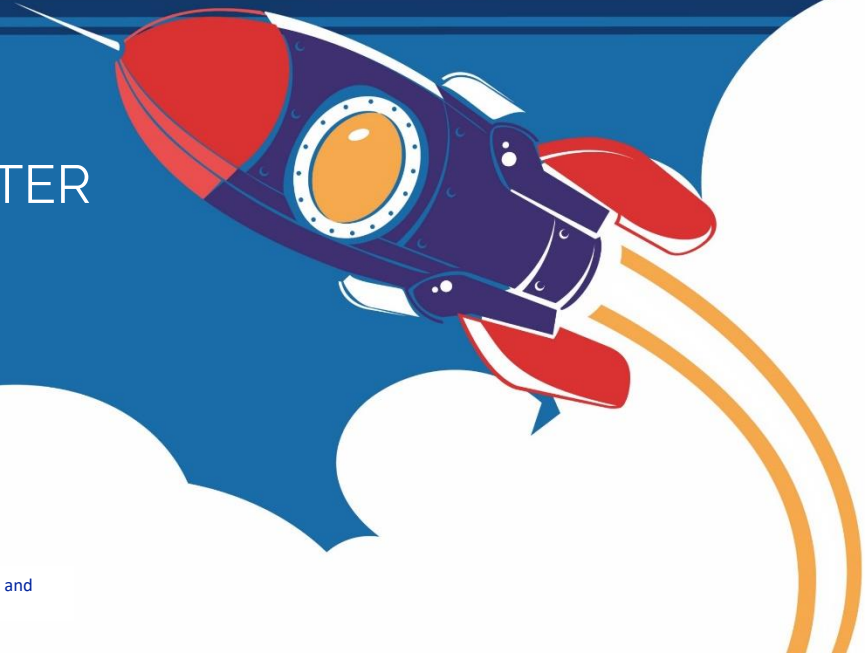


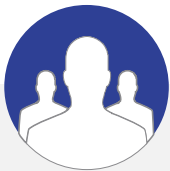
# Future of Travel

IPSOS / EUROP ASSISTANCE BAROMETER  
**GLOBAL RESULTS**

30th JULY, 2020



# METHODOLOGY



## Sample

In each country, the survey was conducted among 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 5th (UK) and June 26th 2020 (Thailand)



## Method of data collection

Online survey

# GLOBAL RESULTS

INTEND TO GO ON HOLIDAY IN 2020 **81%**

ALREADY BOOKED OR INTEND TO *for SUMMER 2020*  
(July-August) **35%**

HOLIDAY IN THEIR OWN COUNTRY IN 2020 **77%**

HOLIDAY ABROAD IN 2020 **32%**

HOLIDAY PREFERENCES FOR MAIN TRIP IN 2020\*  
Beach holiday **26%** 

TOP 3 RISK FREE BEHAVIOURS

Avoid travelling to certain countries **79%**

Avoid crowded places **77%**

Spend holidays in own country **76%**

## COUNTRIES WITH THE HIGHEST SCORES

 89%  87%  85%

 45%  39%

 88%  85%  84%

 54%  46%

 37%  34%

 85%  84%

 87%  86%  85%

 88%  86%  85%

## COUNTRIES WITH THE LOWEST SCORES


 72%  73%  73%

 26%  30%

 68%  69%  70%

 15%  18%  21%

  17% →  Touring 26%

 21% →  Visiting family and friends 36%

 72%  76%  76%

 60%  63%  72%

 53%  65%  70%

# GLOBAL RESULTS

## MODES OF TRANSPORTATION

SUMMER 2020

CAR 70%

PLANE 20%

TRAIN 13%

2021

CAR 51%

PLANE 44%

TRAIN 17%

## ACCOMMODATION

SUMMER 2020

HOTELS 43%

PRIVATE RENTALS 33%

GUEST-HOUSE 12%

2021

HOTELS 59%

PRIVATE RENTALS 27%

GUEST-HOUSE 14%

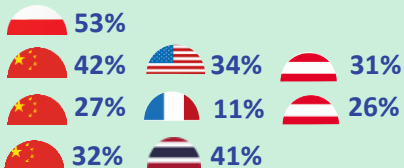
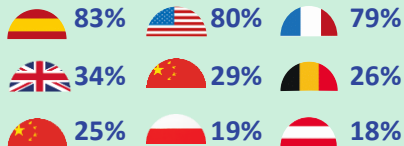
## INSURANCE COVERAGE

IN THE PAST 48%

IN THE FUTURE 54%

## COUNTRIES WITH THE HIGHEST SCORES

SUMMER 2020

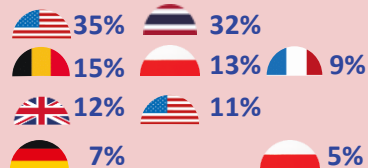
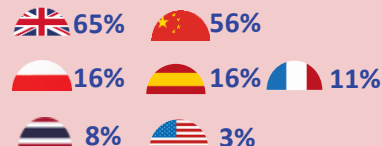


IN THE FUTURE



## COUNTRIES WITH THE LOWEST SCORES

SUMMER 2020



# 1.

## IMPACT OF COVID-19 ON CURRENT PERSONAL SITUATION



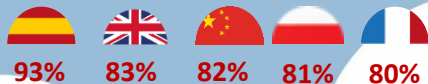
# CONTEXT: THE COVID-19 SHOCK

## CONCERNED ABOUT THEIR HEALTH

His/her own health / his/her family's health

74%

COUNTRIES WITH THE HIGHEST SCORES



COUNTRIES WITH THE LOWEST SCORES



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

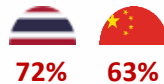
Your health/ Your family and friends' health / The economy of your country / Your economic situation / Your job

Base : All

## ECONOMIC IMPACT

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

41%



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

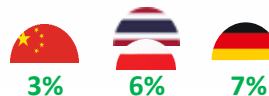
You were dismissed from your job / Your work activity has decreased / You lost a part of your revenue / You may lose your job or stop your activity in the next few months / None of the above

Base : All

## GOT SICK / IMPACTED BY COVID-19

Himself/herself or family/friends

13%



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

You got sick with the virus without having to go to the hospital / You got sick with the virus and had to go to the hospital / One of your family members / close friends got sick / You didn't get sick and none of your family members / close friends got sick / You prefer not to answer

Base : All

# 2.

## TRAVELLING IN A POST-COVID WORLD



# A GREAT DESIRE TO TRAVEL IN 2020

## INTENT TO TRAVEL IN 2020 IF AUTHORISED

*Will certainly or probably travel...*

...inside their own country  
**ONLY IN CERTAIN REGIONS** **74%**

...inside their own country  
**EVERYWHERE** **64%**

...abroad, **IN BORDER COUNTRIES** **29%**

...abroad, **OUTSIDE BORDER COUNTRIES** **20%**

**GLOBAL**

**81%**

**77%**  
...inside their country



**32%**  
...abroad



*Total > 100 as one respondent can go abroad AND in his own country*

*C2. If you are authorised to travel in 2020, will you travel to any of the following?*

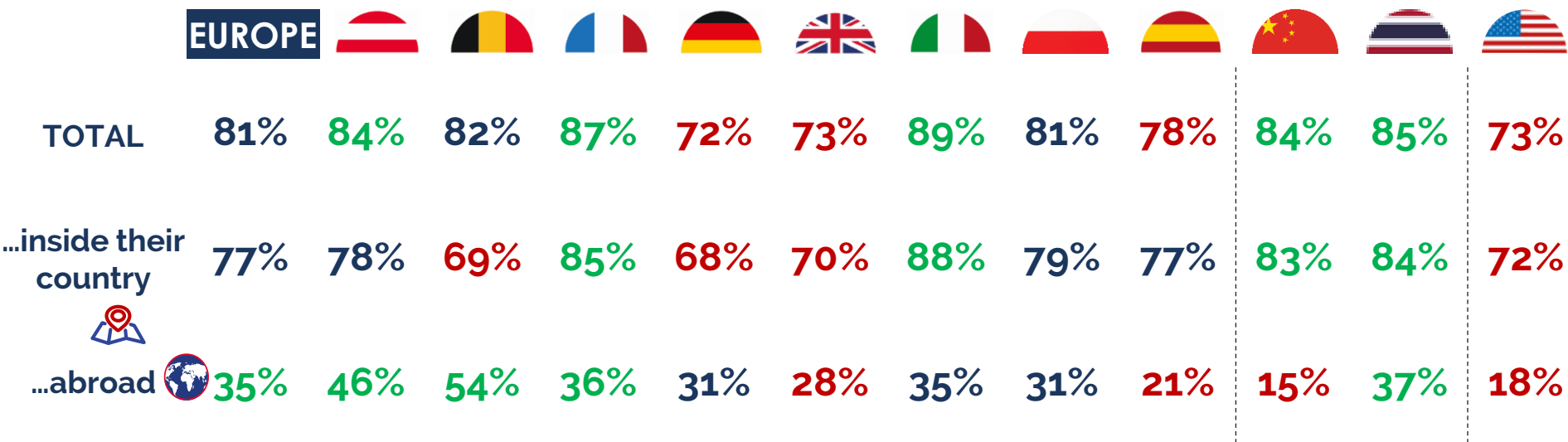
*Base : All*

**GAME CHANGERS**



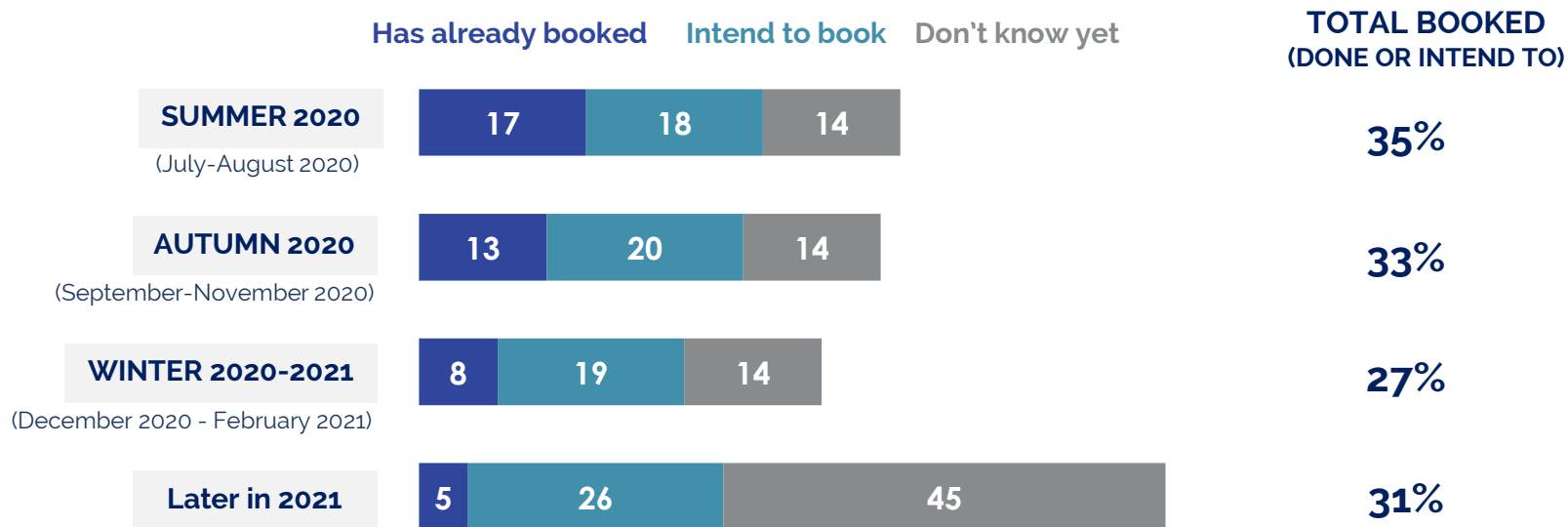
# IN MOST COUNTRIES, MORE THAN 8 OUT OF 10 PEOPLE WANT TO TRAVEL IN 2020. ONLY GERMANY, THE UK AND THE US ARE LOWER THAN AVERAGE

## INTENT TO TRAVEL IN 2020 IF AUTHORISED



# DESPITE A GREAT DESIRE TO TRAVEL, HUGE UNCERTAINTY REMAINS REGARDING FUTURE TRIPS: MANY RESPONDENTS DON'T KNOW IF THEY ARE GOING TO BOOK A HOLIDAY IN THE COMING MONTHS, OR HAVEN'T BOOKED ANYTHING

## BOOKING PER PERIOD



*Difference c.f. 100 is due to people who said they would not travel for this period*

C4. Have you made any 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

# THE AUSTRIANS AND ITALIANS ARE THE ONES WHO HAVE BOOKED THE MOST, CONTRARY TO PEOPLE IN THE UK AND US

## BOOKING FOR SUMMER 2020



Already booked or intend to

35%

36%

37%

Don't know yet

14%

15%

12%

Already booked or intend to



45%



37%



35%



33%



26%



39%



38%



33%



37%



36%



30%

Don't know yet

17%

15%

16%

11%

11%

16%

18%

13%

10%

14%

14%

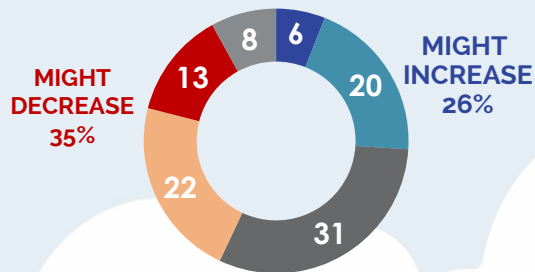
C4. Have you made any travel reservations for the following period(s)? Yes, you booked a trip(s) before the lock-down/Yes, you booked a trip(s) during the lock-down/Yes, you booked a trip(s) after the lock-down/You haven't booked a trip(s) yet, but you intend to /You won't travel during this period/You 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: GREAT DISPARITY ACROSS AND WITHIN COUNTRIES



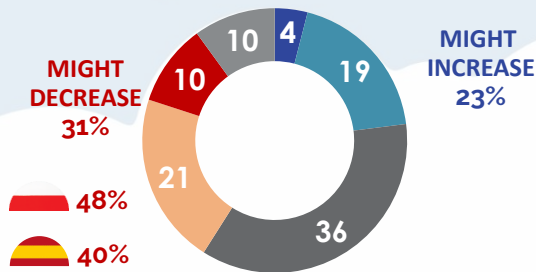
## GLOBAL AVERAGE

€ 1,506



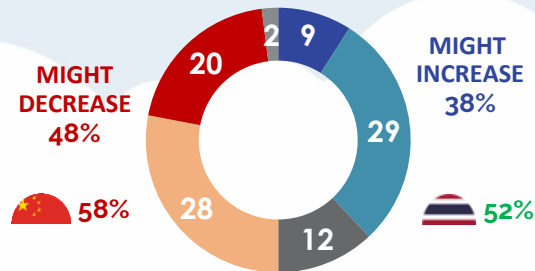
## EUROPEAN AVERAGE

€ 1,604



## ASIAN AVERAGE

€ 910



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

Exchange rate applied: 1 USD = €0.888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0.029

C13. What do you consider as your full budget for your next main trip?  
 C12. How might your budget for your main leisure trip change? Will it:  
 Base : Intend to travel in 2020/2021

# OVERALL BUDGETS SEEM TO HAVE GONE DOWN COMPARED TO 2019 (HOWEVER THE QUESTION EVOLVED BETWEEN THE 2 SURVEYS)

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

Exchange rate applied : 1 USD = €0.888, 1 GBP = €1.11, 1 PLN = €0.225, 1 CNY = €0.126, 1 THB = €0.029
















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, accommodations, food, leisure activities etc.)

Base : intend to go on Holiday this summer

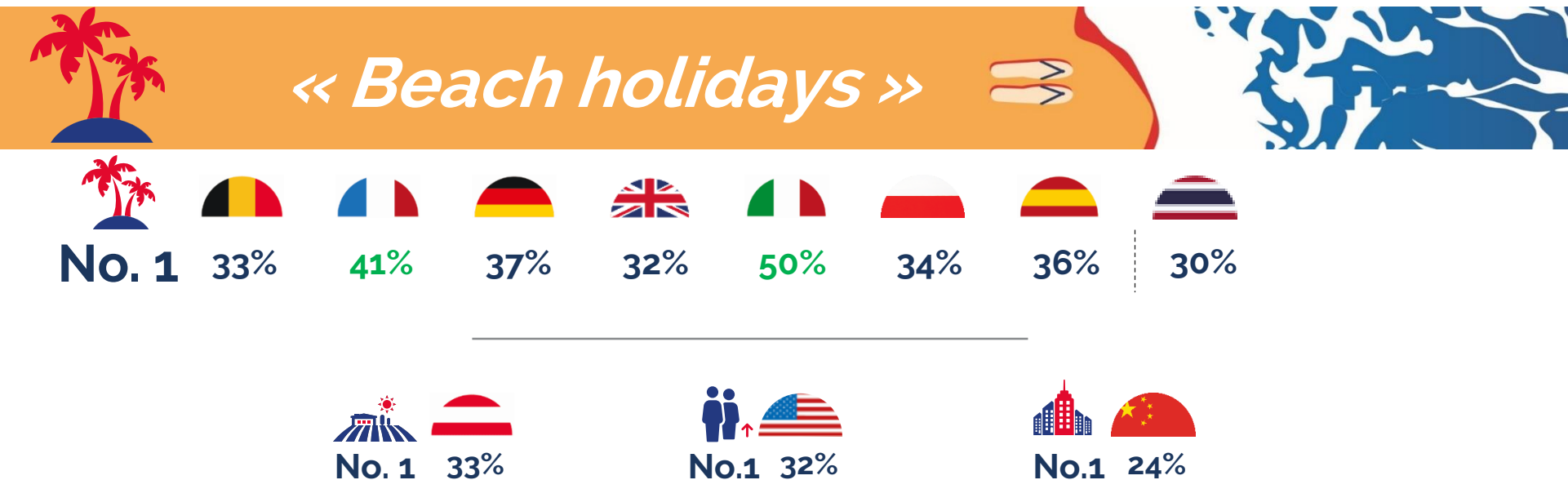
# HOLIDAY PREFERENCES IN 2020 FOR THE MAIN LEISURE TRIP: THE BEACH, ESPECIALLY FOR EUROPEAN COUNTRIES

	 TOTAL GLOBAL	 EUROPEAN AVERAGE	 ASIAN AVERAGE	 TOTAL USA	 SINGLE TRAVELLER	 2 PEOPLE TRAVELLING	 AT LEAST 3 PEOPLE TRAVELLING	 FAMILIES
 Beach holiday	26%	29%	17%	21%	12%	23%	29%	29%
 Visiting friends and family	21%	20%	20%	36%	43%	22%	18%	20%
 Touring holidays	15%	12%	26%	4%	9%	13%	16%	15%
 Countryside break	14%	14%	15%	12%	9%	15%	15%	15%
 City break	13%	12%	15%	8%	14%	14%	12%	11%
 Winter-ski holiday	2%	2%	4%	2%	1%	2%	3%	3%
 Cruise	2%	2%	2%	3%	1%	2%	2%	2%

C6. Ideally, what kind of trip are you planning?  
Base: Those who have planned a main trip (in total)

# THE SEASIDE DOMINATES SUMMER DESTINATIONS FOR EUROPEANS AS THE MAIN LEISURE TRIP. THE CHINESE PREFER CITY BREAKS, AND AMERICANS VISITING FAMILY

## SUMMER HOLIDAY PREFERENCES FOR MAIN LEISURE TRIP

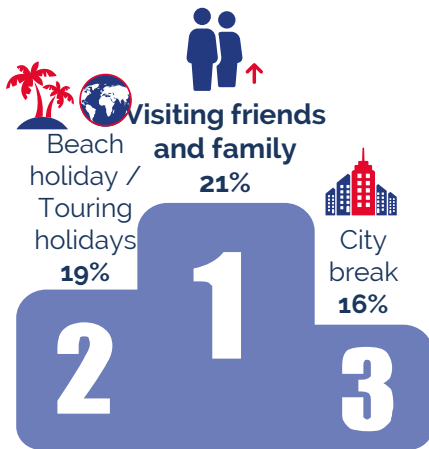


# BEACH HOLIDAYS IN SUMMER, VISITING FRIENDS AND FAMILY IN AUTUMN AND WINTER

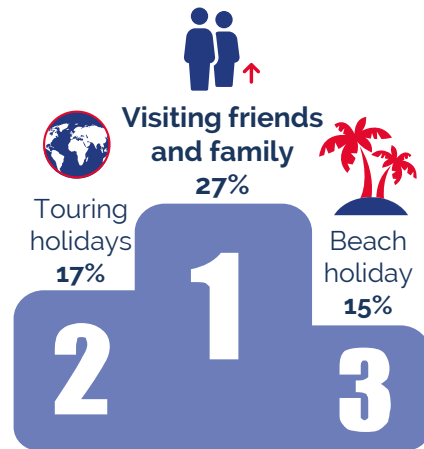
## HOLIDAY PREFERENCES PER PERIOD FOR THE MAIN LEISURE TRIP



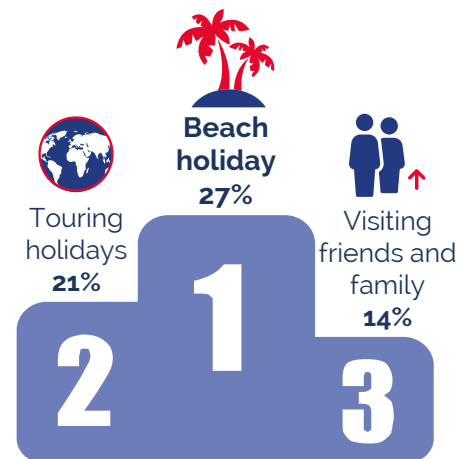
SUMMER 2020



AUTUMN 2020



WINTER 2020-2021

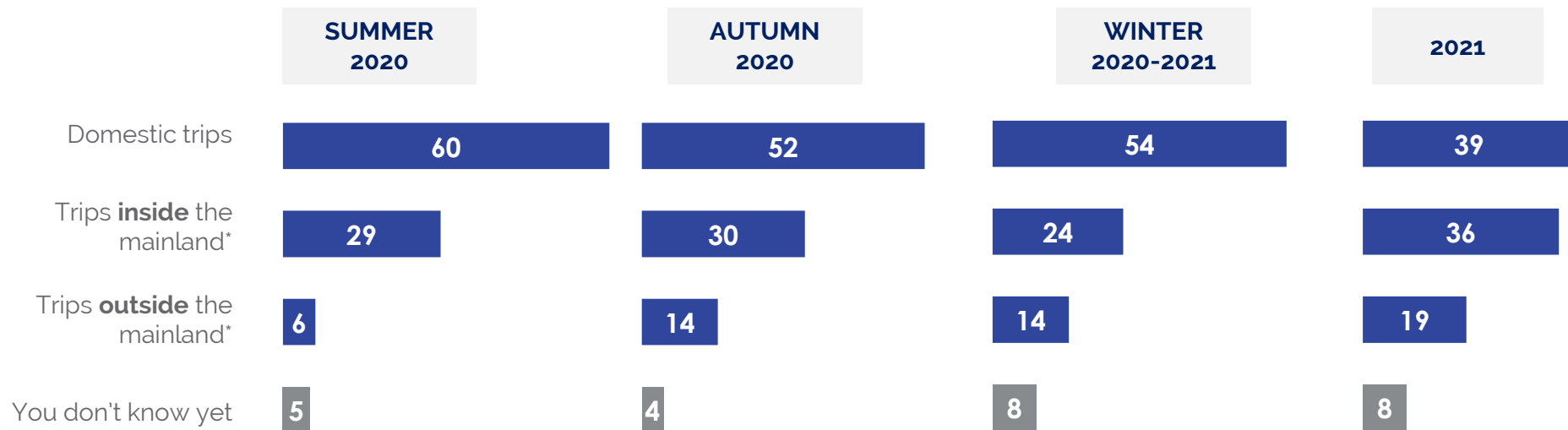


2021  
(FROM MARCH TO DECEMBER)



# DOMESTIC TRIPS ARE WIDELY PREFERRED THIS SUMMER, BUT PEOPLE INTEND TO GO ABROAD MORE AND MORE OVER TIME

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



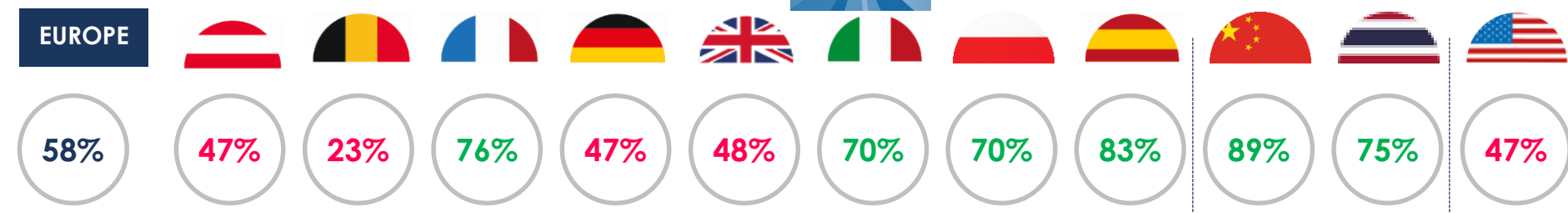
\*Europe for European countries, Asia for Asian countries, and America for US

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

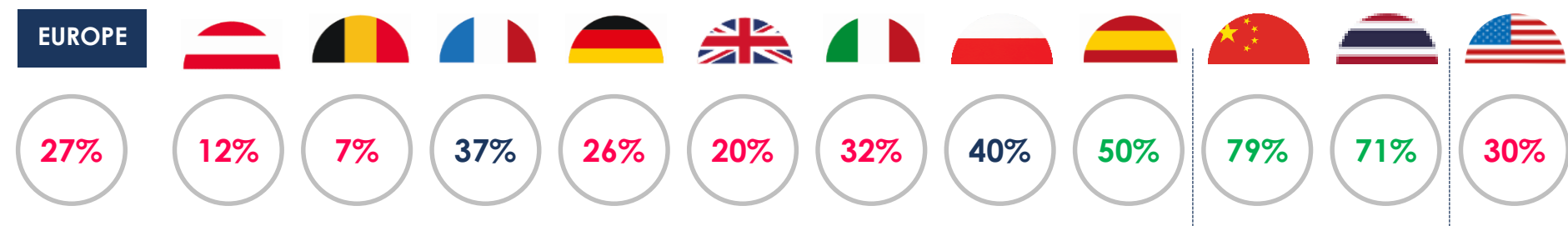
Base : Those who have planned a main trip (per period)

**DOMESTIC TRIPS ARE WIDELY PREFERRED THIS SUMMER, BUT PEOPLE INTEND TO GO ABROAD MORE AND MORE OVER TIME. ONLY THE CHINESE AND THAIS CONTINUE TO WIDELY CHOOSE DOMESTIC TRIPS IN 2021**

## LOCATION OF MAIN SUMMER TRIP – % DOMESTIC TRIPS



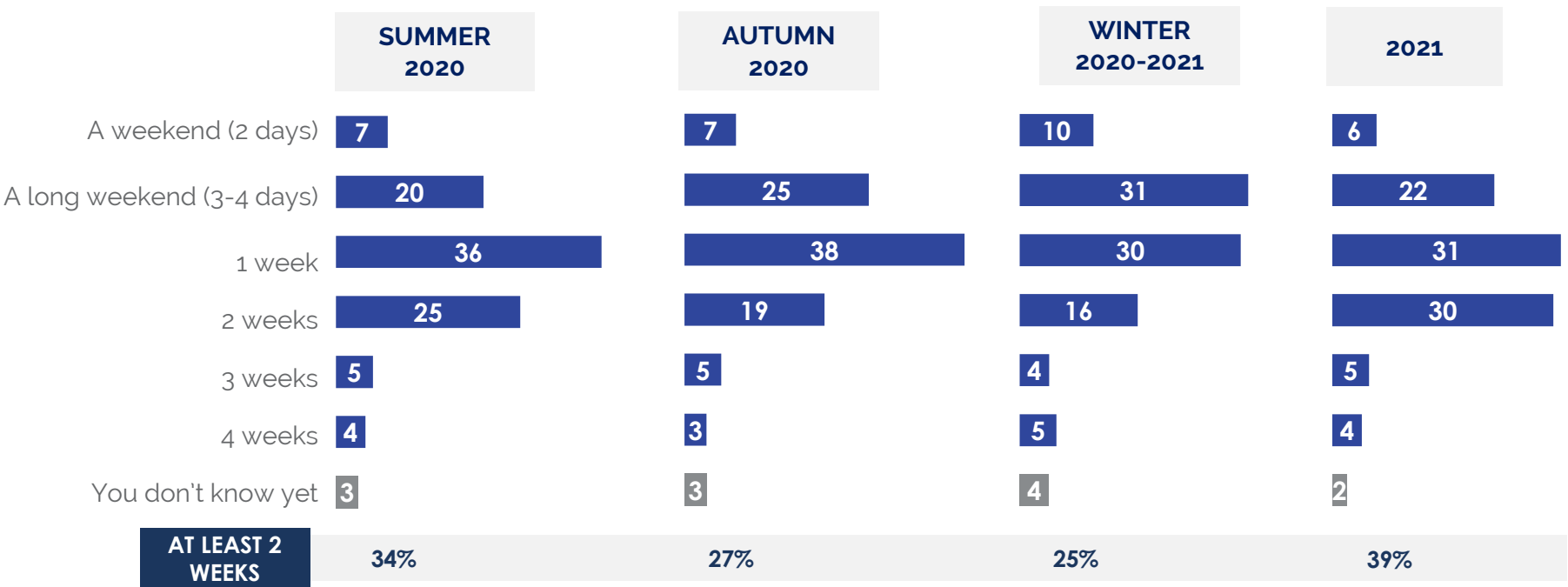
## LOCATION OF MAIN 2021 TRIP – % DOMESTIC TRIPS



C7. Ideally, for the main leisure trip that 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)

# MAIN SUMMER LEISURE TRIP IS PLANNED TO BE LONGER THAN FOR AUTUMN AND WINTER

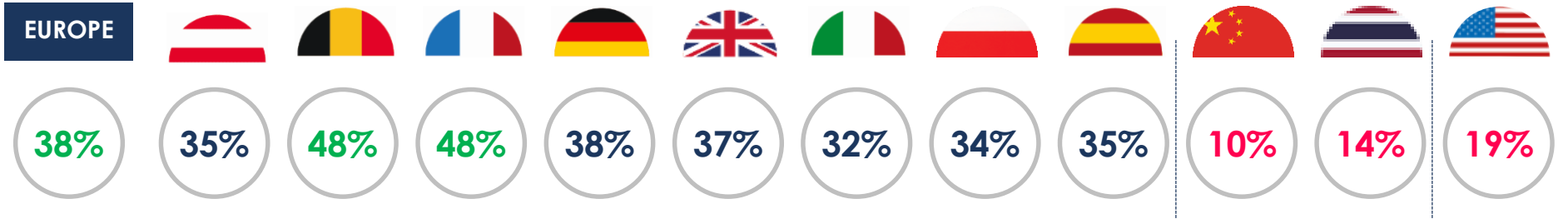
## TRIP DURATION FOR THE MAIN LEISURE TRIP IN 2020



C8. For the main leisure trip that 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)

# ALMOST HALF THE FRENCH AND BELGIANS ARE LEAVING FOR MORE THAN 2 WEEKS THIS SUMMER, WHEREAS VERY FEW ASIANS AND AMERICANS ARE LEAVING FOR SO LONG

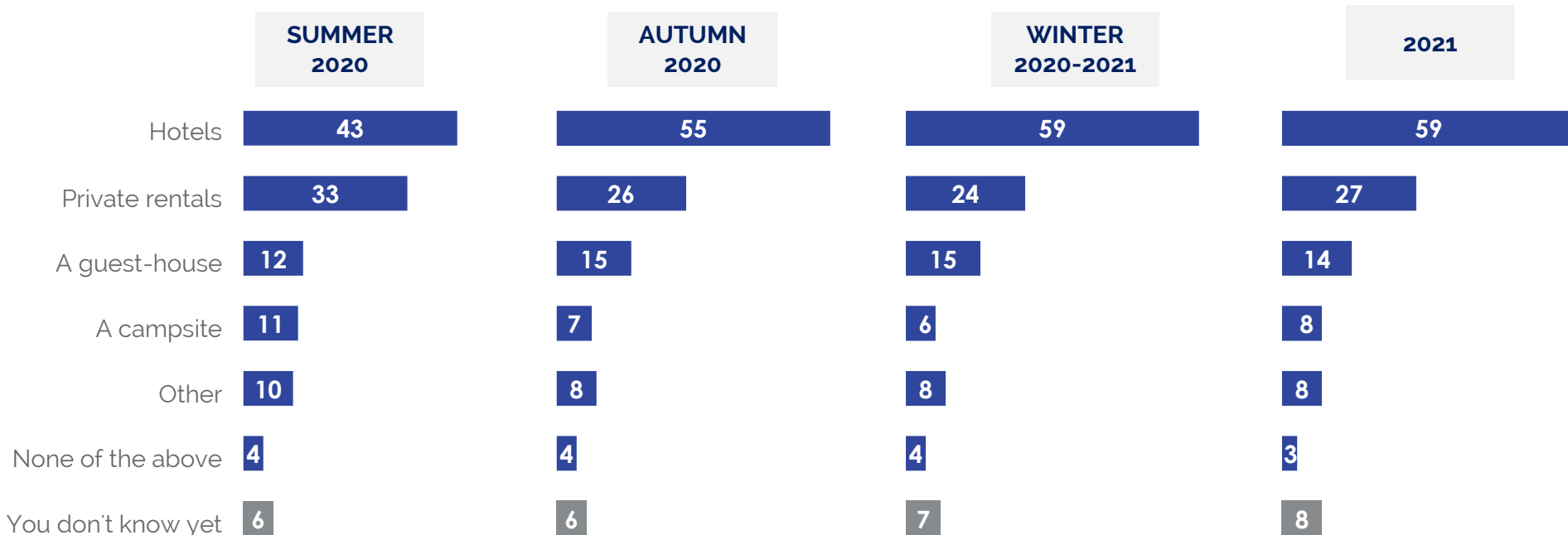
## TRIP DURATION FOR MAIN SUMMER TRIP - % AT LEAST 2 WEEKS



C8. For the main leisure trip that 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)

# HOTELS REMAIN THE MOST POPULAR ACCOMMODATION TYPE, AND ARE INCREASINGLY BEING CHOSEN OVER TIME

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



C10. Ideally, for the main leisure trip that 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)

Total > 100 as one respondent can go in multiple types of accommodation

# FOR THIS SUMMER, THE AUSTRIANS AND ASIANS WIDELY PREFER HOTELS, WHEREAS THE ITALIANS, FRENCH AND POLES PREFER PRIVATE RENTALS

## TYPE OF HOUSING FOR MAIN SUMMER TRIP



EUROPE



Hotel

39%

54%

38%

25%

43%

40%

40%

32%

42%

76%

71%

46%



Private rental

34%

24%

35%

37%

33%

31%

41%

35%

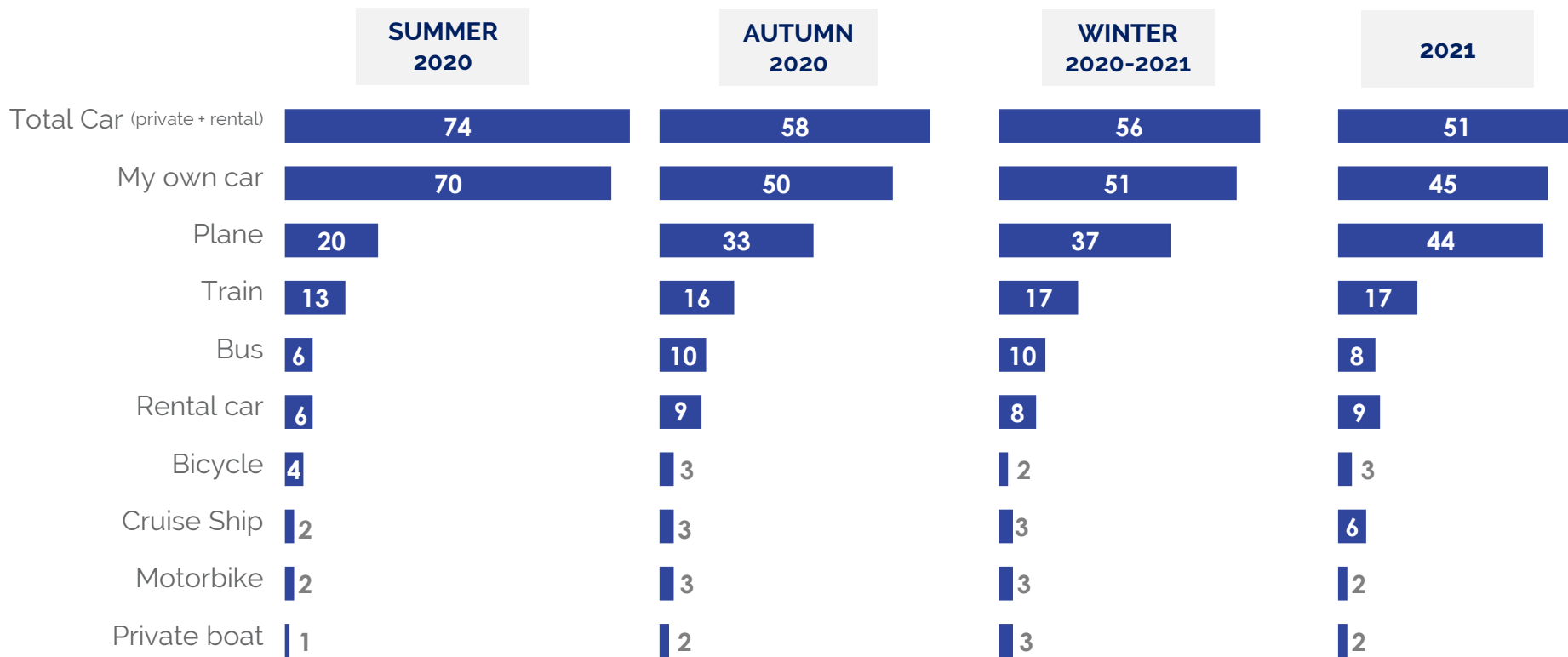
37%

19%

27%

33%

# CARS ARE PREFERRED OVER PLANE AND TRAIN THIS SUMMER, BUT THE PLANE IS INCREASINGLY BEING CHOSEN OVER TIME



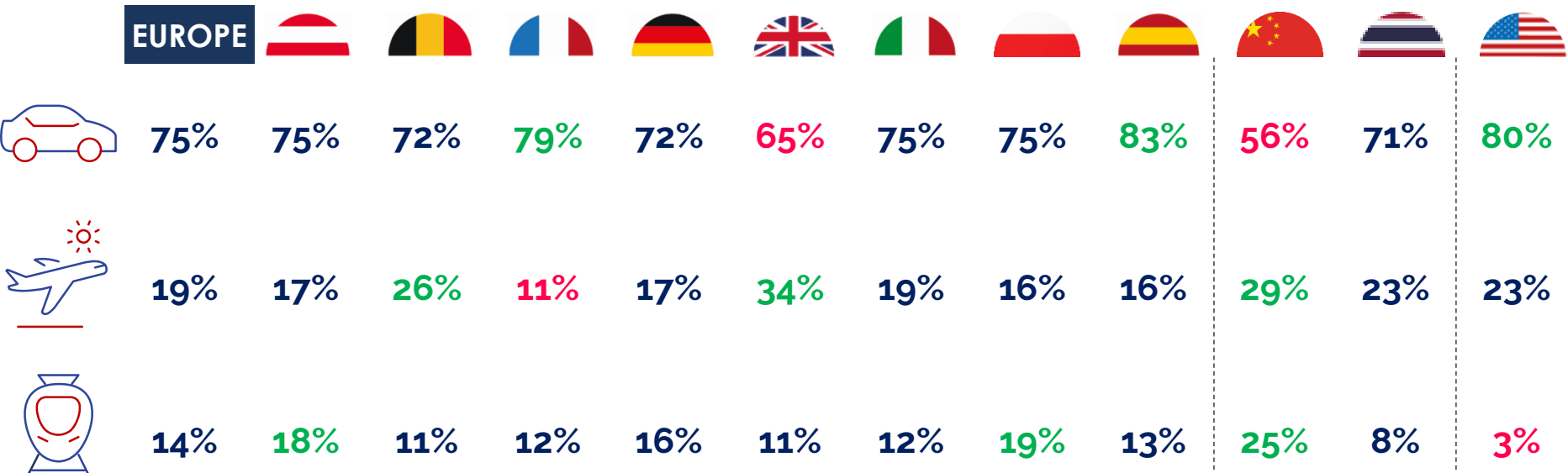
C10bis. Which mode(s) of transportation are you planning to use as a priority during your main leisure trips after COVID 19 in the coming months?  
Base : Those who have planned a main trip (per period)

© 2020 Ipsos

Total > 100 as one respondent can use multiple modes of transportation

# THE CHINESE AND BELGIANS ARE THE MOST LIKELY TO TAKE THE PLANE THIS SUMMER

## MODE OF TRANSPORTATION PREFERRED FOR MAIN SUMMER TRIP

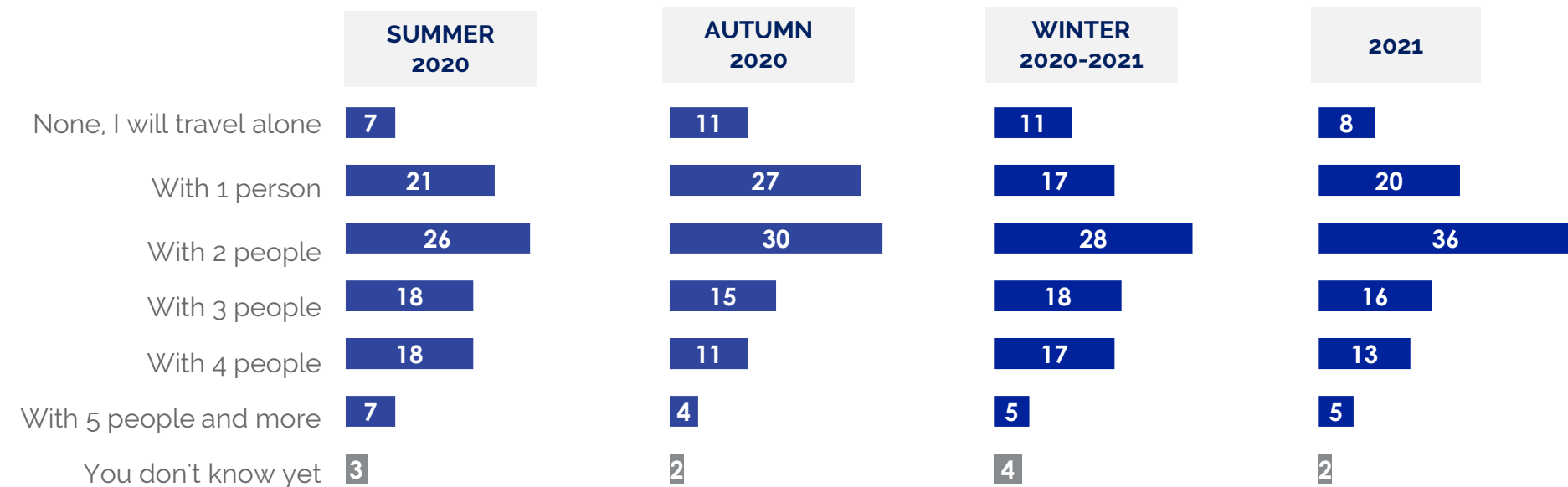


Car (owned + rented)  Plane  Train 



# THE NUMBER OF PEOPLE TRAVELLING TOGETHER REMAINS QUITE STABLE OVER TIME

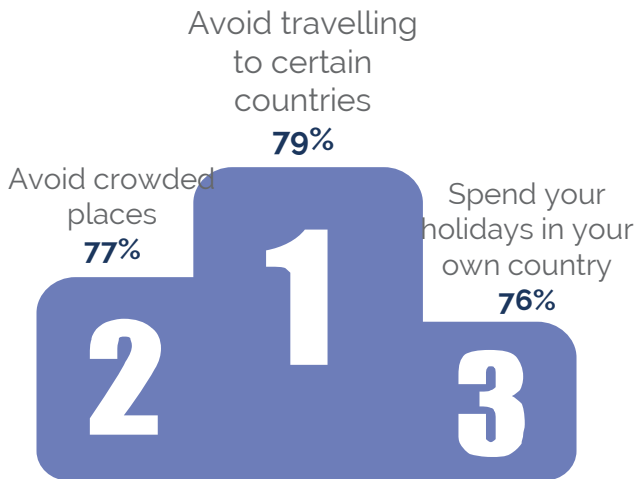
## NUMBER OF PEOPLE TRAVELLING TOGETHER FOR THE MAIN LEISURE TRIP IN 2020



C9. For the main leisure trip that 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)

# A MAJORITY OF PEOPLE WILL AVOID TRAVELLING IN CERTAIN COUNTRIES AND WILL AVOID CROWDED PLACES, ESPECIALLY OLDER PEOPLE

## TOP 3 RISK-FREE BEHAVIORS



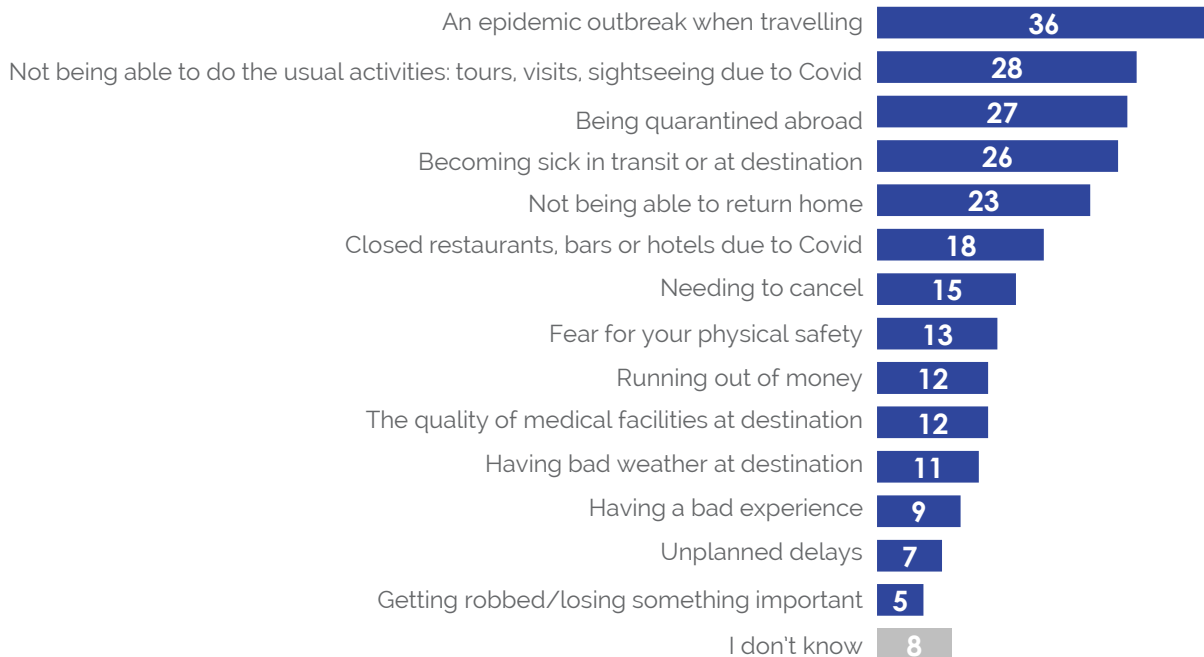
	TOTAL	YOUNG (<30 YO)	55-64 YO
Avoid travelling to certain countries	79%	74%	83%
Avoid crowded places	77%	71%	81%
Spend your holidays in your own country	76%	75%	77%
Avoid going on a cruise	72%	66%	75%
Favour close destinations you can come back from quickly	72%	69%	75%
Avoid amusement parks	64%	57%	70%
Avoid flying and going to airports	58%	54%	61%
Avoid taking the train and going to train stations	54%	49%	57%
Travel only when COVID-19 tested	44%	48%	44%
Avoid staying at a hotel / resort	41%	41%	42%

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

Base : All

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# THE EPIDEMIC IS NOW THE MAIN FEAR WHEN TRAVELLING



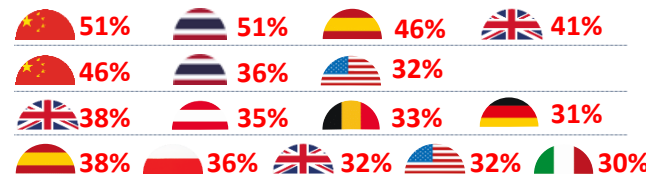
Total > 100 as one respondent can have up to 3 fears

C17. What are your main fears when travelling the next time you're able to travel?

Base : All

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## COUNTRIES WITH THE HIGHEST SCORES

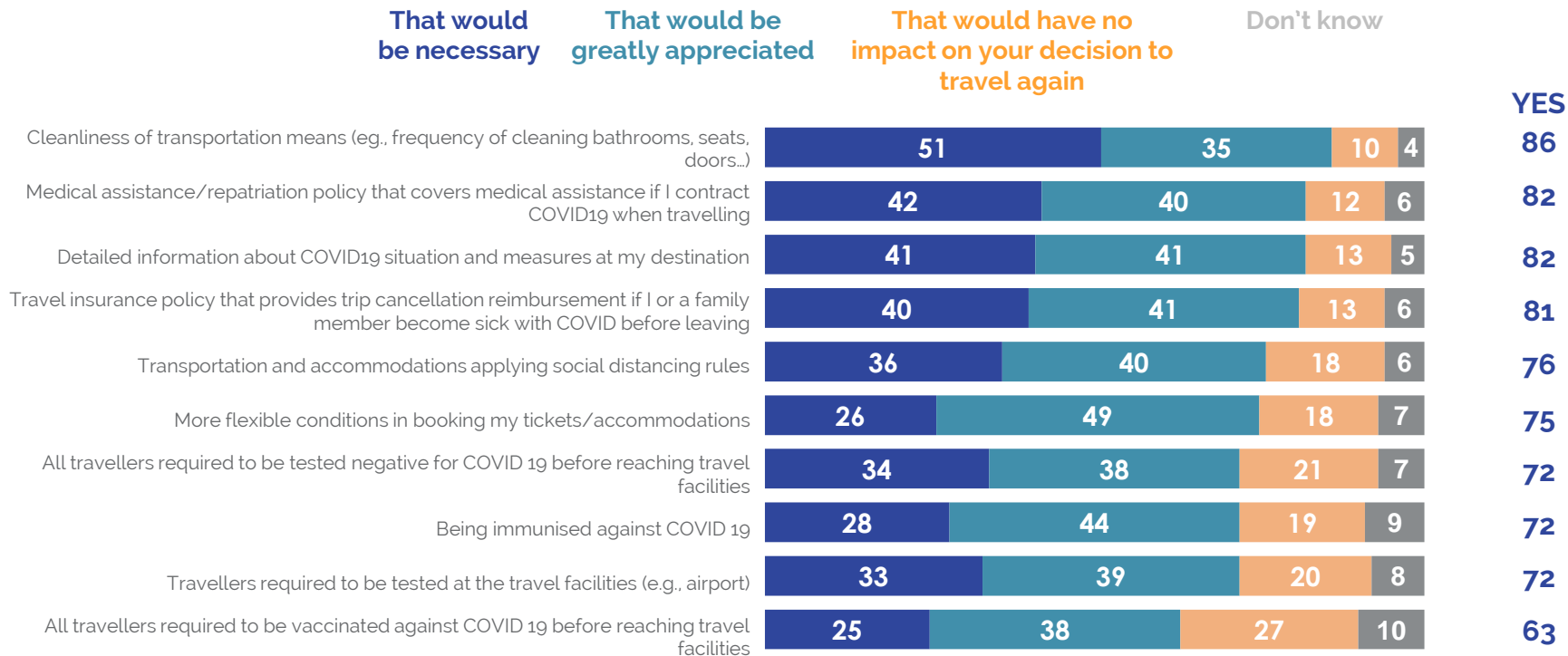


Total Medical reasons 67%

Total Bad experience 65%  
Including due to Covid 38%

Total Organisational issues 21%

# REASSURING MEASURES



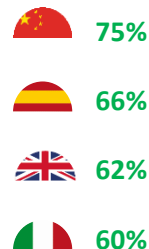
# FOR PEOPLE WHO WON'T TRAVEL IN 2020, COVID-19 HAS CHANGED THE PLANS OF 1 OUT OF 2 RESPONDENTS

TO THOSE WHO SAID THEY WOULDN'T TRAVEL IN 2020

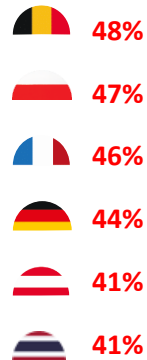
HAVE CHANGED THEIR  
PLANS BECAUSE OF COVID

53%

COUNTRIES WITH  
THE HIGHEST  
SCORES



COUNTRIES WITH  
THE LOWEST  
SCORES



C14. You mentioned that you will not travel in 2020, even if you are authorised to. Have your plans changed because of COVID-19?

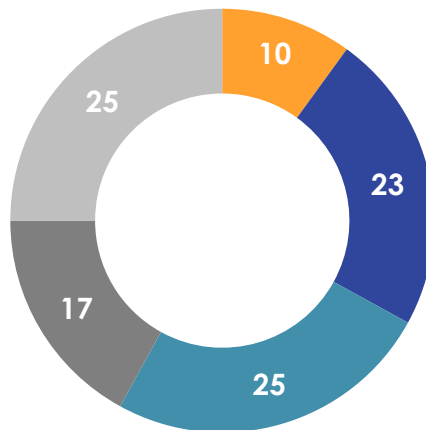
Base : Won't travel in 2020

© 2020 Ipsos

# TRAVEL BOOST WOULD BE *BETTER SAFETY CONDITIONS* RATHER THAN *CHEAP FARES*

## TO THOSE WHO SAID THEY WOULDN'T TRAVEL IN 2020

Cheap fares and offers    Good safety and hygienic conditions    Both    Other reason    I don't know



# 3.

## TRAVEL INSURANCE AND ASSISTANCE



# INSURANCE COVERAGE MAY INCREASE SLIGHTLY, BUT ONLY IN ASIA, NOT IN EUROPE

## INSURANCE COVERAGE

### IN THE PAST...

**48%**

Covered by  
travel insurance



**51%**

**49%**

**25%**

### IN THE FUTURE...

**54%**

Planned to purchase  
travel insurance



**51%**

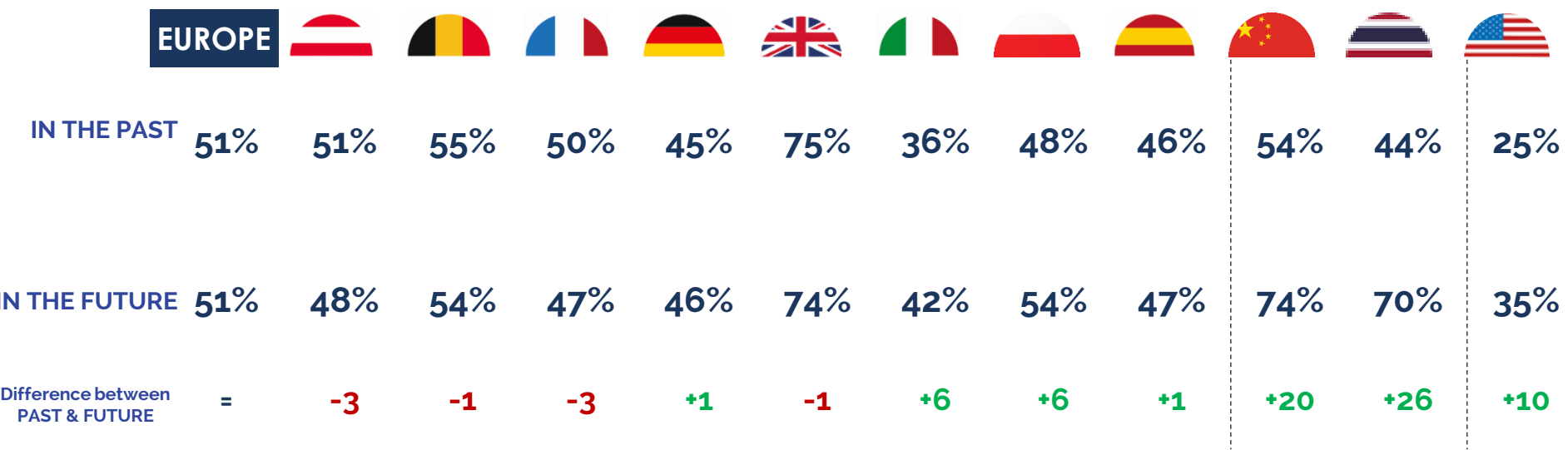
**72%**

**35%**



# THE CHINESE AND THAIS INTEND TO BUY TRAVEL INSURANCE MORE THAN IN THE PAST. THE ITALIANS, POLISH AND AMERICANS ALSO, BUT TO A LESSER EXTENT

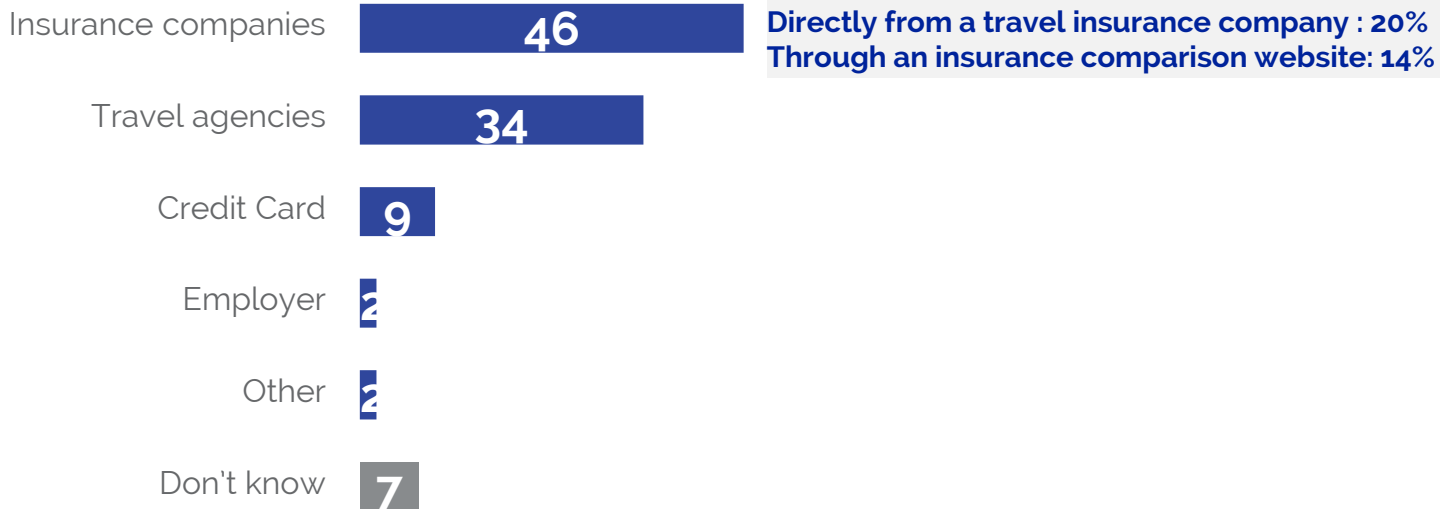
## INSURANCE COVERAGE



# INSURANCE COMPANIES ARE GENERALLY PREFERRED WHEN PURCHASING A TRAVEL INSURANCE POLICY

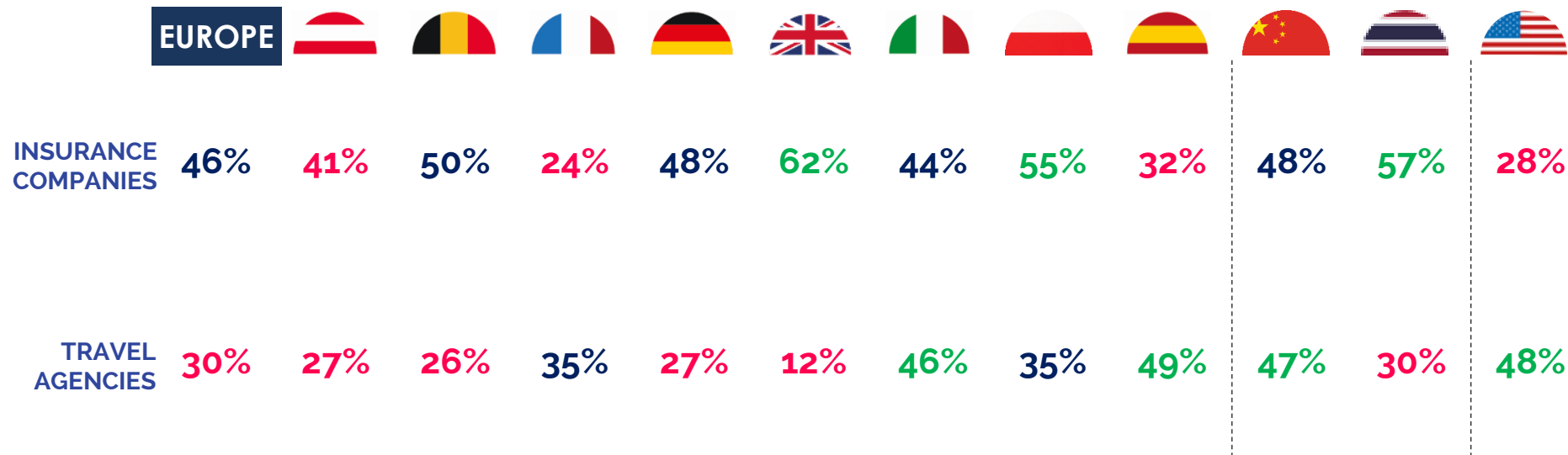
## CHANNELS THEY PLAN TO USE FOR PURCHASING TRAVEL INSURANCE

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

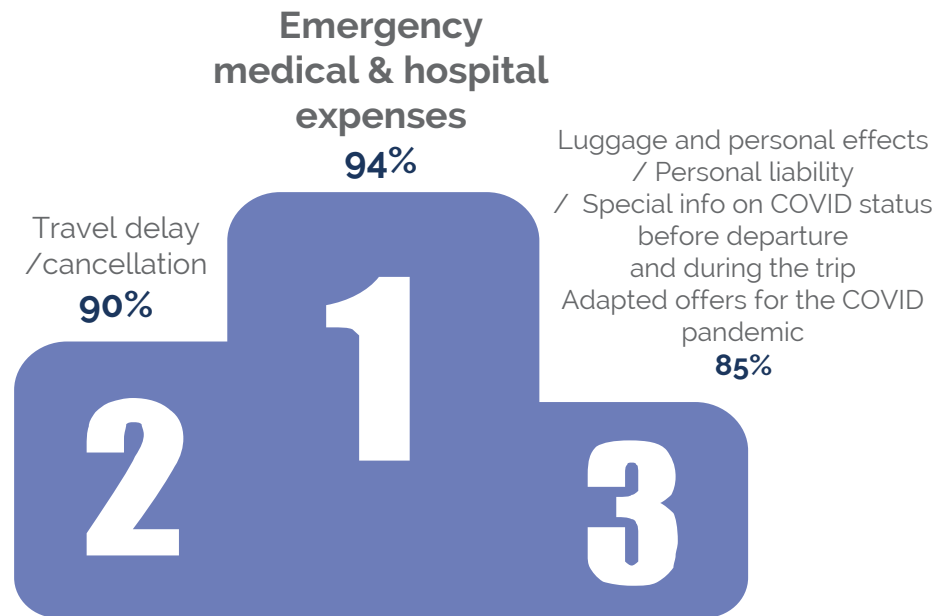


# BUT THE ITALIANS, SPANISH , CHINESE AND AMERICANS PREFER TRAVEL AGENCIES

## INSURANCE COVERAGE

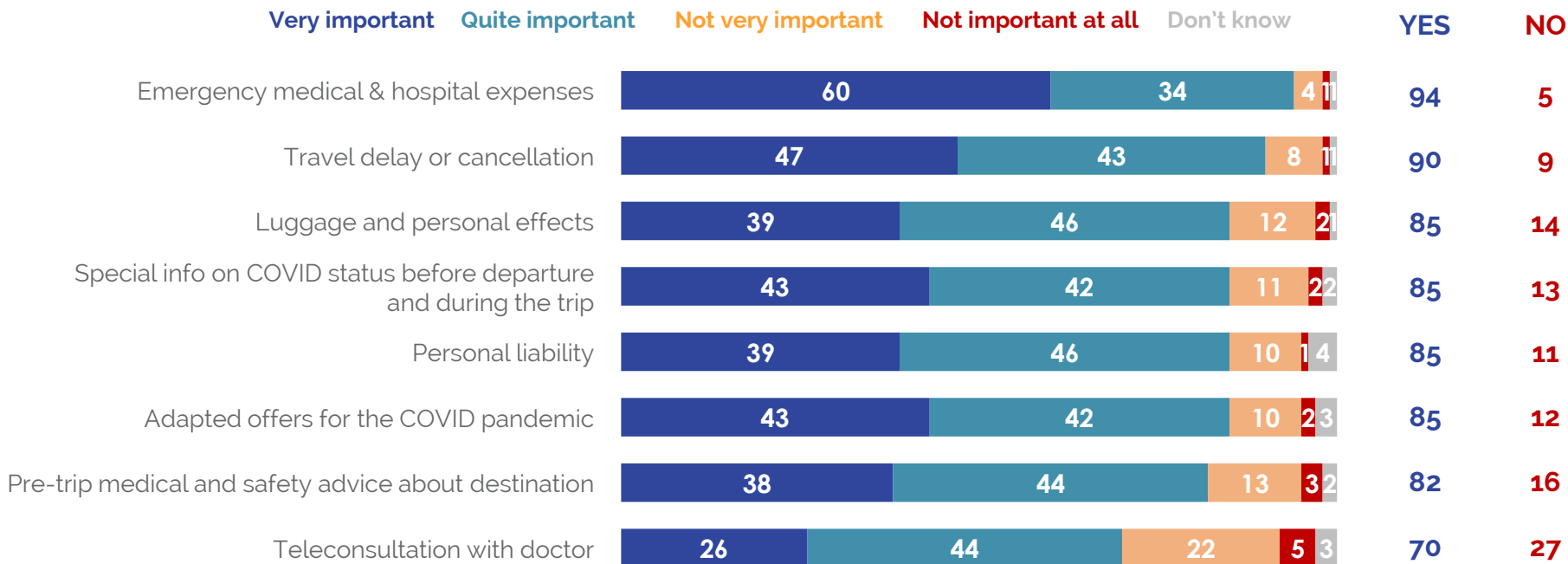


## TOP 3 TRAVEL INSURANCE COVERAGE



# TRAVEL INSURANCE IS MOSTLY REQUIRED FOR EMERGENCY EXPENSES AND TRAVEL DELAY/CANCELLATION

## IMPORTANCE OF HAVING TRAVEL INSURANCE FOR THE FOLLOWING



# 4.

## COVID-RELATED PRODUCTS



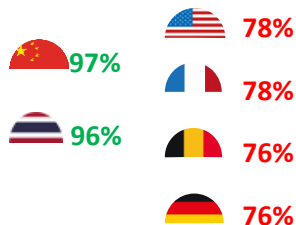
# WILLINGNESS TO PAY IS HIGH, ESPECIALLY IN ASIA. PREFERRED SERVICE IS COVERAGE FOR REPATRIATION

## WILLING TO PAY FOR AT LEAST ONE SERVICE

84%

Including

48% Certainly



## FIRST 3 SERVICES

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

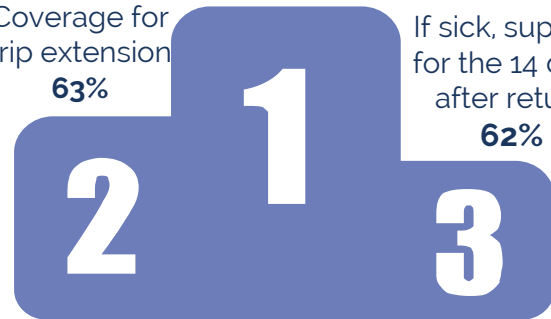
66%

Coverage for  
trip extension

63%

If sick, support  
for the 14 days  
after return

62%



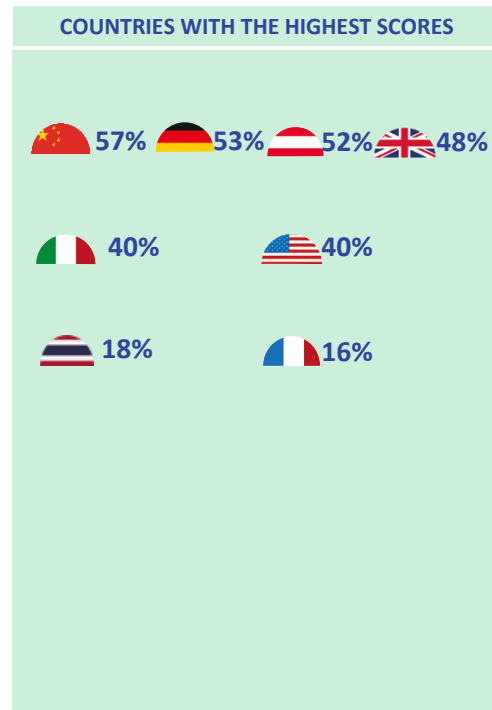
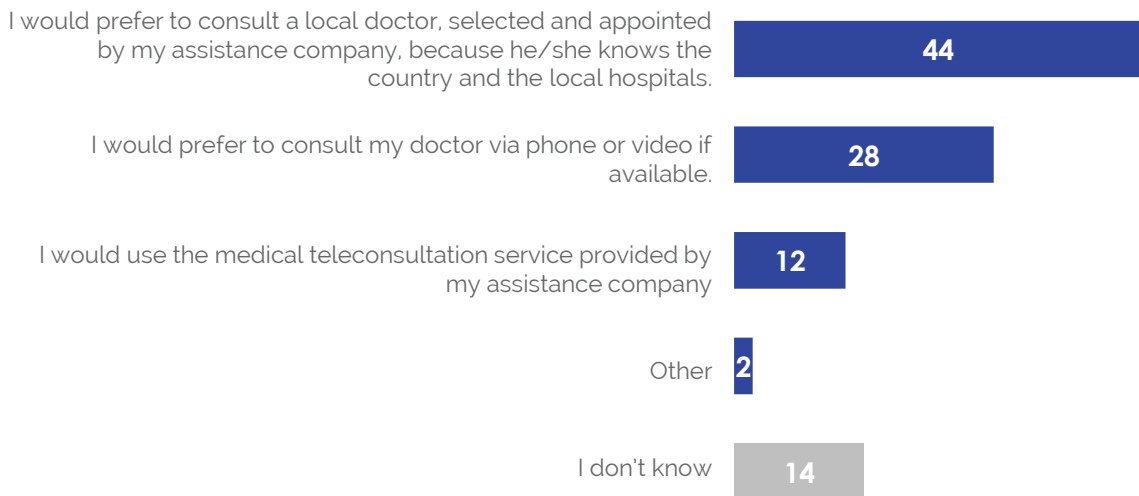
# MOST SERVICES PROPOSED COULD REASSURE TRAVELERS, ESPECIALLY IN ASIA

## FEELING OF SAFETY IF THE FOLLOWING SERVICES WERE ENABLED





# RESPONDENTS PREFER A LOCAL DOCTOR SELECTED BY THEIR ASSISTANCE COMPANY OVER THEIR OWN DOCTOR OR TELECONSULTATION



# TELECONSULTATION SEEMS TO BE A REAL CHOICE, NOT A DEFAULT CHOICE

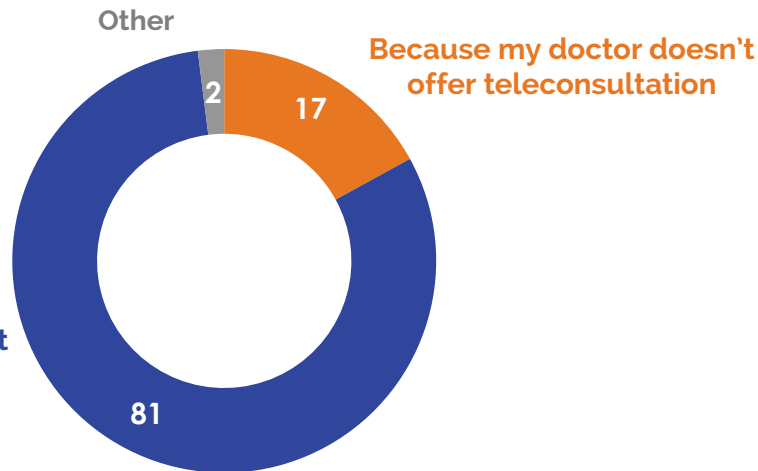
I would use the medical teleconsultation service provided by my assistance company

12



**WHY ?**

Because they speak my language and can provide additional assistance support that I may need



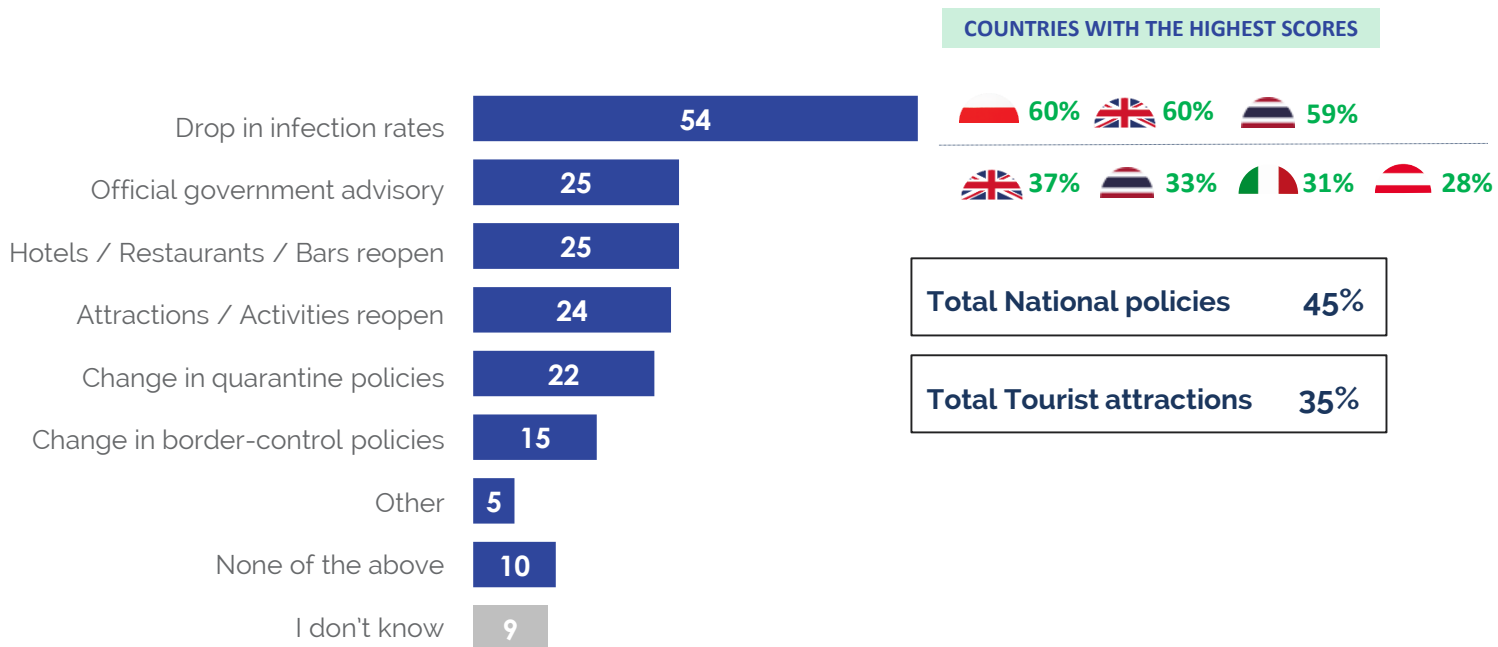


# 5.

## APPENDICES

(QUESTIONS NOT MENTIONED IN  
COUNTRY REPORTS)

# CONSEQUENTLY, A DROP IN INFECTION RATES IS THE BEST WAY TO REASSURE



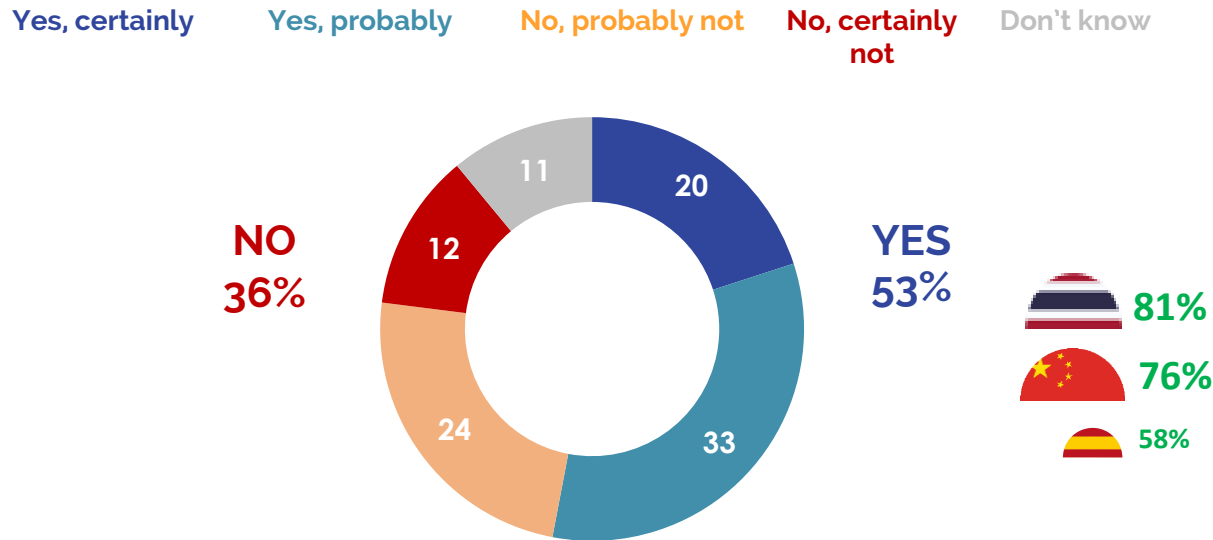
Total > 100 as one respondent can choose multiple aspects

C18. Which of the following aspects would make you feel comfortable traveling as you did before COVID-19?

Base : All

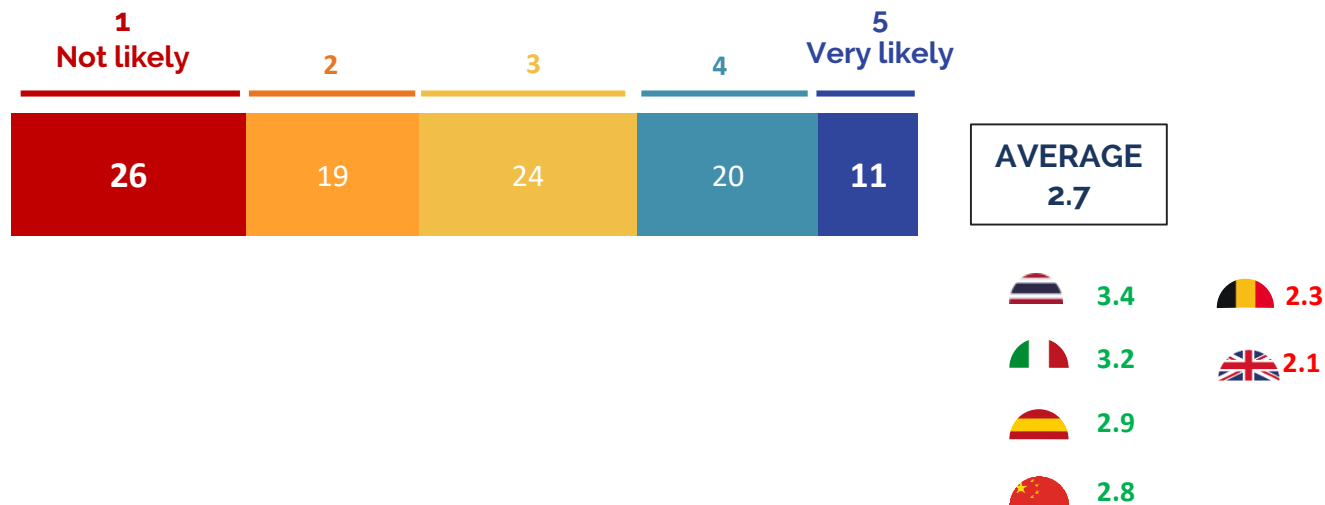
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# HAVING COVID-19 FACILITIES AND HOSPITALS COULD AFFECT THE DESTINATION CHOICE OF 1 OUT OF 2 RESPONDENTS



# AND FOR THOSE WHO MAY TRAVEL IN 2020, A (SMALL) MAJORITY SAY THEY MIGHT TRAVEL SPECIFICALLY TO TAKE ADVANTAGE OF DEALS

## TO THOSE WHO SAID THEY MIGHT TRAVEL IN 2020: LIKELIHOOD OF TRAVEL TO TAKE ADVANTAGE OF DEALS



C16. How likely are you to travel within the next 3 months (June -Sept) specifically to take advantage of the deals (e.g., cheap airfares) available on the market?

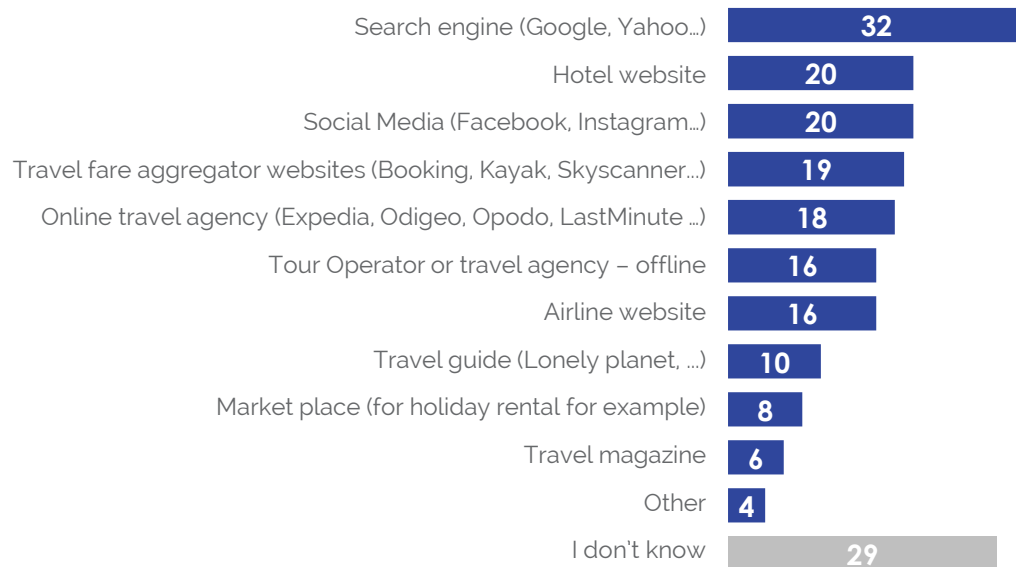
Base : May travel in 2020

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# REASONS FOR CHOOSING MAIN TRANSPORTATION MODES



# SOURCES OF INFORMATION USED MORE THAN BEFORE COVID-19: SEARCH ENGINE ABOVE ALL



**Total Tourism professionals 51%**

**Total Information sites 50%**

*Total > 100 as one respondent can choose multiple channels*

C22. Which of these channels will you use more than before COVID19 to look for information about booking your trip?

Base: All

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# FINANCIAL RESPONSIBILITY: TRAVEL INSURANCE OR ASSISTANCE COMPANIES FIRST (1/2)

## FOR TRIP CANCELLATION

## FOR MEDICAL ASSISTANCE



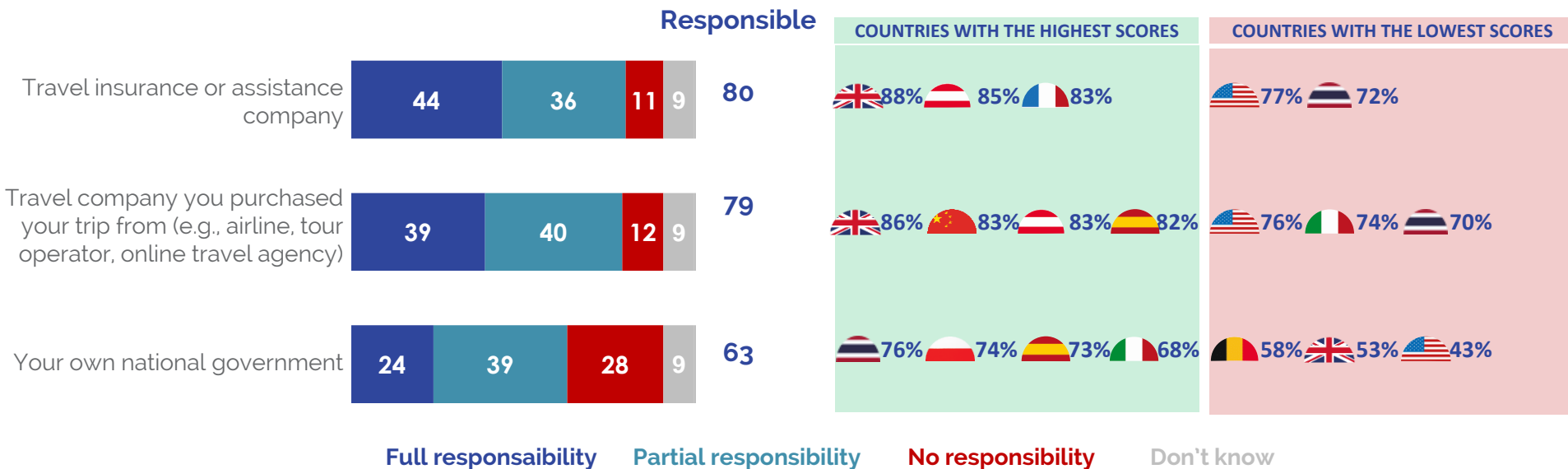
B3a. In your view, what is the financial responsibility of the following to help you in the case of needing to cancel your trip due to an epidemic at destination or at origin?

B3b. In your view, what is the financial responsibility of the following to help you in the case of needing medical assistance during your trip because you have contracted a virus/disease linked to an epidemic?

Base : All

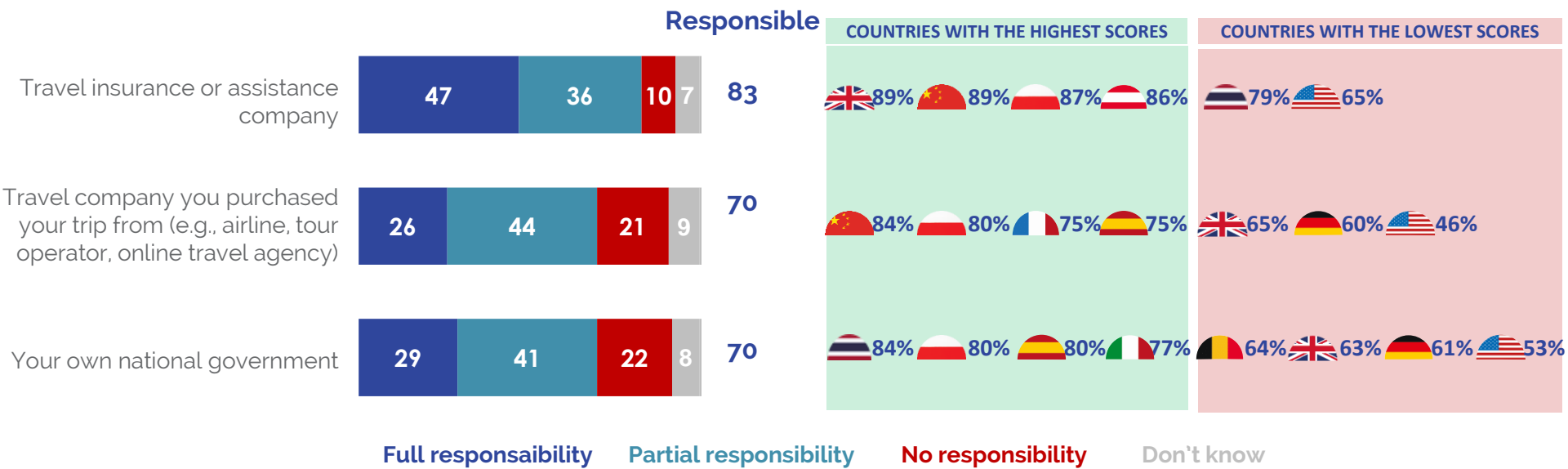
# FINANCIAL RESPONSIBILITY FOR TRIP CANCELLATION: INSURANCE COMPANIES RESPONSIBLE ESPECIALLY FOR BRITISH, AUSTRIANS AND FRENCH

## FOR TRIP CANCELLATION



# FINANCIAL RESPONSIBILITY FOR MEDICAL ASSISTANCE: INSURANCE COMPANIES RESPONSIBLE ESPECIALLY FOR BRITISH AND CHINESE

## FOR MEDICAL ASSISTANCE

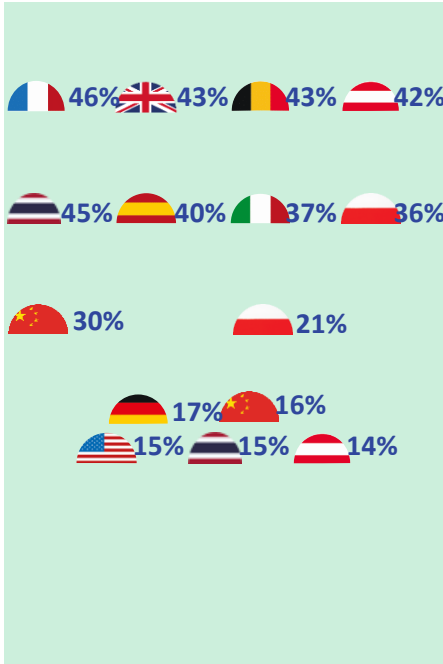


FINANCIAL RESPONSIBILITY: TRAVEL INSURANCE OR ASSISTANCE COMPANIES FIRST (2/2)

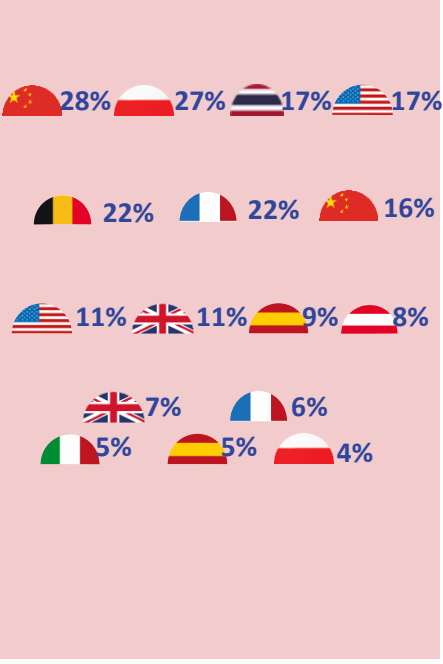
IN CASE OF QUARANTINE OR REPATRIATION



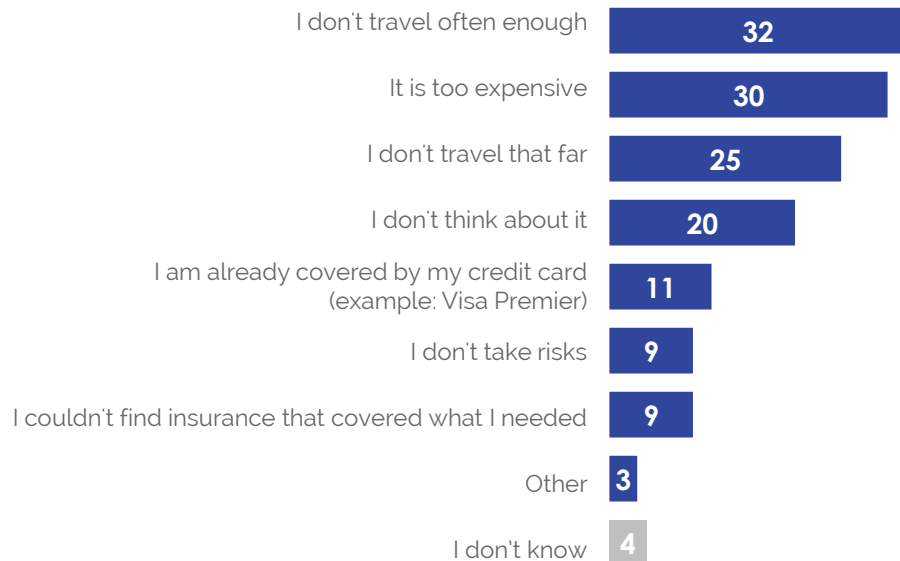
COUNTRIES WITH THE HIGHEST SCORES



COUNTRIES WITH THE LOWEST SCORES

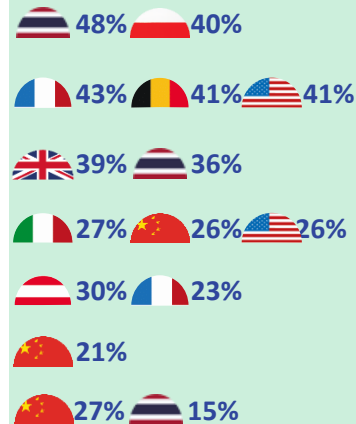


# REASONS FOR NOT PURCHASING TRAVEL INSURANCE

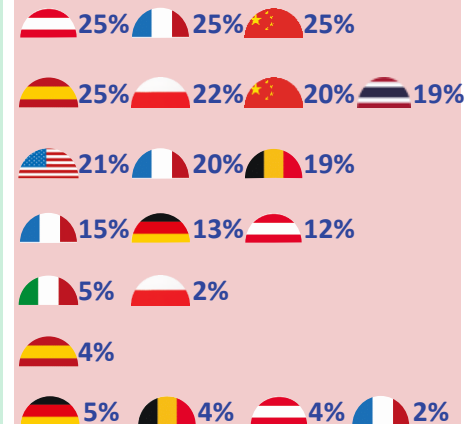


Total > 100 as one respondent can choose multiple reasons

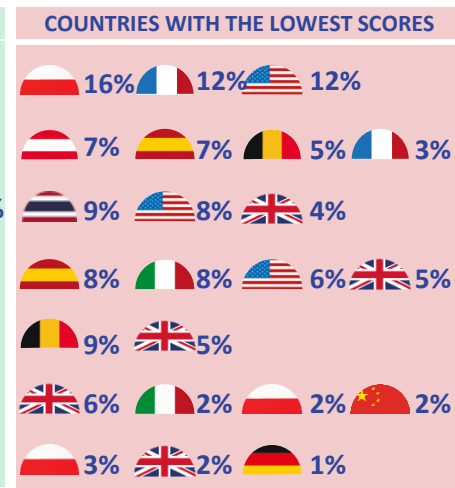
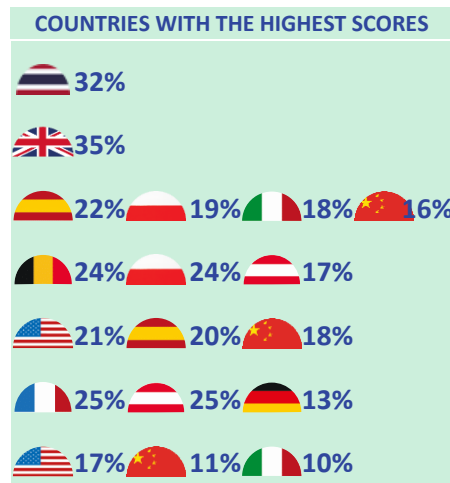
## COUNTRIES WITH THE HIGHEST SCORES



## COUNTRIES WITH THE LOWEST SCORES



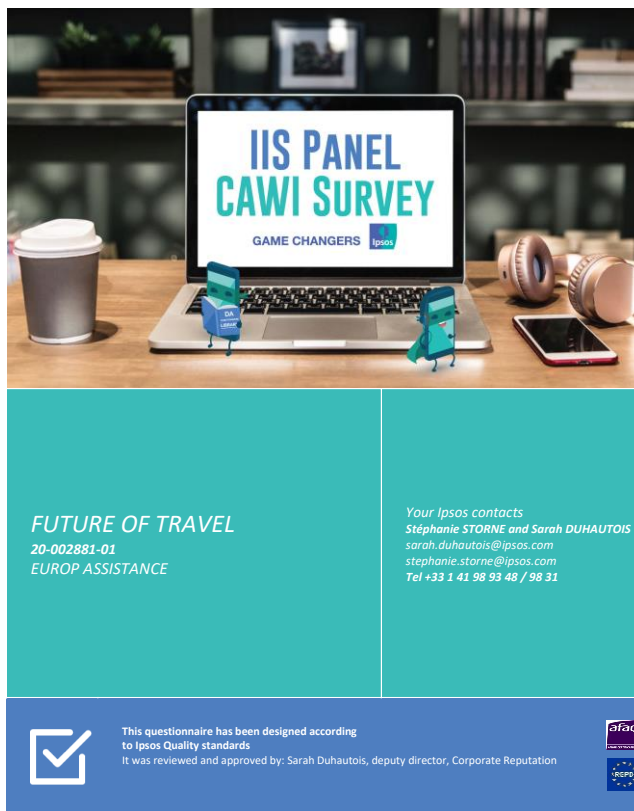
# TRAVEL INSURANCE COMPANY AS THE MAIN CHANNEL FOR BUYING TRAVEL INSURANCE



Total Insurance company 46%

Total Travel company 34%

# THE QUESTIONNAIRE



14/05/2020

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**You act better when you are sure.**