HOLIDAY
BAROMETER 2025

AMONG EUROPEANS, NORTH AMERICANS, ASIANS & OCEANIANS

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Summary

P3

Methodology (1/3)

Scope of the survey

American scope

- 1000 Canadians
- 1000 Americans

European scope

- 1000 Britons
- 1000 Belgians
- 1000 Germans
- 1000 Poles
- 1001 Czechs
- 1000 Austrians
- 1000 French
- 1001 Swiss
- 1000 Italians
- 1000 Spaniards
- 1000 Portuguese

Asian/Oceanian scope

- 1000 Japaneses
- 1000 South Koreans
- 1000 Hong Kongers
- 1000 Indians
- 1000 Malaysians
- 1000 Singaporeans
- 1000 Australians
- 1000 New Zealanders

MENA scope

- 1000 Emiratis
- 1000 Saudis

Methodology (2/3)

Samples & data collection

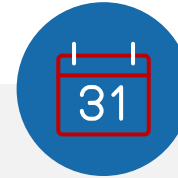### Samples
In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older, put together using the quota method (gender, age, profession) after stratification by region and by city size.

Timeline
The field studies were carried out between February 24th and March 26th

Method of data collection
Online survey in the 23 countries

READING NOTE: We present, in this report, two types of significative differences (please see details on slide 4):

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

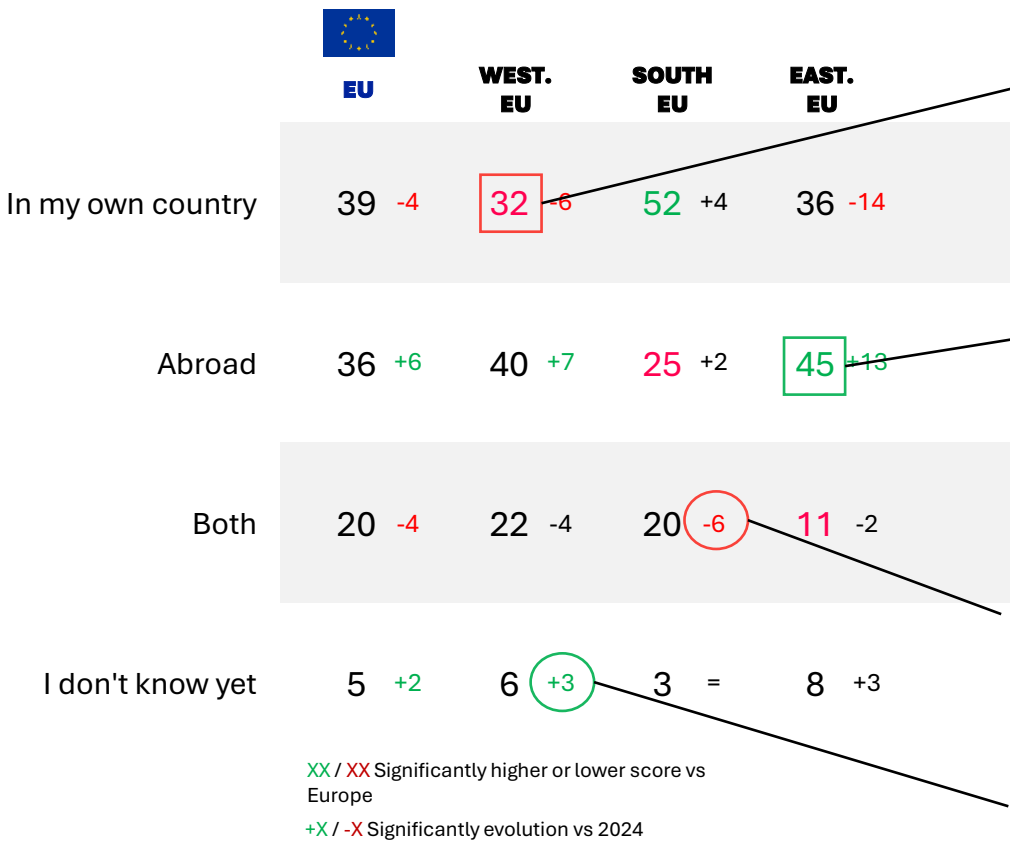XX Significantly lower result in the country compared to EUROPE

Evolutions between 2025 and 2024 results

XX Significantly better result in 2025 compared to 2024

XX Significantly lower result in 2025 compared to 2024

Methodology (3/3)

How to read the results?

2 ways

Where do you intend to spend your workation?

EU

	EU	WEST. EU	SOUTH EU	EAST. EU
In my own country	39 -4	**32** -6	52 +4	36 -14
Abroad	36 +6	40 +7	25 +2	**45** +13
Both	20 -4	22 -4	20 -6	11 -2
I don't know yet	5 +2	6 +3	3 =	8 +3

XX / XX Significantly higher or lower score vs Europe

+X / -X Significantly evolution vs 2024

Absolute scores and significativity

In Western Europe, 32% of the respondents plan to work remotely form their own country. This is significatively lower than the score for Europeans overall (39%).

Conversely, in Eastern Europe 45% of them plan to work from abroad, which is significantly higher than the average for Europe (36%).

Evolutions and significativity

In South Europe, the proportion of respondents intend to work remotely from both their own countries and from abroad is decreasing by 6 point. This decrease is statistically significant compared to the score of 2024.

In Eastern Europe, the proportion of people who do not know yet from where they will work remotely is increasing by 3 points – making this proportion significantly higher than what we had for Eastern Europe in 2024.
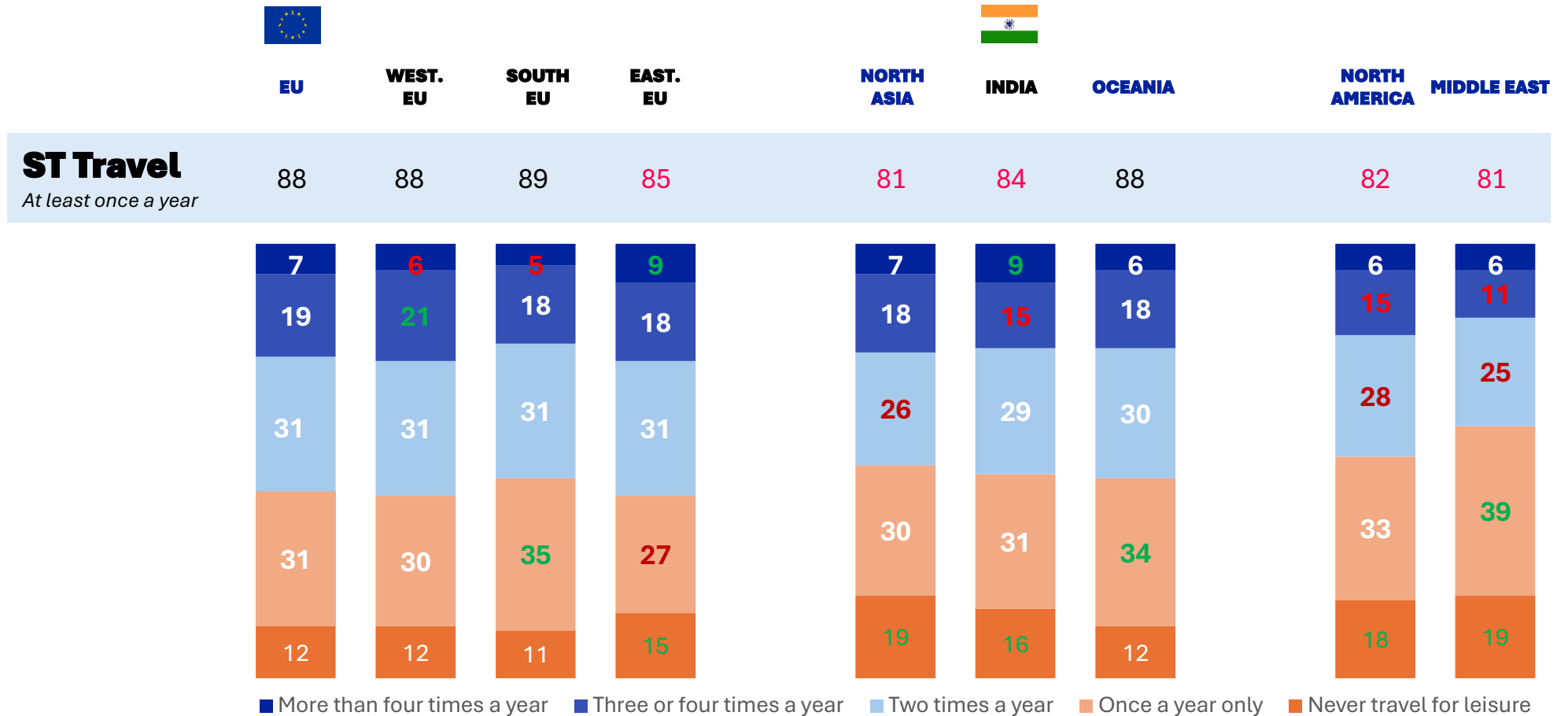
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INTRODUCTORY DATA

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Travelling is a well-established habit : in all regions, at least 8 out of 10 citizens travel for leisure at least once a year.

In Europe, North Asia , India and Oceania, around 1 out of 4 even qualify as frequent travellers, with at least 3 travel occasions a year.
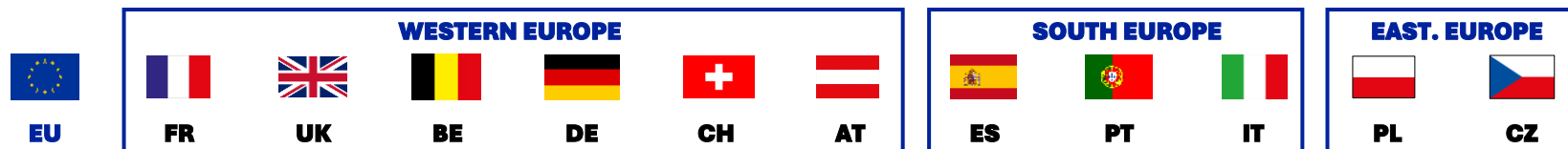
1/3   Frequency of leisure travel (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
ST Travel *At least once a year*	88	88	89	85	81	84	88	82	81

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
More than four times a year	7	6	5	9	7	9	6	6	6
Three or four times a year	19	21	18	18	18	15	18	15	11
Two times a year	31	31	31	31	26	29	30	28	25
Once a year only	31	30	35	27	30	31	34	33	39
Never travel for leisure	12	12	11	15	19	16	12	18	19

■ More than four times a year ■ Three or four times a year ■ Two times a year ■ Once a year only ■ Never travel for leisure

NEW
Q25Q1. On average, how many times a year do you travel for leisure? By travel we mean a stay of 4 nights or more away from home, and excluding business trips. Basis: To all
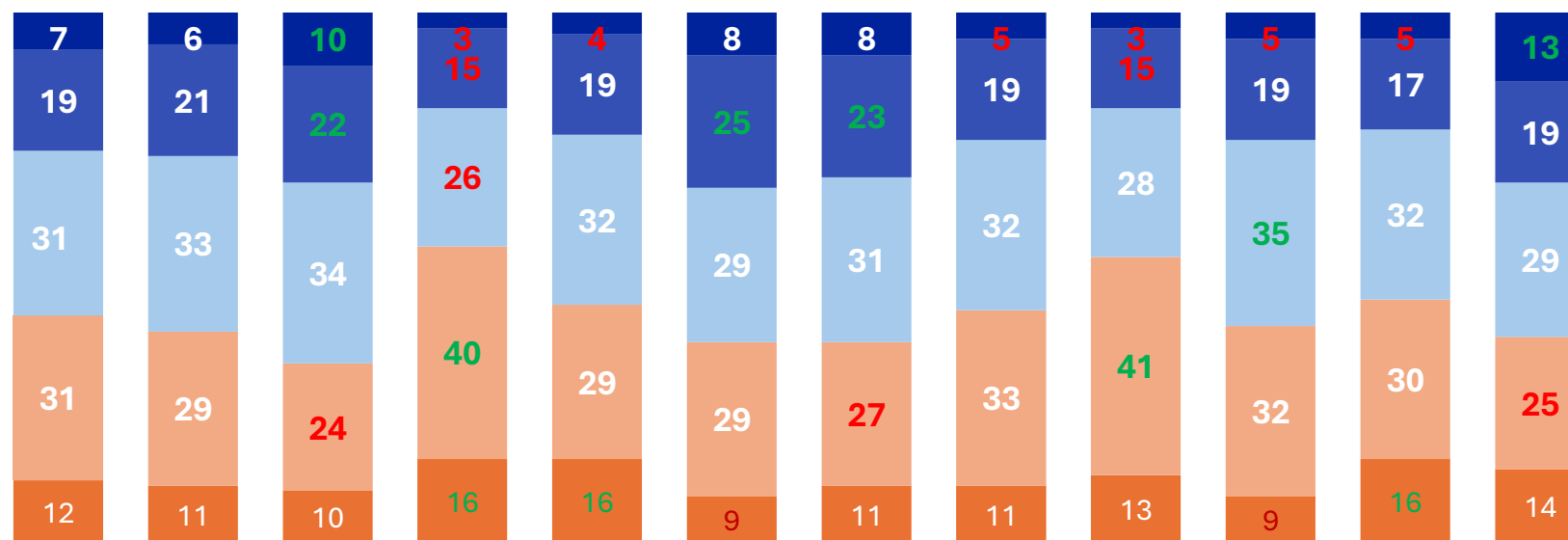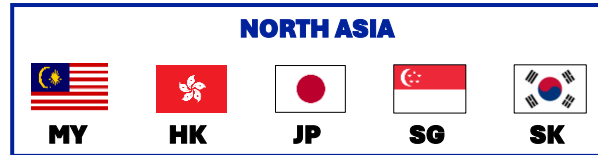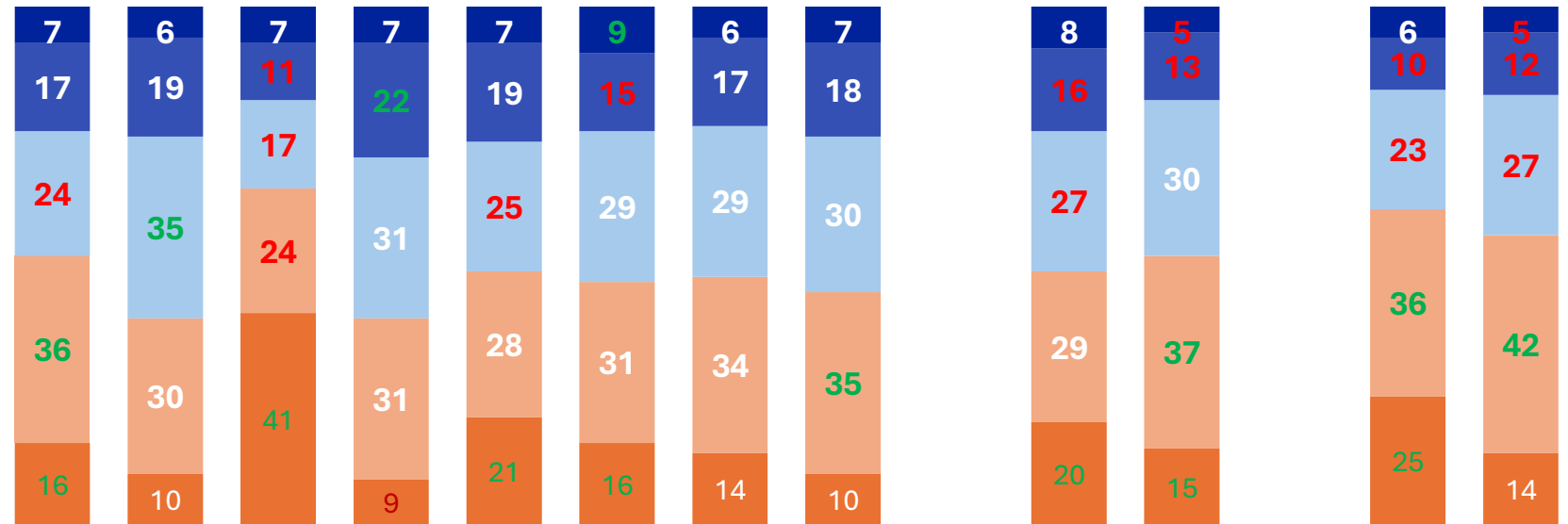
XX / XX *Significantly higher or lower score vs Europe*

Frequency of leisure travel (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
ST Travel *At least once a year*	88	89	90	84	84	91	89	89	87	91	84	86
More than four times a year	7	6	10	3	4	8	8	5	3	5	5	13
Three or four times a year	19	21	22	15	19	25	23	19	15	19	17	19
Two times a year	31	33	34	26	32	29	31	32	28	35	32	29
Once a year only	31	29	24	40	29	29	27	33	41	32	30	25
Never travel for leisure	12	11	10	16	16	9	11	11	13	9	16	14

■ More than four times a year ■ Three or four times a year ■ Two times a year ■ Once a year only ■ Never travel for leisure

NEW
Q25Q1. On average, how many times a year do you travel for leisure? By travel we mean a stay of 4 nights or more away from home, and excluding business trips. Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

INTRODUCTORY DATA

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3/3 Frequency of leisure travel (%)

NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE

ST Travel
At least once a year

| 84 | 90 | 59 | 91 | 79 | 84 | 86 | 90 | | 80 | 85 | | 75 | 86 |

More than four times a year / Three or four times a year / Two times a year / Once a year only / Never travel for leisure

MY: 7 / 17 / 24 / 36 / 16
HK: 6 / 19 / 35 / 30 / 10
JP: 7 / 11 / 17 / 24 / 41
SG: 7 / 22 / 31 / 31 / 9
SK: 7 / 19 / 25 / 28 / 21
IN: 9 / 15 / 29 / 31 / 16
AU: 6 / 17 / 29 / 34 / 14
NZ: 7 / 18 / 30 / 35 / 10
US: 8 / 16 / 27 / 29 / 20
CA: 5 / 13 / 30 / 37 / 15
SA: 6 / 10 / 23 / 36 / 25
AE: 5 / 12 / 27 / 42 / 14

■ More than four times a year ■ Three or four times a year ■ Two times a year ■ Once a year only ■ Never travel for leisure

XX / XX *Significantly higher or lower score vs Europe*

INTRODUCTORY DATA

Preferred months for leisure travel (%)

Travel intentions concentrate around summer for Europe and North America, but much more spread during the year in other zones

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
January	5	5	4	4	10	21	30	11	14
February	6	7	3	7	10	14	18	14	11
March	7	8	6	5	16	17	16	13	12
April	14	16	15	7	19	20	19	15	14
May	23	25	21	21	21	22	11	19	11
June	29	28	28	33	17	19	18	26	17
July	34	30	31	50	12	9	22	31	25
August	33	30	32	46	17	11	14	27	24
September	37	38	36	35	20	15	20	22	15
October	13	16	12	8	29	21	17	18	14
November	5	5	5	2	21	21	15	11	10
December	9	9	11	5	27	29	31	15	19
ST July or August	**54**	**51**	**51**	**67**	**28**	**26**	**33**	**46**	**37**

NEW

Q25Q2. At what time of the year do you prefer to travel for leisure? Basis: To those who travel for leisure at least once a year

Top answers per country: #1 | #2 | #3

XX / XX *Significantly higher or lower score vs Europe*

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Preferred months for leisure travel (%)

When analyzing preferred travelling seasons, the European summer habits clearly stand out: indeed, 87% of Europeans who travel at least once a year tell us that the months from June to September are their preferred time to travel, confirming the summer concentration.

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
January	5	4	7	3	4	7	5	3	4	5	4	3
February	6	8	7	5	6	9	8	3	3	3	8	6
March	7	6	11	9	8	11	6	8	6	5	3	6
April	14	19	19	13	15	19	10	15	12	18	7	8
May	23	27	29	21	27	20	28	22	17	23	24	19
June	29	32	33	25	25	22	32	24	28	31	31	35
July	34	32	27	33	26	34	29	31	32	28	49	51
August	33	35	28	29	31	25	32	31	37	29	45	46
September	37	37	37	35	41	35	41	36	34	39	35	35
October	13	9	19	11	17	24	14	16	10	10	9	8
November	5	3	9	5	4	6	5	4	5	5	1	3
December	9	8	15	6	9	10	7	11	11	11	4	7
ST July or August	54	57	50	54	43	50	53	48	53	51	66	68

Top answers per country: #1 #2 #3

NEW
Q25Q2. At what time of the year do you prefer to travel for leisure? Basis: To those who travel for leisure at least once a year

XX / XX Significantly higher or lower score vs Europe

3/3 Preferred months for leisure travel (%)

The same phenomenon shows for North America even though less strongly: June to September period is mentioned by 72% of North Americans.

However, in zones where seasons are different, such as Asia and Oceania, preferred travel time is much more spread out and less concentrated between June and September, whereas fall and winter months stand out.

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
January	14	9	7	11	9	21	24	36	8	12	14	13
February	14	12	6	10	6	14	12	24	10	17	12	9
March	14	20	16	18	12	17	15	16	13	13	14	11
April	13	22	23	18	22	20	21	18	19	11	15	13
May	15	16	34	16	31	22	14	8	24	14	10	11
June	19	17	11	25	9	19	18	18	30	23	18	16
July	9	18	12	8	14	9	22	22	30	33	19	29
August	12	20	21	10	22	11	15	13	26	29	21	27
September	16	19	24	21	21	15	25	16	22	22	15	15
October	17	26	43	25	38	21	20	15	19	16	14	14
November	25	21	20	28	10	21	15	15	10	11	8	12
December	48	19	12	40	11	29	27	35	16	15	13	24
ST July or August	27	32	22	32	22	26	33	34	47	45	33	40

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

Usual months of longest trip of the year (%)

The same concentration around summer is observed in Europe for the actual period usually chosen for the longest trip of the year.

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
January	3	3	2	2	8	14	24	8	9
February	3	3	2	2	7	10	9	8	9
March	3	3	3	2	9	12	8	8	11
April	5	5	6	3	11	14	9	8	11
May	10	12	9	9	13	20	8	12	11
June	18	18	17	21	11	17	11	18	19
July	29	27	25	41	10	10	13	27	27
August	31	28	32	37	16	11	10	23	24
September	26	26	26	23	14	11	13	16	14
October	8	9	7	5	22	17	10	12	13
November	3	3	3	1	18	17	8	6	8
December	5	5	7	2	25	24	28	12	16
ST July or August	43	41	38	55	20	24	21	39	39

NEW
Q25Q3. Usually, what time of year do you take your longest leisure trip? Basis: To those who travel for leisure at least once a year

Top answers per country: #1 | #2 | #3

XX / XX Significantly higher or lower score vs Europe

Usual months of longest trip of the year (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
January	3	3	4	2	3	5	3	2	2	2	2	1
February	3	3	3	2	3	4	4	2	2	3	3	2
March	3	1	3	2	3	6	2	3	2	3	2	2
April	5	7	6	3	5	6	5	5	5	7	3	3
May	10	9	12	10	15	9	16	8	7	11	10	8
June	18	20	19	15	17	14	23	14	17	21	22	21
July	29	28	19	34	22	34	25	26	23	26	39	42
August	31	33	24	30	28	23	30	32	36	29	39	36
September	26	25	24	26	30	24	30	25	26	28	24	23
October	8	5	10	7	10	14	7	9	6	6	6	4
November	3	2	5	3	3	4	3	2	3	2	1	2
December	5	3	9	3	5	6	5	6	8	6	2	3
ST July or August	43	45	34	47	35	42	43	37	36	42	53	57

NEW

Q25Q3. Usually, what time of year do you take your longest leisure trip? Basis: To those who travel for leisure at least once a year

Top answers per country: #1 #2 #3

XX / XX *Significantly higher or lower score vs Europe*

Usual months of longest trip of the year (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
January	11	9	5	6	6	14	18	29	6	10	9	9
February	12	8	5	4	6	10	7	11	5	10	9	9
March	7	13	11	7	7	12	8	7	6	9	11	10
April	8	14	10	9	12	14	10	9	10	7	11	10
May	11	12	20	9	14	20	9	6	15	9	11	11
June	13	13	7	14	6	17	12	10	23	14	18	19
July	7	17	10	6	12	10	14	12	26	28	26	28
August	11	19	23	6	22	11	11	9	21	26	22	26
September	13	15	16	12	15	11	16	10	15	17	15	13
October	17	22	28	19	25	17	12	8	12	11	13	12
November	23	19	17	23	8	17	9	8	5	6	7	9
December	49	13	10	39	10	24	26	30	12	12	12	20
ST July or August	19	28	17	19	17	24	22	20	41	36	37	40

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

Trips plans outside of summer (%)

Travel plans outside summer concentrate in the spring period for Europeans (April & May) and North Americans.

In other regions, October & November are popular periods too.

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
I'm planning to travel between April and May 2025	34	35	34	32	26	42	28	31	28
I'm planning to travel between October and November 2025	22	25	19	20	32	36	25	24	23
I already travelled this year between January & March 2025	17	20	15	14	19	29	29	18	25
I'm planning to travel in December 2025	11	11	14	8	19	20	26	16	18
None of these answers	37	36	35	43	30	10	19	33	24

NEWQ7. Apart from the June to September period, do you plan to go on a trip this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

2/3 Trips plans outside of summer (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I'm planning to travel between April and May 2025	34	39	41	27	37	34	35	35	26	41	33	31
I'm planning to travel between October and November 2025	22	22	31	20	24	27	25	23	17	18	19	21
I already travelled this year between January & March 2025	17	22	16	16	18	27	18	16	14	16	14	14
I'm planning to travel in December 2025	11	11	15	7	12	11	10	12	15	14	8	8
None of these answers	37	33	27	47	37	31	40	32	42	32	42	45

XX / XX *Significantly higher or lower score vs Europe*

Trips plans outside of summer (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
I'm planning to travel between April and May 2025	26	29	21	25	29	42	28	28	37	25	26	30
I'm planning to travel between October and November 2025	30	39	28	30	34	36	28	22	28	21	23	24
I already travelled this year between January & March 2025	24	18	11	26	16	29	25	34	18	18	23	28
I'm planning to travel in December 2025	32	15	8	29	12	20	26	27	18	14	17	19
None of these answers	18	26	50	22	33	10	21	17	26	40	30	19

NEWQ7. Apart from the June to September period, do you plan to go on a trip this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

01

A desire to travel stronger than ever

01

In 2025, the desire to travel reaches unprecedent heights among Europeans and North Americans.

Plans to go away on a trip this year – **Trend over several years**
% Yes (one or several trips)

Europe
North America
Australia

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Europe	63	55	63	64	63		57	71	75		79
North America		61	66	68	68		50	61	63		71
Australia								52	54		61

Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / **XX** *Significantly higher or lower score vs Europe*
+X / **-X** *Significantly evolution vs 2024*

01

If we look in detail how the different European countries have evolved over the last 10 years, we can see that UK (+27 pts vs 2015), Italy (+24pts) and Spain (+20pts) are the ones in which travel intentions during the summer have increased the most. (France +15 pts, Belgium +13pts, Austria +11 pts, Germany +9 pts.)

Plans to go away on a trip this year – **Trend over several years**
% Yes (one or several trips)

France
United Kingdom
Belgium

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
France	67	60	65	69	69		67	74	78		82
United Kingdom	55	60	65	65	64		50	68	71		82
Belgium	60	47	60	63	65		53	71	70		73

Germany
Switzerland
Austria

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Germany	63	55	63	64	63		42	61	63		72
Switzerland				66	62		63	75	76		77
Austria	65	63	66	66	70		61	75	78		76

Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Plans to go away on a trip this year – **Trend over several years**
% Yes (one or several trips)

01

If we look in detail how the different European countries have evolved over the last 10 years, we can see that UK (+27 pts vs 2015), Italy (+24pts) and Spain (+20pts) are the ones in which travel intentions during the summer have increased the most. (France +15 pts, Belgium +13pts, Austria +11 pts, Germany +9 pts.)

Italy
Spain
Portugal

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Italy	62	53	61	62	61		67	76	83		86
Spain	60	49	58	61	60		58	78	82		80
Portugal				59	60		62	79	78		78

Poland
Czech Republic

	2018	2019	2020	2021	2022	2023	2024	2025
Poland	60	61		66	75	75		82
Czech Republic				65	73	80		82

Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

01

Plans to go away on a trip this year – **Trend over several years**
% Yes (one or several trips)
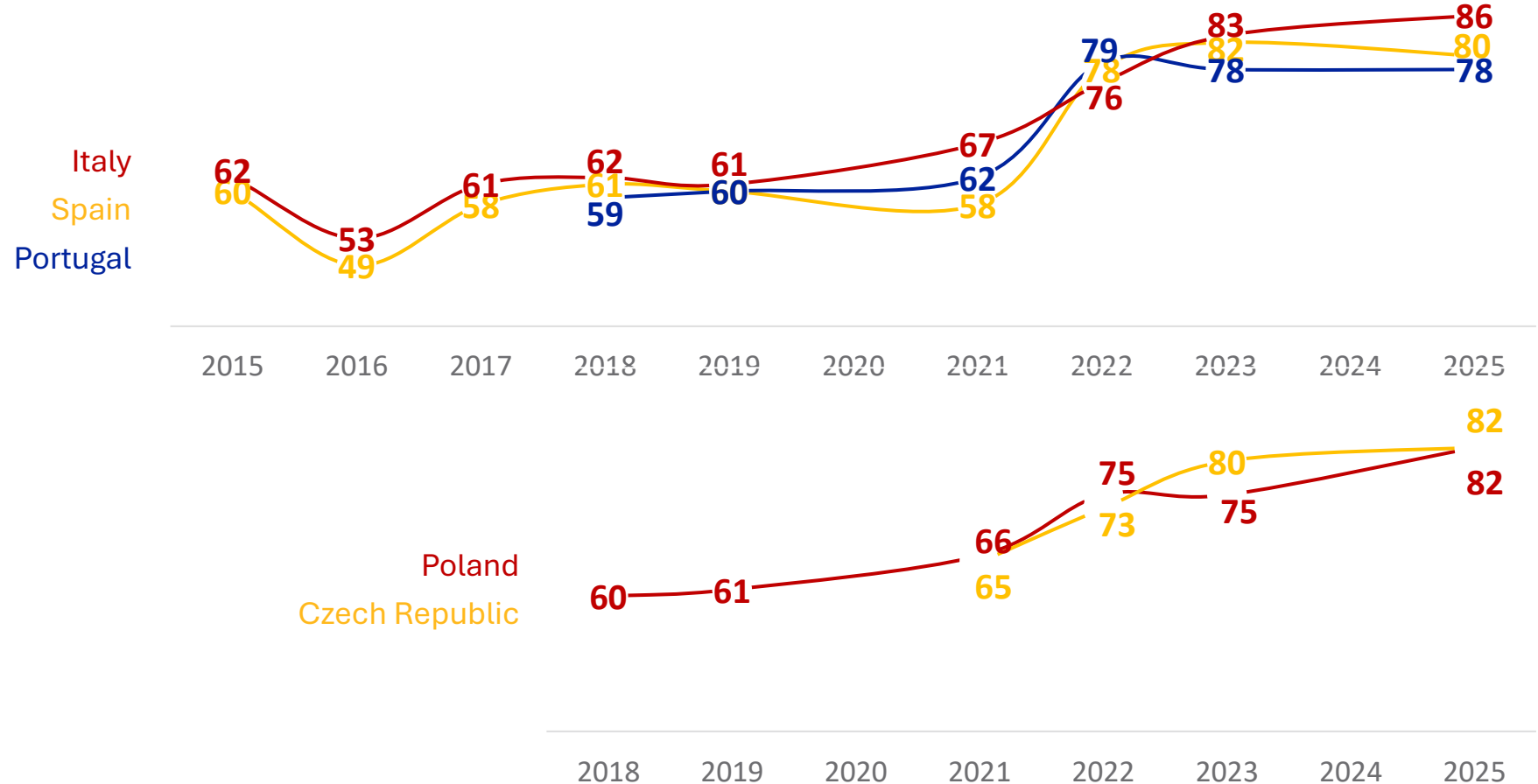
In North America, the desire to travel is also at an all-time high this year. However, the road to recovery has been a longer one than in Europe. Pre-pandemic in 2019, over two-thirds of Americans (68%) planned summer travel but unlike Europe, these numbers struggled to rebound post-COVID. This year 2025 marks a significant milestone, as North American travel intentions have not only recovered but surpassed pre-pandemic levels, reaching 71% (+10 pts versus 2016).

USA

Canada

| 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |

USA: 61, 66, 68, 68, 50, 60, 63, 69

Canada: 61, 64, 72

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Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / **XX** Significantly higher or lower score vs Europe
+X / **-X** Significantly evolution vs 2024

Plans to go away on a trip this year (%)

01

In line with Europeans, a bit over three quarters (76%) of individuals in Middle East countries (United Arabic Emirates and Saudi Arabia) intend to go on a trip between June and September. In North Asia, travel intentions reach 63% meanwhile in Oceania, where it's winter from June to September, travel plans are understandably lower than levels measured elsewhere but still reach 58%.

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Yes *(one or several trips)*	79	77	81	82	63	79	58	71	76

Region	Yes, and I plan to take several	Yes, and I plan to take only one trip	No
EU	32	47	21
WEST. EU	30	47	23
SOUTH EU	32	49	19
EAST. EU	40	42	18
NORTH ASIA	22	41	37
INDIA	43	36	21
OCEANIA	14	44	42
NORTH AMERICA	29	42	29
MIDDLE EAST	41	35	24

■ Yes, and I plan to take several   ■ Yes, and I plan to take only one trip   ■ No

Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Plans to go away on a trip this year (%)

01

In line with Europeans, a bit over three quarters (76%) of individuals in Middle East countries (United Arabic Emirates and Saudi Arabia) intend to go on a trip between June and September. In North Asia, travel intentions reach 63% meanwhile in Oceania, where it's winter from June to September, travel plans are understandably lower than levels measured elsewhere but still reach 58%.

		WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Yes (one or several trips)	79	82	82	73	72	77	76	80	78	86	82	82
Yes, and I plan to take several	32	27	41	28	23	28	32	32	27	38	37	43
Yes, and I plan to take only one trip	47	55	41	45	49	49	44	48	51	48	45	39
No	21	18	18	27	28	23	24	20	22	14	18	18

■ Yes, and I plan to take several   ■ Yes, and I plan to take only one trip   ■ No

Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]?

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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In line with Europeans, a bit over three quarters (76%) of individuals in Middle East countries (United Arabic Emirates and Saudi Arabia) intend to go on a trip between June and September. In North Asia, travel intentions reach 63% meanwhile in Oceania, where it's winter from June to September, travel plans are understandably lower than levels measured elsewhere but still reach 58%.
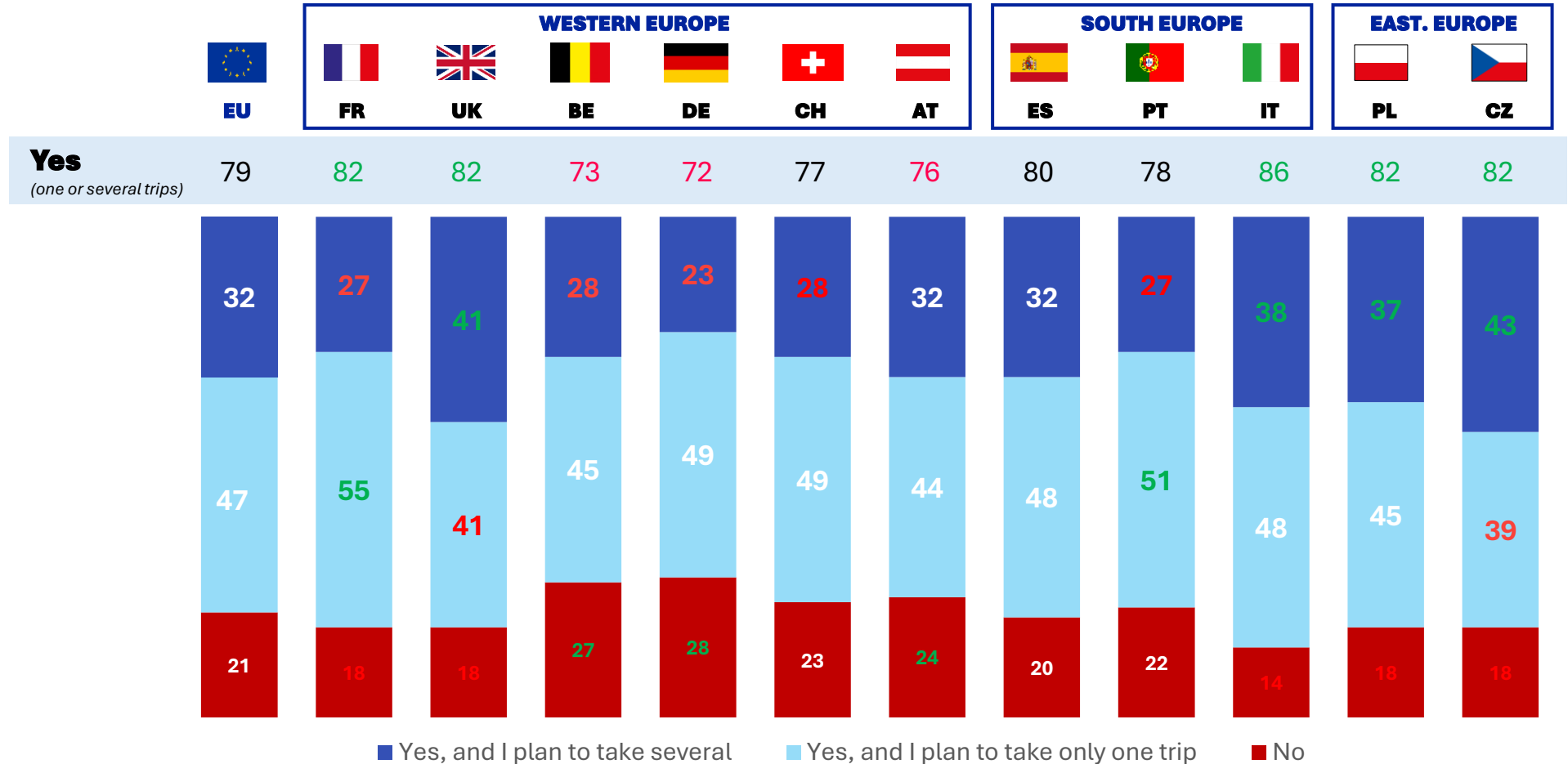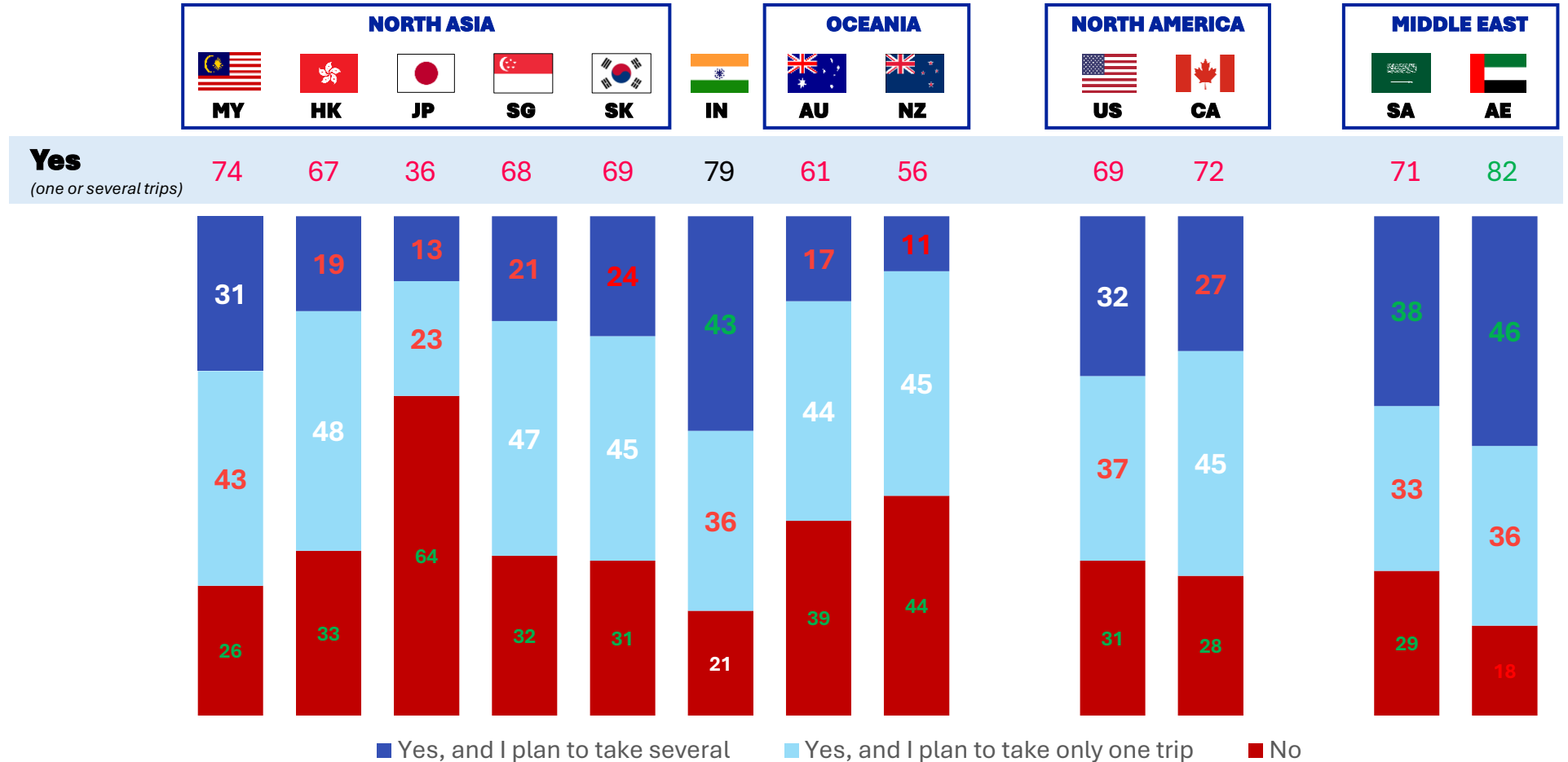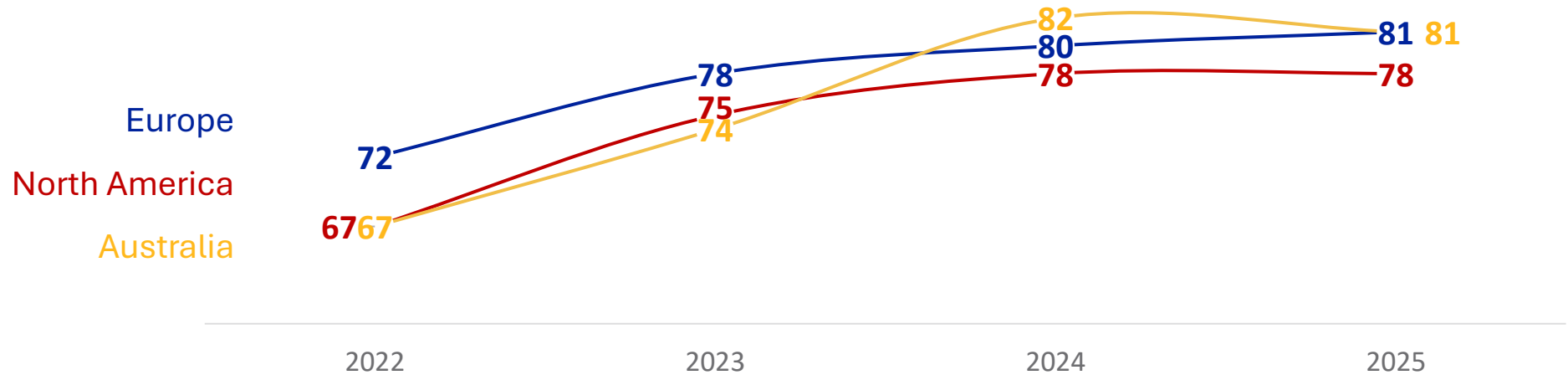
7/7 Plans to go away on a trip this year (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Yes (one or several trips)	74	67	36	68	69	79	61	56	69	72	71	82

Country	Several (dark blue)	Only one (light blue)	No (red)
MY	31	43	26
HK	19	48	33
JP	13	23	64
SG	21	47	32
SK	24	45	31
IN	43	36	21
AU	17	44	39
NZ	11	45	44
US	32	37	31
CA	27	45	28
SA	38	33	29
AE	46	36	18

■ Yes, and I plan to take several   ■ Yes, and I plan to take only one trip   ■ No

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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01

Beyond travel intentions, this growing appetite for travel over the years is also reflected in the sheer excitement individuals feel about the prospect of traveling this year and exploring new horizons.
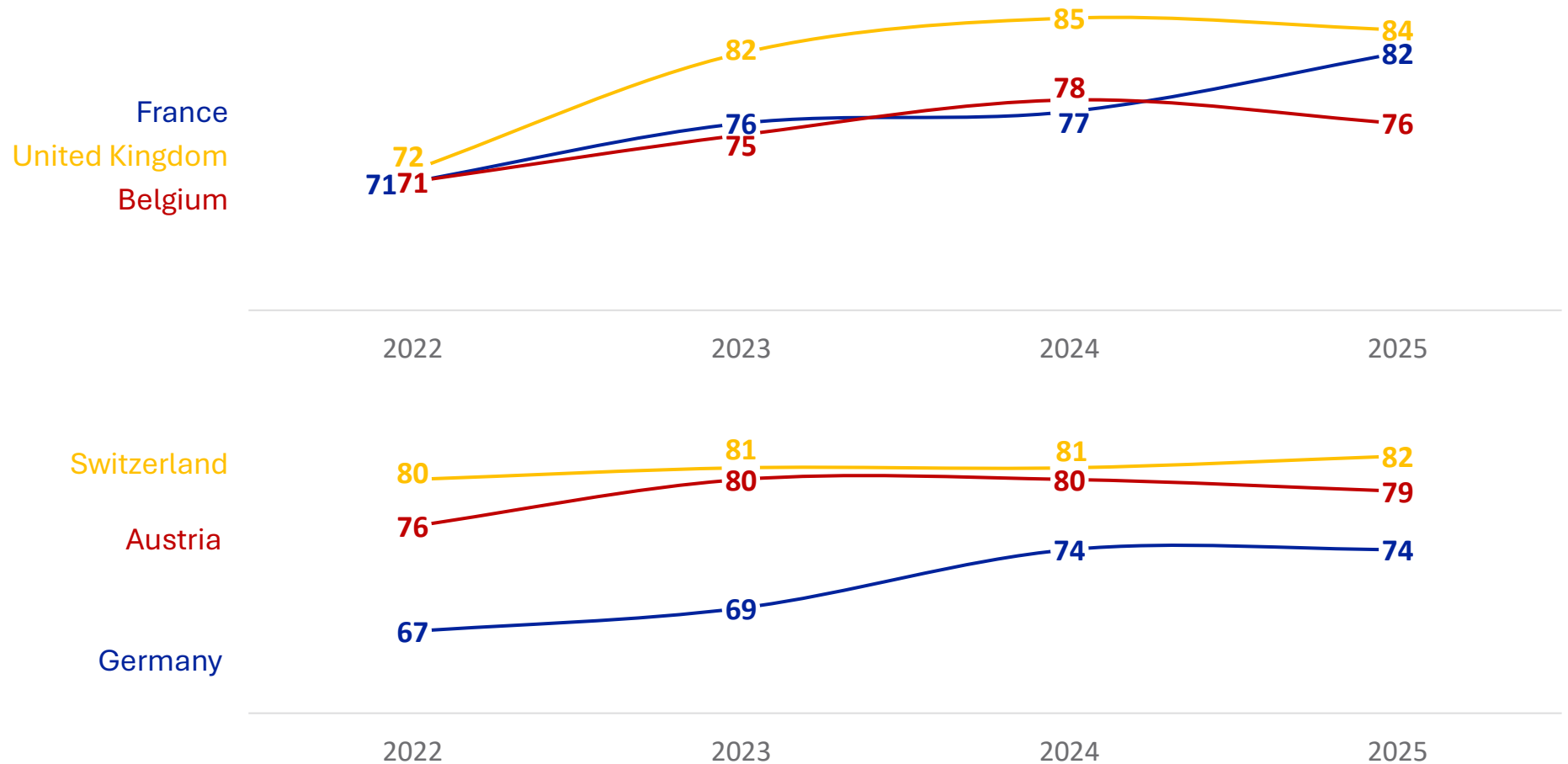
Travel enthusiasm – **Trend over several years**
% Enthusiast (Excited + Happy to travel)

Europe

North America

Australia

	2022	2023	2024	2025
Europe	72	78	80	81
North America	67	75	78	78
Australia	67	74	82	81

NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / **XX** *Significantly higher or lower score vs Europe*
+X / **-X** *Significantly evolution vs 2024*

01

Beyond travel intentions, this growing appetite for travel over the years is also reflected in the sheer excitement individuals feel about the prospect of traveling this year and exploring new horizons.

Travel enthusiasm – **Trend over several years**
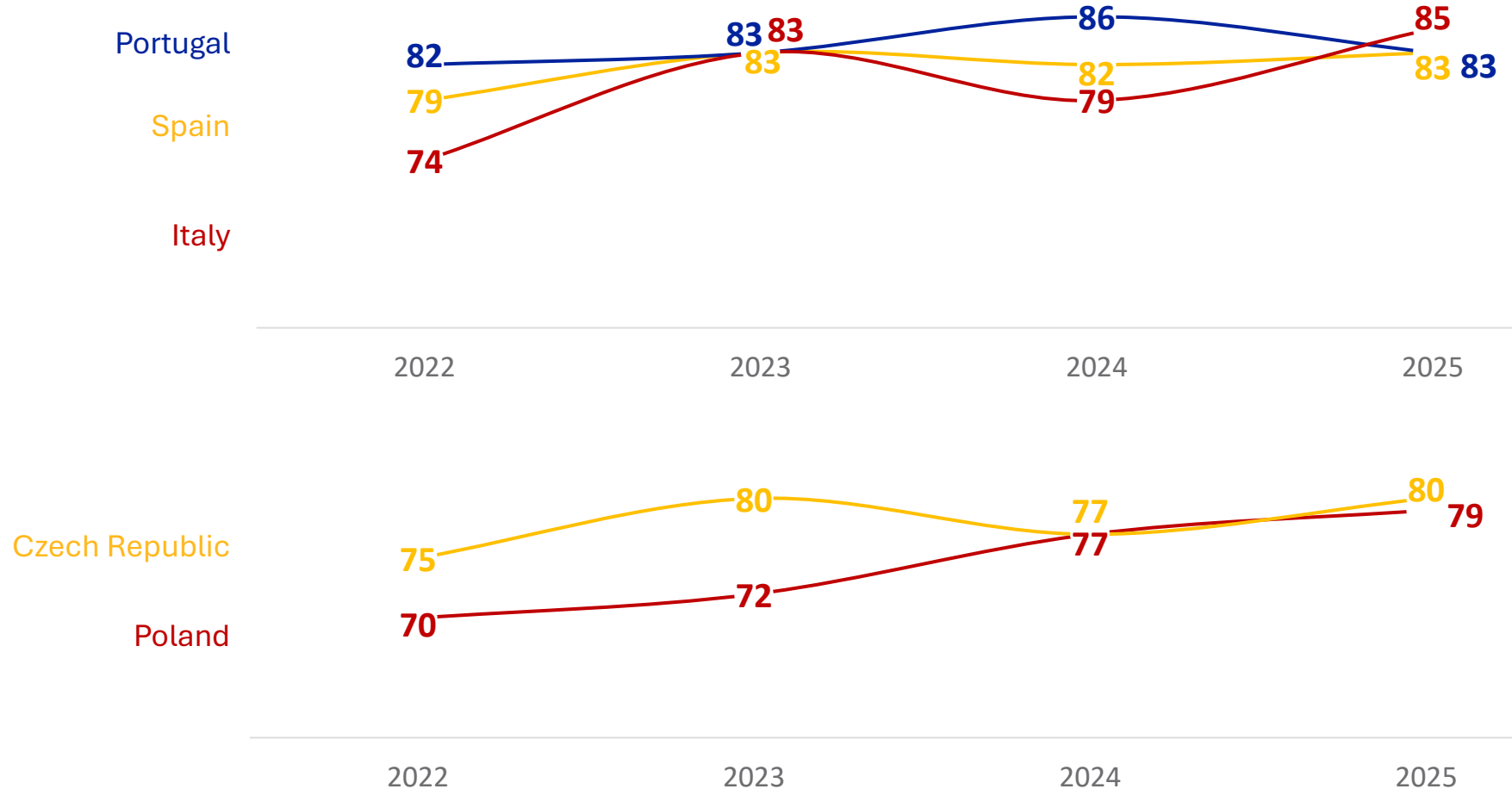% Enthusiast (Excited + Happy to travel)

France
United Kingdom
Belgium

- 72 → 82 → 85 → 84
- 71 → 76 → 77 → 82
- 71 → 75 → 78 → 76

2022   2023   2024   2025

Switzerland
Austria
Germany

- 80 → 81 → 81 → 82
- 76 → 80 → 80 → 79
- 67 → 69 → 74 → 74

2022   2023   2024   2025

NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

01

Beyond travel intentions, this growing appetite for travel over the years is also reflected in the sheer excitement individuals feel about the prospect of traveling this year and exploring new horizons.
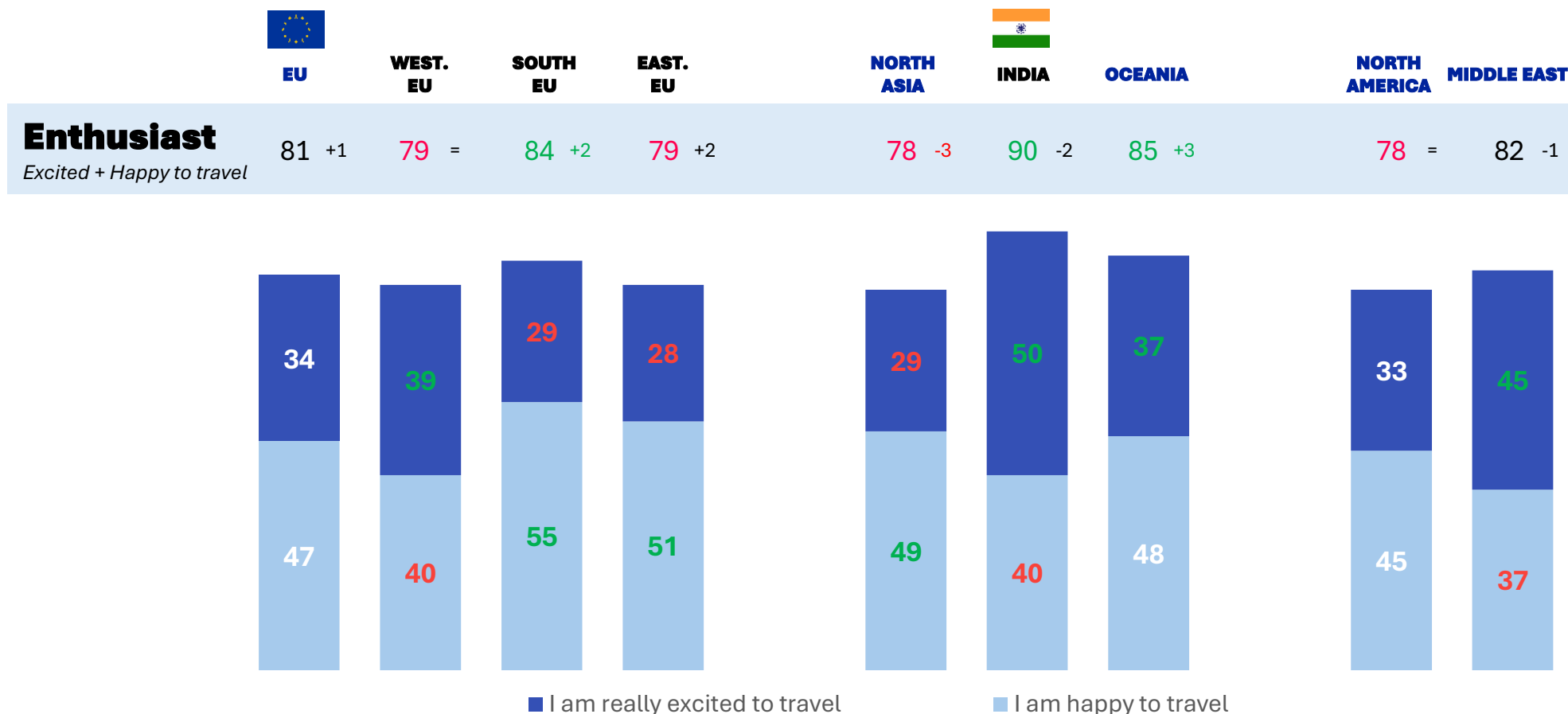
Travel enthusiasm – **Trend over several years**
% Enthusiast (Excited + Happy to travel)

Portugal

Spain

Italy

82 → 83 83 → 86 → 85
79 → 83 → 82 → 83
74 → 83 → 79 → 83

2022   2023   2024   2025

Czech Republic

Poland

75 → 80 → 77 → 80
70 → 72 → 77 → 79

2022   2023   2024   2025

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NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Travel enthusiasm – **Trend over several years**
% Enthusiast (Excited + Happy to travel)

01

Beyond travel intentions, this growing appetite for travel over the years is also reflected in the sheer excitement individuals feel about the prospect of traveling this year and exploring new horizons.

USA
Canada

68   75   76   77
66   75   80   78

2022   2023   2024   2025

XX / **XX** *Significantly higher or lower score vs Europe*
+X / **-X** *Significantly evolution vs 2024*
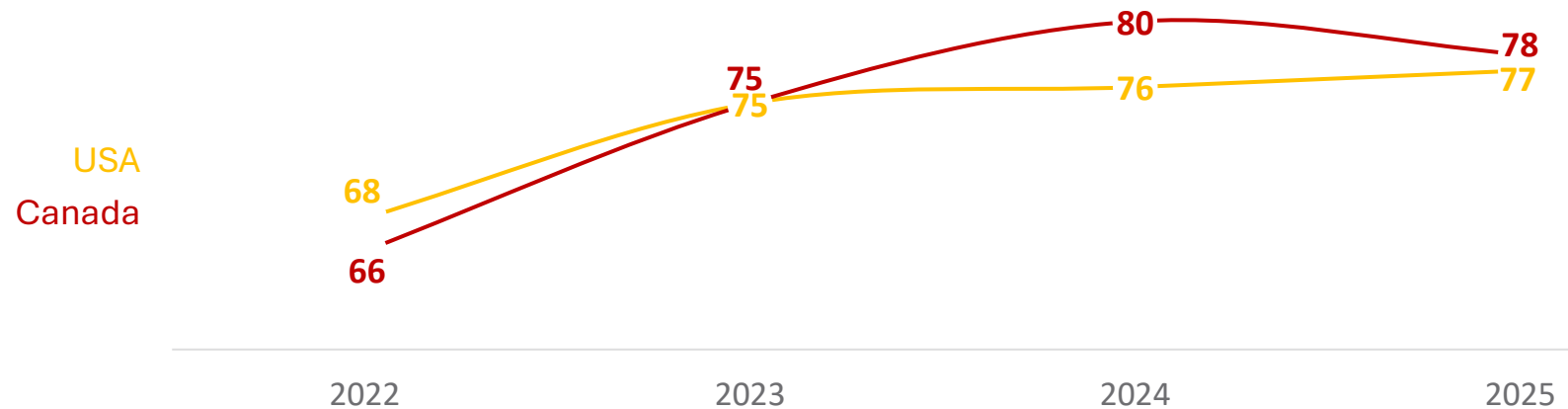
01

Around 80% of the population in Europe and other regions of the world feel enthusiastic about traveling this year and a bit over a fourth (29% in North Asia) to a half (50% in India) describing themselves as 'very excited' to travel.
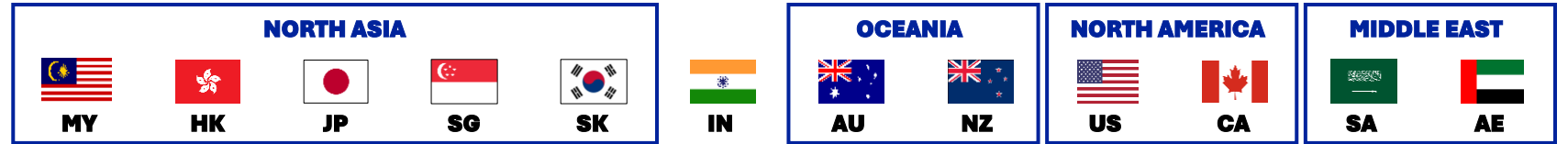
5/7 Travel enthusiasm (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Enthusiast *Excited + Happy to travel*	81 +1	79 =	84 +2	79 +2	78 -3	90 -2	85 +3	78 =	82 -1

Bars (I am really excited to travel / I am happy to travel):

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
I am really excited to travel	34	39	29	28	29	50	37	33	45
I am happy to travel	47	40	55	51	49	40	48	45	37

■ I am really excited to travel   ■ I am happy to travel

NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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Around 80% of the population in Europe and other regions of the world feel enthusiastic about traveling this year.

6/7

Travel enthusiasm (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Enthusiast *Excited + Happy to travel*	81 +1	82 +5	84 -1	76 -2	74 =	82 +1	79 -1	83 +1	83 -3	85 +6	79 +2	80 +3

Stacked bar chart — "I am really excited to travel" (top) / "I am happy to travel" (bottom):

	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Really excited	34	33	38	35	39	44	44	31	30	28	23	34
Happy	47	49	46	41	35	38	35	52	53	57	56	46

■ I am really excited to travel   ■ I am happy to travel

NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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01

This eagerness, which has been growing over the past years and peaked last season, hasn't declined and remains remarkably strong in every region of the world, the only exception being North Asia where the level of enthusiasm for travel has decreased slightly (78%, -3 points). Breaking down enthusiasm by country, we find, as we did last year, variations in the levels worldwide: Japan registers once again the lowest enthusiasm score (66%, -5) and India the highest (90%, -2).

7/7

Travel enthusiasm (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Enthusiast *Excited + Happy to travel*	86 -2	77 -4	66 -5	86 +1	75	90 -2	81 -1	88	77 +1	78 -2	76 -2	88 =
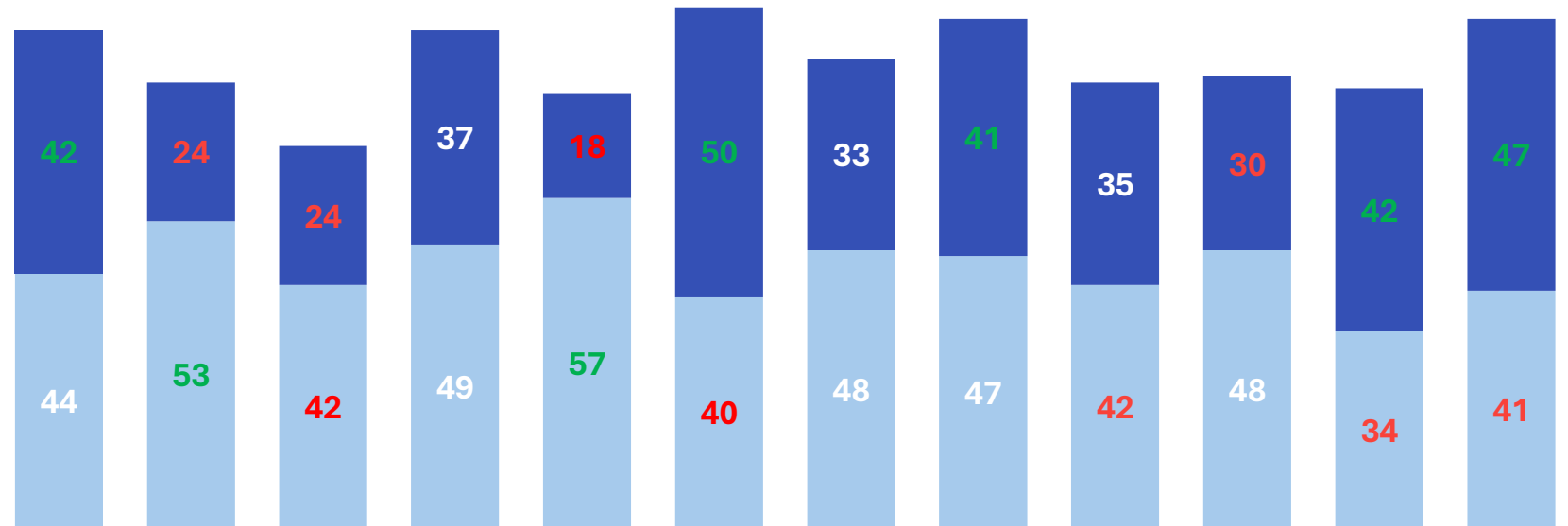
Bar chart values (I am really excited to travel / I am happy to travel):

	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
I am really excited to travel	42	24	24	37	18	50	33	41	35	30	42	47
I am happy to travel	44	53	42	49	57	40	48	47	42	48	34	41

■ I am really excited to travel   ■ I am happy to travel

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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The concept of the ideal summer vacation is evolving, with international travel taking center stage.

International travel is now the preferred choice for half of the respondents (50%, +1 versus 2024), a new signal that demonstrates the growing desire for global exploration. Domestic vacations are becoming less appealing (35%, -2), and even fewer people (8%, -1) envision their ideal vacation as staying home.

1/3 Ideal destination for summer vacation in 2025 (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
ST Travel *Abroad or in their country*	85 -1	84 -1	87 -1	85 +2	81 -1	87 -1	90 +5	81 +2	80 +3
Nowhere, I stay home *	8	10	5	8	12	8	5	12	9
Travel in my own country	35 -2	27 -1	51 -5	36 +1	33 +1	57 -5	39 -4	51 +1	38 +1
Travel abroad	50 +1	57 =	36 +4	49 +1	48 -2	30 +4	51 +9	30 +1	42 +2
I don't know	7	6	8	7	7	5	5	7	11

■ Nowhere, I stay home * ■ Travel in my own country ■ Travel abroad ■ I don't know

* Item updated. In 2024: "Stay home"

NEWQ2. When you think of the ideal [summer vacation / vacation] in 2025, where would you primarily want to go? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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01

The concept of the ideal summer vacation is evolving, with international travel taking center stage.

International travel is now the preferred choice for half of the respondents (50%, +1 versus 2024), a new signal that demonstrates the growing desire for global exploration. Domestic vacations are becoming less appealing (35%, -2), and even fewer people (8%, -1) envision their ideal vacation as staying home.

Ideal destination for summer vacation in 2025 (%)

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
EU	**FR**	**UK**	**BE**	**DE**	**CH**	**AT**	**ES**	**PT**	**IT**	**PL**	**CZ**

ST Travel
Abroad or in their country

EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
85 -1	86 +4	87 -1	81 -2	79 -3	84 -3	85 -3	86 -2	89 -1	86 =	85 +3	87 +2
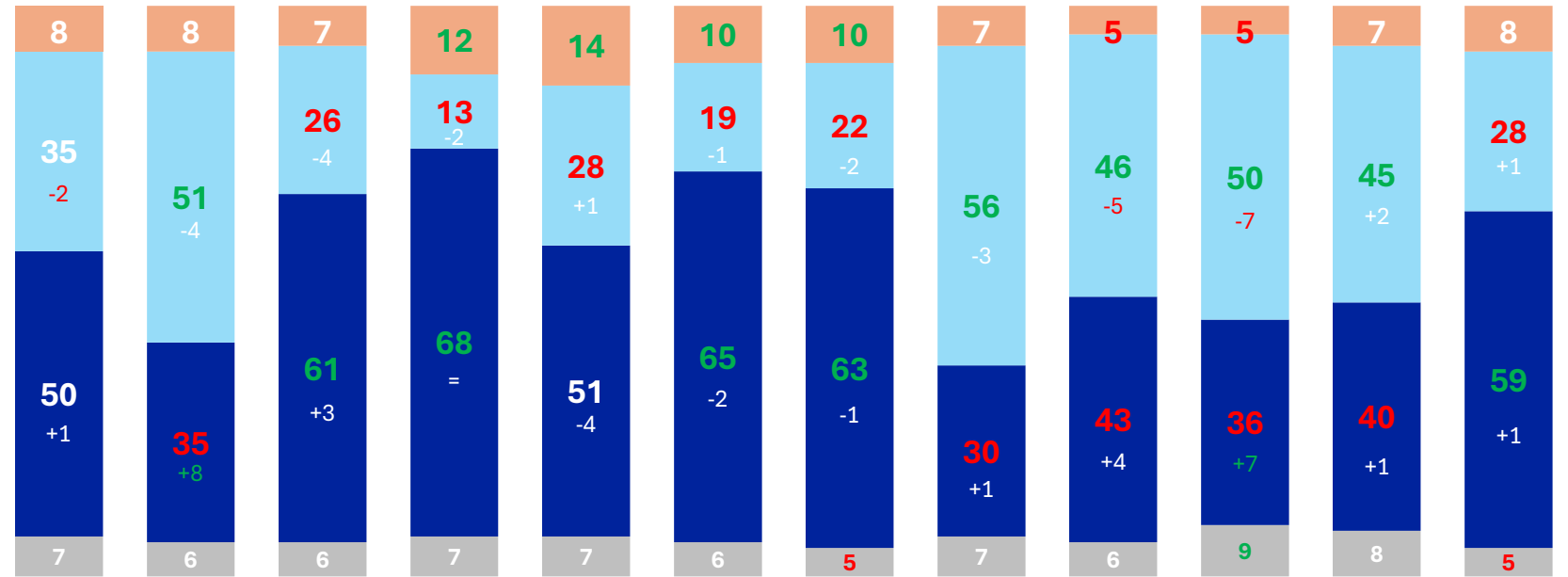
Stacked bar values:

Nowhere, I stay home* (top / orange):
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
8	8	7	12	14	10	10	7	5	5	7	8

Travel in my own country (light blue):
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
35 -2	51 -4	26 -4	13 -2	28 +1	19 -1	22 -2	56 -3	46 -5	50 -7	45 +2	28 +1

Travel abroad (dark blue):
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
50 +1	35 +8	61 +3	68 =	51 -4	65 -2	63 -1	30 +1	43 +4	36 +7	40 +1	59 +1

I don't know (grey):
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
7	6	6	7	7	6	5	7	6	9	8	5

- Nowhere, I stay home *
- Travel in my own country
- Travel abroad
- I don't know

* Item updated. In 2024: "Stay home"

NEWQ2. When you think of the ideal [summer vacation / vacation] in 2025, where would you primarily want to go? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

01

International travel as the ideal vacation remains the norm in Hong Kong and Singapore, and is also dominant in New Zealand.

Ideal destination for summer vacation in 2025 (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE

ST Travel
Abroad or in their country
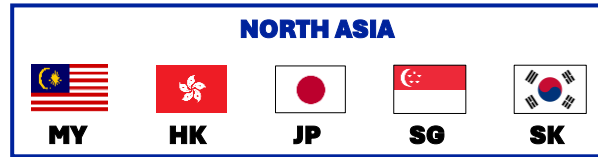
MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
86 =	85 -1	72 +5	87 -1	76	87 -1	86 +1	93	78 +1	83 +2	73 +4	87 +2
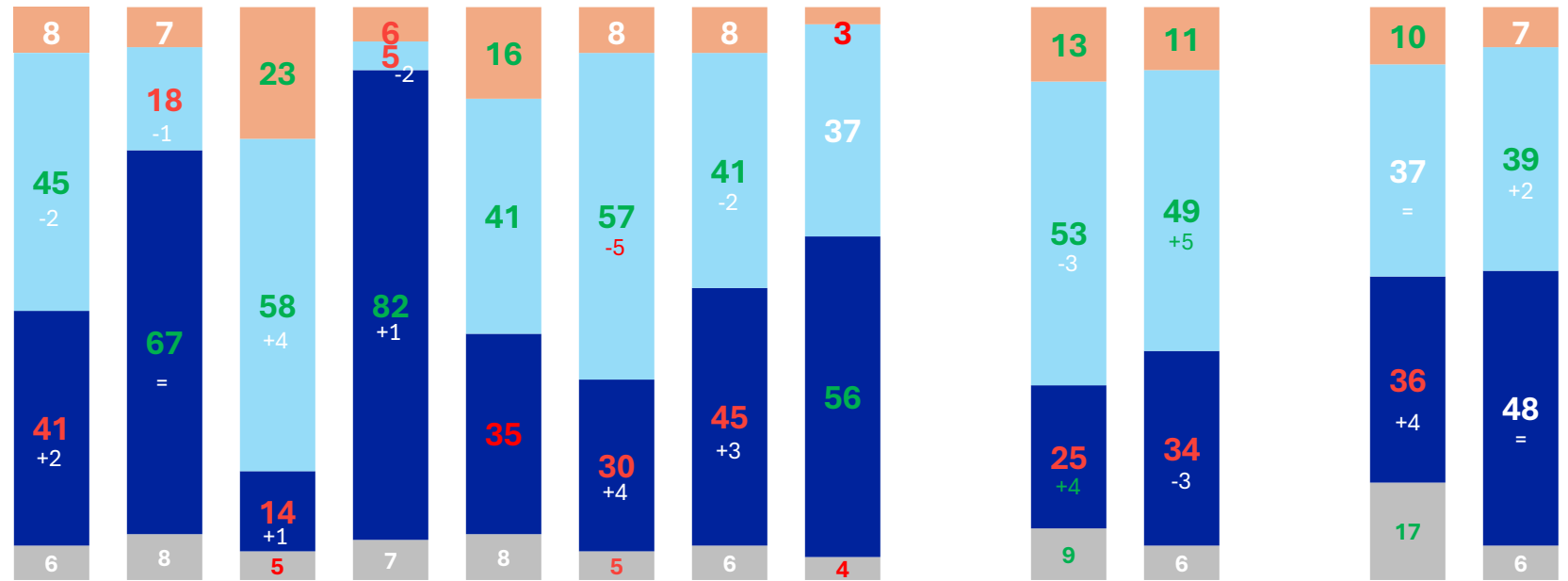
Stacked bars (bottom to top):

	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
I don't know	6	8	5	7	8	5	6	4	9	6	17	6
Travel abroad	41 +2	67 =	14 +1	82 +1	35	30 +4	45 +3	56	25 +4	34 -3	36 +4	48 =
Travel in my own country	45 -2	18 -1	58 +4	5 -2	41	57 -5	41 -2	37	53 -3	49 +5	37 =	39 +2
Nowhere, I stay home *	8	7	23	6	16	8	8	3	13	11	10	7

■ Nowhere, I stay home *   ■ Travel in my own country   ■ Travel abroad   ■ I don't know

* Item updated. In 2024: "Stay home"

NEWQ2. When you think of the ideal [summer vacation / vacation] in 2025, where would you primarily want to go? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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In every area of the world, whether one has planned to travel in one's own country or abroad, four key dimensions shape vacation expectations:

- Coming together with family & friends

- Exploring nature

- Relaxing holidays

- Discovering new cultures

1/6 Thinking of the ideal vacation
Firstly (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Come together as a family, or with friends	22	23	18	28	20	20	24	24	24
Rest *	20	19	22	24	19	6	12	12	13
NEW Explore nature (visit national parcs, natural wildlife reserves)	19	18	19	19	20	32	23	22	16
Discover new cultures **	14	15	18	10	13	13	16	11	9
Enjoy my home (do things inside that I don't have time to do normally)	4	4	3	3	7	6	4	6	9
Do sports (such as hiking, climbing...)	4	4	3	5	3	4	3	5	5
Learn new things	4	4	6	2	4	6	4	4	7
Take time to read	3	3	2	1	2	3	2	2	3
NEW Attend a concert, a festival or a cultural event	3	3	3	3	4	4	5	6	5
Volunteer for a social or environmental cause/association	1	1	1	1	1	2	0	1	3
Other	3	3	3	2	2	1	4	3	1
None of these	3	3	2	2	5	3	3	4	5

Item modified. In 2024: "Rest, have peace of mind"
**Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"*

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX Significantly higher or lower score vs Europe

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Thinking of the ideal vacation
Firstly (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Come together as a family, or with friends	22	23	20	24	24	22	22	15	18	23	29	27
Rest *	20	18	17	18	19	20	18	23	29	14	26	21
NEW Explore nature (visit national parcs, natural wildlife reserves)	19	22	22	16	20	14	15	19	17	22	15	24
Discover new cultures **	14	14	17	14	13	16	15	18	18	17	11	8
Enjoy my home (do things inside that I don't have time to do normally)	4	3	4	4	5	5	5	3	2	3	3	3
Do sports (such as hiking, climbing...)	4	5	2	4	3	3	6	3	2	3	4	6
Learn new things	4	5	5	5	3	3	4	7	4	7	3	2
Take time to read	3	3	2	5	4	4	3	2	2	2	2	1
NEW Attend a concert, a festival or a cultural event	3	2	4	3	2	4	4	4	2	3	2	3
Volunteer for a social or environmental cause/association	1	0	1	0	0	1	1	1	0	1	1	0
Other	3	2	3	3	3	5	5	3	3	3	1	3
None of these	3	3	3	4	4	3	2	2	3	2	3	2

Item modified. In 2024: "Rest, have peace of mind"
**Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"*

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

Thinking of the ideal vacation
Firstly (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Come together as a family, or with friends	31	29	13	22	7	20	21	27	26	22	23	25
Rest *	14	13	18	16	30	6	13	12	11	13	18	9
NEW Explore nature (visit national parcs, natural wildlife reserves)	19	23	17	22	18	32	24	22	19	24	12	19
Discover new cultures **	13	8	7	16	20	13	15	16	11	12	9	10
Enjoy my home (do things inside that I don't have time to do normally)	5	5	13	4	7	6	5	3	6	5	6	12
Do sports (such as hiking, climbing...)	2	4	4	3	3	4	3	3	3	6	5	5
Learn new things	6	5	4	4	2	6	4	3	5	4	9	5
Take time to read	2	2	4	1	3	3	3	2	2	3	2	3
NEW Attend a concert, a festival or a cultural event	3	4	8	4	3	4	4	7	7	5	4	5
Volunteer for a social or environmental cause/association	2	1	0	2	1	2	1	0	2	0	3	4
Other	0	3	4	2	0	1	4	3	3	3	1	1
None of these	3	3	8	4	6	3	3	2	5	3	8	2

* Item modified. In 2024: "Rest, have peace of mind"
** Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX Significantly higher or lower score vs Europe

Thinking of the ideal vacation
Total – Firstly, secondly, thirdly (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Come together as a family, or with friends	53	53	48	63	48	48	53	52	50
Rest *	50	48	48	58	44	17	41	36	36
NEW Explore nature (visit national parcs, natural wildlife reserves)	50	49	51	54	49	63	55	52	45
Discover new cultures **	38	37	42	33	37	44	37	29	31
Learn new things	22	20	32	13	23	35	26	25	28
Take time to read	16	19	13	11	10	10	12	12	12
Enjoy my home (do things inside that I don't have time to do normally)	16	17	14	15	25	23	17	21	30
Do sports (such as hiking, climbing…)	15	15	12	19	13	14	13	16	17
NEW Attend a concert, a festival or a cultural event	13	12	15	13	16	21	18	22	18
Volunteer for a social or environmental cause/association	3	3	4	2	5	12	3	4	11
Other	7	8	7	5	5	2	10	9	1
None of these	3	3	2	2	5	3	3	4	5

* Item modified. In 2024: "Rest, have peace of mind"
** Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX Significantly higher or lower score vs Europe

01

Thinking of the ideal vacation
Total – Firstly, secondly, thirdly (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Come together as a family, or with friends	53	56	50	53	53	49	58	43	48	52	61	64
Rest *	50	47	43	46	50	52	49	48	59	38	60	56
NEW Explore nature (visit national parcs, natural wildlife reserves)	50	55	54	45	50	44	43	49	50	55	50	59
Discover new cultures **	38	36	41	35	34	40	34	40	43	44	35	31
Learn new things	22	25	24	21	15	20	16	31	28	36	15	10
Take time to read	16	16	20	23	18	19	17	14	14	12	13	10
Enjoy my home (do things inside that I don't have time to do normally)	16	13	14	16	19	20	22	15	12	14	13	17
Do sports (such as hiking, climbing…)	15	19	10	14	15	14	18	13	11	11	17	21
NEW Attend a concert, a festival or a cultural event	13	11	14	11	10	12	14	16	14	14	14	11
Volunteer for a social or environmental cause/association	3	3	3	4	3	4	3	4	3	5	3	2
Other	7	4	8	8	7	10	11	9	7	6	4	7
None of these	3	3	3	4	4	3	2	2	3	2	3	2

* Item modified. In 2024: "Rest, have peace of mind"
** Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

Thinking of the ideal vacation
Total – Firstly, secondly, thirdly (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Come together as a family, or with friends	62	60	35	53	29	48	49	56	52	52	46	55
Rest *	38	37	44	40	59	17	42	40	34	37	41	32
NEW Explore nature (visit national parcs, natural wildlife reserves)	52	50	40	56	47	63	54	56	49	55	40	50
Discover new cultures **	41	29	20	48	48	44	36	38	30	28	30	33
Learn new things	35	21	19	25	15	35	29	23	28	22	31	24
Take time to read	7	8	16	6	14	10	11	13	11	13	12	11
Enjoy my home (do things inside that I don't have time to do normally)	20	21	40	19	27	23	18	15	21	21	25	35
Do sports (such as hiking, climbing...)	10	21	14	11	10	14	12	14	13	19	18	15
NEW Attend a concert, a festival or a cultural event	12	17	21	12	20	21	16	20	23	22	14	22
Volunteer for a social or environmental cause/association	7	9	3	5	4	12	4	3	5	3	10	12
Other	3	5	9	6	2	2	10	10	9	9	2	1
None of these	3	3	8	4	6	3	3	2	5	3	8	2

Item modified. In 2024: "Rest, have peace of mind"
**Item modified. In 2024: "Discover new cultures, enjoy a total change of scenery"*

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2025, what would you primarily want to do? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

Beyond the motivations of relaxation, family time, and discovery, a new dimension seems to be emerging: the experiential aspect of travel and the creation of lasting memories. In a newly introduced survey question about the most valued aspects of travel, over 4 respondents out of 10 across all geographic regions highlighted "making memories." This underscores a shift in travel priorities, where the focus is not just on visiting a place, but on creating meaningful experiences and memories that enrich one's life.

1/3 Favourite aspects of traveling (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Relaxing, escaping from daily routines and stress	60	61	56	63	60	57	66	62	44
Exploring new places (cities, landscapes, and attractions)	55	55	52	60	56	56	64	56	41
Making memories	43	45	39	43	46	46	59	55	36
Experiencing different cultures, local traditions and customs	40	40	39	39	43	51	47	39	32
Trying new foods and local cuisine	40	41	38	41	53	48	51	44	31
Personal growth: gaining new perspectives and broadening horizons	26	24	32	21	31	37	33	30	31
Meeting new people: connecting with locals and other travellers	25	27	24	22	20	44	32	27	31
Learning new languages or improving your language skills	13	14	14	11	14	31	14	13	24

NEW

Q25Q9. What aspects of traveling do you enjoy the most? Basis: To all

XX / XX Significantly higher or lower score vs Europe

2/3 Favourite aspects of traveling (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Relaxing, escaping from daily routines and stress	60	60	68	61	61	59	60	57	64	46	60	67
Exploring new places (cities, landscapes, and attractions)	55	58	62	51	51	53	54	54	56	48	57	63
Making memories	43	44	57	40	44	40	43	32	50	33	41	46
Experiencing different cultures, local traditions and customs	40	42	46	36	35	41	37	36	46	36	36	42
Trying new foods and local cuisine	40	39	45	37	39	44	41	39	42	34	40	42
Personal growth: gaining new perspectives and broadening horizons	26	20	27	20	25	27	27	29	36	31	23	20
Meeting new people: connecting with locals and other travellers	25	30	30	24	24	28	25	23	27	22	25	20
Learning new languages or improving your language skills	13	12	18	11	12	16	12	12	15	14	11	11

NEW

Q25Q9. What aspects of traveling do you enjoy the most? Basis: To all

XX / **XX** *Significantly higher or lower score vs Europe*

3/3 Favourite aspects of traveling (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Relaxing, escaping from daily routines and stress	66	63	43	68	59	57	65	68	61	63	40	47
Exploring new places (cities, landscapes, and attractions)	62	53	51	61	53	56	58	70	53	59	41	41
Making memories	55	35	48	53	39	46	54	64	53	56	35	36
Experiencing different cultures, local traditions and customs	51	50	28	55	31	51	42	52	37	40	30	35
Trying new foods and local cuisine	55	63	48	60	41	48	47	54	47	40	27	34
Personal growth: gaining new perspectives and broadening horizons	36	32	17	36	32	37	30	36	30	30	30	31
Meeting new people: connecting with locals and other travellers	34	12	10	29	15	44	30	34	29	26	30	32
Learning new languages or improving your language skills	25	12	7	18	9	31	13	15	14	13	24	24

NEW

Q25Q9. What aspects of traveling do you enjoy the most? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

External Data Insights: the "new nihilism" from Ipsos Global Trends study

It aligns with the "new nihilism" trend identified in the Ipsos Global Trends study, conducted annually since 2013 with a sample of 50,000 respondents across 50 countries. This is a widespread sentiment that it's better to live for today — either because tomorrow is uncertain, or that it will simply take care of itself, because individuals feel powerless to take personal control.

The important thing is to enjoy life today, tomorrow will take care of itself

2013
2016
2024

	2013	2024	
(World)	50%	61%	+11
EUROPE	49%	59%	+10
NORTH AMERICA	57%	63%	+6
NORTH ASIA	48%	61%	+10

EUROPE
🇫🇷 58% 68% +10
🇬🇧 51% 60% +9
🇩🇪 56% 62% +6
🇪🇸 45% 60% +15

NORTH AMERICA
🇺🇸 51% 64% +13
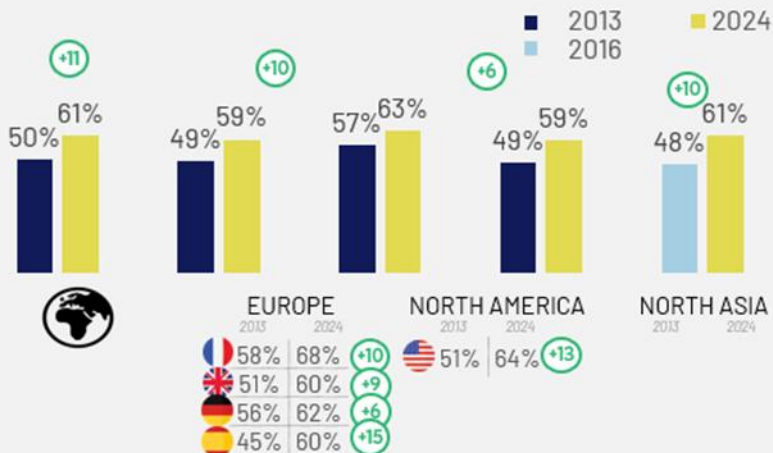
I live for today because the future is uncertain
To what extent do you agree or disagree with the statement…

% Agree
France 78, India 78, Spain 72, Belgium 69, KSA 69, Singapore 67, UAE 67, United States 66, Switzerland 66, Czechia 66, Canada 65, Portugal 64, Italy 64, Malaysia 63, Australia 62, Great Britain 62, Germany 60, New Zealand 54, Japan 52, Poland 52, South Korea 49

% Disagree
18, 20, 23, 25, 23, 29, 26, 29, 29, 30, 29, 32, 32, 30, 33, 32, 32, 42, 32, 42, 45
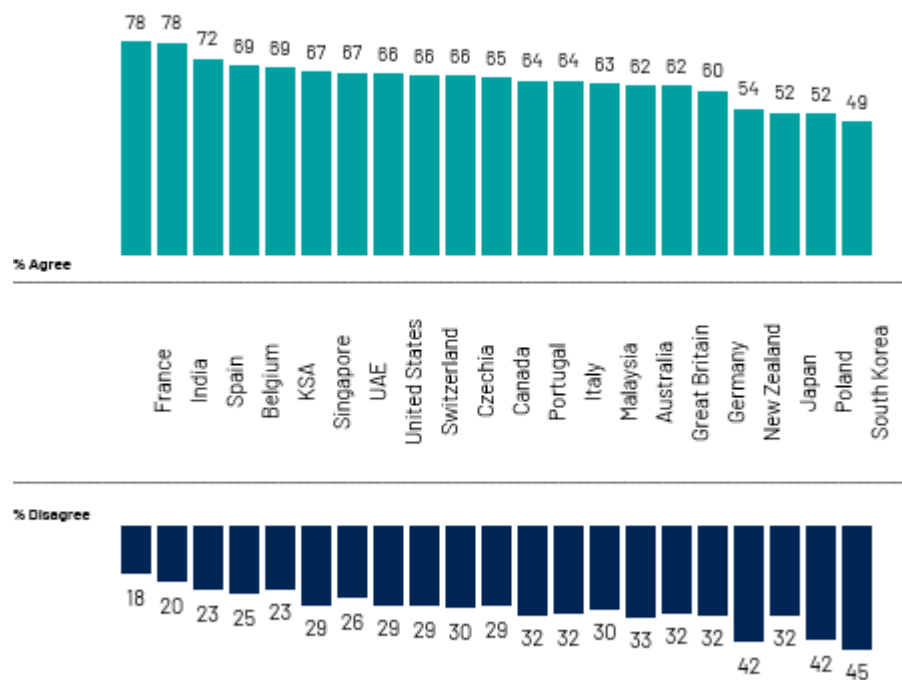
01

One in five people won't and their reasons go beyond a simple lack of enthusiasm.

Financial constraints are the primary obstacle.

One-third of Europeans respondents also cite personal obligations as preventing them from traveling, such as fragile health, caring for a loved one, lacking a travel companion, or work commitments.

One-fifth are planning to travel at another time of the year, and only a smaller segment (18%) simply prefers to stay home and express a genuine disinterest in travel.

Reasons for not travelling this summer (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
I cannot afford it	42	41	42	44	34	39	44	45	36
I am saving money	27	25	28	32	32	25	36	34	29
I will go at another time of the year	22	26	21	10	29	35	44	24	25
NEW I prefer to stay home, I do not enjoy traveling	18	19	12	20	18	13	8	17	10
My health condition does not allow me to travel	13	13	7	19	8	9	5	9	4
NEW I don't have a companion to travel with	9	8	9	12	10	12	6	8	11
I cannot take vacations from my job	7	6	10	3	13	12	11	7	19
I am in charge of a relative that I cannot leave behind	7	6	9	9	9	7	5	7	10
I want to reduce as much as possible my carbon footprint	3	4	2	2	2	6	1	2	2
NEW Travelling makes me anxious (flying, unfamiliar places…)	3	3	3	4	4	1	1	8	4
NEW I'm concerned about safety & security in potential travel destinations	3	3	2	5	5	6	2	7	6
NEW I had negative past experiences while traveling	1	1	1	3	1	5	0	1	3
TOTAL Financial reasons	58	56	61	61	53	51	63	63	56
TOTAL Personal obligations	33	31	32	39	37	36	25	28	39
TOTAL Personal choices	42	47	34	32	47	47	52	41	35
TOTAL Anxiety to travel	6	6	5	8	9	6	3	14	9

Q17. And why are you not going on a trip [this summer / between June and September]? Basis: To those who don't plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*

Reasons for not travelling this summer (%)

Financial constraints are the primary obstacle of summer travel in Europe, particularly in the UK (66%) and in Portugal (70%)

One-third of Europeans respondents also cite personal obligations as preventing them from traveling, such as fragile health, caring for a loved one, lacking a travel companion, or work commitments.

One-fifth are planning to travel at another time of the year, and finally, only a smaller segment (18%) simply prefers to stay home and express a genuine disinterest in travel.

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I cannot afford it	42	47	47	39	46	33	36	41	44	42	43	44
I am saving money	27	28	34	24	24	21	22	21	39	20	33	31
I will go at another time of the year	22	29	23	22	20	36	28	23	19	20	13	8
NEW I prefer to stay home, I do not enjoy traveling	18	18	17	21	20	19	18	11	13	14	20	20
My health condition does not allow me to travel	13	8	13	14	17	12	13	7	7	8	18	20
NEW I don't have a companion to travel with	9	6	9	10	8	6	9	10	10	6	11	14
I cannot take vacations from my job	7	6	2	7	6	11	5	9	9	12	2	5
I am in charge of a relative that I cannot leave behind	7	5	3	10	7	3	6	11	7	8	6	11
I want to reduce as much as possible my carbon footprint	3	2	3	5	6	3	6	2	3	1	2	2
NEW Travelling makes me anxious (flying, unfamiliar places...)	3	4	6	3	2	4	1	3	4	2	4	5
NEW I'm concerned about safety & security in potential travel destinations	3	2	1	4	4	3	4	3	2	2	5	5
NEW I had negative past experiences while traveling	1	2	1	1	0	1	2	1	1	2	2	3
TOTAL Financial reasons	58	63	66	54	60	47	47	56	70	52	61	61
TOTAL Personal obligations	33	23	25	38	35	30	31	34	30	33	33	46
TOTAL Personal choices	42	47	42	45	43	58	48	35	33	34	35	29
TOTAL Anxiety to travel	6	6	6	5	6	6	5	6	4	4	8	8

XX / XX Significantly higher or lower score vs Europe

Reasons for not travelling this summer (%)

01

In other regions of the world, financial constraints are also the predominant factor preventing summer travel, consistently ranking as the top reason for forgoing trips between June and September.

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
I cannot afford it	31	23	38	27	47	39	43	45	47	43	36	37
I am saving money	47	19	37	38	20	25	33	38	34	34	27	32
I will go at another time of the year	33	39	19	40	22	35	39	48	25	24	24	26
NEW I prefer to stay home, I do not enjoy traveling	17	22	19	6	29	13	10	7	19	15	13	6
My health condition does not allow me to travel	8	4	9	8	12	9	6	4	8	11	4	5
NEW I don't have a companion to travel with	11	14	8	15	6	12	8	4	9	8	13	7
I cannot take vacations from my job	15	11	9	18	17	12	12	10	6	8	16	24
I am in charge of a relative that I cannot leave behind	13	12	6	7	11	7	5	5	8	6	10	10
I want to reduce as much as possible my carbon footprint	2	2	0	4	4	6	1	1	2	3	1	3
NEW Travelling makes me anxious (flying, unfamiliar places...)	2	6	6	3	4	1	1	2	8	8	5	2
NEW I'm concerned about safety & security in potential travel destinations	7	10	2	8	3	6	3	1	5	10	7	5
NEW I had negative past experiences while traveling	2	1	1	2	2	5	0	0	2	0	3	3
TOTAL Financial reasons	61	36	58	49	55	51	59	66	65	62	56	56
TOTAL Personal obligations	38	38	31	41	41	36	28	22	28	29	37	43
TOTAL Personal choices	50	58	38	49	52	47	48	55	43	38	37	33
TOTAL Anxiety to travel	8	14	7	11	6	6	4	2	12	16	11	6

Q17. And why are you not going on a trip [this summer / between June and September]? Basis: To those who don't plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*

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02

Finding serenity amidst chaos, the difficult equation for the 2025 traveler

02

Motivations for the choice of destination (%)

Safety has become a paramount concern for travelers choosing a destination. For those with summer travel plans, safety ranks as the top reason for selecting destinations for North Asian and North American travelers. It's a top-three factor in Europe, India, Oceania, and the Middle East.

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
I like the **weather/climate** in this/these country (ies)	42 -2	42 -3	41 -1	41 -1	31 -4	39 -6	27 -8	32 +2	33 -2
I have **already been there** and wanted to return	39 +1	44 +2	26 =	39 -4	34 =	17 +2	29 -3	27 -1	20 +1
It is a **safe** destination (in terms of security)	28 +2	26 +1	31 +2	33 +3	34 -4	34 -4	26 -5	32 +1	27 -5
It offers **activities I like** (e.g. hiking, monuments to visit…)	27 =	25 -1	27 =	34 =	25 +1	25 -3	25 +2	29 -1	25 -2
I have **friends / family to visit** there	19 =	20 +1	21 -1	14 +1	19 =	24 -2	36 +7	32 =	27 -5
I have **friends / family that recommended** it	15 +1	15 +1	14 -1	15 +2	20 +1	27 +2	17 -2	15 -2	26 +1
I found a **good deal** to go there	13 -1	11 -1	14 -4	19 +1	31 -2	22 =	14 -7	12 -4	18 =
It is a country **with good healthcare** infrastructures	9 +2	8 +1	12 +2	7 +2	10 =	24 -2	6 -3	10 =	19 +2
I saw a **documentary / movie /** read an **article / a book** about this country	8 +1	8 +2	8 -1	8 +1	15 -1	20 +1	8 +2	10 =	14 -1
NEW A **social media influencer** posted a story on this country and it made me want to go there	4	4	4	3	15	25	5	8	17
Other	6 -1	7 -1	6 =	5 =	4 +1	1 -1	14 +5	10 +1	2 +1

Top answers per country: #1 #2 #3

Q22. What motivated you to pick [first country picked in Q21] as a [summer / travel] destination? Basis: To those who plan to go on a trip in [first country picked in Q21]

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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2/4 Motivations for the choice of destination (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I like the **weather/climate** in this/these country (ies)	42 -2	38 -6	42 +2	37 -5	47 -3	40 -6	47 -2	39 -1	43 -1	41 =	45 +3	38 -3
I have **already been there** and wanted to return	39 +1	44 +7	40 -1	42 -3	46 =	44 +4	50 +4	26 -1	24 +1	27 =	33 +1	44 -7
It is a **safe** destination (in terms of security)	28 +2	23 +3	29 -2	22 +2	31 =	22 +3	27 -2	29 +1	34 +2	29 +3	34 +3	33 +4
It offers **activities I like** (e.g. hiking, monuments to visit…)	27 =	35 +9	23 -1	33 -5	18 -3	17 -4	22 =	31 +5	23 -3	27 -2	23 -1	43 +1
I have **friends / family to visit** there	19 =	25 +2	21 +2	18 +4	18 +4	22 -1	14 -3	19 -5	28 +8	17 -5	15 =	13 +1
I have **friends / family that recommended** it	15 +1	13 +2	13 -5	16 +6	16 +3	15 =	17 +3	15 +1	14 -3	13 =	17 =	13 +2
I found a **good deal** to go there	13 -1	9 -5	19 =	13 +2	7 -4	9 =	7 -1	16 -3	13 -6	12 -4	24 =	15 +2
It is a country **with good healthcare** infrastructures	9 +2	9 +2	6 -3	6 +1	10 +4	9 -1	7 +2	12 +2	11 =	12 +4	9 +3	5 +1
I saw a **documentary / movie /** read an **article / a book** about this country	8 +1	6 =	10 +2	7 +4	9 =	8 +1	7 +2	8 =	6 -2	10 =	9 -1	6 +2
NEW A **social media influencer** posted a story on this country and it made me want to go there	4	4	5	6	3	5	3	4	4	3	3	2
Other	6 -1	3 -3	8 -1	6 -5	6 =	8 =	10 =	7 =	7 =	5 +1	5 +1	5 -1

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Motivations for the choice of destination (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
I like the **weather/climate** in this/these country (ies)	32 -3	30 -6	26 -5	34 -1	29	39 -6	31 -4	23	34 +3	32 +3	37 +5	31 -6
I have **already been there** and wanted to return	25 +3	41 +3	47 +6	40 -1	29	17 +2	30 -2	29	23 -5	29 +1	20 =	20 +2
It is a **safe** destination (in terms of security)	36 -2	37 -7	40 -1	30 -2	31	34 -4	28 -3	24	29 -3	33 +3	30 -3	25 -7
It offers **activities I like** (e.g. hiking, monuments to visit...)	22 -1	28 +2	25 -4	18 -4	37	25 -3	25 +2	25	28 -6	29 +1	30 -3	22 -1
I have **friends / family to visit** there	25 +5	15 =	14 -10	20 +1	11	24 -2	32 +3	41	30 -1	34 +2	22 -10	31 -2
I have **friends / family that recommended** it	20 -3	19 +1	11 +3	23 +5	17	27 +2	20 +1	14	18 +2	13 -5	25 -3	26 +3
I found a **good deal** to go there	30 -7	33 -2	33 +5	22 -5	42	22 =	15 -6	12	14 -2	10 -6	17 -1	18 =
It is a country **with good healthcare** infrastructures	15 =	7 -4	11 +4	10 +5	6	24 -2	10 +1	3	12 +1	8 -1	20 -1	18 +4
I saw a **documentary / movie /** read an **article / a book** about this country	20 -4	12 -1	13 -1	13 +2	13	20 +1	9 +3	8	11 -4	9 +2	12 -4	16 +2
NEW A **social media influencer** posted a story on this country and it made me want to go there	20	14	17	10	12	25	6	5	10	6	14	18
Other	3 -1	3 +1	4 +3	8 +3	2	1 -1	12 +3	15	8 +1	12 +1	2 +1	2 =

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe
**+X / -X** Significantly evolution vs 2024

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02

This heightened awareness of safety isn't new; it's been a growing trend over the past five years, reaching unprecedented levels in both Europe and North America.

Motivations for the choice of destination – **Trend over several years** (%)
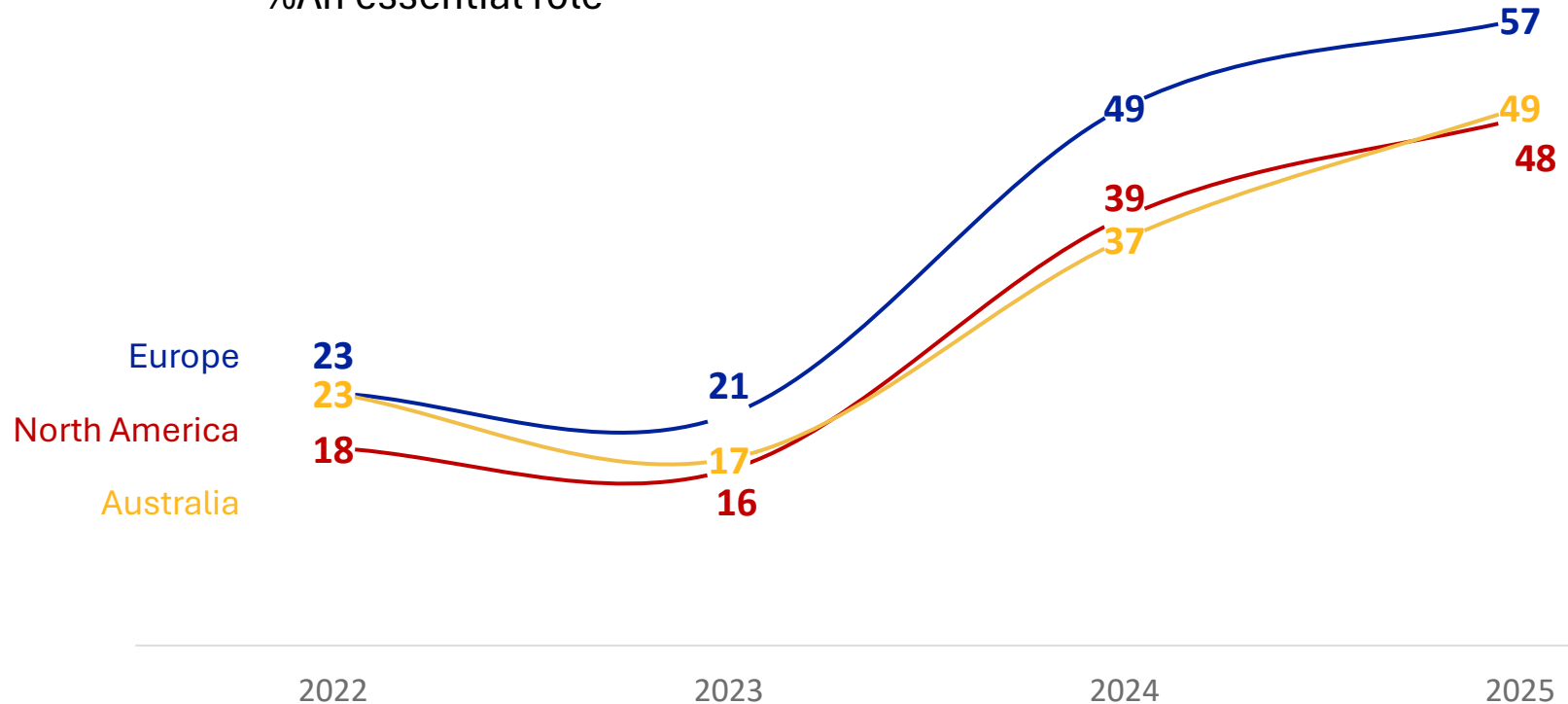
It is a **safe** destination

(in terms of security

	2021	2022	2023	2024	2025
Europe	25	25	25	26	28
North America	23	27	27	31	32

Q22. What motivated you to pick [first country picked in Q21] as a [summer / travel] destination? Basis: To those who plan to go on a trip in [first country picked in Q21]

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*
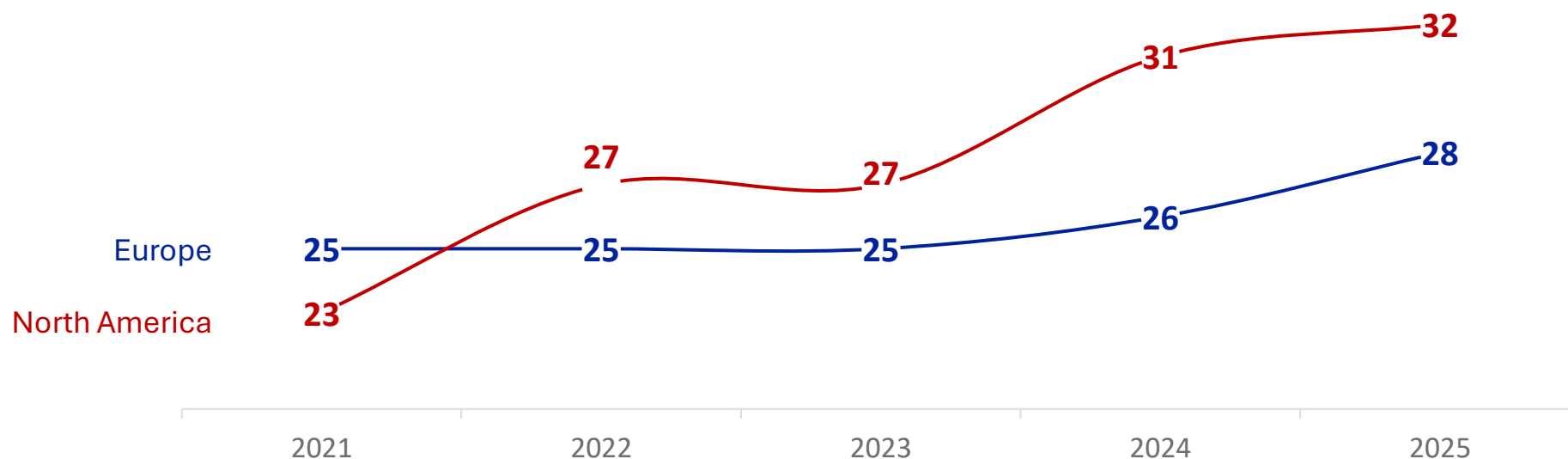
02

Last year's growing unease about armed conflicts in destination countries has not only been confirmed but intensified.

The proportion of Europeans, North American and Australian travelers mentioning this factor risk as essential in their choice of destination tripled for 2023: 21% of European travelers used to mention the risk related to armed conflict at destination as essential in their choice, they are now 57%. Same dynamic can be observed in North America (from 16% to 48%) and Australia (from 17% to 49%).

1/5 Factors that play an 'essential' role in choosing a destination – **Trend over several years**
(%)

The risk related to **armed conflict** in the destination zone
%An essential role

Europe
North America
Australia

	2022	2023	2024	2025
Europe	23	21	49	57
North America	18	16	39	48
Australia	23	17	37	49

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

02

But beyond the risks related to actual war zones, there are rising concerns about political climate in the destination country. The trend observed already observed in 2024 is amplified, with respectively a 9pts and 15pts increase in North America and Europe for this item for 2023. In these two zones, 4 travelers out of 10 consider this factor as essential when choosing a destination.

Factors that play an 'essential' role in choosing a destination – **Trend over several years** (%)

The **political and social climate** in the destination country %An essential role

Europe

North America

Australia

	2022	2023	2024	2025
Europe	27	28	34	37
North America	27	25	32	40
Australia	26	28	25	35

Q26. For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination. Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Factors that play an 'essential' role in choosing a destination (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
The risk related to **armed conflict** in the destination zone	57 +8	55 +10	62 +5	55 +8	61 +2	56 +2	52 +15	48 +9	56 +2
The risk of a **terrorist attack** *	52 +9	49 +10	59 +7	53 +9	64 +3	62 +5	47 +14	48 +10	59 +2
The risk of a **personal attack** (hold-up, attempted theft, etc.)	46 +4	43 +5	55 +2	42 +5	62 +2	56 +2	45 +9	48 +9	57 -2
Health risks ***	41	37	48	41	59	59	41	43	59
The risk of a **natural disaster** (flood, heat wave, wild fires, storms)	40 +6	36 +6	48 +4	40 +8	60 +4	59 +4	33 +3	38 +5	54 -1
The risks of **social unrest** (strikes, demonstrations, etc.)	38 +5	37 +6	42 +3	35 +7	54 +2	54 +2	35 +5	37 +4	51 -2
The **political climate** in the destination country (latest elections, respect of human rights...) **	37 +3	38 +6	43 +2	29 +3	39 -2	47 +1	33 +8	40 +8	46 -5
The **cost of living** in the destination country	33 =	28 -1	41 -3	32 +1	37 -2	53 -4	27 -7	29 -1	51 -3
The possibility that the destination will be **overcrowded**	33 +3	32 +4	38 +3	30 +2	30 -1	44 -1	24 +3	28 +1	38 -2
Your ability to speak the destination country's **language**	23 -2	19 -3	30 -2	22 =	23 -4	40 -3	22 -2	31 -2	40 =
The **ecological footprint** of the trip	18 =	17 +1	22 -1	16 +1	23 =	43 -4	12 -3	19 =	38 -5

Saudi Arabia and the UAE: The risk of an armed conflict

**Saudi Arabia and the UAE: The political and social climate in the destination country (latest elections, civil unrest...)*

****Item modified. In 2024: "Health risks (e.g. COVID)"*

Q26. For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination. Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Factors that play an 'essential' role in choosing a destination (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
The risk related to **armed conflict** in the destination zone	57 +8	56 +13	54 +16	57 +10	51 +6	50 +7	61 +8	63 +5	68 +7	58 +7	58 +11	52 +6
The risk of a **terrorist attack** *	52 +9	47 +13	50 +15	54 +15	44 +9	47 +5	51 +4	58 +3	67 +10	51 +8	55 +10	52 +9
The risk of a **personal attack** (hold-up, attempted theft, etc.)	46 +4	45 +8	45 +9	38 +1	43 +7	41 +4	46 +4	53 -1	62 +4	50 +2	43 +6	41 +3
Health risks ***	41	36	39	44	28	35	40	45	58	40	48	34
The risk of a **natural disaster** (flood, heat wave, wild fires, storms)	40 +6	36 +10	39 +13	40 +8	34 +5	32 =	36 +4	49 +2	55 +8	42 +5	44 +6	35 +7
The risks of **social unrest** (strikes, demonstrations, etc.)	38 +5	30 +7	39 +10	33 +6	37 +4	35 +5	45 +4	42 -2	43 +4	41 +8	31 +4	38 +8
The **political climate** in the destination country (latest elections, respect of human rights...) **	37 +3	39 +6	32 +6	35 +7	43 +4	36 +5	42 +4	45 =	43 =	41 +5	32 +1	25 +3
The **cost of living** in the destination country	33 =	34 -2	24 -4	26 =	32 +1	26 -2	28 +3	38 -3	48 -3	38 -2	38 -1	26 +3
The possibility that the destination will be **overcrowded**	33 +3	35 +10	28 +3	34 +5	33 +2	27 -2	35 +4	36 +2	39 =	38 +4	31 -1	29 +6
Your ability to speak the destination country's **language**	23 -2	23 -5	14 -7	19 -3	23 +1	20 -1	15 -2	33 +3	30 -2	27 -6	24 -1	21 +2
The **ecological footprint** of the trip	18 =	18 +1	15 -2	16 +3	16 -2	17 =	17 +4	20 -2	23 =	22 -3	25 +2	8 =

Saudi Arabia and the UAE: The risk of an armed conflict
**Saudi Arabia and the UAE: The political and social climate in the destination country (latest elections, civil unrest...)*
***Item modified. In 2024: "Health risks (e.g. COVID)"*

Q26. For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination. Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Factors that play an 'essential' role in choosing a destination (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
---	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
The risk related to **armed conflict** in the destination zone	57 -1	67 +4	49 -2	61 -1	64	56 +2	49 +12	55	46 +7	50 +11	57 -1	56 +5
The risk of a **terrorist attack** *	63 +1	68 +4	49 =	64 +1	69	62 +5	44 +11	50	44 +6	52 +14	59 -3	59 +5
The risk of a **personal attack** (hold-up, attempted theft, etc.)	59 -2	69 +5	49 -1	56 -4	72	56 +2	43 +7	48	48 +7	48 +10	57 -4	56 -1
Health risks ***	60	58	45	59	65	59	46	36	42	45	62	56
The risk of a **natural disaster** (flood, heat wave, wild fires, storms)	59 =	64 +6	44 -1	60 +4	64	59 +4	38 +8	28	35 +3	40 +7	54 -1	54 -1
The risks of **social unrest** (strikes, demonstrations, etc.)	51 -2	60 +9	43 -1	56 +1	54	54 +2	35 +5	35	35 -2	40 +10	51 -3	50 -2
The **political climate** in the destination country (latest elections, respect of human rights...) **	38 -6	38 =	39 -3	39 -1	39	47 +1	35 +10	32	37 +4	44 +13	50 -5	42 -6
The **cost of living** in the destination country	44 -2	30 -6	40 -3	25 -6	47	53 -4	30 -4	23	29 -2	29 =	54 -8	49 +1
The possibility that the destination will be **overcrowded**	33 -6	28 -5	29 +6	28 +2	32	44 -1	24 +3	24	27 -4	28 +3	38 -5	38 +1
Your ability to speak the destination country's **language**	31 =	19 -6	25 -9	17 -4	23	40 -3	23 -1	21	36 -2	26 -3	42 -3	39 +2
The **ecological footprint** of the trip	28 -3	24 +4	21 =	16 =	22	43 -4	15 =	9	21 -2	18 +3	41 -7	36 -3

Saudi Arabia and the UAE: The risk of an armed conflict
**Saudi Arabia and the UAE: The political and social climate in the destination country (latest elections, civil unrest...)*
***Item modified. In 2024: "Health risks (e.g. COVID)"*

Q26. For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination. Basis: To those who plan to go on a trip

XX / **XX** Significantly higher or lower score vs Europe
+X / **-X** Significantly evolution vs 2024

02

This question reveals country-specific responses driven more by risk assessment than tourist appeal:

Conflict Zones: Countries experiencing active conflict top the list

Political Instability: Destinations facing political upheaval or strained diplomatic relations also feature prominently, again influenced by cultural and geographic proximity.

Adding to these trends is a significant new entrant: the United States. Unlike the aforementioned countries, the US has historically been a highly sought-after destination, particularly for travelers from Europe, Canada, Australia, and Japan

Destinations that travelers could give up due to political / social climate
Top 5 countries mentioned

TOP 5 2024

- Russia for 21 out of 21 countries
- Ukraine for 18 out of 21 countries
- Israel for 18 out of 21 countries
- **US for 8 out of 21 countries (and only one European country, UK)**
- China for 8 out of 23 countries

TOP 5 2025

- Russia for 22 out of 23 countries, n°1 in ALL of the European countries
- Ukraine for 22 out of 23 countries
- Israel for 18 out of 23 countries, and ALL of the European countries
- **US for 17 out of 23 countries; 7 out of the 11 European countries**
- China for 9 out of 23 countries
- Turkey, only in Europe but in 6 out of 11 European countries, and n°2 in Germany

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Destinations that travelers could give up due to political / social climate

Top 5 countries mentioned (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
#1	Russia 17 -4	Russia 17 -4	Russia 16 -4	Russia 18 -2	Russia 8 -1	Russia 10 -3	USA 19 +7	USA 19 +13	Russia 6 -1
#2	Ukraine 13 -1	Ukraine 13 =	Ukraine 12 -2	Ukraine 15 -2	USA 8 -1	USA 10 +3	Russia 15 -2	Russia 10 -2	Syria 6 +1
#3	Israel 10 -8	Israel 10 -8	Israel 10 -10	Israel 9 -7	Ukraine 6 =	Ukraine 9 +1	Ukraine 11 +1	Israel 8 -4	Lebanon 6 =
#4	USA 6 +5	Turkey 7 -1	USA 8 +7	USA 4 +3	Israel 5 -5	China 7 -2	Israel 10 -2	Ukraine 7 -1	USA 4 = / Ukraine 4 =
#5	Turkey 5 -1	Egypt 5 -1 / USA 5 +3	Egypt 4 -1	Germany 3 +1 / China 3 -2 / Egypt 3 -1	Thailand 5 +1	UK 6 =	China 6 -5	China 5 -2	Sudan 4 = / Iraq 4 -2

NEWQ22. You mentioned that the [political / political and social] climate in the destination country played a role in your choice of destination. Which country could you give up visiting this year for this reason? Basis: To those who plan to go on a trip AND mentioned that the political climate play a role in the choice of destination

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

02

Destinations that travelers could give up due to political / social climate
Top 5 countries mentioned (%)

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
#1	Russia 17 -4	Russia 15 -2	Russia 13 =	Russia 15 +1	Russia 17 -6	Russia 21 -2	Russia 23 -10	Russia 18 -3	Russia 18 -5	Russia 12 -4	Russia 10 -1	Russia 26 -4
#2	Ukraine 13 -1	Ukraine 11 =	Ukraine 12 +3	Israel 10 -8	Turkey 13 -1	Ukraine 16 +2	Ukraine 16 -1	Ukraine 14 =	Israel 13 -11	Ukraine 8 -2	Ukraine 9 -3	Ukraine 21 -1
#3	Israel 10 -8	USA 10 +8	USA 9 +3	Ukraine 9 -3	Ukraine 12 -2	Israel 13 -11	Israel 15 -6	USA 10 +9	Ukraine 12 -5	Israel 7 -8	Israel 8 -6	Israel 11 -6
#4	USA 6 +5	Israel 7 -5	Israel 8 -5	USA 6 +5	Israel 10 -9	Turkey 9 +1	Turkey 9 -5	Israel 10 -10	USA 11 +9	Egypt 6 -1	France 3 =	USA 6 +5
#5	Turkey 5 -1	Algeria 5 +2	China 4 +1	Turkey 5 -1	Egypt 8 +1	USA 6 +5	Egypt 7 -2 Syria 7 +4	Afghanistan 3 +1 Syria 3 +2 Egypt 3 -3 Venezuela 3 +1	Venezuela 6 +4	Turkey 4 -2	Germany 3 = Egypt 3 -2 Turkey 3 -1	China 5 -3

NEWQ22. You mentioned that the [political / political and social] climate in the destination country played a role in your choice of destination.
Which country could you give up visiting this year for this reason? Basis: To those who plan to go on a trip AND mentioned that the political
climate play a role in the choice of destination

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Destinations that travelers could give up due to political / social climate
Top 5 countries mentioned (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
#1	USA 13 =	Thailand 8 +5	South Korea 4 +3	Russia 11 =	Russia 8	Russia 10 -3	USA 15 +3	USA 24	Russia 10 -1	USA 35 +26	Syria 9 +3	Russia 8 =
#2	India 11 -1	Russia 7 -2	China 4 =	Ukraine 10 +3	China 7	USA 10 +3	Russia 13 -4	Russia 18	Israel 7 -1	Russia 10 -3	Lebanon 8 +1	Lebanon 5 =
#3	Russia 8 -1	Israel 7 -1	Russia 3 -3	USA 9 +3	USA 6	Ukraine 9 +1	Ukraine 10 =	Ukraine 12	Ukraine 7 =	Israel 8 -7	Argentina 6 +4	Ukraine 5 -1
#4	Thailand 8 =	USA 6 -4	USA 2 +1	Israel 9 -8	Ukraine 6	China 7 -2	Israel 9 -3	Israel 11	China 6 =	Ukraine 7 -3	Sudan 5 +1	India 5 -1
#5	Israel 7 -3	Ukraine 5 -1	HK 2 Thailand 2 = +1	South Korea 4 +3	Philippines 3	UK 6 =	China 5 -6	China 7	Mexico 4 +1	China 5 +4	Palestine 4 +1	USA 5 -1 Pakistan 5 +1

XX / XX Significantly higher or lower score vs Europe
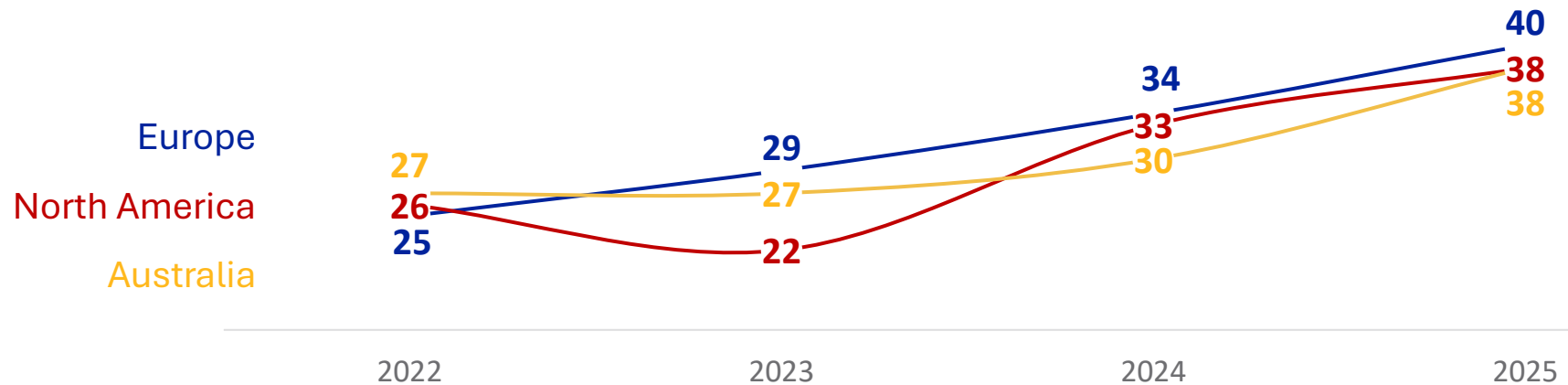+X / -X Significantly evolution vs 2024

02

The consequences of climate change are already here, impacting international travel decisions. Travelers face a tension between their desire for escape and these environmental realities. Just as the 2025 traveler must juggle geopolitical risks, they must also contend with environmental ones.

Four out of ten European travelers worry about experiencing a natural disaster during their trip, a proportion that has nearly doubled since 2022 (40% vs. 25%). Similar proportions are seen in North American and Australian travelers, with dramatic increases in these concerns compared to 2022 (+12 and 11 points, respectively).

Factors that play an 'essential' role in choosing a destination – **Trend over several years**
(%)

A **natural disaster** when travelling
(flood, heat wave, wildfire, storm)

Europe
North America
Australia

	2022	2023	2024	2025
Europe	25	29	34	40
Australia	27	27	30	38
North America	26	22	33	38

1/6 Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Getting robbed	54 +1	44 =	72 +2	55 +1	73 -2	75 =	50 +2	46 =	69 +3
Becoming sick in transit or at destination	54 +3	44 +1	71 +3	57 +4	75 =	76 =	53 -2	48 +2	66 +3
Losing something important	53 -1	45 -1	68 -1	53 =	75 -1	77 -2	55 -2	49 =	68 =
The possibility that the destination will be overcrowded	52 +2	46 +1	64 +3	51 +3	68 -1	76 +1	43 -3	42 -2	62 +1
NEW Being a victim of a travel scam at your destination	52	43	71	50	72	77	49	44	68
Having bad weather at destination	51 +1	45 +1	66 +3	49 +1	76 -2	79 +1	45 =	49 =	62 =
The quality of medical facilities at destination	51 =	43 -1	71 +3	48 =	65 -2	78 -2	48 -4	46 +3	63 +1
Needing to cancel before your trip *	49 +4	40 +2	65 +4	50 +7	67 =	72 +2	46 +1	42 +5	60 =
Fear for your physical safety	48 +2	39 +1	63 +1	50 +3	73 -2	80 =	44 +1	43 +1	66 =
A natural disaster when travelling (flood, heat wave, wild fire, storm)	48 +4	38 +3	67 +6	48 +5	74 -1	79 +2	45 +1	43 +5	66 +2

Item modified. In 2024: "Needing to cancel"
Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Not being able to return home	47 +2	38 +1	64 +2	47 +3	66 -1	73 =	47 =	43 +4	61 +1
Fear of a terrorist attack *	47 +4	39 +3	61 +3	46 +3	65 -1	73 +2	37 =	38 +3	
Having a bad experience	45 +1	39 +1	66 +2	31 =	69 -2	73 -1	45 =	44 =	62 -2
Unplanned delays	44 +2	37 +1	61 +3	40 +2	70 -1	72 -1	45 -4	44 -1	63 -1
An epidemic outbreak when travelling	42 +3	33 +3	63 +5	40 +2	72 +1	75 +1	44 =	40 +5	67 +4
NEW Language barriers and communications difficulties	36	28	49	40	54	68	32	34	57
My carbon footprint	35 -2	30 -3	53 +1	25 =	41 -2	71 -3	29 -5	30 -2	55 +3
NEW Infrastructure not accessible to people with physical disabilities	31	25	45	26	42	69	26	28	58
NEW Being discriminated because of your sexual orientation **	23	19	33	20	33	64	21	24	

Not asked in Saudi Arabia and the UAE
** Not asked in Saudi Arabia, the UAE and Malaysia

Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
		WESTERN EUROPE						**SOUTH EUROPE**			**EAST. EUROPE**	
Getting robbed	54 +1	62 +1	46 +1	52 +3	31 -3	40 -5	35 +6	78 +1	82 +6	57 -1	62 =	49 +3
Becoming sick in transit or at destination	54 +3	54 +1	46 =	54 +5	34 =	38 -1	37 +3	73 +1	76 +4	63 +2	61 +1	52 +6
Losing something important	53 -1	58 +1	53 -1	50 -1	32 -2	40 -6	36 +1	72 -4	77 +3	54 -4	59 =	47 +1
The possibility that the destination will be overcrowded	52 +2	59 +2	45 +2	48 =	40 +4	45 -5	42 +4	67 +1	68 +5	56 +2	55 -1	48 +7
NEW Being a victim of a travel scam at your destination	52	59	43	53	29	40	33	73	80	59	63	38
Having bad weather at destination	51 +1	56 +2	47 -1	51 +1	36 -1	40 +1	38 +3	63 +1	73 +5	63 +2	52 -2	46 +4
The quality of medical facilities at destination	51 =	52 -3	47 -2	49 -1	31 -2	39 -1	38 +2	72 +3	78 +4	62 +2	50 -3	45 +2
Needing to cancel before your trip *	49 +4	55 +3	39 =	45 +3	32 =	38 +1	33 +6	70 +2	68 +8	56 +1	57 +7	43 +8
Fear for your physical safety	48 +2	53 +2	42 +2	43 +1	31 =	35 -2	30 +3	68 +2	73 +2	49 =	59 +1	41 +5
A natural disaster when travelling (flood, heat wave, wild fire, storm)	48 +4	51 +2	41 +5	44 +5	27 =	35 -1	29 +5	67 +4	75 +8	58 +4	57 +4	39 +6

Item modified. In 2024: "Needing to cancel"

Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

02

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Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
		WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
Not being able to return home	47 +2	51 -1	42 -1	43 +1	25 -2	34 =	31 +5	71 +2	76 +6	46 =	57 +2	37 +4
Fear of a terrorist attack	47 +4	53 +3	42 +6	42 +3	30 +1	35 -2	34 +8	64 +4	69 +3	50 +2	53 +4	40 +3
Having a bad experience	45 +1	50 +1	48 -1	43 =	30 +1	32 -2	31 +6	73 +3	72 +3	54 +1	29 -1	33 +1
Unplanned delays	44 +2	46 +1	45 -2	40 +5	29 -2	33 +2	29 -1	64 +2	67 +5	51 +1	45 +1	36 +5
An epidemic outbreak when travelling	42 +3	43 +1	37 +3	37 +5	22 -1	33 +3	25 +5	67 +3	71 +7	51 +4	48 =	32 +3
NEW Language barriers and communications difficulties	36	38	32	30	23	25	21	50	52	44	43	37
My carbon footprint	35 -2	38 -4	36 -5	32 -1	25 -1	28 -6	20 -2	55 +2	62 =	44 +2	33 -3	16 +3
NEW Infrastructure not accessible to people with physical disabilities	31	28	27	26	22	26	22	46	53	37	32	20
NEW Being discriminated because of your sexual orientation	23	24	21	23	13	18	14	38	33	29	28	13

Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Getting robbed	87 -2	70 +4	58 -1	83 -4	66	75 =	51 +3	50	42 -2	50 +2	62 +2	76 +5
Becoming sick in transit or at destination	85 +2	73 +3	62 +1	85 =	71	76 =	54 -1	51	43 =	52 +3	61 +2	71 +4
Losing something important	88 +1	72 =	55 -3	87 -2	72	77 -2	55 -2	56	48 +2	51 -1	61 =	75 -1
The possibility that the destination will be overcrowded	74 -1	55 =	73 -4	71 +2	64	76 +1	45 -1	40	42 -2	43 -1	58 =	67 +3
NEW Being a victim of a travel scam at your destination	87	68	54	82	68	77	49	50	42	46	61	75
Having bad weather at destination	83 =	71 =	74 -4	80 =	71	79 +1	48 +3	42	49 =	50 +2	56 -2	69 +2
The quality of medical facilities at destination	79 -2	57 +3	53 -2	75 -2	63	78 -2	48 -4	49	43 +4	49 +2	55 =	71 +2
Needing to cancel before your trip *	78 +3	62 +3	56 -2	77 +1	61	72 +2	47 +2	45	38 +5	47 +7	54 -3	66 +3
Fear for your physical safety	86 =	71 +2	56 -1	83 -4	68	80 =	45 +2	42	41 -1	45 +2	59 -2	73 +1
A natural disaster when travelling (flood, heat wave, wild fire, storm)	88 +1	72 +7	61 -4	83 -1	66	79 +2	47 +3	43	41 +3	45 +7	58 =	74 +5

Item modified. In 2024: "Needing to cancel"

Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Main concerns when traveling
Concerned ("very concerned" or "quite concerned") (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Not being able to return home	86 +4	57 +4	47 -3	83 =	55	73 =	47 =	48	40 +3	46 +5	55 +1	67 +1
Fear of a terrorist attack *	84 +4	63 +7	45 -2	79 -3	55	73 +2	40 +3	35	38 +3	39 +4	-	-
Having a bad experience	81 =	59 +1	59 -6	80 -1	68	73 -1	46 +1	43	43 -1	44 -1	58 +1	67 -4
Unplanned delays	80 +1	66 +3	62 -4	79 +2	64	72 -1	46 -3	44	43 -2	45 -1	57 -2	68 -1
An epidemic outbreak when travelling	85 =	72 +10	54 -5	82 +3	67	75 +1	46 +2	42	40 +6	39 +2	63 +4	70 +2
NEW Language barriers and communications difficulties	66	47	47	55	57	68	34	30	36	33	53	61
My carbon footprint	64 =	28 -3	27 -1	45 -5	38	71 -3	29 -5	30	31 =	29 -3	50 +3	61 +4
NEW Infrastructure not accessible to people with physical disabilities	68	26	31	49	37	69	30	23	31	26	52	64
NEW Being discriminated because of your sexual orientation **		22	26	49	35	64	24	18	25	24		

Not asked in Saudi Arabia and the UAE
** *Not asked in Saudi Arabia, the UAE and Malaysia*

Q36. Are you concerned about the following when you travel? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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1/3 Issues impacting travel enthusiasm
Impacting at least somewhat (%)

	EU		WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA		INDIA		OCEANIA		NORTH AMERICA		MIDDLE EAST	
Inflation / high prices affecting my leisure budget	70	=	64	=	80	-1	70	+1	73	-1	78	+2	66	=	66	-3	73	-2
Wars, armed conflicts worldwide *	57	=	52	+2	69	=	58	+1	65	-2	74	-2	47	+2	46	+3		
Personal / family reasons	54	-4	47	-6	68	-2	53	-2	63	-3	75	-4	48	-1	48	-4	72	-1
Some places becoming too hot in the summer due to climate change	52	=	48	+1	62	=	54	+3	64	-4	79	-2	38	-1	41	-1	68	-1
Health concerns (e.g epidemic outbreak) ***	49		42		65		46		66		76		39		43		70	
NEW My available time to take vacations	48		43		59		48		64		76		49		45		70	
NEW Professional workload **	45		39		56		52		58		73		43		43		69	
NEW Bureaucratic hassles (Dealing with visas, customs, other travel documentation…)	45		39		57		46		59		73		40		39		70	
The rise of extreme / populist parties in democratic countries *	44	+3	40	+2	55	+5	38	+1	51	-2	69	=	38	+3	42	+5		
The ecological impact of travelling (carbon footprint)	38	-2	34	-3	53	+2	32	=	40	-4	71	-1	26	-1	30	-1	60	+2

Not asked in Saudi Arabia and the UAE
** Asked to Active people only
*** Item changed. In 2024: Covid-19

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

2/3 Issues impacting travel enthusiasm
Impacting at least somewhat (%)

	EU		WESTERN EUROPE							SOUTH EUROPE			EAST. EUROPE	
			FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Inflation / high prices affecting my leisure budget	70 =		74 -2	55 +1	62 -5	65 +2	65 +1	67 +1	76 -1	85 -2	77 -2	72 -2	67 +2
Wars, armed conflicts worldwide *	57 =		58 =	41 =	52 +2	52 +4	52 -5	54 +5	67 =	77 +1	63 +2	61 -1	55 +3
Personal / family reasons	54 -4		52 -8	45 -2	47 -10	45 -1	49 -4	46 -5	64 =	74 -4	66 -2	58 -1	48 -3
Some places becoming too hot in the summer due to climate change	52 =		55 +1	41 +1	50 =	49 +3	48 +1	47 +1	61 +2	63 -3	61 -1	58 +1	50 +4
Health concerns (e.g epidemic outbreak) ***	49		51	36	42	36	43	39	65	73	56	53	39
NEW My available time to take vacations	48		46	39	39	43	44	45	57	64	56	51	45
NEW Professional workload **	45		37	40	38	37	40	39	59	60	49	54	50
NEW Bureaucratic hassles (Dealing with visas, customs, other travel documentation…)	45		43	36	39	37	41	40	54	65	53	51	42
The rise of extreme / populist parties in democratic countries *	44 +3		45 +2	33 =	38 +1	41 +4	41 +1	40 +4	53 +2	63 +6	51 +9	44 +1	32 =
The ecological impact of travelling (carbon footprint)	38 -2		39 -6	31 -2	32 -4	33 -3	34 -7	32 -1	50 +1	58 -1	49 +1	41 =	22 -1

Not asked in Saudi Arabia and the UAE
**Asked to Active people only*
***Item changed. In 2024: Covid-19*

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

02

Issues impacting travel enthusiasm
Impacting at least somewhat (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Inflation / high prices affecting my leisure budget	81 -3	58 =	73 -3	77 +2	74	78 +2	65 -1	68	63 -2	68 -5	70 -4	76 +1
Wars, armed conflicts worldwide *	80 -3	59 +2	48 -3	76 =	62	74 -2	47 +2	47	42 +1	50 +5		
Personal / family reasons	74 +1	49 -4	62 -8	69 +3	62	75 -4	47 -2	50	50 -2	47 -5	70 -1	75 =
Some places becoming too hot in the summer due to climate change	70 -9	55 -1	63 -3	69 =	62	79 -2	41 +2	36	42 +3	42 -3	64 -4	70 -1
Health concerns (e.g epidemic outbreak) ***	80	52	60	75	62	76	42	36	41	44	69	71
NEW My available time to take vacations	72	50	54	70	70	76	47	51	45	46	66	73
NEW Professional workload **	69	52	51	58	58	73	43	44	44	42	66	71
NEW Bureaucratic hassles (Dealing with visas, customs, other travel documentation…)	73	52	44	63	60	73	42	38	37	42	65	74
The rise of extreme / populist parties in democratic countries *	70 -4	42 =	32 -1	64 +1	50	69 =	39 +4	37	37 +1	47 +7		
The ecological impact of travelling (carbon footprint)	59 -3	33 -3	30 -2	43 -6	35	71 -1	28 +1	24	31 +3	30 -4	57 -1	64 +5

Not asked in Saudi Arabia and the UAE
**Asked to Active people only*
****Item changed. In 2024: Covid-19*

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

Summer 2025: despite the global turmoil, travelers plan to enjoy a relaxing break

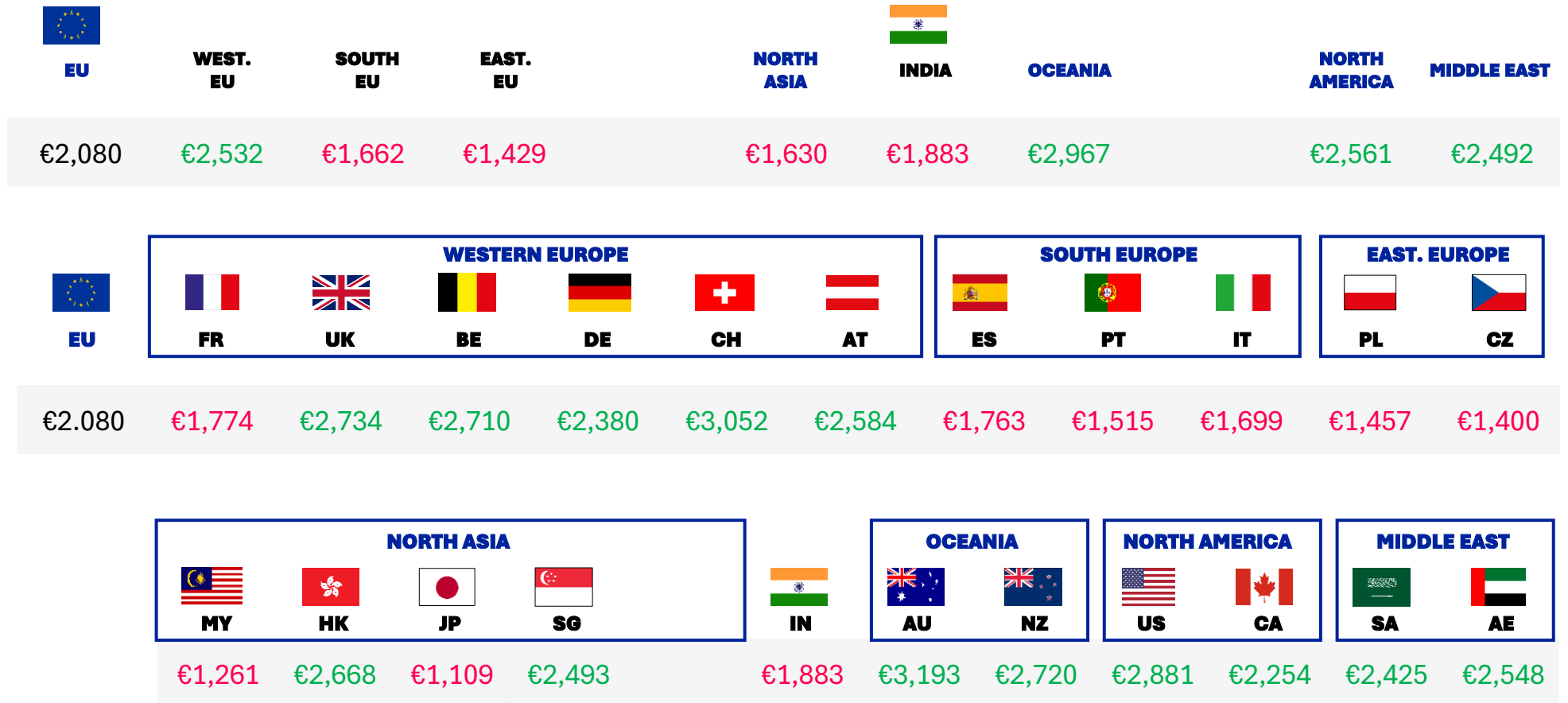# Summer holiday budget (Average sum spent, converted to euro)

03

Holiday budget remains protected, highlighting its importance

As travel intentions have never been higher despite global uncertainty and risks, those trips are planned in advance and get a dedicated budget that reflects their importance.

In Europe, the average summer holiday budget for 2025 is 2,080€. This represents an increase of 162 € when compared to 2023.

As it was already observed in past editions of the Holiday Barometer, this budget varies according to zones: within Europe it is higher in Western Europe (2,532€) than in Southern and Eastern Europe (1,662 € and 1,429€). The holiday budget is even higher than Europe in Oceania (2,967€), North America (2,561€) and MENA (2,492€).

EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
€2,080	€2,532	€1,662	€1,429	€1,630	€1,883	€2,967	€2,561	€2,492

EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
€2.080	€1,774	€2,734	€2,710	€2,380	€3,052	€2,584	€1,763	€1,515	€1,699	€1,457	€1,400

NORTH ASIA				INDIA	OCEANIA		NORTH AMERICA		MIDDLE EAST	
MY	HK	JP	SG	IN	AU	NZ	US	CA	SA	AE
€1,261	€2,668	€1,109	€2,493	€1,883	€3,193	€2,720	€2,881	€2,254	€2,425	€2,548

Q30. What is your full budget for your next [summer trip / trip] (when you take into account transportation, accommodations, food, leisure activities, etc.)? Basis: To those who plan to go on a trip

2/2 Summer holiday budget (Average sum spent, converted to euro) –
Trend over several years

Average summer holiday budget for 2025
(€)
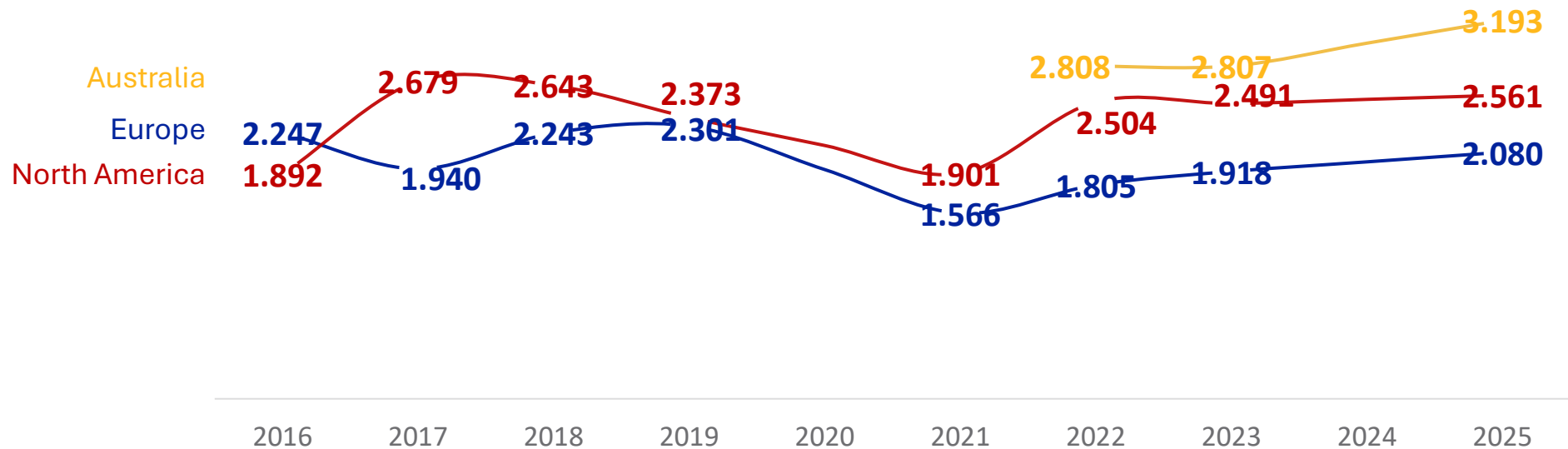
Australia
Europe
North America

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |

Australia: 2.808 — 2.807 — 3.193
North America (red): 1.892 — 2.679 — 2.643 — 2.373 — 1.901 — 2.504 — 2.491 — 2.561
Europe (blue): 2.247 — 1.940 — 2.243 — 2.301 — 1.566 — 1.805 — 1.918 — 2.080
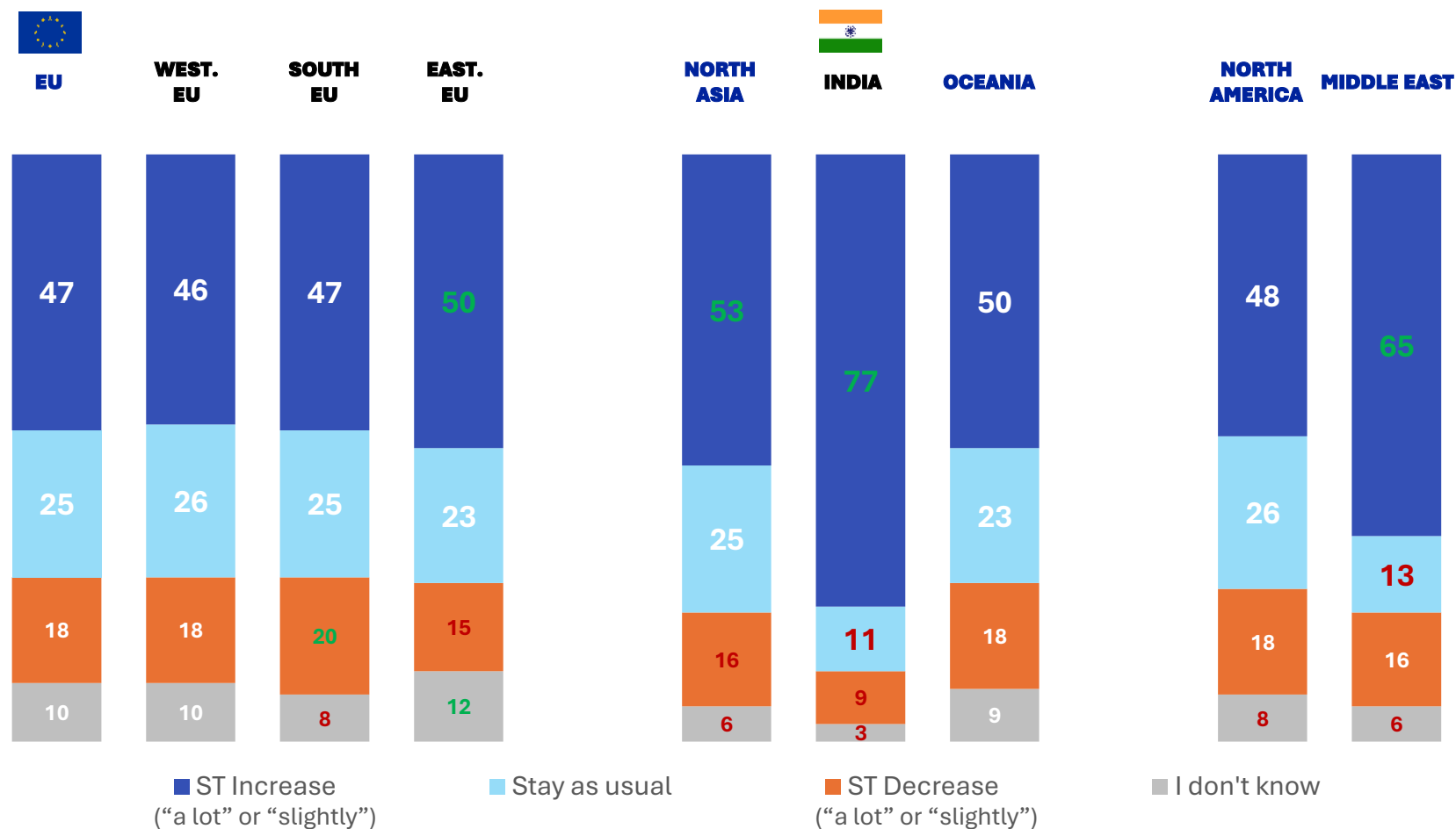
Q30. What is your full budget for your next [summer trip / trip] (when you take into account transportation,
accommodations, food, leisure activities, etc.)? Basis: To those who plan to go on a trip

03

In a global context where cost of living remains a preoccupation for citizens, 47% of European travelers say their budget will increase compared to last year.

1/3 Expected change in holiday budget compared to last year (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
ST Increase	47	46	47	50	53	77	50	48	65
Stay as usual	25	26	25	23	25		23	26	13
ST Decrease	18	18	20	15	16	11	18	18	16
I don't know	10	10	8	12	6	9	9	8	6
						3			

■ ST Increase ("a lot" or "slightly")   ■ Stay as usual   ■ ST Decrease ("a lot" or "slightly")   ■ I don't know
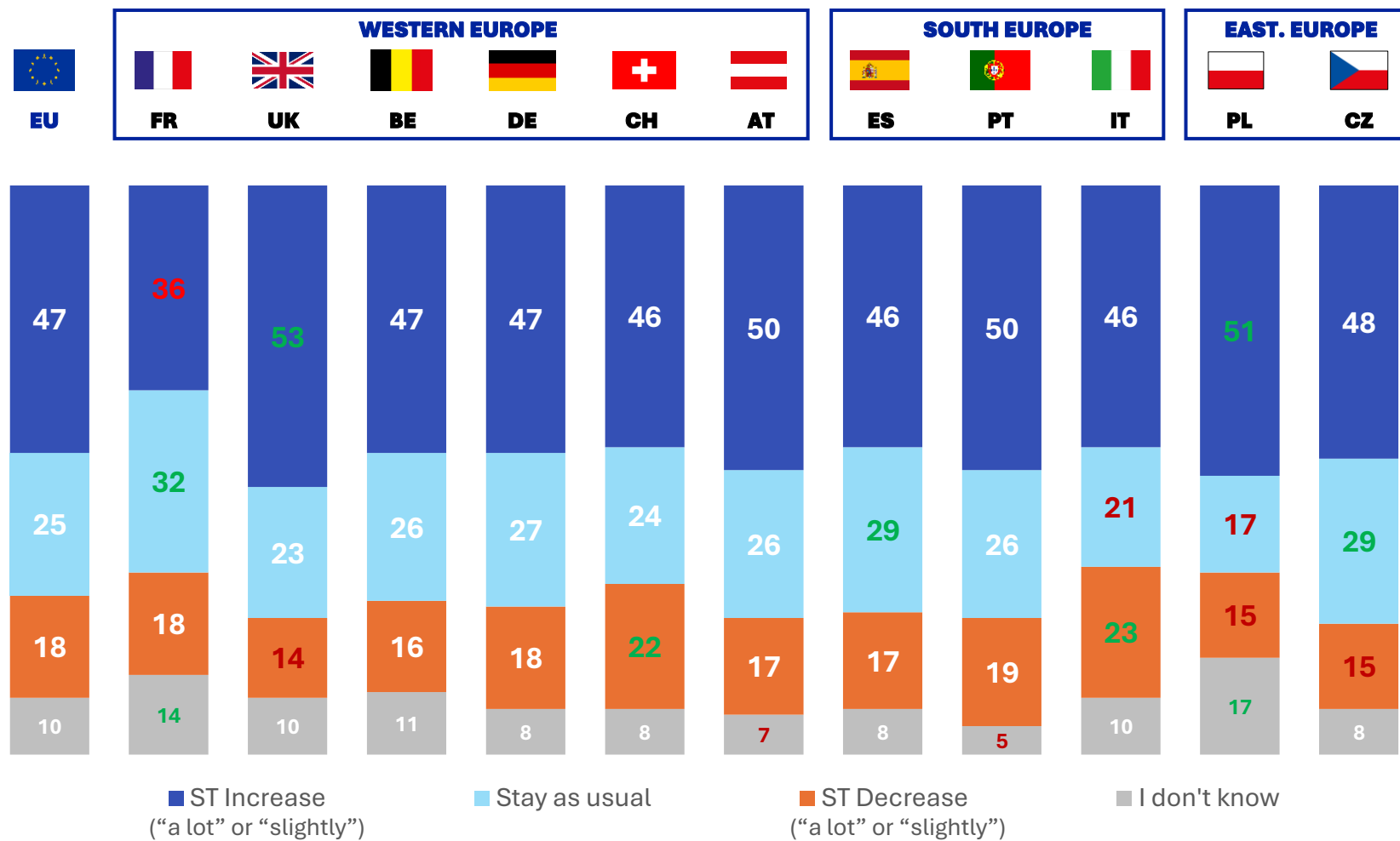
Q32. How might your budget for your next [summer trip / trip between June and September] change compared to what you spent last year? Will it... Basis: To those who plan to go on a trip
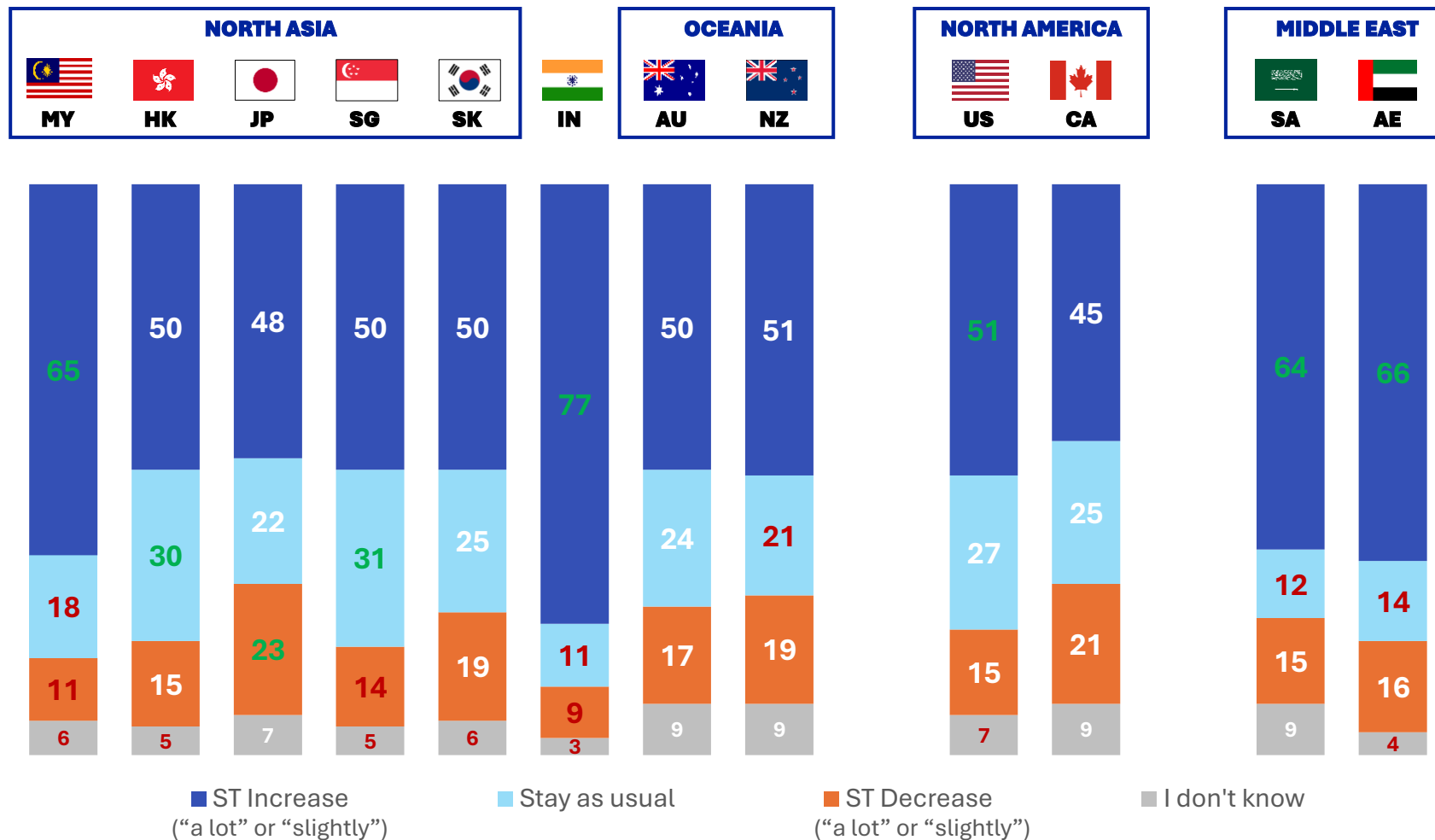
XX / XX *Significantly higher or lower score vs Europe*

2/3 Expected change in holiday budget compared to last year (%)

		WESTERN EUROPE					SOUTH EUROPE			EAST. EUROPE	
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
47	36	53	47	47	46	50	46	50	46	51	48
25	32	23	26	27	24	26	29	26	21	17	29
18	18	14	16	18	22	17	17	19	23	15	15
10	14	10	11	8	8	7	8	5	10	17	8

■ ST Increase ("a lot" or "slightly")   ■ Stay as usual   ■ ST Decrease ("a lot" or "slightly")   ■ I don't know

Q32. How might your budget for your next [summer trip / trip between June and September] change compared to what you spent last year? Will it... Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*

03

The proportion of travelers expecting their travel budgets to increase is particularly high in Middle-East, Malaysia, and India.

Expected change in holiday budget compared to last year (%)

NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE

	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
ST Increase	65	50	48	50	50	77	50	51	51	45	64	66
Stay as usual	18	30	22	31	25		24	21	27	25	12	14
ST Decrease	11	15	23	14	19	11	17	19	15	21	15	16
I don't know	6	5	7	5	6	9 / 3	9	9	7	9	9	4

■ ST Increase ("a lot" or "slightly") ■ Stay as usual ■ ST Decrease ("a lot" or "slightly") ■ I don't know

Q32. How might your budget for your next [summer trip / trip between June and September] change compared to what you spent last year? Will it... Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*

03

For those who will take a trip between June and September, the duration of the trip is quite similar to previous editions of the barometer: 1,9 week for Europe (stable), 2 weeks in Oceania, and 2,3 weeks for MENA.

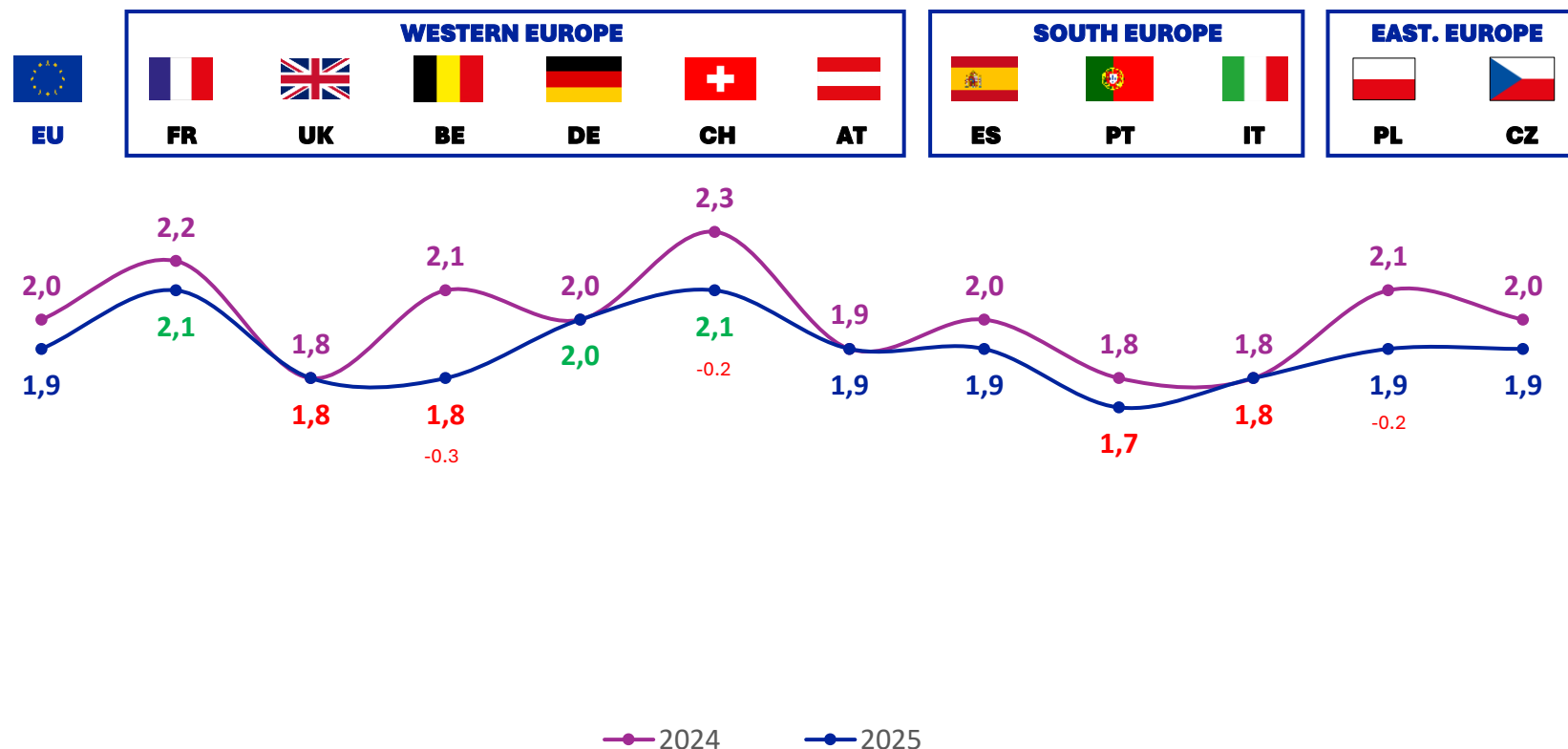North Asians, Indians and North Americans tend to take shorter trips.

Planned trip duration
Number of weeks (Mean)

EU	WEST. EU	SOUTH EU	EAST. EU
2,0	2,0	1,9	2,0
1,9	1,9	1,8	1,9
-0,1	-0,1	-0,1	-0,1

NORTH ASIA	INDIA	OCEANIA
1,4	1,8	2,1
1,2	1,7	2,0
-0,2		

NORTH AMERICA	MIDDLE EAST
1,8	2,3
1,7	2,3
-0,1	

━●━ 2024   ━●━ 2025

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Q18. In total, how long will you be away on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

Planned trip duration
Number of weeks (Mean)
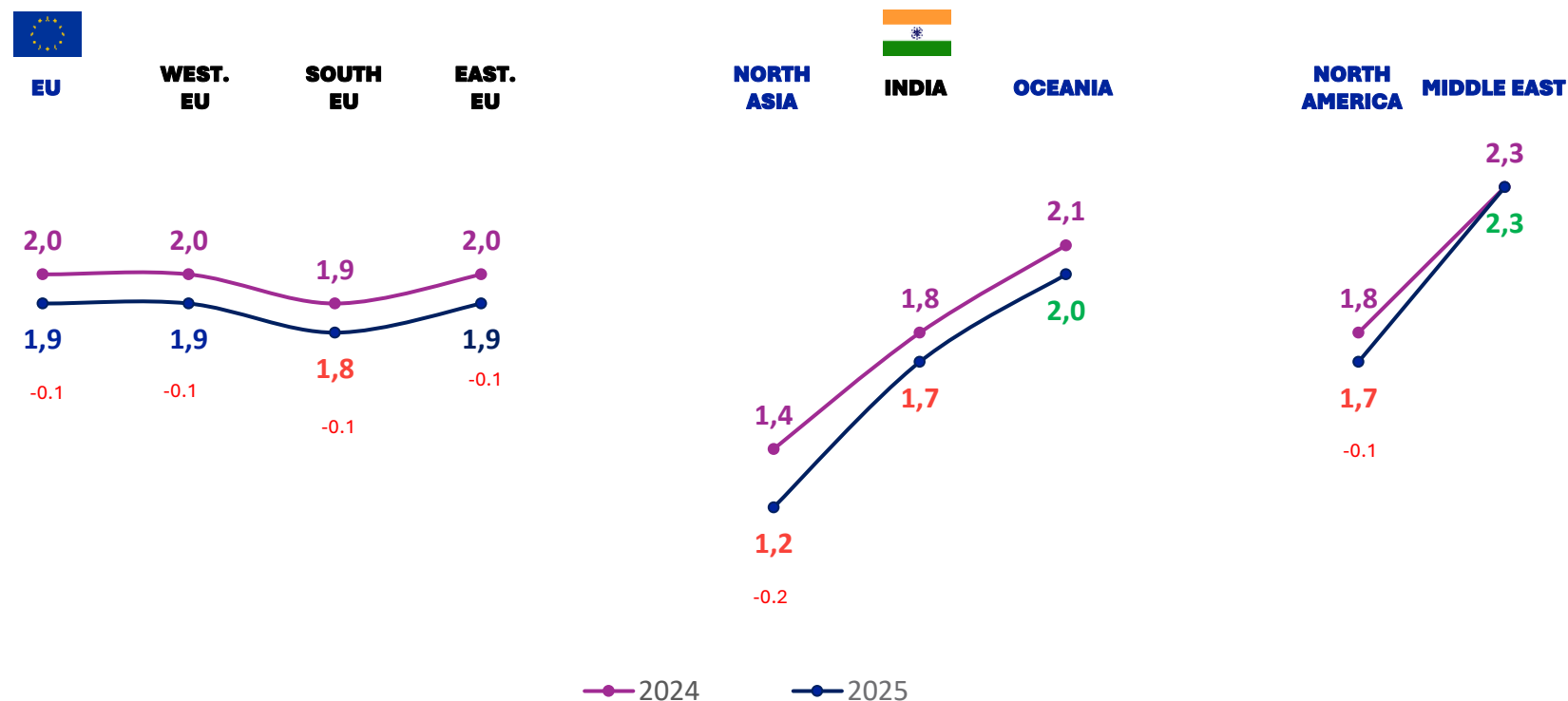
For those who will take a trip between June and September, the duration of the trip is quite similar to previous editions of the barometer: 1,9 weeks for Europe, a stable and rather homogeneous duration across the continent.

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ

2024 — **2025**

EU: 2024 = 2,0 / 2025 = 1,9
FR: 2024 = 2,2 / 2025 = 2,1
UK: 2024 = 1,8 / 2025 = 1,8 (-0.3)
BE: 2024 = 2,1 / 2025 = 1,8
DE: 2024 = 2,0 / 2025 = 2,0
CH: 2024 = 2,3 / 2025 = 2,1 (-0.2)
AT: 2024 = 1,9 / 2025 = 1,9
ES: 2024 = 2,0 / 2025 = 1,9
PT: 2024 = 1,8 / 2025 = 1,7
IT: 2024 = 1,8 / 2025 = 1,8
PL: 2024 = 2,1 / 2025 = 1,9 (-0.2)
CZ: 2024 = 2,0 / 2025 = 1,9

Q18. In total, how long will you be away on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

North Asians, Indians and North Americans tend to take shorter trips than travellers in MENA or Oceania.

Planned trip duration
Number of weeks (Mean)

NORTH ASIA

| MY | HK | JP | SG | SK |

IN

OCEANIA

| AU | NZ |

NORTH AMERICA

| US | CA |

MIDDLE EAST

| SA | AE |

1,3 / 1,3
1,5 / 1,3 (-0.2)
1,0 / 0,9
1,6 / 1,5
1,8 / 1,7
2,1 / 1,9

1,7 / 1,5 (-0.2)
1,8

2,1 / 2,0
2,5 / 2,4

—●— 2024   —●— 2025

Q18. In total, how long will you be away on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

The vast majority of travellers still plan their trips at least 2 months in advance.

1/3 Trip planning (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
More than 6 months before my trip	15 -1	18 =	13 -1	12 -1	12 -2	12 +2	23 +4	19 +4	16 -1
Between 4 and 6 months before my trip	22 +1	25 +2	21 +1	19 -1	22 =	21 =	26 +1	24 +3	21 -1
Between 2 and 4 months before my trip	30 +1	27 -1	33 +4	30 +1	34 =	27 -2	27 =	28 -2	26 =
Between 2 months and 15 days before my trip	20 =	18 =	20 -4	23 +1	22 =	28 =	14 -5	17 -4	21 =
Less than 15 days before my trip	4 -2	3 -2	4 -1	7 -1	5 +1	9 -1	3 =	4 -1	8 -1
I haven't planned it yet	9 +1	9 +1	9 +1	9 +1	5 +1	3 +1	7 =	8 =	8 +3

NQ1. How much in advance have you planned, or do you plan to book your trip? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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03

More than 1 in 5 travelers from the UK, Belgium, and Portugal plan their trips more than six months in advance.

2/3 Trip planning (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
More than 6 months before my trip	15 -1	13 -2	24 -2	21 +1	17 =	15 +1	17 -1	10 +1	21 =	9 -1	12 +1	12 -3
Between 4 and 6 months before my trip	22 +1	25 +3	28 +4	21 -3	22 =	26 +6	24 +2	20 -2	22 +1	19 +2	20 +1	18 -4
Between 2 and 4 months before my trip	30 +1	28 -2	25 -6	26 -2	33 +4	27 -1	27 +4	33 +2	29 +5	37 +5	30 +1	30 +2
Between 2 months and 15 days before my trip	20 =	17 -1	14 +1	18 +3	18 =	22 -2	20 =	24 -2	17 -4	21 -4	23 -1	24 +3
Less than 15 days before my trip	4 -2	4 -2	2 =	5 =	2 -5	4 -3	5 -2	4 -2	4 =	4 -2	6 -3	7 =
I haven't planned it yet	9 +1	13 +4	7 +3	9 +1	8 +1	6 -1	7 -3	9 +3	7 -2	10 =	9 +1	9 +2

NQ1. How much in advance have you planned, or do you plan to book your trip? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Trip planning (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
More than 6 months before my trip	19 -1	6 -2	11 -2	19 +4	2	12 +2	20 +1	26	20 +3	18 +4	15 -3	18 +2
Between 4 and 6 months before my trip	23 =	22 +5	21 +1	28 +1	15	21 =	23 -2	30	22 +3	26 +4	22 -1	19 -2
Between 2 and 4 months before my trip	29 -1	35 =	39 +4	33 -3	37	27 -2	30 +3	23	27 -6	30 +2	22 -4	29 +3
Between 2 months and 15 days before my trip	17 -3	28 -1	20 -1	13 -3	31	28 =	16 -3	13	19 -2	15 -6	23 +3	19 -4
Less than 15 days before my trip	5 +1	6 =	2 -2	3 +1	8	9 -1	4 +1	2	4 =	3 -2	8 -1	9 =
I haven't planned it yet	7 +4	3 -2	7 =	4 =	7	3 +1	7 =	6	8 +2	8 -2	10 +6	6 +1

NQ1. How much in advance have you planned, or do you plan to book your trip? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

The majority of travellers plan to share those moments with their close family : partner and/or children.

Only 1 out of 10 plan to travel on their own in Europe, this proportion being higher in other regions.

1/3 Partner planned for the trip (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
ST Family	81 -2	79 -2	83 -2	84 -2	75 -4	80 -4	72 +2	78 -2	77 -3
Your partner	65 -3	64 -1	66 -5	67 -2	55 =	51 -6	58 +4	58 -4	49 -5
Your children	33 -2	30 +1	35 -4	41 -5	33 =	40 -1	27 +4	31 -2	39 -5
Your friends	17 =	15 -1	17 -1	22 =	21 -2	33 =	13 -7	20 -1	18 -3
On your own	11 =	13 +1	9 +1	10 =	15 +1	16 -1	20 -2	14 =	16 =
Your parents	9 -1	9 -1	9 =	9 =	17 -3	27 -1	9 -3	13 =	18 +1
Your siblings	6 -1	6 -2	7 =	5 -1	12 -3	19 -2	7 -1	11 =	14 -1
Your grand children	4 -1	4 =	4 =	7 =	2 =	4 +1	2 =	5 =	4 -1
Your grand parents	1 =	1 =	0 =	1 =	1 -1	4 -1	1 =	1 -1	5 +1
I don't know yet	3 +1	3 +1	4 +2	4 +2	4 +2	2 +1	4 +2	4 =	4 +3

Q20. With whom do you plan on going on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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03

The proportion of solo travelers in the UK and Switzerland is higher than the European average.

Partner planned for the trip (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
ST Family	**81** -2	**81** -4	**81** -1	**79** -4	**78** -2	**75** -6	**77** -2	**85** -2	**84** -3	**80** -2	**84** -3	**83** -2
Your partner	65 -3	64 -5	67 +2	63 -3	66 +2	59 -5	65 =	69 -2	65 -5	65 -5	68 -3	66 -1
Your children	33 -2	36 +3	35 +4	31 -1	22 -2	26 -4	27 +3	36 -6	38 -6	30 -1	40 -7	43 -2
Your friends	17 =	14 =	15 -2	14 -2	15 -1	14 -2	21 +4	17 =	14 =	20 -3	20 +2	24 -1
On your own	11 =	10 =	14 +2	11 +2	13 -1	19 +3	12 -1	7 =	10 +3	9 =	7 -1	12 +1
Your parents	9 -1	9 +2	10 -2	10 =	7 -2	9 -3	9 -1	10 =	9 -2	8 =	7 =	12 =
Your siblings	6 -1	8 +1	9 +1	7 -1	4 -3	7 -1	5 -2	7 -1	6 =	8 +2	5 -2	5 -1
Your grand children	4 -1	4 -2	4 =	4 =	4 =	3 +1	3 =	4 +1	5 =	3 -2	6 -1	7 =
Your grand parents	1 =	0 -1	1 =	1 =	2 +1	1 =	1 =	1 =	0 =	1 +1	1 =	1 =
I don't know yet	3 +1	4 +1	3 +1	3 =	3 +1	4 +3	4 +1	4 +1	3 +1	3 +1	4 +1	3 +1

Q20. With whom do you plan on going on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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03

Australia shows the highest proportion of slow travellers : almost 1 out of 4 are planning to travel on their own.

Partner planned for the trip (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
ST Family	80 -2	76 -6	72 =	75 =	70	80 -4	69 -1	75	76 -1	80 -2	76 -5	78 -1
Your partner	52 +5	62 -2	55 -2	55 -1	50	51 -6	55 +1	61	55 -3	62 -3	47 -5	51 -4
Your children	40 +2	34 -2	28 +4	32 +2	31	40 -1	28 +5	27	33 -4	29 -1	38 -11	40 =
Your friends	22 -4	21 +1	20 +3	22 -3	19	33 =	13 -7	14	22 =	19 -2	16 -7	19 -1
On your own	17 +2	11 -1	16 -2	12 +1	16	16 -1	22 =	17	15 -1	14 +1	14 +1	17 -1
Your parents	26 -4	12 -2	14 +2	16 -1	14	27 -1	7 -5	10	14 +1	12 -2	18 +2	19 +1
Your siblings	20 -4	9 -1	5 =	11 -4	12	19 -2	7 -1	8	12 =	9 -2	15 +1	13 -2
Your grand children	2 -1	2 -1	3 +1	2 =	2	4 +1	2 =	2	6 =	5 =	5 -2	3 =
Your grand parents	1 -1	1 =	1 =	1 -1	1	4 -1	1 =	1	1 -2	1 -1	4 =	5 +1
I don't know yet	3 +2	4 +2	5 +2	4 +1	7	2 +1	4 +2	4	5 =	3 =	5 +4	3 +1

Q20. With whom do you plan on going on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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Online channels are the most popular ways of booking.

1/3 Means used to plan for the trip (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Online travel agency (e.g., Expedia, Booking.com)	36	37	37	34	45	50	42	34	32
Directly through the airline or hotel website	28	32	27	20	32	31	48	37	26
Travel agency (in-person or via phone)	19	17	22	22	21	26	19	14	19
Mobile app (e.g., airline or hotel app)	16	17	17	14	36	47	25	24	35
Tour operator	12	11	8	20	9	15	5	4	16
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	12	13	14	6	20	25	14	11	20
Other	8	8	6	11	2	2	4	8	1
I never travel	9	8	8	11	10	5	5	10	8
ST Directly on apps-websites of airlines-hotels	**40**	**43**	**39**	**30**	**54**	**63**	**61**	**53**	**52**
ST Travel agency in person or Tour Operator	**28**	**25**	**28**	**37**	**26**	**35**	**22**	**17**	**32**

XX / XX *Significantly higher or lower score vs Europe*

03

Means used to plan for the trip (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Online travel agency (e.g., Expedia, Booking.com)	36	32	43	29	41	35	41	41	34	34	35	32
Directly through the airline or hotel website	28	33	39	30	21	36	30	28	22	31	22	18
Travel agency (in-person or via phone)	19	14	18	18	14	16	21	21	23	22	26	17
Mobile app (e.g., airline or hotel app)	16	15	22	12	14	19	18	16	17	18	17	12
Tour operator	12	6	13	9	12	10	15	6	12	8	11	29
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	12	15	15	10	10	16	9	17	12	14	8	4
Other	8	12	4	10	9	7	7	5	6	7	12	11
I never travel	9	9	6	11	12	5	6	7	9	6	10	12
ST Directly on apps-websites of airlines-hotels	**40**	**44**	**52**	**39**	**32**	**49**	**42**	**39**	**35**	**44**	**34**	**26**
ST Travel agency in person or Tour Operator	**28**	**18**	**27**	**25**	**23**	**23**	**31**	**25**	**32**	**27**	**34**	**41**

NEW
Q25Q4. [How did you book your trip or plan to book your trip? / How do you usually book your trips?] Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

3/3 Means used to plan for the trip (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Online travel agency (e.g., Expedia, Booking.com)	47	55	43	49	30	50	41	42	33	35	29	35
Directly through the airline or hotel website	34	32	22	48	23	31	45	51	36	38	19	32
Travel agency (in-person or via phone)	25	26	18	18	16	26	19	19	12	16	17	22
Mobile app (e.g., airline or hotel app)	46	39	21	35	39	47	21	30	27	22	34	35
Tour operator	12	11	3	11	10	15	6	4	4	4	17	16
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	20	27	7	24	21	25	13	16	10	12	18	22
Other	2	1	3	2	3	2	4	4	9	8	2	1
I never travel	7	5	20	4	15	5	6	5	13	8	12	4
ST Directly on apps-websites of airlines-hotels	**63**	**55**	**37**	**65**	**51**	**63**	**57**	**66**	**56**	**51**	**47**	**57**
ST Travel agency in person or Tour Operator	**30**	**33**	**20**	**25**	**22**	**35**	**24**	**21**	**15**	**19**	**31**	**34**

NEW
Q25Q4. [How did you book your trip or plan to book your trip? / How do you usually book your trips?] Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

Planned destination for the trip (%)

03

In terms of holiday environment, seaside is still by far the most popular choice for European travelers with an impressive score of 63% in Europe. This level is stable compared to last year, confirming the attractiveness of coastal scenery.

City trips come second as holiday destination for Europeans, however at a much lower level than seaside (28%), and then we find mountains and countryside (23% and 22%)

It is interesting to note that city trips are much more popular in other zones, even ranking first in North Asia (60%) and MENA (51%) and almost neck and neck with seaside for North America and Oceania

	EU		WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA		INDIA		OCEANIA		NORTH AMERICA		MIDDLE EAST	
To the seaside	63	-1	64	+1	61	-5	62	-2	50	+8	51	+1	45	-6	45	+1	49	-5
To a city	28	=	26	-1	33	+1	23	=	60	-3	41	-3	49	+7	42	=	51	=
To the countryside	23	-1	26	-1	17	-1	23	=	39	-2	46	+4	35	-2	33	=	39	-2
To the mountains	22	=	21	+1	20	=	30	=	28	+2	58	+1	23	+2	27	-1	33	-1
Other	3	-1	3	-1	2	-1	4	=	0	-1	1	=	3	=	5	-1	1	+1

Q28. Place of destination: For your [next summer trip / next trip], do you intend to go mainly… Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

Planned destination for the trip (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
To the seaside	63 -1	65 +3	61 +1	62 +4	65 -3	65 =	67 +1	57 -5	59 -5	66 -6	64 -1	60 -3
To a city	28 =	22 +4	40 +4	24 -2	22 -5	26 -5	24 +2	42 +4	30 +3	29 -1	25 =	22 +1
To the countryside	23 -1	25 +2	37 -2	24 -3	21 -1	20 -8	26 +2	17 -1	24 +1	11 -1	17 =	29 +1
To the mountains	22 =	23 +1	17 -1	26 +7	20 =	21 +1	17 -4	22 +1	14 =	25 =	34 +2	26 -3
Other	3 -1	2 -1	4 =	4 -1	3 =	4 +1	3 -2	1 -2	2 -2	2 -1	4 =	4 =

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Planned destination for the trip (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
To the seaside	56 +2	44 +5	41 +2	37 +5	65	51 +1	48 -3	42	46 -3	44 +4	51 -9	48 =
To a city	55 =	75 -1	55 +5	68 +5	44	41 -3	48 +6	51	43 =	42 =	52 +1	50 -1
To the countryside	52 +6	32 +2	38 -3	47 =	25	46 +4	38 +1	32	30 +1	36 -1	37 =	40 -4
To the mountains	34 +3	24 +5	29 +2	29 +4	25	58 +1	26 +5	20	30 -2	25 +1	27 +2	37 -4
Other	0 -1	0 -2	1 -3	1 =	0	1 =	3 =	3	5 +1	5 -2	1 +1	0 -1

Q28. Place of destination: For your [next summer trip / next trip], do you intend to go mainly… Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

City trips have increased in popularity across Europe over the years.

City trips – **Trend over several years** (%)

North America

Australia

Europe

| 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |

North America: 43, 46, 43, 42, 35, 41, 46, 42, 42
Australia: 40, 43, 42, 48
Europe: 16, 17, 24, 24, 25, 21, 26, 30, 28, 28

Q28. Place of destination: For your [next summer trip / next trip], do you intend to go mainly… Basis: To those who plan to go on a trip

XX **/ XX** *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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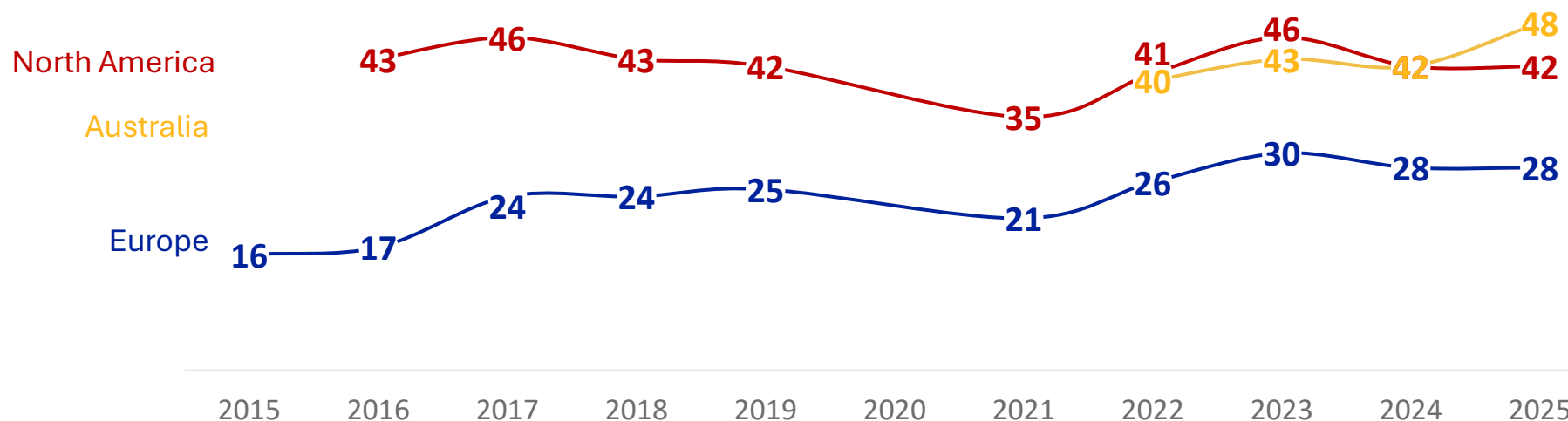
City trips – **Trend over several years** (%)

03
...and in Spain

Spain
Portugal
Italy

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

Spain line (yellow): 22 27 43 40 45 — 33 39 44 38 42
Portugal line (blue): 34 34 — 23 31 39 27 30
Italy line (red): 20 18 19 23 23 — 14 21 26 30 29

Poland
Czech Republic

2018 2019 2020 2021 2022 2023 2024 2025

Czech Republic (yellow): 26 29 31 21 22
Poland (red): 20 18 19 21 22 25 25

Q28. Place of destination: For your [next summer trip / next trip], do you intend to go mainly... Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

7/7 City trips – **Trend over several years**
(%)

USA

Canada

2016   2017   2018   2019   2020   2021   2022   2023   2024   2025

Q28. Place of destination: For your [next summer trip / next trip], do you intend to go mainly… Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

44% of European travelers who already know their destination will spend at least a part of their holiday in their own country, with important differences within Europe on this trend: 64% of Southern Europeans plan to go in their own country, whereas it's only 35% for Western Europe and 45% for Eastern.

Holiday plans in one's own country this summer (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
In my own country	44 -2	35 -1	64 -5	45 +4	21 =	33 =	42 -4	55 +1	16 -5

	EU	**WESTERN EUROPE**						**SOUTH EUROPE**			**EAST. EUROPE**	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
In my own country	44 -2	67 -1	32 -2	22 -6	30 -4	27 +2	32 -4	66 -5	60 -3	67 -7	53 +7	39 +1

	NORTH ASIA					IN	**OCEANIA**		**NORTH AMERICA**		**MIDDLE EAST**	
	MY	HK	JP	SG	SK		AU	NZ	US	CA	SA	AE
In my own country	41 +2	6 +2	56 -2	8 -1	16	33 =	42 -4	43	47 -2	61 +4	17 -3	15 -7

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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03

In France, Italy, Spain and Portugal, around two thirds of travellers who already know their destination, intend to travel in their own country.

Holiday plans in one's own country this summer (%)

Belgium
22%

UK
32%

DE
30%

PL
53%

CZ
39%

AT
32%

France
67%

Italy
67%

Canada
61%

USA
47%

Spain
66%

CH
27%

PT
60%

India
33%

HK
6%

SK
16%

JP
56%

MY
41%

SG
8%

UAE
15%

SA
17%

Australia
42%

NZ
43%

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Q21. Where do you plan to go on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip and already know their destination   **XX / XX** *Significantly higher or lower score vs Europe*
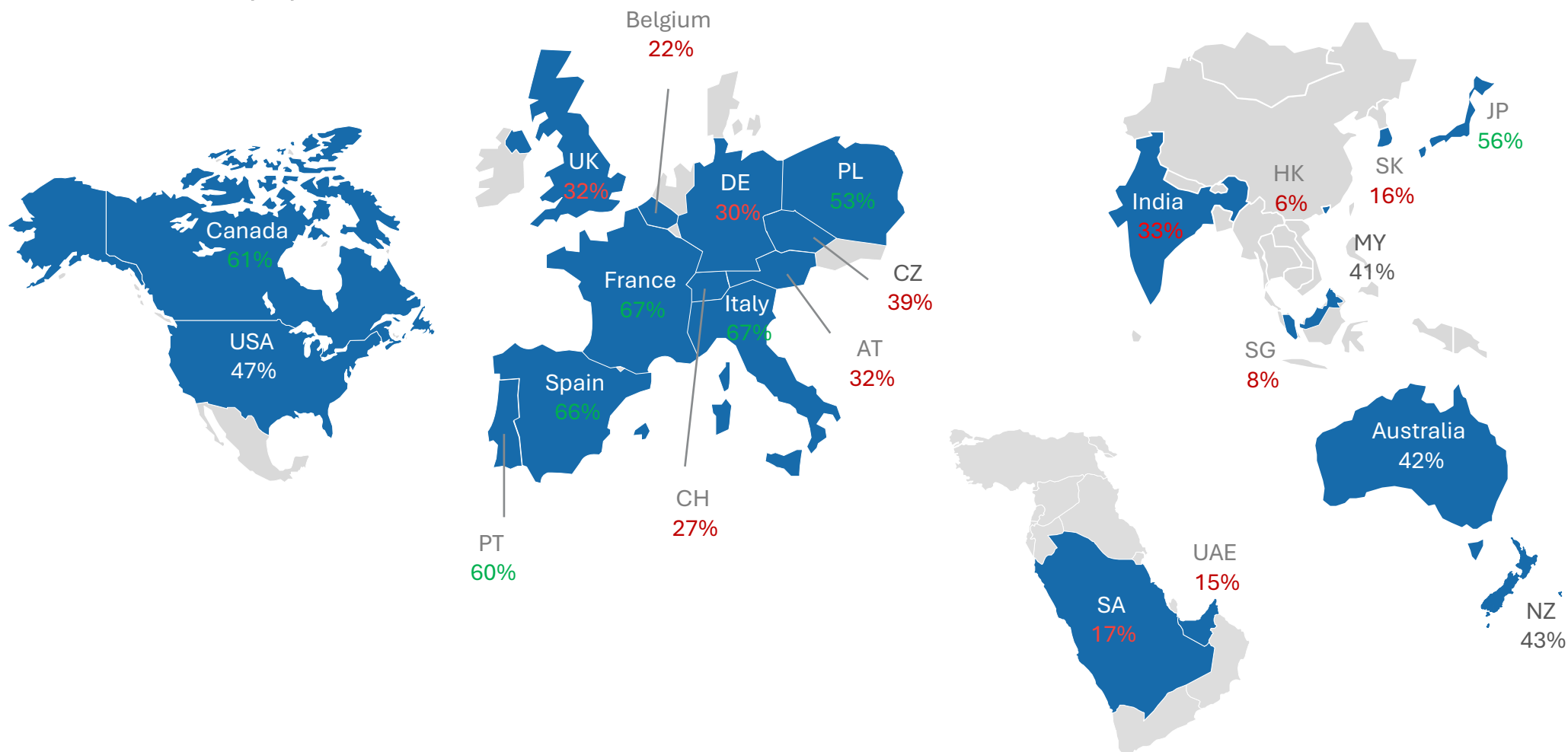
03

NEXT SUMMER TRAVEL PLANS DETAILS

Spain, France, and Italy: the holy trinity of foreign destinations for European countries

Foreign destinations planned this summer
(Top 3; %)
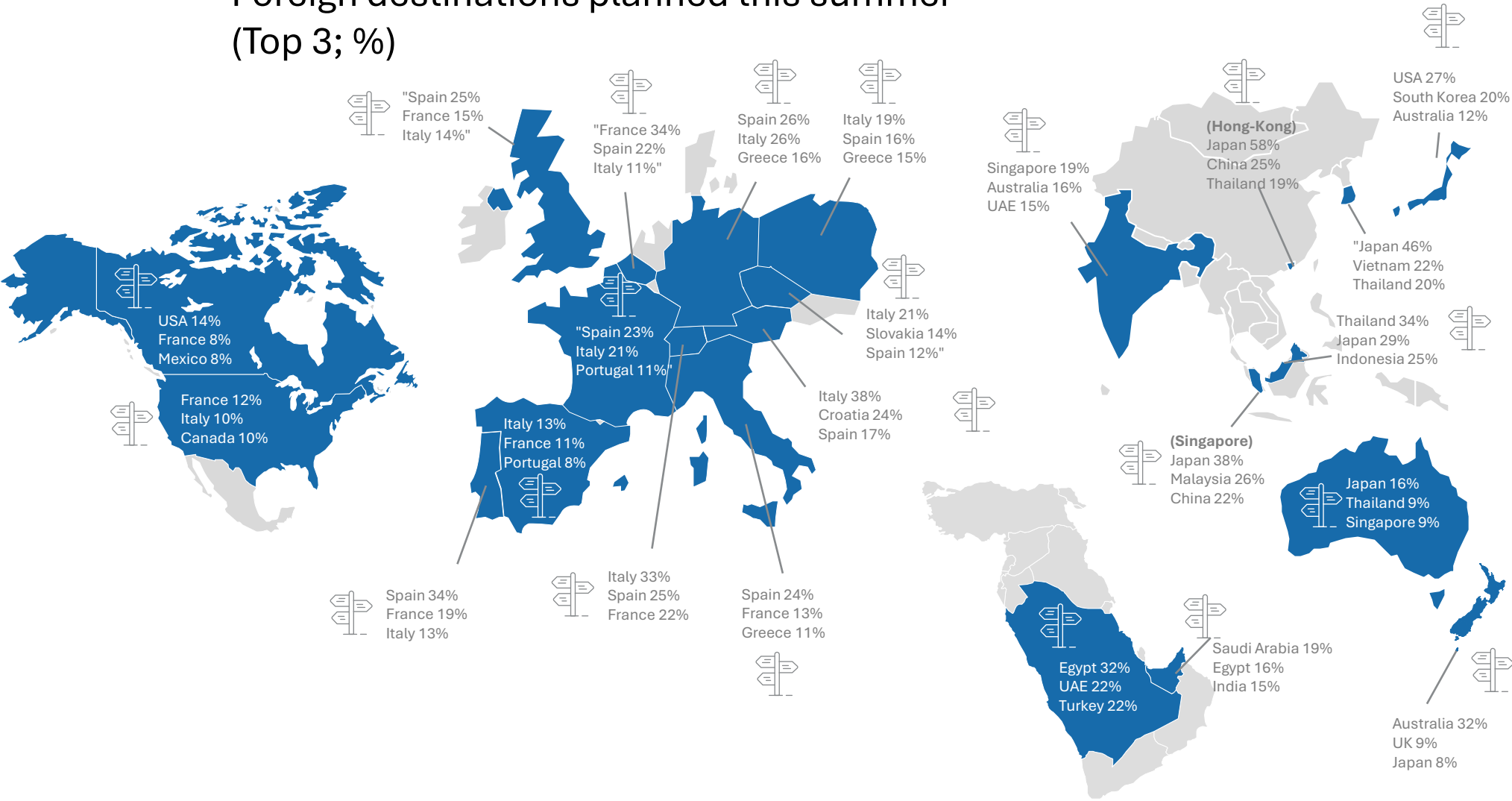
"Spain 25%
France 15%
Italy 14%"

"France 34%
Spain 22%
Italy 11%"

Spain 26%
Italy 26%
Greece 16%

Italy 19%
Spain 16%
Greece 15%

USA 27%
South Korea 20%
Australia 12%

Singapore 19%
Australia 16%
UAE 15%

(Hong-Kong)
Japan 58%
China 25%
Thailand 19%

"Japan 46%
Vietnam 22%
Thailand 20%"

USA 14%
France 8%
Mexico 8%

France 12%
Italy 10%
Canada 10%

"Spain 23%
Italy 21%
Portugal 11%"

Italy 21%
Slovakia 14%
Spain 12%"

Thailand 34%
Japan 29%
Indonesia 25%

Italy 13%
France 11%
Portugal 8%

Italy 38%
Croatia 24%
Spain 17%

(Singapore)
Japan 38%
Malaysia 26%
China 22%

Japan 16%
Thailand 9%
Singapore 9%

Spain 34%
France 19%
Italy 13%

Italy 33%
Spain 25%
France 22%

Spain 24%
France 13%
Greece 11%

Egypt 32%
UAE 22%
Turkey 22%

Saudi Arabia 19%
Egypt 16%
India 15%

Australia 32%
UK 9%
Japan 8%

Q21. Where do you plan to go on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip and already know their destination

03

1/3 Modes of transportation used to go to destination (%)

	EU		WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA		INDIA		OCEANIA		NORTH AMERICA		MIDDLE EAST	
Plane	50	+6	50	+3	50	+9	48	+7	70	+3	62	-1	65	+5	52	+5	60	-5
Personal car	48	-1	46	-1	49	-4	54	+4	26	+6	23	+1	32	-1	47	-1	24	-2
Train	22	+5	22	+5	22	+6	24	+5	35	+5	55	+8	26	+13	15	+3	18	+3
Bus	12	+3	11	+3	10	+1	17	+3	23	+4	32	+8	20	+9	11	+2	16	=
Rental car through an agency	6	+1	6	+1	7	=	3	=	17	+6	25	+9	19	+5	17	+3	17	+3
Boat	6	+1	7	+2	6	+1	3	=	8	+2	14	+2	8	+2	8	+2	9	+2
Rental car between private individuals	4	+1	4	+1	4	=	2	=	10	+3	21	+5	12	+5	7	=	14	+2
Carpooling	3	+1	3	+1	3	+1	2	=	5	+1	9	+3	3	+1	6	=	9	+1
Bike	3	=	3	-1	3	+1	3	-1	4	+1	13	-1	6	+3	6	+3	9	+3
Camper van	3	=	4	+1	3	+1	3	=	4	+1	10	+3	5	-1	5	-1	7	+2
Motorbike	2	=	2	=	2	=	1	-1	4	+1	14	+2	3	=	3	=	7	+2
Other	1	=	1	=	1	=	1	=	1	=	0	-1	2	=	2	+1	0	=

Q23. What kind of transportation will you [use this summer / use] to go to your holiday destination? Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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2/3 Modes of transportation planned to go to destination (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Plane	50 +6	34 +9	66 +7	51 +3	46 +1	55 -2	50 +4	49 +6	55 +12	46 +8	47 +7	49 +7
Personal car	48 -1	60 -2	33 -1	44 -1	48 +2	39 -1	54 =	49 -3	46 -9	51 -1	51 +5	56 +2
Train	22 +5	24 +8	29 +8	15 +3	19 +2	23 +2	21 +5	24 +6	16 +6	25 +5	25 +3	22 +6
Bus	12 +3	7 +2	15 +3	9 +2	9 +2	12 +5	12 +3	11 +4	12 +2	8 -1	15 +3	19 +3
Rental car through an agency	6 +1	5 =	11 +4	5 +1	6 +3	7 +1	6 +4	8 +1	8 +1	7 -1	3 -2	2 =
Boat	6 +1	6 +3	11 +2	3 =	5 -3	7 +2	7 +4	5 +1	3 +1	9 =	3 =	3 -1
Rental car between private individuals	4 +1	3 =	4 -1	2 -1	4 +1	5 +2	4 +3	4 =	5 +2	5 =	3 -1	1 =
Carpooling	3 +1	3 =	2 -1	2 +1	2 =	4 +2	3 =	3 =	2 =	3 =	1 =	3 =
Bike	3 =	2 -1	3 -1	3 =	4 -1	4 -1	3 +1	3 +2	2 =	2 -2	4 -1	3 -1
Camper van	3 =	2 -1	4 =	3 +1	4 -1	6 +1	4 +3	3 +1	2 =	3 =	3 -1	3 +1
Motorbike	2 =	1 -1	2 =	2 =	1 -2	2 +1	3 +1	2 +1	2 =	2 =	1 -1	1 =
Other	1 =	1 +1	2 +1	1 =	1 =	1 -1	1 =	1 +1	1 -1	1 =	1 =	1 =

Q23. What kind of transportation will you [use this summer / use] to go to your holiday destination?

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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03

Modes of transportation planned to go to destination (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Plane	64 +6	85 +7	60 +8	82 +7	53	62 -1	66 +6	65	51 +2	54 +9	53 -5	66 -4
Personal car	35 +2	11 +3	41 =	11 +2	38	23 +1	30 -3	35	50 +3	45 -5	24 -7	24 +2
Train	37 +12	32 +4	48 +4	37 +9	26	55 +8	27 +14	24	14 +3	17 +4	13 -1	23 +7
Bus	27 +7	20 +4	18 +3	28 +5	22	32 +8	18 +7	22	9 +1	12 +3	13 -1	19 +2
Rental car through an agency	28 +11	8 +2	11 +2	15 +5	19	25 +9	18 +4	21	18 +1	16 +4	16 +2	17 +3
Boat	8 +2	9 +2	9 +4	10 +5	5	14 +2	7 +1	9	7 -1	9 +5	8 +1	11 +4
Rental car between private individuals	15 +4	6 +2	6 +1	12 +6	8	21 +5	10 +3	14	8 +1	6 =	14 +5	14 +1
Carpooling	8 +1	6 +3	4 +3	3 =	1	9 +3	3 +1	2	5 =	6 =	10 =	8 +2
Bike	5 +1	3 +1	6 +3	4 +2	3	13 -1	6 +3	6	6 +4	6 +3	8 +2	10 +4
Camper van	6 +1	4 +1	3 =	4 +1	3	10 +3	5 -1	6	5 -1	5 -2	6 -1	8 +4
Motorbike	8 +2	2 =	4 +1	3 +1	1	14 +2	3 =	3	4 +1	3 +1	7 +3	8 +2
Other	1 +1	1 =	1 =	2 +1	1	0 -1	3 +1	1	1 =	2 =	0 =	0 =

Q23. What kind of transportation will you [use this summer / use] to go to your holiday destination?

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03

Reasons of choice of the main transportation mode (%)

If convenience is the first motivation overall whatever the mode of transportation, it is even more quoted by those who chose personal car (62%).

Environmental concerns are at the bottom of the list of motivations to pick a transportation mode over another (representing 10% of motivations overall), however those who choose carpooling mention it more (28%) along with those who choose the train (24% of them mention environmental motivations)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
It is the most convenient way to reach my destination	57 =	58 +1	52 -2	60 =	61 +4	58 +2	58 =	59 +5	43 -2
I am used to taking this mode of transportation	38 +4	38 +5	36 +3	41 +4	41 +9	45 +8	32 +2	36 -2	35 -1
It is more affordable for me	28 +3	30 +5	30 +3	22 +3	32 +2	50 +7	34 +6	39 +6	32 +3
It is the only possible way to reach my destination	22 +1	25 +2	20 +2	20 +3	34 =	38 +3	35 +5	26 +2	35 +3
It is more environmentally friendly	10 +1	11 +1	8 =	8 =	18 +4	38 +2	10 +2	13 +3	22 +2
Other	1 -1	2 =	1 =	1 =	1 =	1 +1	2 =	2 +1	0 =
None of these	1 =	2 +1	1 =	1 =	1 =	1 +1	2 +1	1 =	1 =

Q24. Why will you choose this mode of transportation? Is it because... Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

2/3 Reasons of choice of the main transportation mode (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
It is the most convenient way to reach my destination	57 =	54 +2	65 +7	53 -5	62 +3	52 -7	61 +3	54 -5	52 =	51 -1	59 +1	61 -1
I am used to taking this mode of transportation	38 +4	43 +3	34 +8	34 +4	39 +2	39 +5	38 +4	40 +7	31 -1	38 +5	36 =	46 +8
It is more affordable for me	28 +3	34 +4	32 +8	26 +2	28 +2	28 +4	29 +5	25 +1	33 +7	31 =	27 +3	18 +3
It is the only possible way to reach my destination	22 +1	22 +2	31 +4	21 -1	22 -1	25 +3	26 +1	20 +3	21 =	19 +3	19 +4	20 +2
It is more environmentally friendly	10 +1	12 +3	11 =	11 +3	13 +3	11 -1	11 +3	10 +1	7 +1	7 -2	9 -2	7 +1
Other	1 -1	1 =	1 -1	3 +1	2 -1	2 -1	2 -1	1 =	1 -1	1 =	1 =	2 =
None of these	1 =	1 =	2 +1	2 +1	1 =	2 +1	2 +1	2 +1	1 =	1 =	1 =	2 +2

Q24. Why will you choose this mode of transportation? Is it because… Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

3/3 Reasons of choice of the main transportation mode (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
It is the most convenient way to reach my destination	63 +3	58 +8	60 -6	59 +3	62	58 +2	58 =	58	56 +5	61 +4	42 -5	44 =
I am used to taking this mode of transportation	42 +10	39 +8	49 -1	34 +11	45	45 +8	35 +5	29	39 -1	33 -3	36 -4	34 +1
It is more affordable for me	48 +12	26 +2	33 -3	34 +8	16	50 +7	37 +9	32	43 +6	35 +5	32 +4	31 +1
It is the only possible way to reach my destination	39 +1	35 +1	25 +6	44 +7	22	38 +3	33 +3	37	23 +1	28 +2	33 +5	37 +2
It is more environmentally friendly	31 +12	16 +2	9 +1	18 +6	11	38 +2	11 +3	8	15 +3	11 +2	17 -5	25 +6
Other	0 =	0 -1	0 -1	1 =	1	1 +1	1 -1	2	2 +1	1 =	0 =	0 =
None of these	0 =	1 =	3 +2	1 =	2	1 +1	2 +1	1	1 =	1 =	2 +2	1 =

Q24. Why will you choose this mode of transportation? Is it because… Basis: To those who plan to go on a trip

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

03

The majority of European travelers stay in hotels or resorts (57%), the 2nd accommodation is holiday rental (30% in Europe)

Outside Europe, house rental is less popular in some zones (North Asia 25%, MENA and North America 24%), whereas staying for free at a friend's place, family's or holiday home is much more common in India, North America, MENA and Oceania than it is in Europe (only 18% of European travelers mention this type of accommodation, vs 33% in India and 29% North America).

1/3 Type of accommodation planned (%)

	EU		WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA		INDIA		OCEANIA		NORTH AMERICA		MIDDLE EAST	
Hotels	46	-4	48	-3	44	-5	42	-8	70	=	62	-2	51	-8	50	-3	45	-5
Rental of a house or apartment	30	-1	32	+2	29	-1	29	-3	25	-1	31	+2	28	+4	24	-3	24	-4
NEW All-inclusive resorts	19		19		18		22		20		31		16		17		25	
A bed & breakfast	18	+2	13	+2	24	+2	23	=	25	+6	30	+5	17	+3	14	=	22	+2
Friends'/family's houses or in your holiday home	18	+1	18	+1	19	+1	18	+3	15	-2	33	+1	30	+6	29	+3	26	-4
Camping at a campsite	10	=	11	=	8	+1	10	-1	11	+1	24	+1	11	+1	19	=	15	=
Boat (e.g. cruise)	6	+1	6	+1	5	+1	5	+1	10	=	23	+2	9	=	11	=	17	-2
Roadtrip in a camper van/caravan	5	=	5	-1	3	-1	4	=	9	=	27	=	9	-1	9	+1	17	-2
Do a house exchange	3	=	4	+1	3	+1	2	=	5	+1	14	+3	4	+2	4	=	10	=
Other	2	-1	3	-1	2	=	2	=	1	=	0	=	2	-1	3	=	0	-1
NEW ST Hotel or resort	**57**		**58**		**55**		**57**		**78**		**73**		**59**		**58**		**59**	

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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Type of accommodation planned (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Hotels	46 -4	34 +3	52 +1	47 -2	45 -10	52 -4	57 -6	47 -10	38 -8	45 +1	46 -2	38 -13
Rental of a house or apartment	30 -1	42 +5	31 =	31 =	35 +3	25 +1	28 =	29 -1	30 =	27 -4	28 -6	29 -2
NEW All-inclusive resorts	19	10	22	14	21	18	28	21	18	16	17	27
A bed & breakfast	18 +2	6 +1	16 +1	12 +1	12 +2	14 +2	17 +5	14 =	26 +2	32 +2	18 =	28 +1
Friends'/family's houses or in your holiday home	18 +1	27 +1	15 =	13 -3	14 =	21 +1	14 =	18 -1	23 +3	16 =	20 +2	15 +3
Camping at a campsite	10 =	15 =	10 -1	10 +1	8 -4	10 -1	12 +6	9 +3	7 =	7 =	8 =	12 -2
Boat (e.g. cruise)	6 +1	3 +1	11 +2	4 +1	6 -4	6 +2	7 +4	5 +1	3 =	7 +1	4 -1	6 +3
Roadtrip in a camper van/caravan	5 =	3 -2	7 -1	5 =	6 =	7 +2	7 +4	4 +1	2 -1	4 -2	4 =	3 =
Do a house exchange	3 =	4 +2	2 -2	2 -1	2 -1	5 +1	6 +4	3 =	3 +1	2 =	2 -2	1 =
Other	2 -1	3 -1	3 -1	3 -1	3 +1	4 =	1 -3	2 -1	1 -1	1 -1	2 =	1 =
NEW ST Hotel or resort	**57**	**40**	**65**	**57**	**59**	**60**	**72**	**61**	**52**	**54**	**58**	**57**

Q25. Regarding your accommodations during your next [summer trip / trip] in 2024, do you mostly intend to…
Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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03

3/3 Type of accommodation planned (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Hotels	57 -3	76 +1	84 =	68 -3	70	62 -2	53 -6	50	52 -6	47 -3	42 -7	48 -3
Rental of a house or apartment	44 +6	23 +2	9 -2	27 +2	13	31 +2	26 +2	30	24 -4	24 -1	25 -5	24 -3
NEW All-inclusive resorts	32	18	12	24	9	31	19	13	18	16	27	24
A bed & breakfast	25 +1	26 +2	10 +4	21 +7	35	30 +5	19 +5	14	16 =	13 +1	21 +1	24 +4
Friends'/family's houses or in your holiday home	23 +1	14 =	10 -3	15 -1	9	33 +1	25 +1	36	25 =	32 +5	23 -5	29 -4
Camping at a campsite	20 +1	8 =	10 +4	8 +5	8	24 +1	12 +2	11	18 =	20 -1	14 -1	16 +1
Boat (e.g. cruise)	15 +2	9 =	8 +4	10 +1	4	23 +2	11 +2	7	12 -2	10 +1	16 -3	17 -1
Roadtrip in a camper van/caravan	17 +4	8 +1	6 +2	10 +3	4	27 =	9 -1	9	10 +2	8 -1	15 -4	18 -1
Do a house exchange	7 +2	4 -1	2 =	5 +3	6	14 +3	4 +2	3	4 -1	4 +2	9 -2	10 =
Other	0 -1	1 =	1 -1	0 -1	1	0 =	2 -1	2	3 +1	3 -1	0 =	0 -1
NEW ST Hotel or resort	72	83	88	78	74	73	62	57	61	56	58	60

Q25. Regarding your accommodations during your next [summer trip / trip] in 2024, do you mostly intend to...
Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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03

Habits (favourite mode or used to this mode) and affordability are the top criteria for accommodation choice.

1/3 Criteria of choice of accommodation (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
It is my favourite mode of accommodation	38 =	38 =	35 -1	44 +3	35 +1	41 -1	33 +5	33 +1	32 -3
It is more affordable for me	35 +3	35 +3	38 +1	29 +2	36 +1	46 +3	44 +2	43 +3	34 +1
I am used to taking this mode of accommodation	35 +1	35 =	34 +2	37 +2	40 +5	40 +2	40 +7	37 +4	32 -4
It's a reliable type of accommodation (e.g. no risk of being scammed) *	26 -2	26 -3	24 =	26 -4	39 =	42 +6	37 -5	33 -2	31 -2
It's a safe / well-protected accommodation	24 +5	25 +6	24 +4	22 +4	45 +8	50 +4	34 +3	35 +7	34 +4
For all the services and activities proposed	20 =	22 =	18 =	15 -2	23 +1	37 +4	23 =	25 +3	26 +1
It is more environmentally friendly	8 =	8 -1	8 +1	9 +2	16 +3	35 +1	9 =	14 +3	22 =
Other	2 =	2 -1	1 =	1 -1	0 -1	0 =	4 =	2 =	0 =
None of these	2 +1	2 =	2 +1	2 +1	2 +1	1 =	1 +1	2 =	2 +1

*Item modified. In 2024: "It's a reliable type of accommodation"

NQ4. Why will you choose this mode of accommodation? Is it because … Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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03

	EU		FR		UK		BE		DE		CH		AT		ES		PT		IT		PL		CZ	
			WESTERN EUROPE												**SOUTH EUROPE**						**EAST. EUROPE**			
It is my favourite mode of accommodation	38	=	35	+3	39	+7	30	-3	45	-3	39	=	43	+2	35	-3	34	-2	35	+1	41	+2	48	+4
It is more affordable for me	35	+3	41	+2	41	+7	32	+1	33	+8	34	=	31	+4	33	+1	42	+2	38	=	39	+5	19	-2
I am used to taking this mode of accommodation	35	+1	42	+3	40	+4	36	-1	29	-2	32	=	30	-3	35	+2	38	+5	28	-2	29	+2	45	+2
It's a reliable type of accommodation (e.g. no risk of being scammed) *	26	-2	23	-3	35	=	23	-3	24	-5	24	-3	29	-1	26	-2	25	+3	22	-1	22	-3	29	-6
It's a safe / well-protected accommodation	24	+5	21	+4	31	+6	23	+7	27	+4	23	=	27	+14	26	+3	26	+6	20	+4	25	+3	20	+5
For all the services and activities proposed	20	=	20	+4	25	+1	22	-4	21	+2	22	-1	25	=	23	=	13	-1	18	+1	18	-5	12	=
It is more environmentally friendly	8	=	8	-1	10	=	6	=	8	-2	10	+1	8	+1	9	+3	6	-1	9	=	11	+2	6	+2
Other	2	=	1	=	2	-1	3	=	3	=	2	-1	2	-2	1	=	1	-1	1	=	1	=	1	-1
None of these	2	+1	2	=	1	=	2	=	1	-1	2	=	2	=	2	+1	2	+1	1	=	2	+1	2	+1

* Item modified. In 2024: "It's a reliable type of accommodation"

NQ4. Why will you choose this mode of accommodation? Is it because … Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

3/3 Criteria of choice of accommodation (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
It is my favourite mode of accommodation	36 +1	42 +2	26 -7	35 +7	33	41 -1	36 +8	29	32 -3	33 +3	32 -6	32 -1
It is more affordable for me	49 +8	33 +6	34 -1	37 =	25	46 +3	43 +1	45	43 +7	44 =	33 +1	35 +1
I am used to taking this mode of accommodation	38 +4	40 +9	42 -4	37 +3	43	40 +2	38 +5	42	35 +2	38 +4	30 -4	34 -4
It's a reliable type of accommodation (e.g. no risk of being scammed) *	43 +4	37 +2	34 -9	43 +3	34	42 +6	36 -6	38	35 -2	32 -1	28 -3	34 -1
It's a safe / well-protected accommodation	51 +11	43 +9	42 +9	51 +13	38	50 +4	34 +3	34	38 +9	31 +3	32 +4	36 +4
For all the services and activities proposed	33 +7	29 +5	17 +7	26 +3	10	37 +4	24 +1	22	24 =	26 +6	25 -4	26 +3
It is more environmentally friendly	28 +9	10 +1	8 +1	17 +4	11	35 +1	11 +2	8	16 +3	12 +2	20 -3	23 +1
Other	0 -1	0 -1	1 =	0 -1	0	0 =	3 -1	5	3 +1	1 -2	0 =	0 =
None of these	1 =	1 +1	3 +2	2 +1	3	1 =	1 +1	1	2 =	3 +1	2 +1	1 =

* Item modified. In 2024: "It's a reliable type of accommodation"

NQ4. Why will you choose this mode of accommodation? Is it because ... Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

04

Travel trends

New item introduced this year, travel to attend an event is appealing for almost half of Europeans, and even more in other regions.

1/3 Travel trends
Likely to try (%)

	EU		WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA		INDIA		OCEANIA		NORTH AMERICA		MIDDLE EAST	
Slow tourism: take time to explore local history and culture, while supporting the environment	68	-1	66	=	73	-1	67	-1	69	=	86	+1	71	=	69	+1	75	+1
Travel to less touristic destinations	68	-2	69	-2	70	-3	64	=	64	+3	78	+3	64	-2	67	+1	66	+2
NEW Travel to attend an event (i.e. music concert)	43		39		47		48		45		70		48		51		60	
Wellbeing trips/tours (e.g. yoga/detox retreats)	38	=	36	=	38	-1	45	=	40	=	71	-3	27	-2	34	+2	67	+3
Culinary trips/tours (e.g. cooking classes)	35	-2	33	-1	42	-3	31	-2	43	-1	64	-1	32	-6	38	+2	59	+1
Solo travelling	33	-1	33	-1	30	+1	37	-3	44	+1	66	+3	41	+1	40	+1	64	+6
Travel to a destination featured in a famous movie / television show / series	33	-1	30	=	40	-2	34	-3	53	-2	75	-2	39	-2	39	+1	69	+4
Travel for the purpose of doing extreme / adventure sports (mountain climbing, ultra-trail, skydiving, scuba diving...)	23	=	21	=	27	=	23	-2	36	+3	71	-3	26	+1	30	+1	65	+5

NEWQ4. Among the following trends/ways to travel, please indicate how likely are you to try them in the next years? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

Travel trends
Likely to try (%)

04

Slow tourism is especially attractive in France, Italy, Portugal and Poland.

	EU	WESTERN EUROPE FR	UK	BE	DE	CH	AT	SOUTH EUROPE ES	PT	IT	EAST. EUROPE PL	CZ
Slow tourism: take time to explore local history and culture, while supporting the environment	68 -1	78 +2	70 +1	63 -6	60 +4	64 -3	61 -1	68 +2	72 -5	78 =	77 +2	57 -4
Travel to less touristic destinations	68 -2	78 +3	65 -1	61 -6	67 +2	75 -3	68 -6	69 -4	66 -7	76 +2	76 -1	52 =
NEW Travel to attend an event (i.e. music concert)	43	44	47	30	33	43	40	48	45	49	52	44
Wellbeing trips/tours (e.g. yoga/detox retreats)	38 =	41 +3	30 =	27 -1	31 -5	45 +3	42 -2	38 +3	35 -6	40 =	41 +2	49 -1
Culinary trips/tours (e.g. cooking classes)	35 -2	44 =	29 =	25 -4	32 +1	41 =	29 -3	37 -1	43 -4	47 -2	40 -3	22 -1
Solo travelling	33 -1	31 =	36 =	31 =	29 -3	40 -2	31 -2	27 =	28 -2	35 +6	35 -6	39 -1
Travel to a destination featured in a famous movie / television show / series	33 -1	29 +3	41 +2	25 -1	24 -6	32 =	27 +3	42 =	38 -8	41 +4	38 -3	31 -1
Travel for the purpose of doing extreme / adventure sports (mountain climbing, ultra-trail, skydiving, scuba diving…)	23 =	25 +4	24 -1	20 -2	16 -2	23 -1	20 +2	26 +3	24 -6	31 +4	30 -1	16 -2

NEWQ4. Among the following trends/ways to travel, please indicate how likely are you to try them in the next years? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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Travel trends
Likely to try (%)

04

Travelling to attend an event is less popular in Japan and Singapore.

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Slow tourism: take time to explore local history and culture, while supporting the environment	86 =	81 +2	38 +3	80 +5	60	86 +1	71 =	71	66 +2	71 -1	72 +3	77 -1
Travel to less touristic destinations	75 +3	75 +1	37 =	70 +7	62	78 +3	62 -4	66	66 +2	68 =	64 +1	69 +4
NEW Travel to attend an event (i.e. music concert)	54	50	29	39	51	70	45	50	55	47	56	64
Wellbeing trips/tours (e.g. yoga/detox retreats)	56 -4	43 -1	14 =	42 +2	48	71 -3	31 +2	24	36 +3	32 +1	65 +2	69 +4
Culinary trips/tours (e.g. cooking classes)	59 =	33 -6	44 +2	40 +6	38	64 -1	34 -4	30	39 +3	37 +1	55 -1	63 +3
Solo travelling	54 =	45 +3	33 -1	40 -1	46	66 +3	43 +3	38	42 +2	38 =	60 +5	67 +6
Travel to a destination featured in a famous movie / television show / series	69 -4	61 -3	25 -4	57 +4	56	75 -2	43 +2	36	42 +4	36 -3	64 +3	73 +3
Travel for the purpose of doing extreme / adventure sports (mountain climbing, ultra-trail, skydiving, scuba diving...)	58 +3	33 +2	18 +4	35 +3	36	71 -3	28 +3	23	32 +1	28 +1	61 +5	68 +4

NEWQ4. Among the following trends/ways to travel, please indicate how likely are you to try them in the next years? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

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The declared willingness to adopt sustainable travel usages stays high, the first being support of local economy.

1/6 Willingness to adopt sustainable travel practices

Yes (whether people are already doing it or would be ready to do it) (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Supporting local economy	84 -2	83 -1	89 -1	84 +1	85 -1	92 +2	87 +1	83 +1	87 =
Adopt responsible behaviors not to waste local resources	82 -3	79 -4	88 -3	78 -3	83 -4	89 -3	80 -1	74 -4	85 =
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	80 -1	79 =	86 =	75 -1	84 +1	90 =	81 +2	77 +3	84 -1
NEW Travel during off-peak seasons	76	74	83	72	79	89	74	71	83
NEW Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	73	69	82	71	80	90	73	65	85
Picking an accommodation with a green certification	69 -3	67 -3	79 -3	62 -3	71 -1	85 -5	65 +1	65 +3	81 -2
Switching transportation modes for a lower carbon impact	65 -2	61 -1	77 -3	59 -3	73 =	89 =	67 +6	63 +7	82 +1

Q29. […] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

04

Two thirds of European travellers would be ready to limit high carbon impact transportations, however when looking at the reality of their plans, plane usage has never been so high (see part 3) : a "say-do" gap that stays strong

Willingness to adopt sustainable travel practices
Yes (whether people are already doing it or would be ready to do it) (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
NEW Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	64	59	76	62	70	85	58	58	82
NEW Limit high carbon impact transportations (e.g. max number of flights/year)	64	61	76	57	67	86	56	58	80
Travel to a closer destination to reduce carbon footprint	63 -4	59 -4	75 -4	58 -3	68 =	82 -1	55 -2	62 +3	76 -2
Bringing goods to donate to the local population when visiting underprivileged regions	59 -4	55 -3	70 -3	57 -2	57 -1	85 -2	59 =	62 +4	81 -3
NEW Select your company airline or travel provider based on their climate commitments	58	53	71	54	69	82	56	55	81
NEW Use carbon offset programs to compensate for the emissions from your flights and other travel activities	57	53	71	52	65	83	52	53	78
NEW Volunteer with NGOs to join community tourism initiatives	43	38	58	38	55	80	38	40	74

Q29. […] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution vs 2024*

04

A higher declared willingness to adopt sustainable practices in Southern Europe.

Willingness to adopt sustainable travel practices
Yes (whether people are already doing it or would be ready to do it) (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Supporting local economy	84 -2	81 -2	83 -2	80 -1	79 -1	84 -5	88 -1	86 -3	91 -1	88 -1	85 -1	83 +3
Adopt responsible behaviors not to waste local resources	82 -3	84 -3	75 -8	79 -3	76 -2	81 -6	83 =	85 -3	90 -4	89 -2	78 -6	77 -2
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	80 -1	77 -2	77 -2	77 -1	75 =	81 -2	84 +2	81 -1	87 -2	88 =	77 -3	73 +1
NEW Travel during off-peak seasons	76	75	73	70	72	77	78	79	84	85	74	69
NEW Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	73	71	72	68	64	73	70	81	80	84	74	68
Picking an accommodation with a green certification	69 -3	69 -4	67 =	65 -2	62 -5	68 -5	68 -3	76 -3	82 -2	78 -4	66 -6	58 -1
Switching transportation modes for a lower carbon impact	65 -2	65 -1	65 +4	62 =	54 -1	64 -3	58 -1	76 -3	76 -3	80 -1	64 -4	54 -1

Q29. [...] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

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Willingness to adopt sustainable travel practices
Yes (whether people are already doing it or would be ready to do it) (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
NEW Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	64	57	61	57	54	60	62	75	78	75	66	58
NEW Limit high carbon impact transportations (e.g. max number of flights/year)	64	63	60	61	57	63	60	72	74	80	63	51
Travel to a closer destination to reduce carbon footprint	63 -4	66 -6	60 -2	60 -2	55 -3	58 -7	56 -2	72 -3	76 -5	76 -4	62 -5	54 -1
Bringing goods to donate to the local population when visiting underprivileged regions	59 -4	59 -5	51 -4	53 -5	48 -2	62 -5	54 -1	65 -4	74 -5	72 -1	61 -5	53 +1
NEW Select your company airline or travel provider based on their climate commitments	58	54	59	49	48	57	51	67	76	71	59	48
NEW Use carbon offset programs to compensate for the emissions from your flights and other travel activities	57	52	55	46	50	56	56	66	74	73	57	47
NEW Volunteer with NGOs to join community tourism initiatives	43	39	37	32	36	44	38	51	65	60	44	32

Q29. […] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

Lower levels of potential adoption in North America, Japan and Australia.

5/6 Willingness to adopt sustainable travel practices
Yes (whether people are already doing it or would be ready to do it) (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Supporting local economy	95 +3	88 -1	79 +1	85 -1	80	92 +2	84 -2	91	81 =	84 +1	82 -2	91 +1
Adopt responsible behaviors not to waste local resources	91 -2	87 -2	73 -8	84 -3	81	89 -3	77 -4	82	69 -5	78 -3	82 +1	89 =
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	88 -1	86 +3	76 -2	85 +4	86	90 =	76 -3	85	75 +6	79 +1	81 =	87 -2
NEW Travel during off-peak seasons	90	80	65	83	77	89	72	76	69	74	80	85
NEW Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	88	84	70	82	77	90	70	75	63	68	81	89
Picking an accommodation with a green certification	85 +1	70 =	56 -3	73 =	74	85 -5	62 -2	68	62 +5	69 +2	78 -3	83 -2
Switching transportation modes for a lower carbon impact	84 +1	72 =	64 -1	73 +1	73	89 =	64 +3	69	62 +10	64 +3	78 -2	87 +4

Q29. […] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

Willingness to adopt sustainable travel practices

6/6

Yes (whether people are already doing it or would be ready to do it) (%)

	NORTH ASIA					IN	OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
NEW Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	83	69	55	70	74	85	57	60	57	59	80	85
NEW Limit high carbon impact transportations (e.g. max number of flights/year)	82	61	49	69	71	86	55	56	56	59	78	83
Travel to a closer destination to reduce carbon footprint	82 -1	70 +1	51 -1	67 +1	71	82 -1	55 -2	55	61 +3	62 +2	74 -3	78 -2
Bringing goods to donate to the local population when visiting underprivileged regions	81 +3	48 -5	41 =	63 +3	54	85 -2	57 -2	61	60 +5	63 +3	76 -5	86 -1
NEW Select your company airline or travel provider based on their climate commitments	81	68	55	66	72	82	54	58	52	57	78	83
NEW Use carbon offset programs to compensate for the emissions from your flights and other travel activities	79	64	49	66	70	83	52	53	52	54	76	79
NEW Volunteer with NGOs to join community tourism initiatives	73	55	40	52	54	80	37	39	42	38	71	79

Q29. […] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices?
Basis : To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2024

The most attractive incentives to adopt sustainable travel practices are direct financial benefits or deals.

1/3 Incentives to adopt sustainable travel practices
Total mentions (firstly, secondly or thirdly) (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Financial benefits and help from the government to help you pay the extra cost of sustainable travel	49	47	49	53	51	54	52	47	46
Access to exclusive deals or experiences with sustainable brands, when booking a trip with a sustainable travel agency, platform or tour operator	42	40	50	38	49	60	49	46	55
Points or rewards for sustainable travel choices	38	38	39	40	48	36	49	46	47
Tax benefits for choosing eco-friendly travel options	36	34	42	36	33	37	34	35	29
Dedicated apps or platforms helping you to plan and book sustainable trips easily	34	33	37	30	43	44	34	29	44
Discovering sustainable travel tips and special deals through an **influencer on social media**	21	20	24	20	28	46	16	21	45
None of these	22	25	16	24	14	7	19	22	10
Other	1	1	1	1	0	0	2	1	0

XX / XX Significantly higher or lower score vs Europe

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2/3 Incentives to adopt sustainable travel practices
Total mentions (firstly, secondly or thirdly) (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Financial benefits and help from the government to help you pay the extra cost of sustainable travel	49	45	49	46	46	48	49	44	48	56	52	55
Access to exclusive deals or experiences with sustainable brands, when booking a trip with a sustainable travel agency, platform or tour operator	42	39	47	36	37	41	41	53	48	49	36	41
Points or rewards for sustainable travel choices	38	35	46	36	33	36	43	39	49	29	43	36
Tax benefits for choosing eco-friendly travel options	36	33	36	38	28	31	34	35	51	41	41	32
Dedicated apps or platforms helping you to plan and book sustainable trips easily	34	35	30	33	31	36	35	37	37	38	30	30
Discovering sustainable travel tips and special deals through an **influencer on social media**	21	20	17	18	20	26	18	26	22	25	22	18
None of these	22	27	22	27	30	23	22	19	13	17	23	26
Other	1	1	2	1	1	2	2	2	1	1	1	1

NEW
Q25Q8. Among the following propositions, what 3 elements would be the most likely to make you change your travel habits towards more sustainable ones? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

04

3/3 Incentives to adopt sustainable travel practices
Total mentions (firstly, secondly or thirdly) (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Financial benefits and help from the government to help you pay the extra cost of sustainable travel	54	54	36	57	53	54	49	56	43	52	42	50
Access to exclusive deals or experiences with sustainable brands, when booking a trip with a sustainable travel agency, platform or tour operator	61	51	29	55	46	60	47	52	47	45	52	57
Points or rewards for sustainable travel choices	43	48	45	50	54	36	43	54	46	45	42	51
Tax benefits for choosing eco-friendly travel options	33	31	27	35	39	37	30	38	29	42	24	33
Dedicated apps or platforms helping you to plan and book sustainable trips easily	47	47	35	40	46	44	31	37	30	28	43	45
Discovering sustainable travel tips and special deals through an **influencer on social media**	40	36	22	25	19	46	19	13	25	18	45	45
None of these	6	9	33	11	13	7	24	13	23	21	15	5
Other	0	1	0	0	0	0	1	2	1	1	0	0

NEW

Q25Q8. Among the following propositions, what 3 elements would be the most likely to make you change your travel habits towards more sustainable ones? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

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04

16% of Europeans have already used AI to prepare or book holidays. A figure quite close in North America even if slightly higher.

1/3 Past use of Artificial Intelligence for holiday planning or booking (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Yes	16	15	19	16	25	51	13	19	43
No	84	85	81	84	75	49	87	81	57

■ Yes   ■ No

XX / XX *Significantly higher or lower score vs Europe*

04

2/3 Past use of Artificial Intelligence for holiday planning or booking (%)

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ

	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Yes	16	15	15	17	11	19	13	20	16	20	19	13
No	84	85	85	83	89	81	87	80	84	80	81	87

■ Yes   ■ No

NEW
Q25Q5. Have you ever used Artificial Intelligence-based tools or apps to prepare your holidays (planning and / or booking)? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

04

3/3 Past use of Artificial Intelligence for holiday planning or booking (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE

NORTH ASIA: MY, HK, JP, SG, SK
IN
OCEANIA: AU, NZ
NORTH AMERICA: US, CA
MIDDLE EAST: SA, AE

Yes (blue) / No (orange) values per country:

Country	Yes	No
MY	37	63
HK	29	71
JP	12	88
SG	28	72
SK	19	81
IN	51	49
AU	12	88
NZ	13	87
US	22	78
CA	15	85
SA	40	60
AE	46	54

■ Yes   ■ No

XX / XX *Significantly higher or lower score vs Europe*

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04

1 out of 5 Europeans could use AI in the future for holiday planning or booking (similar score in North America and Oceania, while it's much higher in other zones).

1/3 Planned future use of Artificial Intelligence for holiday planning or booking (%)
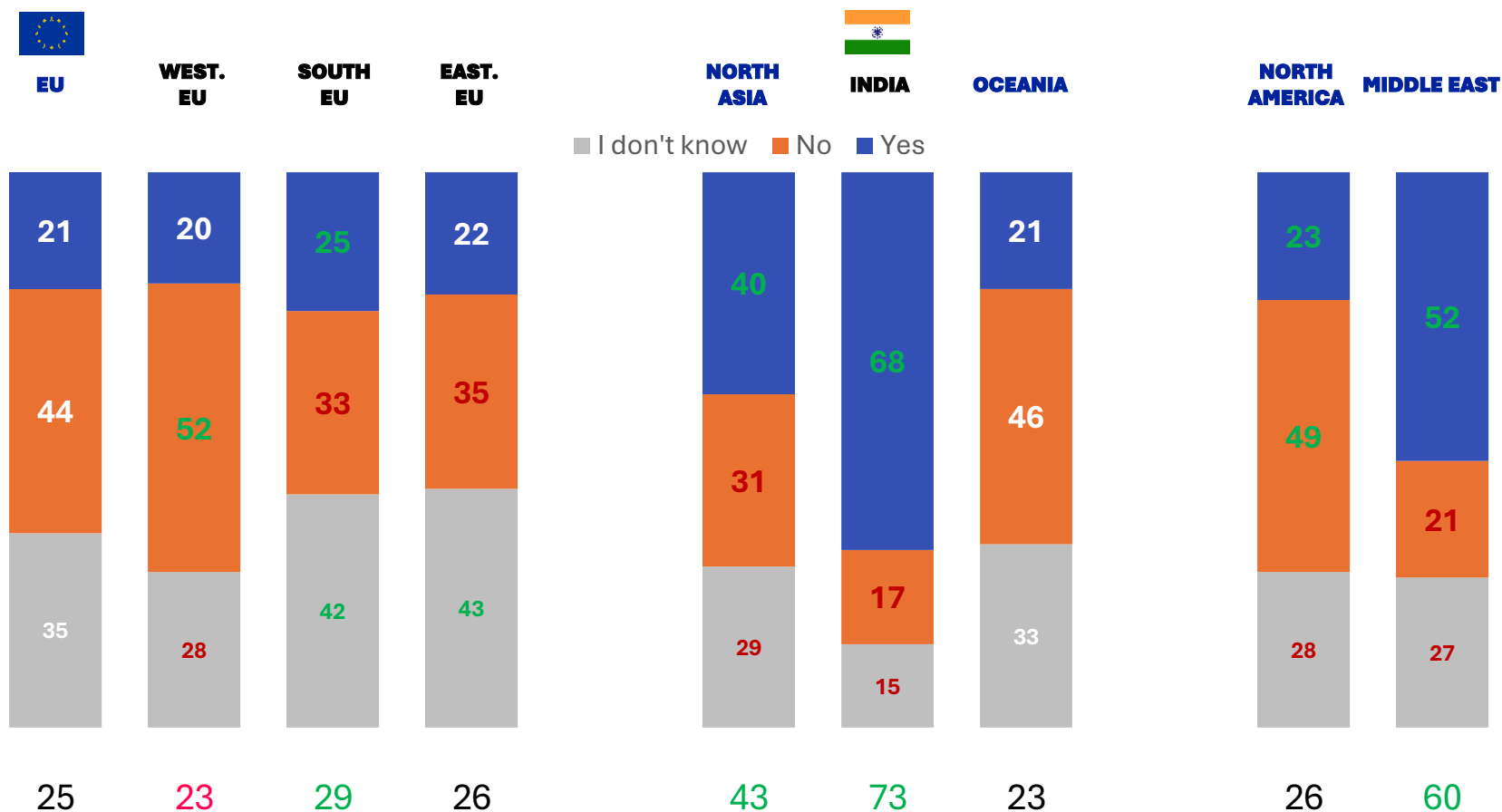
EU   **WEST. EU**   **SOUTH EU**   **EAST. EU**   **NORTH ASIA**   **INDIA**   **OCEANIA**   **NORTH AMERICA**   **MIDDLE EAST**

■ I don't know   ■ No   ■ Yes

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Yes	21	20	25	22	40	68	21	23	52
No	44	52	33	35	31	17	46	49	21
I don't know	35	28	42	43	29	15	33	28	27

TOTAL Have used AI or intend to use AI to prepare future holidays

EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
25	23	29	26	43	73	23	26	60

NEW
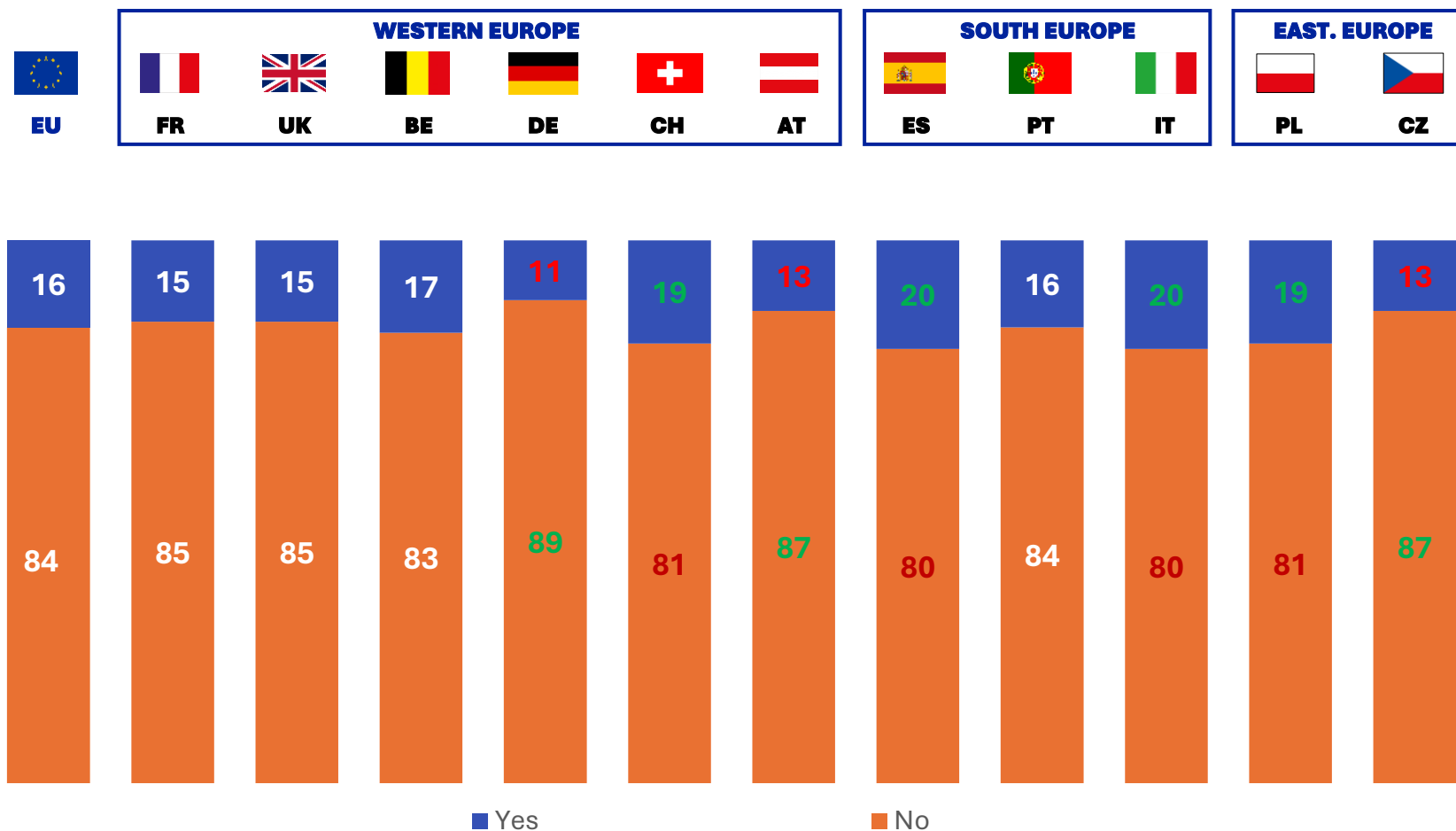Q25Q6. *Do you intend to use Artificial Intelligence-based tools or apps to prepare your future holidays (planning and / or booking)? Basis: To all*

XX / XX *Significantly higher or lower score vs Europe*

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2/3 Planned future use of Artificial Intelligence for holiday planning or booking (%)

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ

■ I don't know ■ No ■ Yes

	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Yes	21	19	20	19	16	23	20	26	23	26	21	22
No	44	47	52	56	55	50	51	35	31	32	33	38
I don't know	35	34	28	25	29	27	29	39	46	42	46	40

| TOTAL Have used AI or intend to use AI to prepare future holidays | 23 | 22 | 23 | 19 | 29 | 23 | 30 | 27 | 31 | 27 | 25 | 23 |

NEW
Q25Q6. Do you intend to use Artificial Intelligence-based tools or apps to prepare your future holidays (planning and / or booking)? Basis: To all

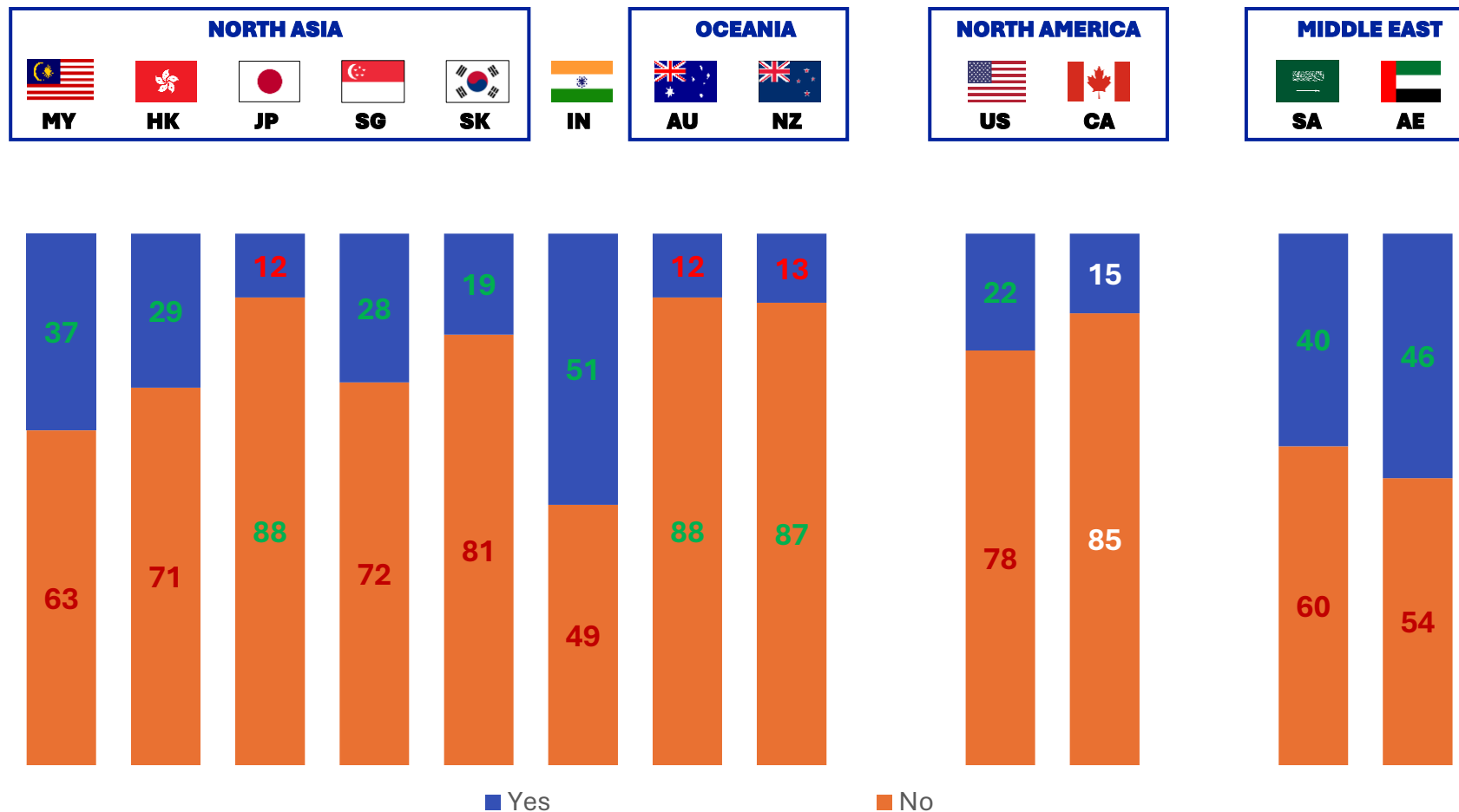**XX / XX** *Significantly higher or lower score vs Europe*

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04

3/3 Planned future use of Artificial Intelligence for holiday planning or booking (%)

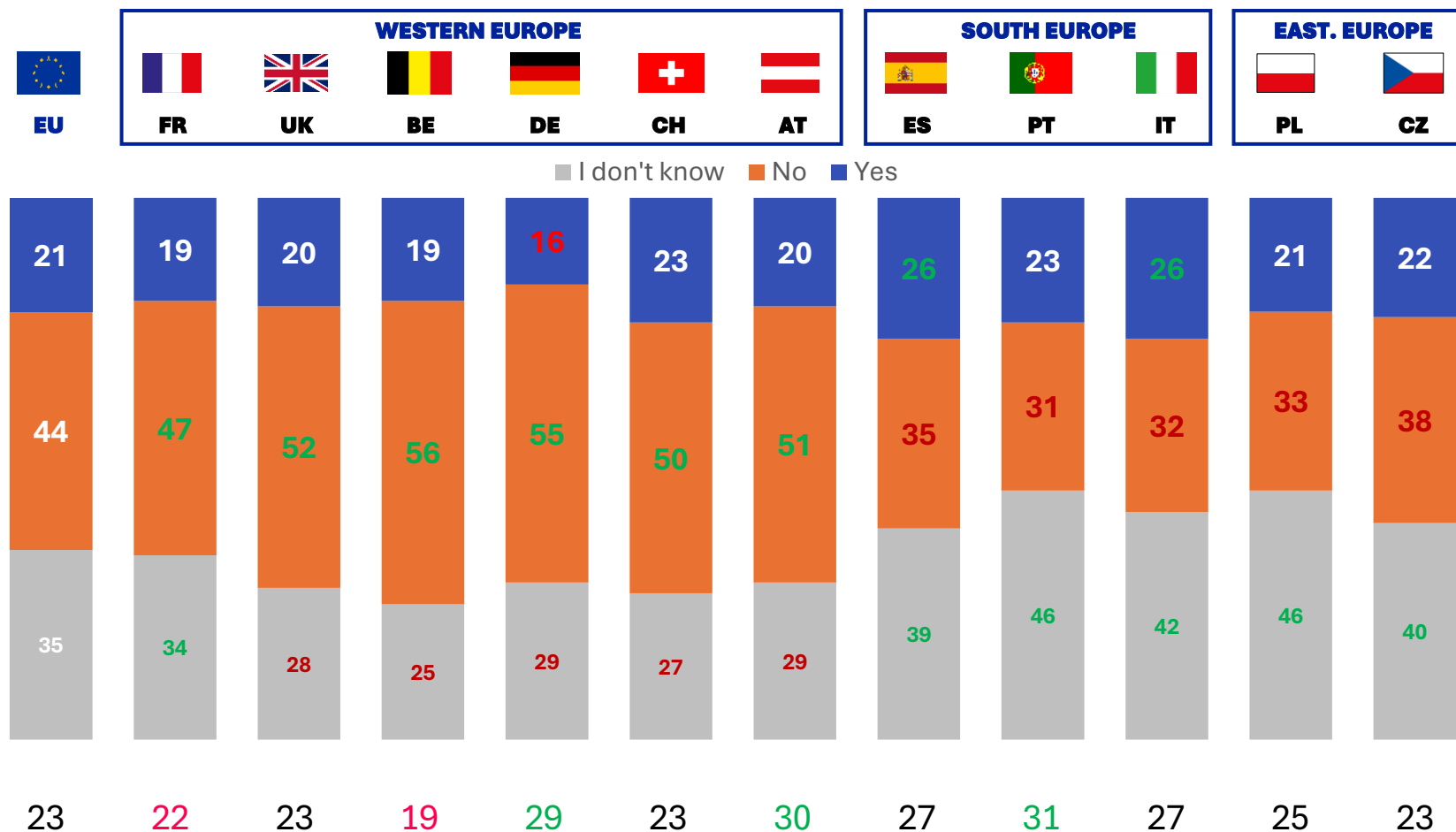|	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE

■ I don't know   ■ No   ■ Yes

Category	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Yes	58	37	16	43	44	68	19	22	25	21	48	55
No	17	36	49	27	28	17	50	42	48	50	19	23
I don't know	25	27	35	30	28	15	31	36	27	29	33	22

TOTAL Have used AI or intend to use AI to prepare future holidays

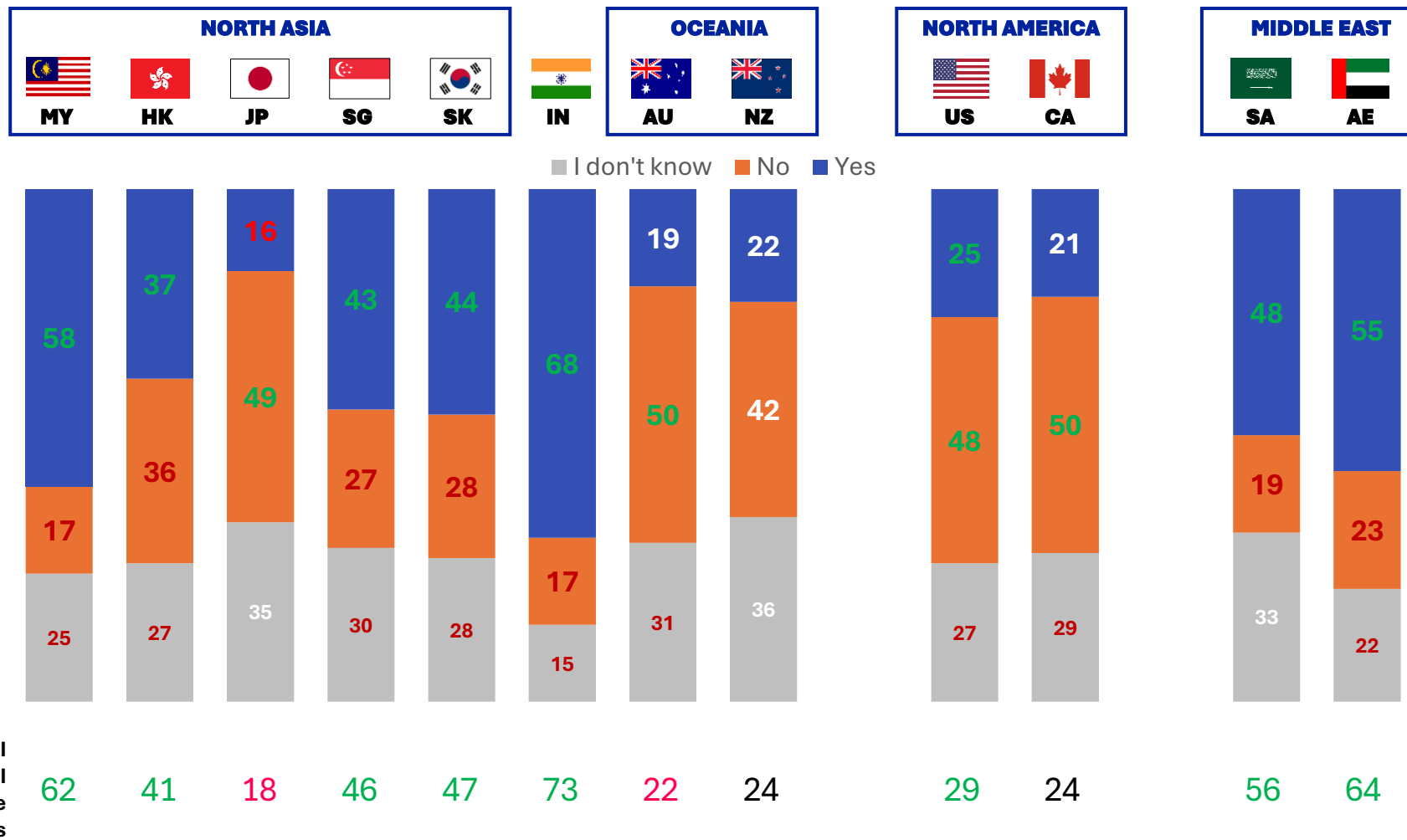|	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
	62	41	18	46	47	73	22	24	29	24	56	64

NEW

Q25Q6. Do you intend to use Artificial Intelligence-based tools or apps to prepare your future holidays (planning and / or booking)? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*

04

Recommendations on destinations, accommodations, itinerary, activities...travellers have or plan to use AI for many concrete travel aspects.

1/3 Type of recommendation or information sought after in Artificial Intelligence tools when trip planning (%)

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Destinations recommendations / information	50	50	49	50	62	60	59	53	47
Accommodation recommendations / information	48	47	47	53	59	54	50	48	47
Itinerary planning tips	47	47	44	50	59	41	54	42	40
Activities recommendations / information	45	51	39	40	53	55	60	59	43
Booking platforms recommendations / information / advice	36	36	37	33	45	64	47	45	42
Other	1	1	1	1	0	0	2	2	0

NEW
Q25Q7. What kind of recommendations/information [did you / would you] look for when using those Artificial Intelligence-based tools? Basis: To those who have used AI or intend to use AI to prepare their holidays

XX / XX Significantly higher or lower score vs Europe

2/3 Type of recommendation or information sought after in Artificial Intelligence tools when trip planning (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Destinations recommendations / information	50	51	61	47	53	37	55	51	57	41	44	56
Accommodation recommendations / information	48	50	58	39	47	38	50	48	53	42	51	55
Itinerary planning tips	47	45	50	40	50	44	53	42	48	44	45	56
Activities recommendations / information	45	57	63	43	54	43	50	40	42	34	36	44
Booking platforms recommendations / information / advice	36	33	57	29	33	33	33	35	39	37	34	31
Other	1	1	1	1	1	2	1	1	1	0	1	1

XX / **XX** *Significantly higher or lower score vs Europe*

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3/3 Type of recommendation or information sought after in Artificial Intelligence tools when trip planning (%)

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Destinations recommendations / information	66	57	58	61	65	60	66	54	51	55	47	47
Accommodation recommendations / information	61	57	60	56	58	54	52	49	47	50	48	46
Itinerary planning tips	51	58	57	68	60	41	50	58	38	48	41	39
Activities recommendations / information	62	52	45	63	35	55	57	63	57	62	40	46
Booking platforms recommendations / information / advice	55	44	44	42	37	64	47	47	46	43	44	41
Other	0	1	0	0	0	0	1	2	1	2	1	0

NEW

Q25Q7. What kind of recommendations/information [did you / would you] look for when using those Artificial Intelligence-based tools? Basis: To those who have used AI or intend to use AI to prepare their holidays

XX / XX *Significantly higher or lower score vs Europe*

APPENDICES

Plan to take holidays during summer (%)

1/3

	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	NORTH AMERICA	MIDDLE EAST
Yes	66	64	69	66	46	65	42	56	59
No	16	19	10	15	20	17	24	20	17
DK	18	17	21	19	34	18	34	24	24

■ Yes   ■ No   ■ DK

NEWQ1. Do you plan to take holidays [this summer / between June and September]? Basis: To all

XX / **XX** *Significantly higher or lower score vs Europe*
+X / **-X** *Significantly evolution on answer Yes' vs 2024*

2/3 Plan to take holidays during summer (%)

		WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
66	67	66	61	60	66	64	70	66	71	63	68
16	14	14	22	24	21	19	11	13	7	17	13
18	19	20	17	16	13	17	19	21	22	20	19

■ Yes   ■ No   ■ DK

NEWQ1. Do you plan to take holidays [this summer / between June and September]? Basis: To all

XX / XX *Significantly higher or lower score vs Europe*
+X / -X *Significantly evolution on answer Yes' vs 2024*

Plan to take holidays during summer (%)

3/3

	NORTH ASIA						OCEANIA		NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
Yes	50	47	39	46	50	65	44	39	53	58	50	68
No	14	21	28	17	17	17	25	24	21	20	17	16
DK	36	32	33	37	33	18	31	37	26	22	33	16

■ Yes   ■ No   ■ DK

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NEWQ1. Do you plan to take holidays [this summer / between June and September]? Basis: To all

Most attractive French regions (%)

Legend:
- Less than 10%
- 10% to less than 15%
- 15% to less than 20%
- 20% or more

Q21B. You have indicated that your travel destination will be France. In which region(s) will you be travelling? Basis: To those who plan to go on a trip – France Only
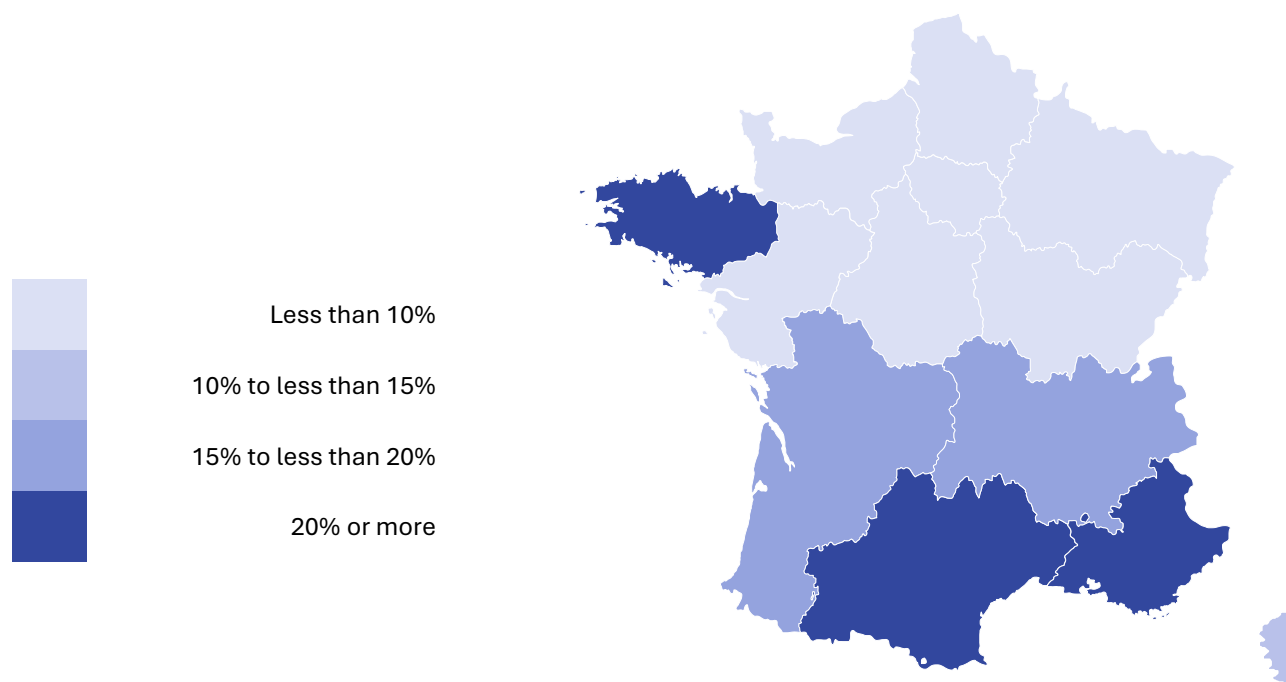
Our commitments

- PROFESSIONAL CODES, QUALITY CERTIFICATION CONSERVATION AND DATA PROTECTION

Ipsos is a member of the following French and European market and opinion research professional bodies:

- SYNTEC (professional union of market research companies in France; www.Syntec-etudes.Com)
- ESOMAR (European Society for Opinion and Market Research, www.Esomar.Org)

Ipsos France is certified ISO 20252 :
Market Research - version 2019
BY AFNOR CERTIFICATION

This document has been produced in compliance with these international codes and standards.

Ipsos France undertakes to apply the ICC/Esomar code for market and opinion research. This code defines the ethical rules for market research professionals and establishes the protective measures from which the persons questioned benefit.Ipsos s'engage à respecter les lois applicables.

Ipsos has appointed a Data Protection Officer and has implemented a compliance plan with the General Data Protection Regulation Regulation 5EU) 2016/679). For more information on our personal data protection policy: https://www.ipsos.com/fr-fr/confidentialite-et-protection-des-donnees-personnelles

As such, the retention period for the personal data of people interviewed as part of a study is, unless there is a specific contractual commitment:

- 12 months following the end date of an Ad Hoc study.
- 36 months following the end date of each wave of a recurring study.

Reliability of results

- **In this instance, with regard to this study:**
  - Confidence interval: **95%**
  - Size of sample : **1000 by country**

- **The proportions observed are between:**

■ **Upper Limit**   ■ **Actual Figure**   ■ **Lower limit**

	1%	2%	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%	65%	70%	75%	80%	85%	90%	95%	98%	99%
Upper Limit	1,6%	2,9%	6,4%	11,9%	17,2%	22,5%	27,7%	32,8%	38,0%	43,0%	48,1%	53,1%	58,1%	63,0%	68,0%	72,8%	77,7%	82,5%	87,2%	91,9%	96,4%	98,9%	99,6%
Actual Figure	1%	2%	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%	65%	70%	75%	80%	85%	90%	95%	98%	99%
Lower limit	0,4%	1,1%	3,6%	8,1%	12,8%	17,5%	22,3%	27,2%	32,0%	37,0%	41,9%	46,9%	51,9%	57,0%	62,0%	67,2%	72,3%	77,5%	82,8%	88,1%	93,6%	97,1%	98,4%
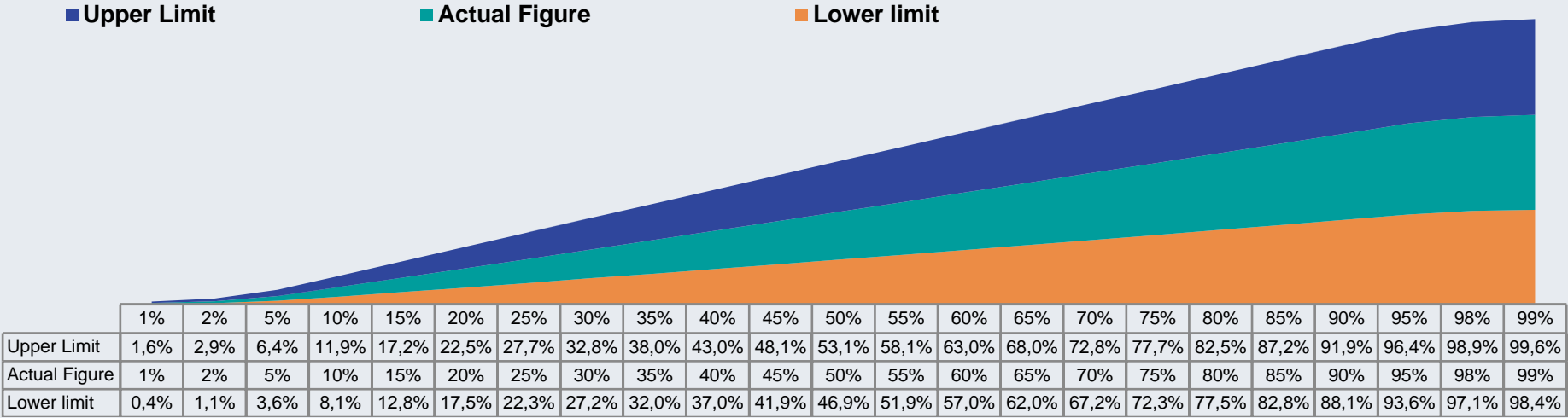
STUDY OVERVIEW
ONLINE STUDY WITH IIS

Ipsos

Survey overview

CAWI survey – Online panel

SAMPLE

- **Target** : : Man/woman aged 18 years and over
- **Selection of the respondent** : participant selection using a quota or random method (Kish method, other random method), etc.
- When appropriate, a reasoned draw to over-represent targets with systematically lower-than-average participation rates

- **Sample representativeness** : criteria and sources : sex, age, socio-economic category of the individual / head of the family, the regions, the market size (INSEE data)

DATA COLLECTION

- **Fieldwork dates** : March 27th to April 22th
- **Sample achieved** : 21000 interviews
- **Data collection** : on line with IIS Panel
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods:** monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- **Checking of IP and consistency of demographic data.**
- Data will be kept on a protected network for 3 years

DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, sex, age, socio-economic category of the individual / head of the family, the regions, the market size
- If applicable
    - Special statistical data processing : imputation procedure, ...etc

Further methodological information available on request

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RELIABILITY OF RESULTS:
Self completion online surveys

To ensure the overall reliability of a survey, all possible error components must be taken into account.
That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample :** structure and representativeness

- **Questionnaire :** the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) is tested by at least 2 people and validated.

- **Data collection :** the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling :** Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).

- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

Survey overview
Organization (CAWI survey – Online panel)

ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Coordination of coding and validation of code frame
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary

ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Translation
- Scripting
- Sampling (IIS panel)
- Emailing
- Data collection [specify IIS countries]
- Coding
- Data Map
- Data processing
- Metrics calculation (GMU)
- Formatting of results

ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation
- Scripting
- Sampling (name of other panels)
- Emailing
- Data collection [add non-IIS countries if applicable]
- Coding
- Data Map
- Data processing
- Formatting the results

ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.