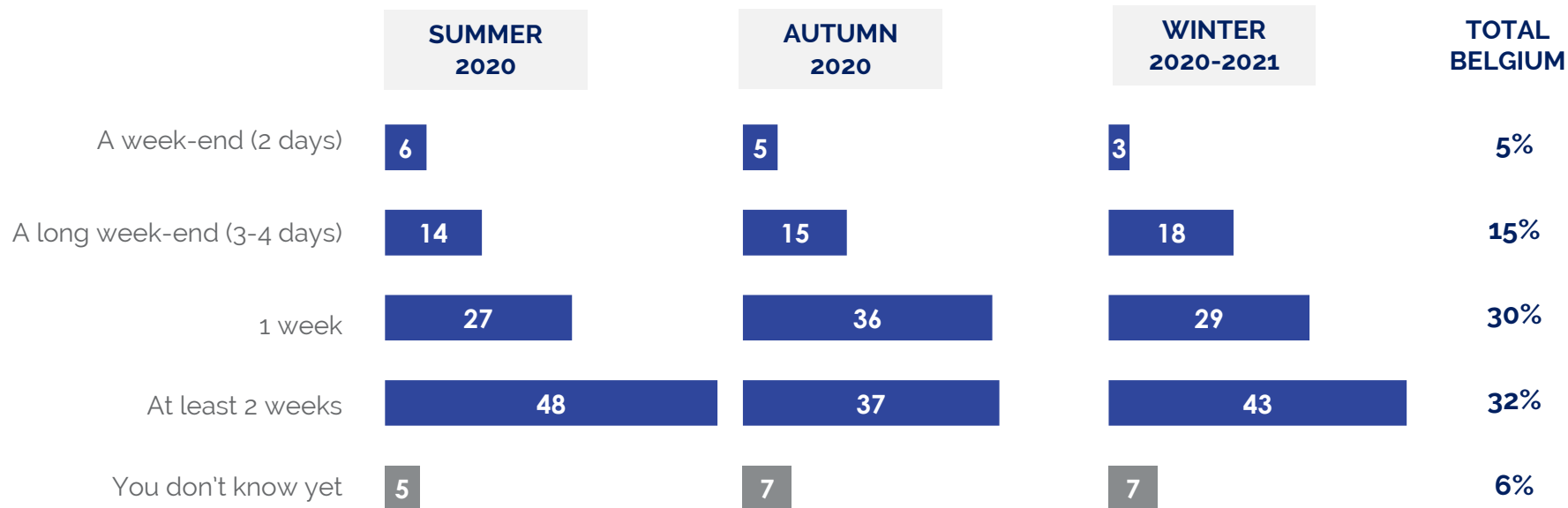
C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:

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 ?

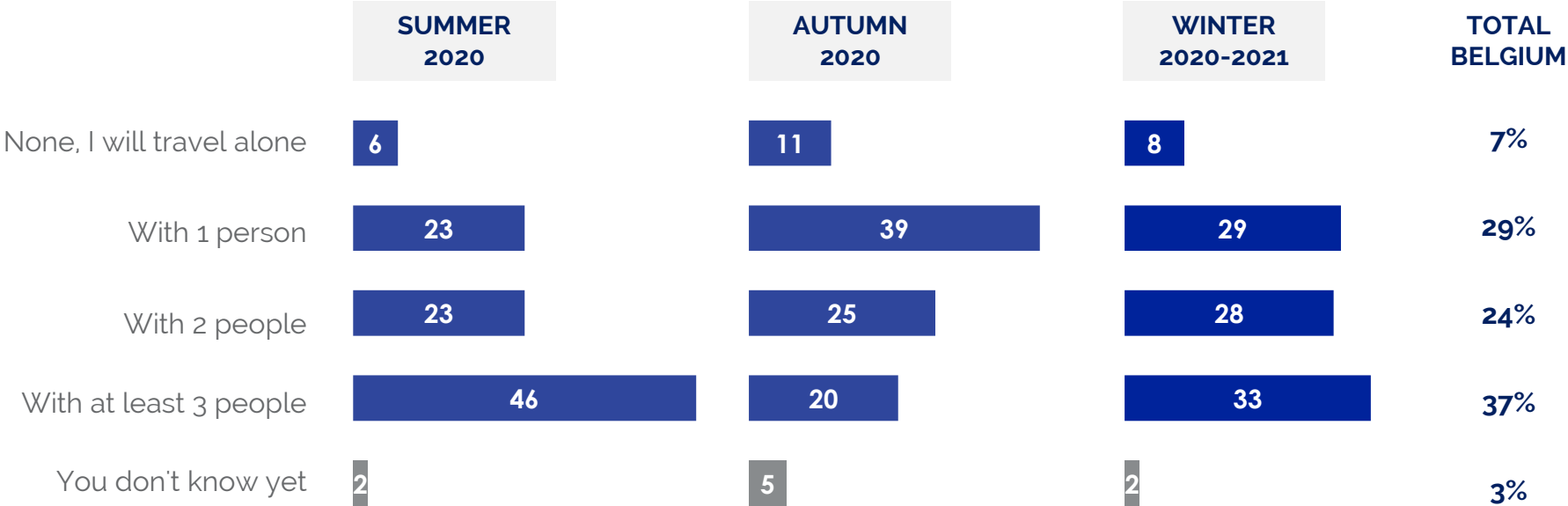
Base: Intend to go on Holiday this summer 2019

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

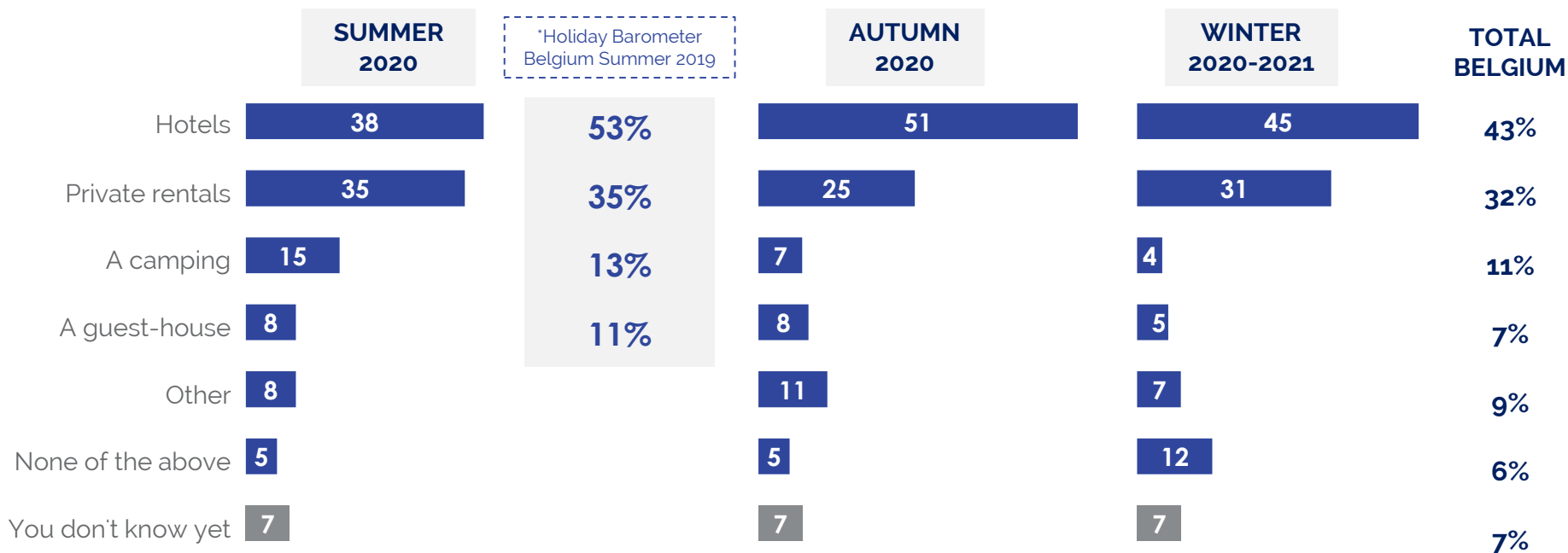


C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering?  
Base : Those who have planned a main trip (per period)

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



# TYPE OF HOUSING FOR THE MAIN LEISURE TRIP IN 2020



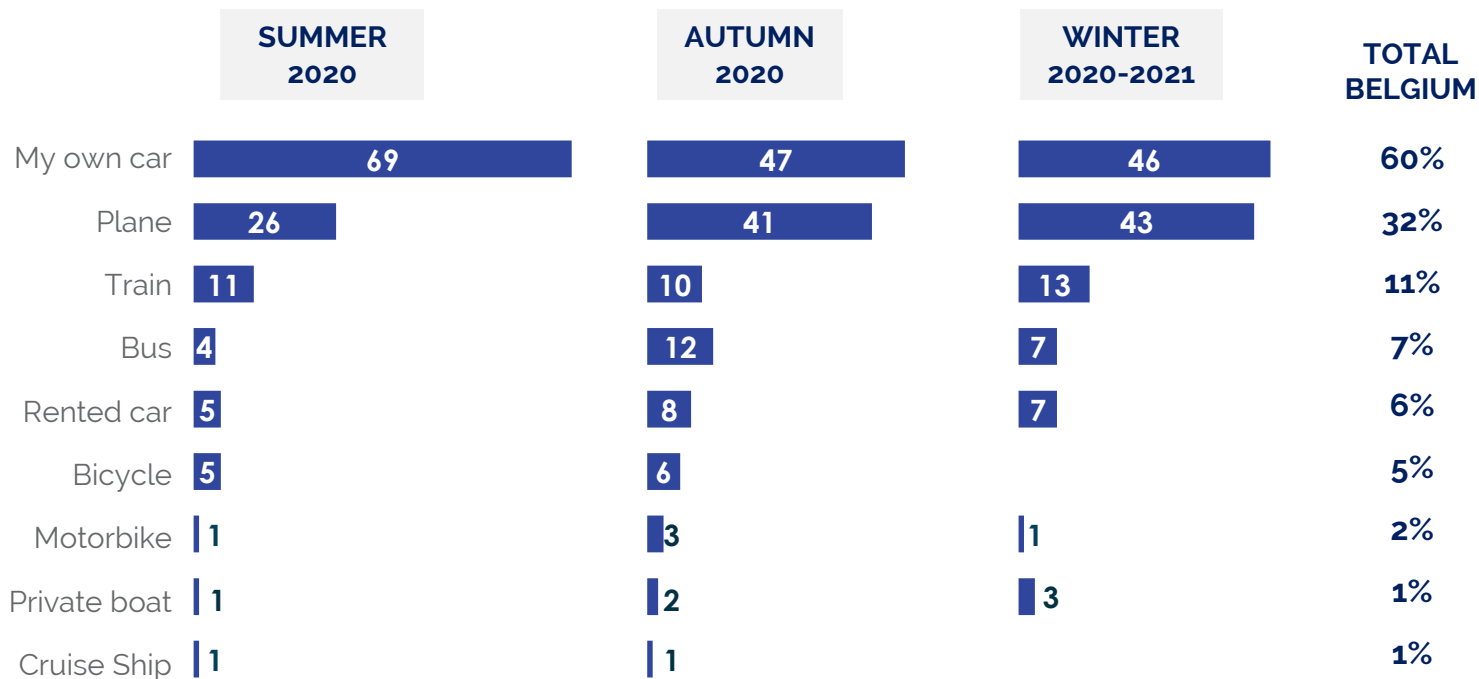
C10. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you considering staying in:  
Base : Those who have planned a main trip (per period)

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

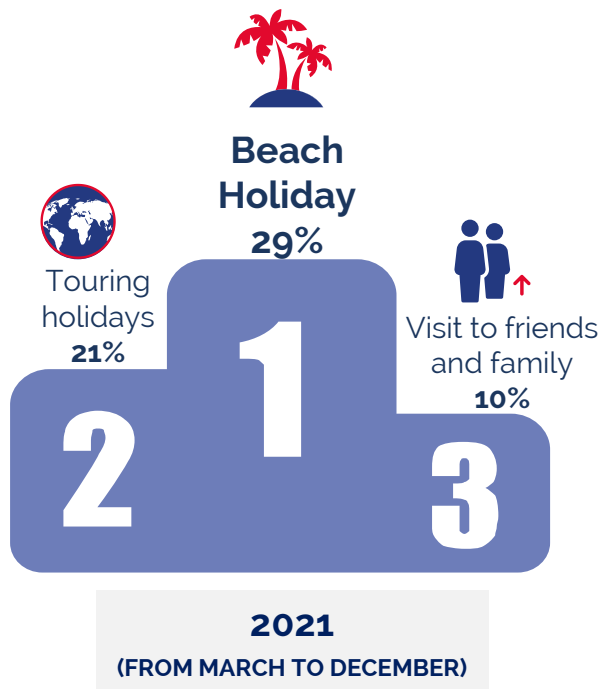
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# MODES OF TRANSPORTATION PREFERRED FOR THE MAIN LEISURE TRIP IN 2020



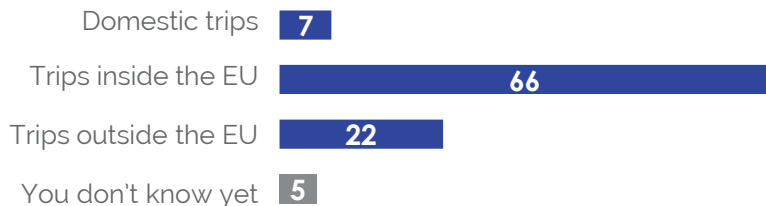
# HOLIDAY PREFERENCES FOR 2021 (FROM MARCH TO DECEMBER)



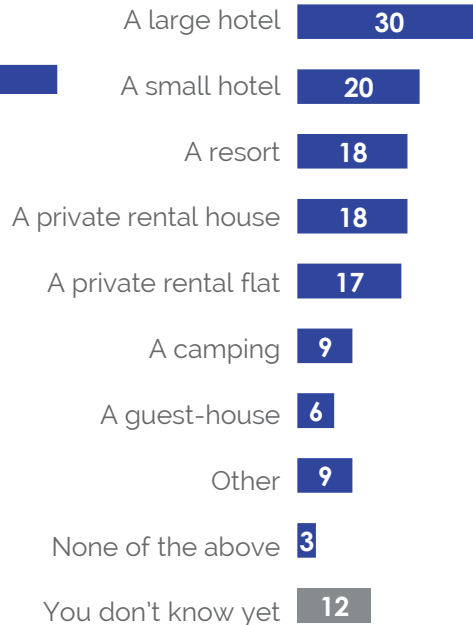
# TRENDS FOR 2021 (FROM MARCH TO DECEMBER)



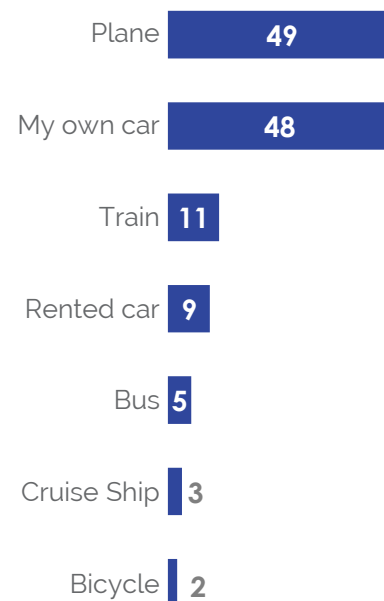
## LOCATION



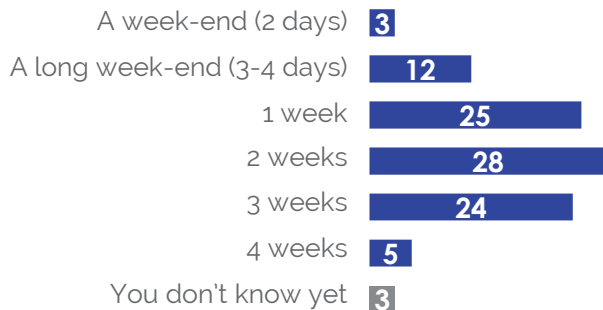
## TYPE OF LOCATION



## TRANSPORTATION



## DURATION

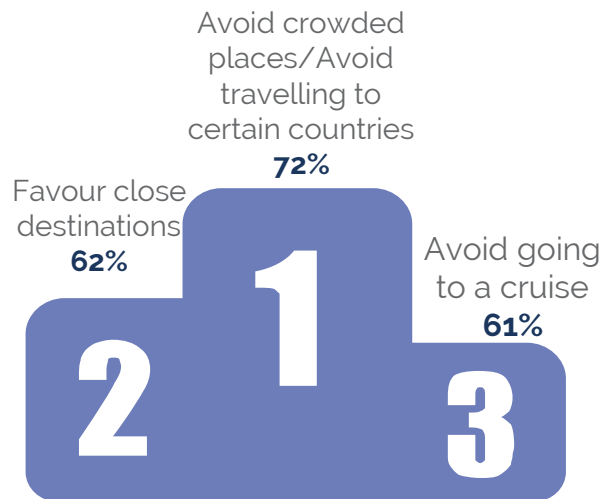


C7. Ideally, for your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, are you planning:  
 C8. For your main leisure trip you would like to plan in SUMMER 2020 / AUTUMN 2020 / WINTER 2020-2021, what is the average trip duration you are considering  
 C10. Ideally, 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



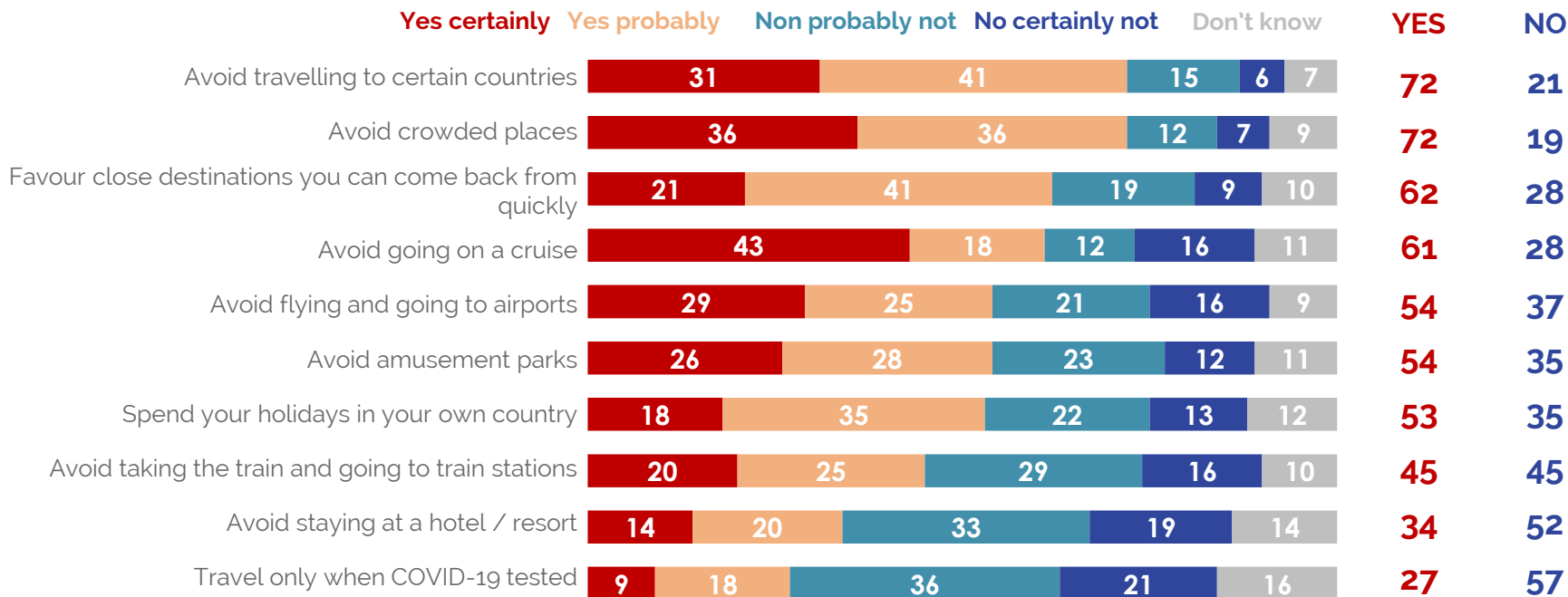
	TOTAL BELGIUM	<35YO	>65 YO	MAIN TRIP IN BELGIUM	MAIN TRIP OUTSIDE EU
Avoid crowded places	72%	60%	82%	85%	56%
Avoid travelling to certain countries	72%	62%	80%	87%	60%
Favour close destinations you can come back from quickly	62%	54%	64%	86%	32%
Avoid going on a cruise	61%	54%	65%	72%	42%
Avoid flying and going to airports	54%	45%	58%	76%	14%
Avoid amusement parks	54%	43%	69%	55%	37%
Spend your holidays in your own country	53%	51%	51%	93%	25%
Avoid taking the train and going to train stations	45%	37%	46%	53%	34%
Avoid staying at a hotel / resort	34%	31%	29%	34%	21%
Travel only when COVID-19 tested	27%	23%	35%	25%	23%

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...

**55%**

Covered by  
a travel insurance

**EUROPE**

**51%**

IN THE FUTURE...

**54%**

Planned to purchase  
travel insurance

**EUROPE**

**51%**

# WAYS OF GETTING TRAVEL INSURANCE



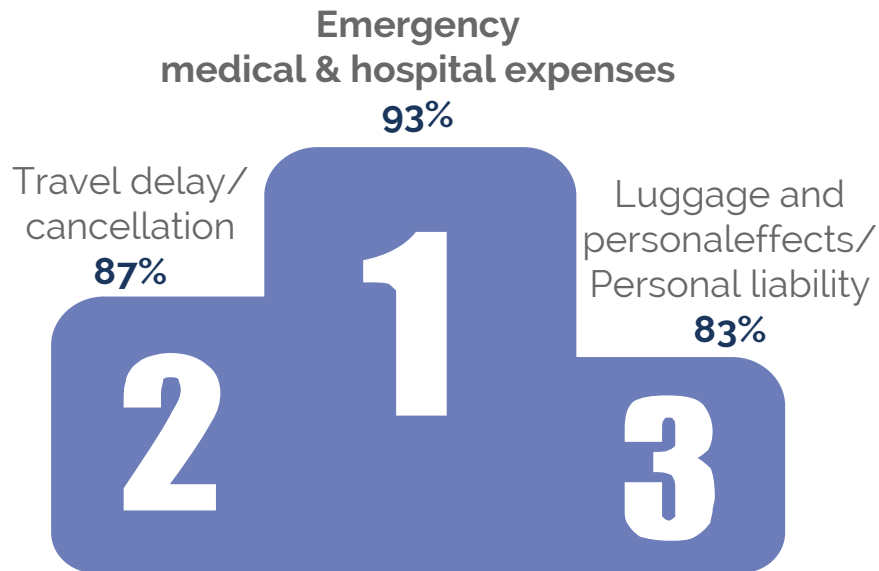
## Planned to buy their travel insurance in the future through...



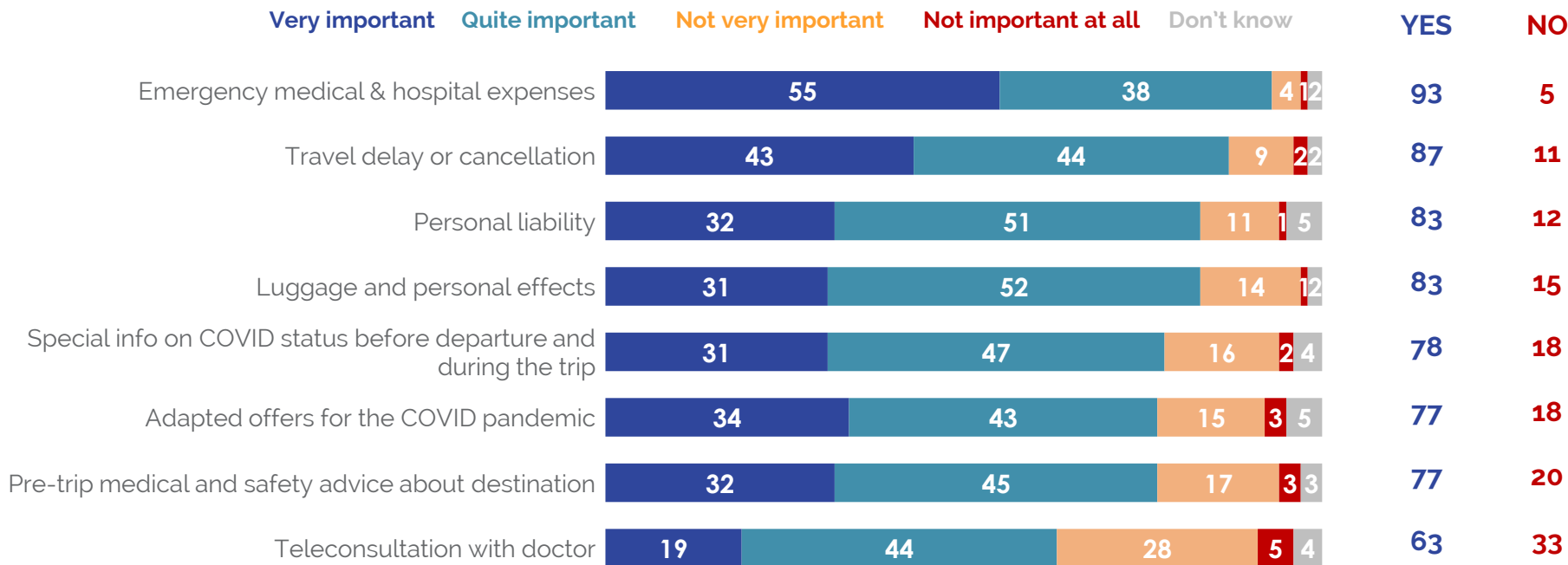
**Through an insurance agent / broker: 24%**  
**Directly from a travel insurance company: 21%**



# TOP 3 TRAVEL INSURANCE COVERAGE



# 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

76%

Including

35% Certainly

FIRST 3 SERVICES

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

55%

Coverage for  
trip extension  
51%

If sick, support  
for the 14 days  
after return  
49%



# FEELINGS OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLED



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# GAME CHANGERS

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