europ assistance
you live we care

2025
HOLIDAY BAROMETER

The world is unstable, let's travel!

Beyond borders: travel is booming despite climate change and global uncertainty

Survey conducted by our partner Ipsos

The world is unstable, let's travel!

Beyond borders: travel is booming despite climate change and global uncertainty

In a very uncertain and changing global context, when one could have expected that anxiety about geopolitical turmoil would deter travelers from planning holidays, the opposite happens with a record-breaking surge in travel intentions, and a stronger than ever enthusiasm for travel.

However, travelers do keep in mind the current situation when planning their trips: safety has become a primary concern, and along with actual ongoing conflicts, the perception of political climate in some countries impacts travelers' decisions.

The ideal vacation combines relaxation, family and discovery of other cultures and nature. The allure of discovery is evident in current travel trends, showing an unprecedented interest in international journeys. Distant destinations are increasingly becoming more significant among travelers.

In a world where borders are tightening and barriers to travel are multiplying, these trends highlight the enduring power of travel as a means of escape, but also a focus on the present moment and the experiential aspect of travel: "dancing like there is no tomorrow…" Given the significant rebound for international travel, in a world increasingly unsecure, are we at the edge of a new era where the need for escape is stronger than having a positive environmental impact?

“ Amidst the challenges of a rapidly changing and unpredictable world, one might assume that geopolitical turmoil would dampen the spirit of travel. Yet, the opposite holds true. The 24th edition of Europ Assistance’s Holiday Barometer reveals a record-breaking surge in travel intentions and an extraordinary enthusiasm for exploring new destinations.

Today’s travelers are highly attuned to the complexities of the global landscape, prioritizing safety and political climate in their plans. Yet, despite these considerations, the unyielding desire for relaxation, family time, and cultural discovery remains a driving force. Even as borders tighten and barriers increase, the remarkable rebound in international travel highlights the resilience of travelers to live intensely now.

At Europ Assistance, we see this barometer as far more than just a study; it’s an essential tool that empowers us to develop cutting-edge, innovative services for our B2B partners and their customers. By doing so, we gain a deeper understanding of the expectations and needs of consumers, allowing us to support our partners in delivering tailored solutions that resonate with travelers worldwide. As the travel industry evolves, this enthusiasm for discovery offers us unique opportunities to tackle new challenges and redefine what’s possible. ”

Virginie Babinet

Chief Executive Officer - Travel Insurance & Assistance
Europ Assistance Group

europ assistance

Antoine Parisi

Group Chief Executive Officer,
Europ Assistance

For nearly 25 years, the Holiday Barometer of Europ Assistance has revealed the evolving desires of travelers worldwide, offering a window into the aspirations and transformations shaping our society. At Europ Assistance, we believe being a caring company is not merely about responding to needs, it is about foresight, the ability to grasp the undercurrents of change, and the vision to anticipate tomorrow’s expectations. In a world in perpetual motion, where travel trends reflect deeper societal shifts, we remain committed to staying ahead, understanding before others, and crafting solutions that resonate and anticipate the experience of those we serve. People travel, experience, explore, and we make it possible for them to experience to the full. In other words, they live, and we care.

Ipsos

Brice Teinturier

Managing Director

Thanks to our partnership with Europ Assistance on the Holiday Barometer, we have two decades of data on the attitudes and concerns of travelers in Europe and around the world.

This unique survey enables us to understand travel intentions and the influence of the global context on the travel industry. After extending the scope last year with six new countries, we have added this year two additional countries (New Zealand and South Korea), bringing the total to twenty-three. A truly global survey, with a total of 23,000 people surveyed!

In this report, you will find key facts about the travelers’ desires and expectations, the impact of various concerns on travel plans such as the geopolitical context, purchasing power, or environmental issues. You will understand how travelers are adapting to a constantly changing context.

IN A NUTSHELL

9 Key learnings from the 2025 Holiday Barometer

1

Unprecedented travel intentions & enthusiasm: Despite global uncertainties, there is an unprecedented surge in travel intentions and enthusiasm, highlighting a strong and resilient desire to explore new horizons and make the most of every travel opportunity.

Nearly 8 out of 10 Europeans (79%) and over 7 out of 10 Americans (71%) plan to travel between June and September this year, marking the highest levels ever measured since the barometer was established. Approximately 80% of Europeans and other regions are enthusiastic about traveling this year. In North Asia, 78% share the enthusiasm for travel, and in India, it reaches 90%. American travel intentions have not only recovered but surpassed pre-pandemic levels, reaching 69% for the USA (+8 pts versus 2016).

2

High interest in international travel: Interest in international travel is at an all-time high. This trend demonstrates an open state of mind among travelers, who are willing to explore new cultures and destinations despite the current geopolitical tensions worldwide.

Interest in traveling abroad is growing in countries that usually prefer domestic trips. Ideally, 36% of Italians and 35% of French now prefer international travel, up by 7 and 8 points from 2024.

3

Preferred destinations: In Europe, travelers prefer seaside destinations, but city trips are also gaining popularity. The top 3 destinations preferred by Europeans remain Spain, Italy, and France. Asia and Africa are becoming more attractive among European travelers. Japan is favored by travelers from Asia and Oceania, particularly Australians' and Hongkongers' travelers. (Fig.A)

63% of European travelers plan seaside trips, while 28% prefer city trips, up 12 points in 10 years. Japan is the main destination for 16% of Australians and 38% of Singaporeans traveling abroad.

4

Ideal vacation, making memories: Travelers are seeking vacations that offer relaxation, family time and nature exploration. What consumers enjoy the most about traveling is the ability to relax and escape from routine, explore new places and make memories.

Across all continents, two main vacation trends emerge:

- *Gather with family or friends: Europe 53%, North Asia 48%, Oceania 53%, North America 52%, Middle East 50%.*
- *Explore nature: Europe 50%, North Asia 49%, Oceania 55%, North America 52%, Middle East 45%.*
- *Some countries have distinctive preferences. Unlike other countries, Japanese people prioritize «enjoy my home» as a top vacation driver (40%). Additionally, «come together as family» ranks low in the list of ideal vacation drivers for Japan (35%) versus Malaysia (62%) for example.*

5

Purchasing power drives vacation plans: Financial constraints are the main barrier to travel, especially in North Asia and North America. However, travelers who are planning to travel indicated they are dedicating more budget to their holidays. This highlights the importance of vacations and the complex interplay between financial constraints and travel aspirations.

Among Europeans who are not planning to travel between June & September, 58% cite financial constraints as the primary obstacle. On the other hand, among Europeans planning to travel, 47% say their budget will increase compared to last year.

6

Safety, a key criterion in choosing destinations: Travelers are more mindful of safety than ever before, making it a top priority when choosing destinations. This increased awareness ensures that people are making informed and secure travel choices.

Safety is now a top priority for 32% of North Americans when selecting travel destinations, 9 points increase since 2021, whereas in Europe, the importance of safety has grown steadily (+3 pts increase since 2021).

7

Geopolitical influences: The geopolitical climate significantly impacts travel decisions, with the U.S. emerging on the list of countries travelers are likely to avoid due to political and social climate.

In 17 of the 23 countries surveyed, among travelers considering the political climate influential in their destination choice, the U.S. was ranked in the top 5 destinations they could avoid due to political climate. In 2024, this was true for 8 of 21 countries surveyed.

8

Environmental concerns take a backseat: Despite growing awareness of environmental issues, they have a minimal impact on travel decisions. This is evidenced by the surge in airplane usage, with more people flying now than ever since the pandemic began.

Plane usage is at a 4-year high, in Europe and North America, surpassing personal cars despite environmental concerns.

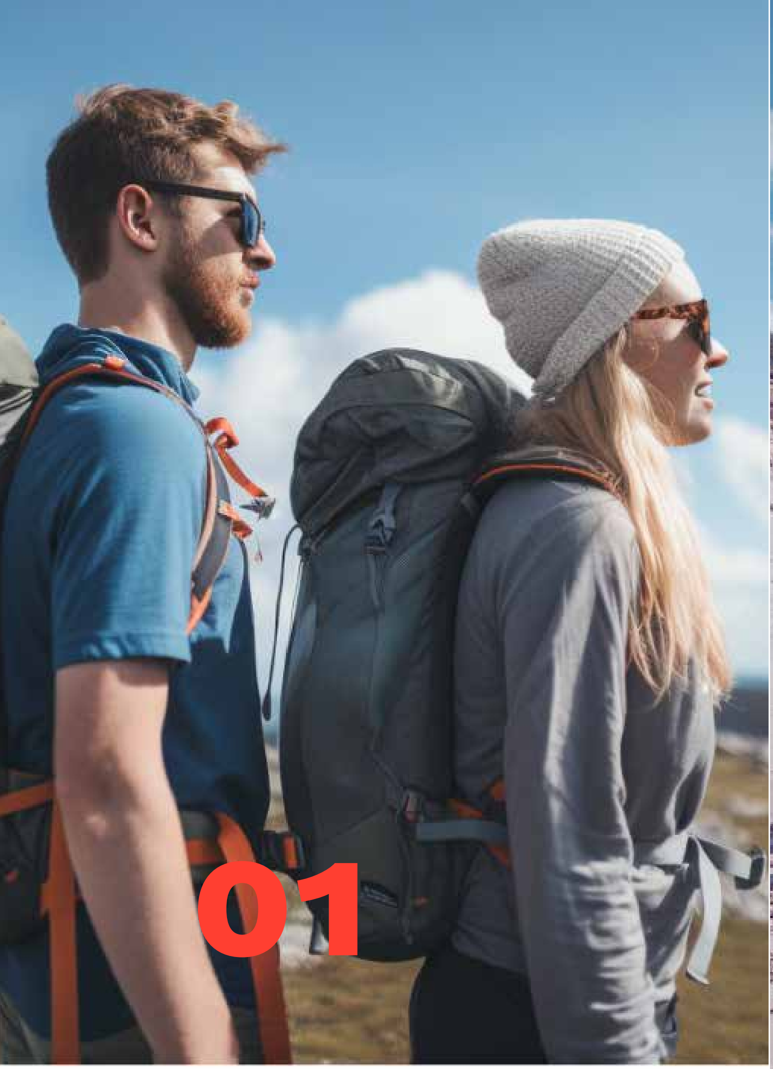
9

Natural disasters impact travel destinations: While travelers are less concerned about the carbon footprint of their trips, the consequences of climate change significantly influence their destination choices. A growing number of respondents avoid countries where the risk of natural disasters is high.

4 out of 10 European travelers worry about experiencing a natural disaster during their trip, a proportion that has nearly doubled since 2022 (40% vs. 25%).

Figure A


FOREIGN DESTINATIONS PLANNED THIS SUMMER
TOP 3
West EU
France: Spain 23%, Italy 21%, Portugal 11%
Belgium: France 34%, Spain 22%, Italy 11%
Switzerland: Italy 33%, Spain 25%, France 22%
Uk: Spain 25%, France 15%, Italy 14%
Germany: Spain 26%, Italy 26%, Greece 16%
Austria: Italy 38%, Croatia 24%, Spain 17%
North Asia
Malaysia: Thailand 34%, Japan 29%, Indonesia 25%
Singapore: Japan 38%, Malaysia 26%, China 22%
Hong-Kong: Japan 58%, China 25%, Thailand 19%
South Korea: Japan 46%, Vietnam 22%, Thailand 20%
Japan: USA 27%, South Korea 20%, Australia 12%
India: Singapore 19%, Australia 16%, UAE 15%
North America
USA: France 12%, Italy 10%, Canada 10%
Canada: USA 14%, France 8%, Mexico 8%
Middle East
KSA: Egypt 32%, UAE 22%, Turkey 22%
UAE: KSA 19%, Egypt 16%, India 15%
South EU
Spain: Italy 13%, France 11%, Portugal 8%
Portugal: Spain 34%, France 19%, Italy 13%
Italy: Spain 24%, France 13%, Greece 11%
East EU
CZ: Italy 21%, Slovakia 14%, Spain 12%
Poland: Italy 19%, Spain 16%, Greece 15%
Oceania
Australia: Japan 16%, Thailand 9%, Singapore 9%
New Zealand: Australia 32%, UK 9%, Japan 8%



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01

What shapes travel in 2025: key drivers and barriers

What shapes travel in 2025:
key drivers and barriers

In 2025, what's on the mind of today's traveler? What key motivations continue to shape their destination choices, and what new drivers are gaining traction?

The 2025 Holiday Barometer underscores how travelers today are navigating a delicate balance between wanderlust and global awareness, highlighting the growing prominence of a trend first observed last year: alongside the perennial favorites of pleasant weather and familiar landscapes, travelers are increasingly factoring personal safety and global events into their travel decisions (fig 1).

If awareness of risks has grown, it doesn't deter travel as much as limited purchasing power (cf part 1.3), which restricts travel opportunities even when the desire exists. As for environmental concerns and carbon footprints, they remain low on the list of factors considered when making travel plans (fig 2).

Figure 1 - Travelers in 2025
Key drivers of motivation to pick their destination

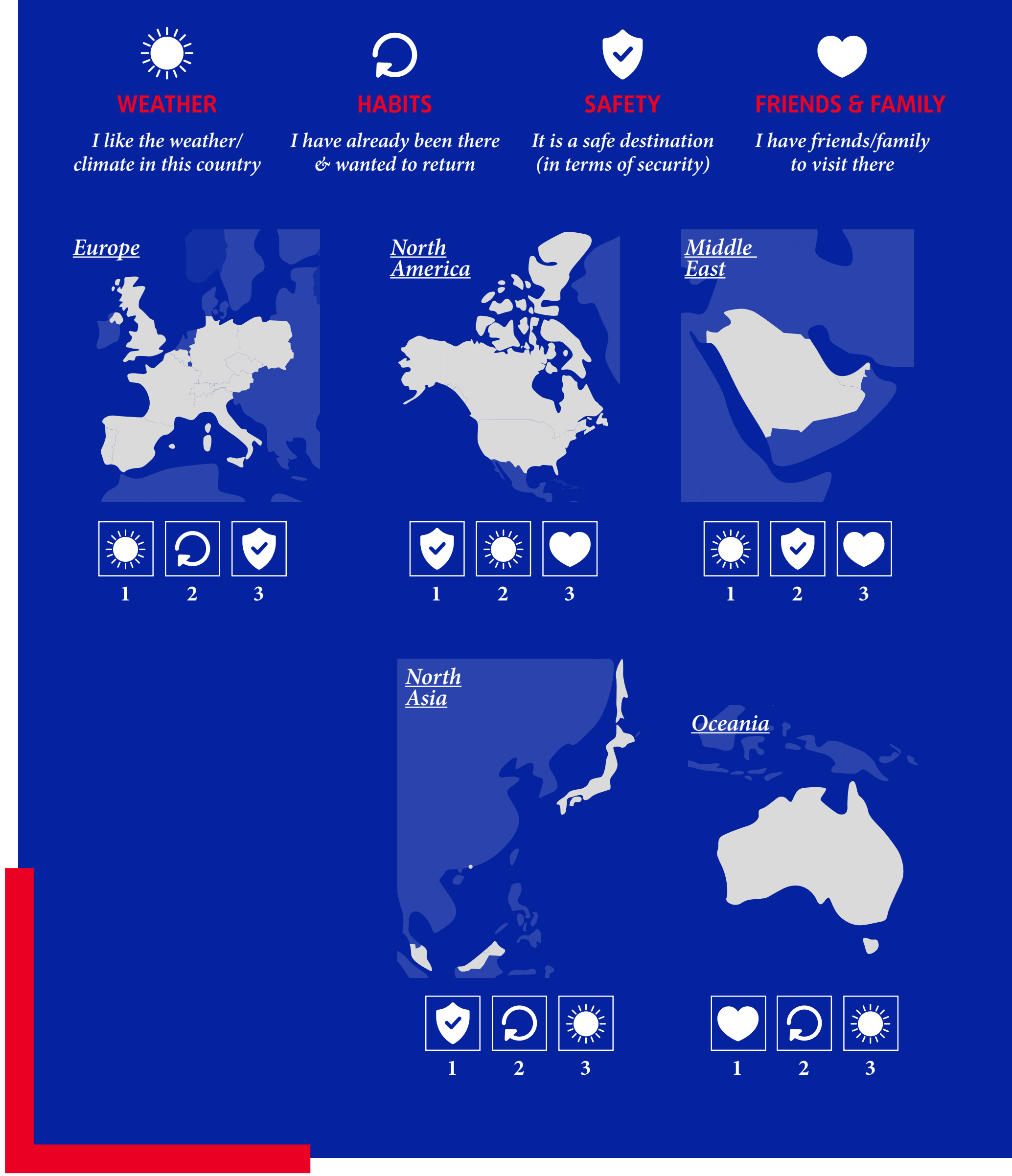
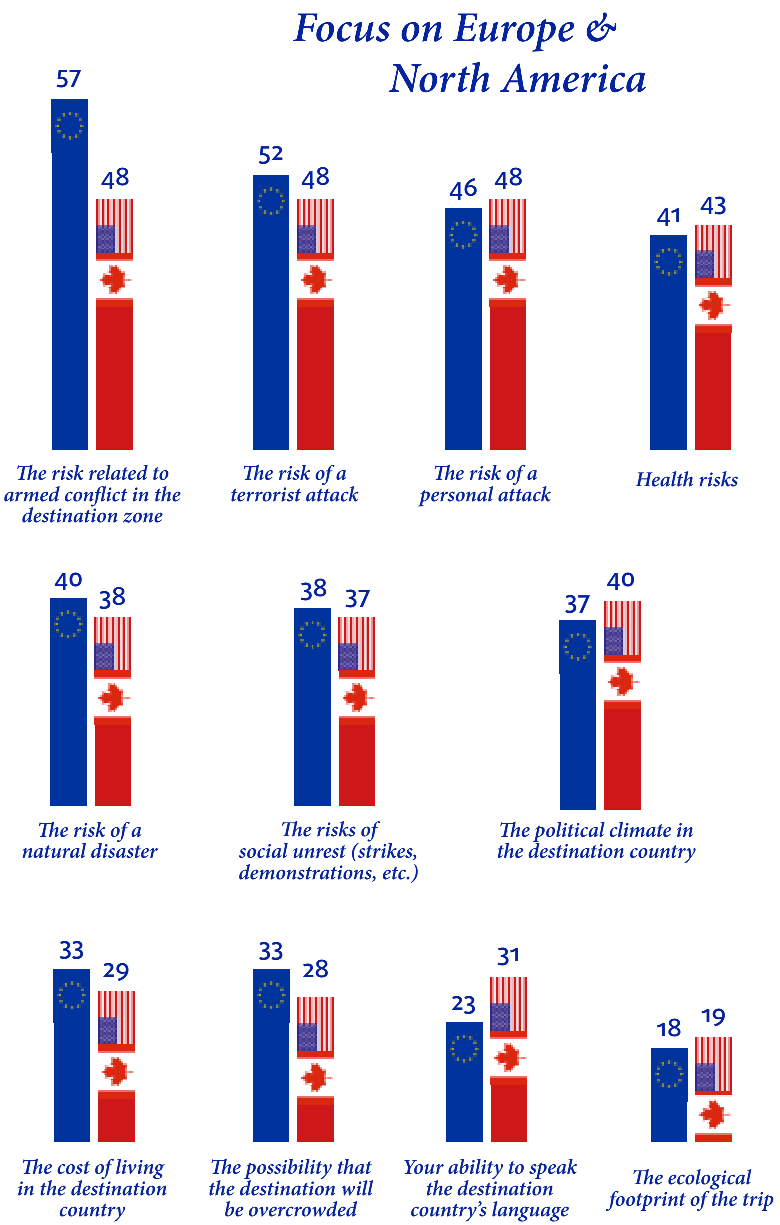


Figure 2 - **Risks/concerns considered in the choice of destination for travelers in 2025 (% factor playing an essential role)**

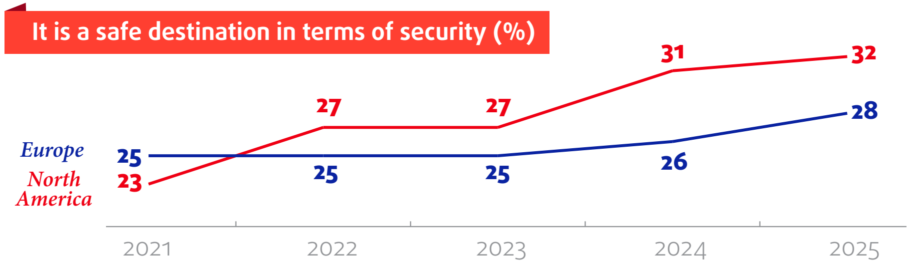


1.1 Safety: A key criterion in choosing destinations

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. 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.

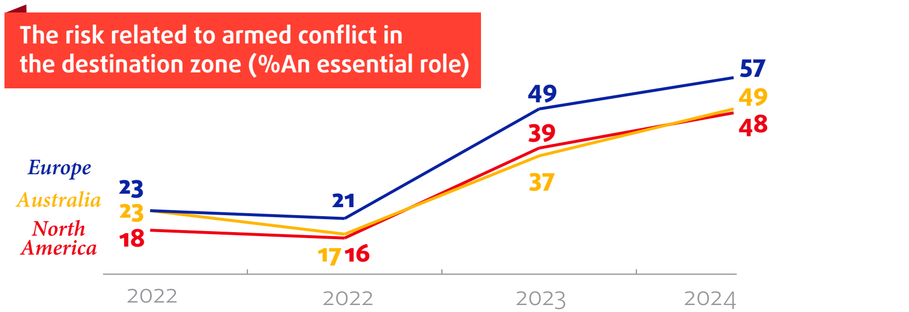
Key drivers of motivation to choose a destination for Europeans & North American travelers – Evolutions between 2021 & 2025 of the "safe destination" item.



The specter of war increasingly casts a shadow over travel decisions. 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 armed conflict as a key factor of risk influencing their choice of destination tripled since 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%).

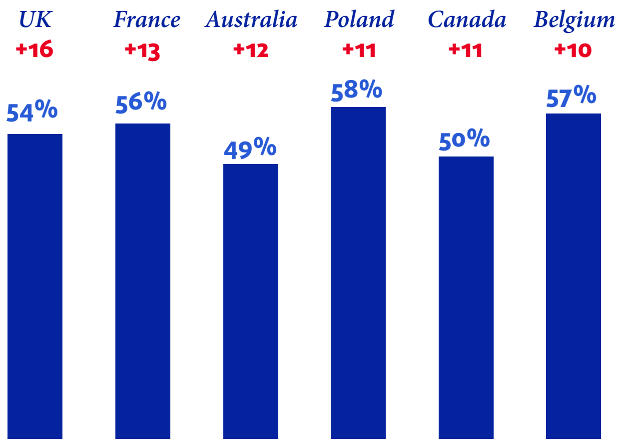
Factors playing an essential role in the choice of destination – Evolutions between 2022 & 2025 of the "risk related to armed conflict in the destination zone" item.



54% of UK travelers say that the risk of armed conflicts in the destination country played an essential role in their choice

In some European countries we witness a very significant increase, compared to 2024, in the importance of the item "risk related to armed conflict in the destination zone" as shown in the graph below.

The risk related to armed conflict in the destination zone (% An essential role) and evolution compared to 2024



Significantly superior to previous wave

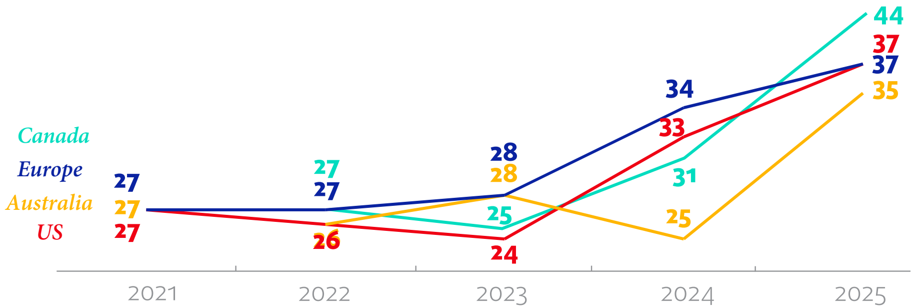
Middle East, Indian and North Asian travelers also take this risk very seriously. Between 56% and 61% of travelers saying that the risk of armed conflicts in the destination country played an essential role in their choice.

1.2 The growing influence of geopolitical risks

How political & social climate shapes destination choices

In 2025, travelers are increasingly factoring in the political and social climate of a destination when making travel decisions. Feeling safe is deeply connected to the global geopolitical context, and this concern extends well beyond conflict zones. Since 2021, the importance of this factor has grown significantly—up by 10 points in North America and 13 points in Europe. Today, 4 in 10 travelers in these regions consider the political and social climate a key criterion when choosing where to go.

Risks/concerns considered in the choice of destination for travelers in 2025 (% factor playing an essential role) - focus on the "political and social climate in the destination country" item



2025 Travel decision-making: The role of political and social factors

This growing awareness can be explained by two main trends. On one hand, travelers face an increasingly unpredictable world, marked by armed conflicts, terrorist threats, and social unrest—all of which raise safety concerns. On the other hand, a new form of conscious travel is emerging, where people avoid destinations, whose values no longer align with their own. This can include boycotts of countries governed by extreme or populist movements, which are seen to erode democratic values or social harmony.

In Europe, 44% of respondents say the political and social climate, and specifically the rise of extreme/ populist parties, influences their desire to travel (+3 points), with figures even higher in Southern Europe (55%, +5 points). In Canada, this share has gone up to 47% (+7 points).

What the barometer reveals: Countries travelers now avoid

Last year's barometer included a new question, repeated this year, asking travelers who consider political and social climate important in their choice of destination, which countries they might avoid. Responses show country-specific choices based on risk assessment rather than tourist appeal:

- **Conflict Zones:** Russia, Ukraine, and Israel are among the potentially avoided destinations across surveyed countries. In the Middle East, Syria, Iraq, and Lebanon are frequently cited.
- **Perceived political instability:** Turkey could potentially be avoided by European travelers, China by Japanese and South Korean travelers, and Algeria by French travelers.

The surprising newcomer: The United States

The United States, historically a top destination for travelers from Europe, Canada, Australia, and Japan, now ranks among the top three countries most likely to be avoided by travelers in 10 out of 23 countries surveyed - largely due to its current political climate.

While this trend doesn't necessarily reflect a widespread drop in travel to the U.S., it is significant. One notable exception is Canada, where travel intentions to the U.S. have halved since 2024.

Destinations that travelers could give up due to political/social climate. Among those for whom political climate plays an essential role in the choice of destination - Top 3 countries mentioned

		West EU						South EU			East EU	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
#1	Russia	Russia	Russia	Russia	Russia	Russia	Russia	Russia	Russia	Russia	Russia	Russia
#2	Ukraine	Ukraine	Ukraine	Israël	Turkey	Ukraine	Ukraine	Ukraine	Israël	Ukraine	Ukraine	Ukraine
#3	Israël	USA	USA	Ukraine	Ukraine	Israël	Israël	USA	Ukraine	Israël	Israël	Israël

	North Asia					India	Oceania		North America		Middle East	
	MY	HK	JP	SG	SK	IN	AU	NZ	US	CA	SA	AE
#1	USA	Thailand	South Korea	Russia	Russia	Russia	USA	USA	Russia	USA	Syria	Russia
#2	Ukraine	Russia	Chine	Ukraine	Chine	USA	Russia	Russia	Israël	Russia	Lebanon	Lebanon
#3	Russia	Israël	Russia	USA	USA	Ukraine	Ukraine	Ukraine	Ukraine	Israël	Argentina	Ukraine

Top countries travelers could potentially give up visiting due to political and social climate: 2024 vs. 2025 (country ranked in the top 5)

#1 Russia
2024 → 2025
21 out of 21 countries → 22 out of 23 countries

#2 Ukraine
2024 → 2025
18 out of 21 countries → 22 out of 23 countries

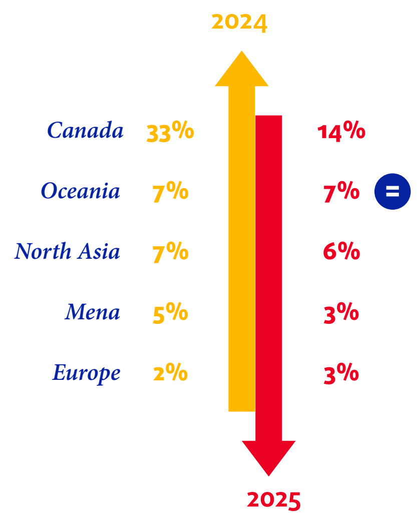
#3 Israël
2024 → 2025
18 out of 21 countries → 18 out of 23 countries
ALL the European countries

#4 US
2024 → 2025
8 out of 21 countries → 17 out of 23 countries
& only one European country, UK → *7 out of the 11 European countries*

#5 China
2024 → 2025
8 out of 21 countries → 9 out of 23 countries

#6 Turkey
2025 only in Europe
6 out of 11 countries
and n°2 in Germany

Intentions to visit the U.S. 2024 vs. 2025 for travelers planning a trip between June and September and already knowing where they are going



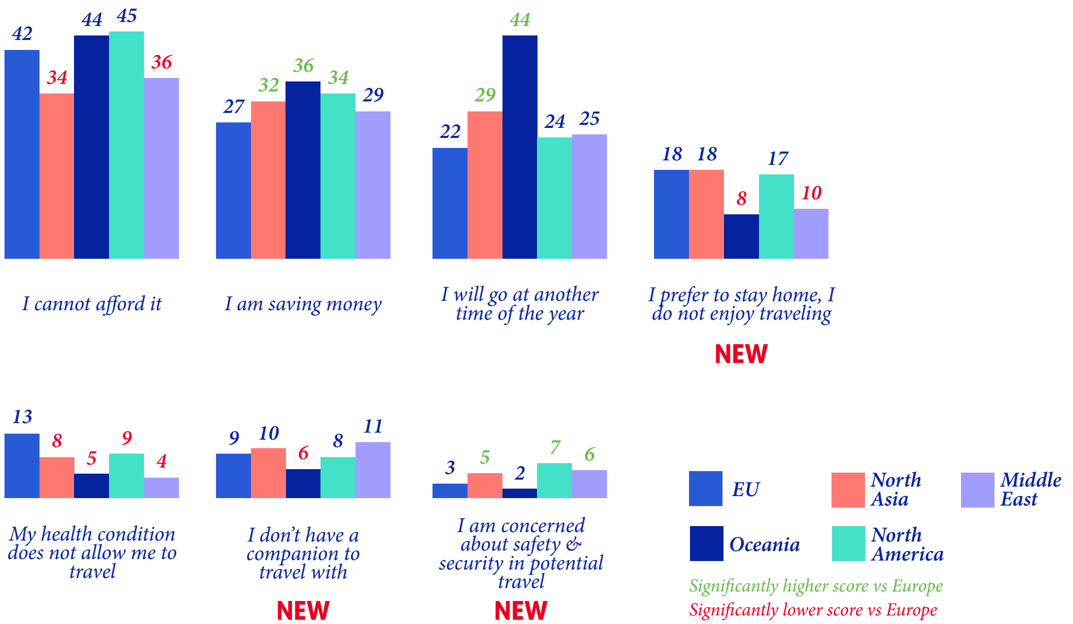
1.3 Purchasing power drives vacation plans

When it comes to travel, money matters more than an uncertain geopolitical context

In a shifting landscape of travel concerns, geopolitical considerations are now at the forefront for potential travelers, overshadowing inflation and cost of living worries. Nonetheless, economic factors remain a crucial part of travel decisions.

Few people planning to stay home between June and September 2025 cite safety concerns. Only 3% of European non-travelers mention this reason, while financial constraints are the main barrier for 58% (42% cannot afford it, 27% want to save money). This issue is notably high in the UK (66%) and Portugal (70%). Financial reasons are also the top reason for not traveling in other regions.

Reasons evoked by respondents for not traveling this summer - %

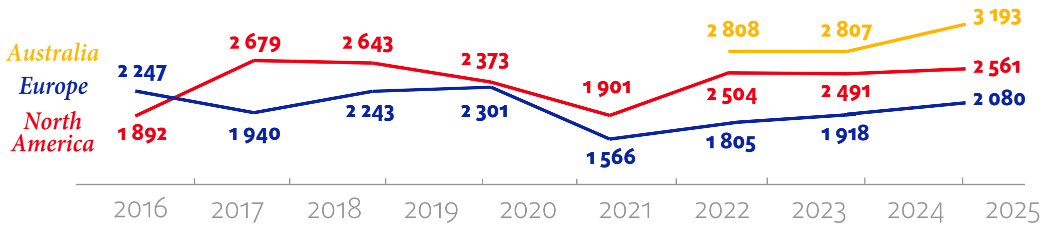


Travel budgets grow as vacations remain a key priority

With travel intentions at an all-time high, trips are being planned well in advance and allocated dedicated budgets that highlight their significance. In Europe, the average summer holiday budget for 2025 is **2,080€**. This represents an increase of 162 € when compared to 2023. Indeed, in a global context where the cost of living remains a major concern for citizens, 47% of European travelers say their **budget will increase compared to last year**.

As 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 Middle East (2,492€).

Average summer holiday budget for 2025 (€)



1.4 Environmental concerns take a backseat

Many express good intentions:

A large percentage of travelers claim their willingness to adopt sustainable travel practices (whether people are already doing it or would be ready to do it) such as support local economies (83%-92% across geographies), switch to lower-carbon transportation (63% of North Americans to 89% of Indians), and choose closer destinations to reduce their carbon footprint (62% of North Americans to 82% of Indians).

However, two emerging trends suggest a shift in environmental commitments:

- A slowdown in the adoption of sustainable practices in Europe as shown in the graph below
- A persistent, even growing, allure of less sustainable options like air travel and cruises…

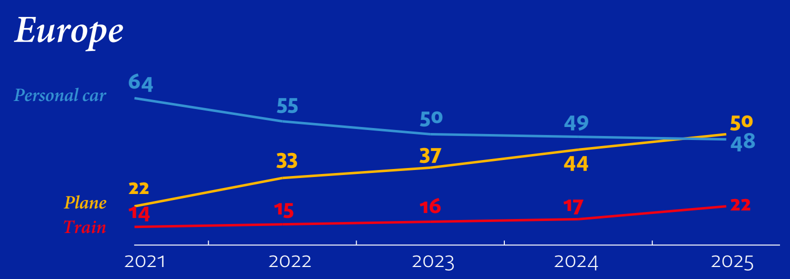
Willingness to adopt sustainable travel practices (%Yes) and evolution vs. 2024

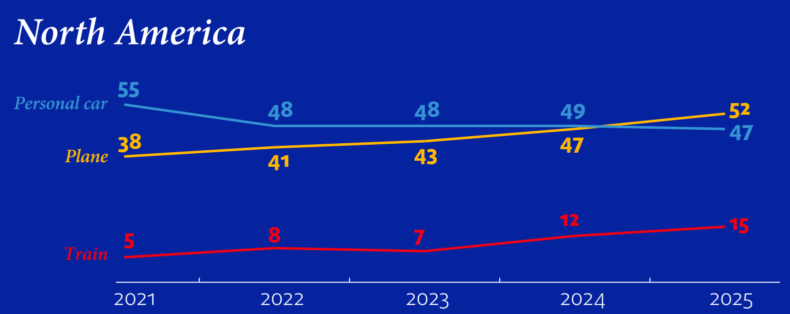
Indeed, when it comes to environmental concerns, a significant disconnect persists between travelers' intentions and their actions. While many express good intentions and a willingness to embrace sustainable travel practices, the reality often falls short.

Most popular modes of transportation remain carbon-heavy, with plane usage reaching its highest level in 4 years

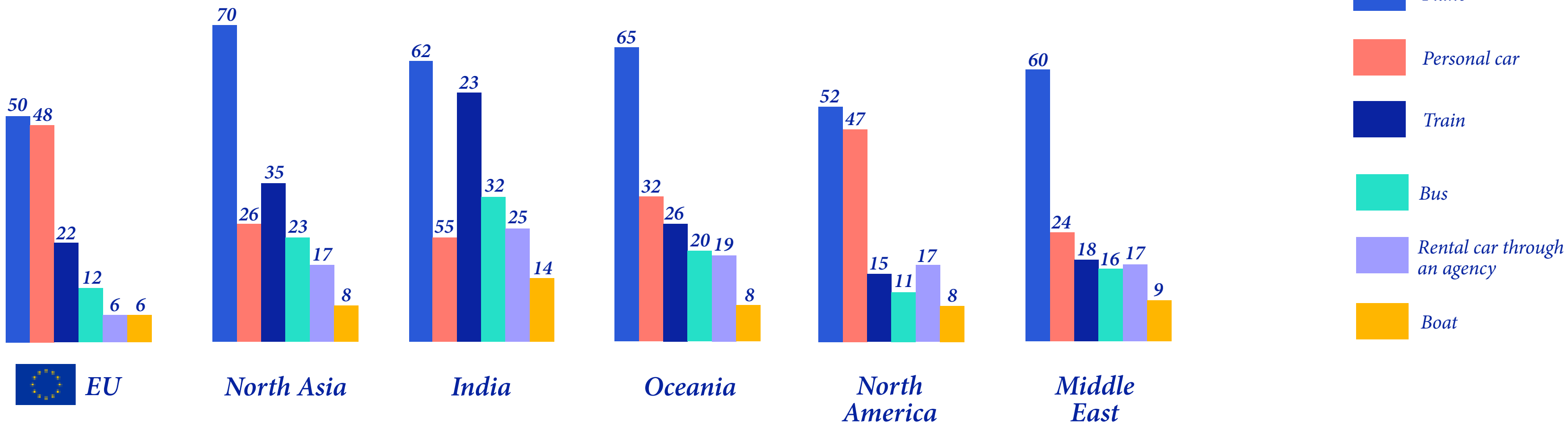
We have started to survey transportation modes to get to a holiday destination back in 2021, when COVID-19 was still very present. This year's barometer shows a significant decrease in personal car use and a surge in plane usage, reaching 50% in Europe this year, marking a notable evolution (+6 points from last year, +28 points since 2021). In North America, plane usage also increased (+5 points from last year, +14 points since 2021). Train usage has steadily risen to 22% in Europe and 15% in North America this year, the highest since 2021, but still lags behind planes and personal cars.

Evolutions between 2021 & 2025 of transportation modes used to go to destination (%)



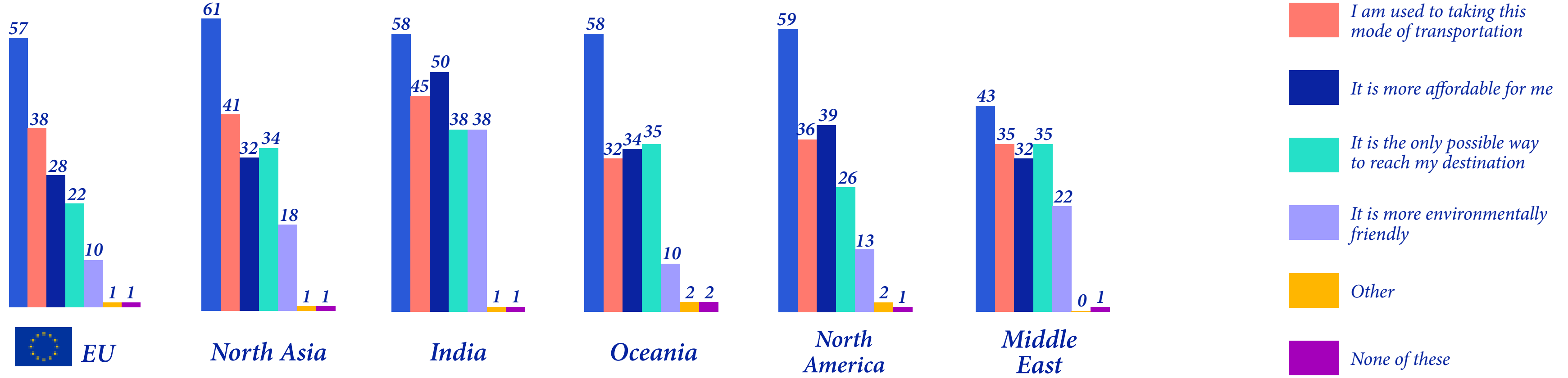


Modes of transportation used to go to destination (%)



Among the reasons that influence the choice of transportation modes, environmental concerns rank lowest overall, with only 10% of European travelers mentioning this as a key factor. Looking at different usages, interestingly, **convenience** is the main reason given for choosing any transportation mode (57% for Europe, 61% for North Asia & 43% for Middle East).

Factors driving the choice of the main transportation mode (%)



Similarly, we observe that the ecological footprint sits at the very bottom of the list of essential factors in destination selection, and this item has remained remarkably stable since its introduction. This is consistent with the unprecedented appetite for international travel as shown in the second part of this report.

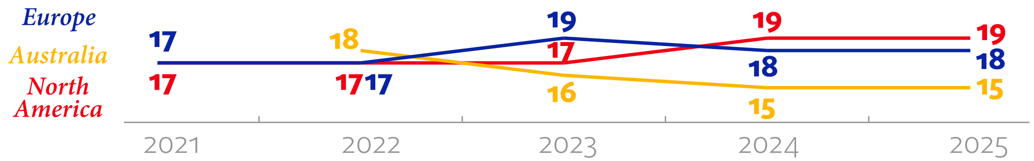
1.5 Natural disasters impact travel choices

Travelers are more concerned with avoiding interruptions caused by natural disasters than with the ecological footprint of their trip.

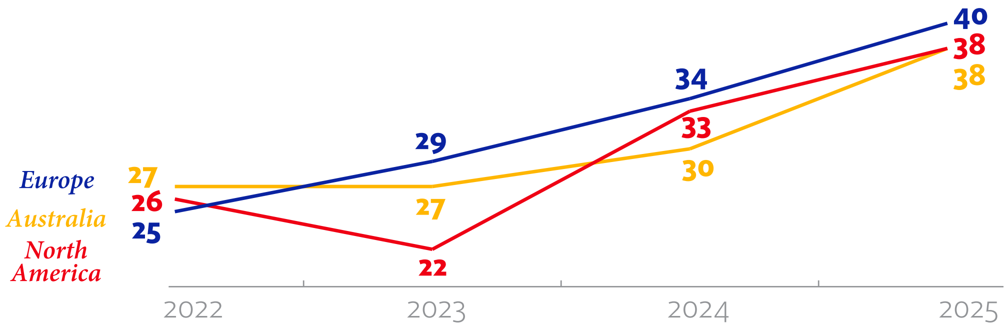
This reveals a gap between stated intentions and actual behavior, likely driven by a «reality principle»: the consequences of climate change are already here, impacting international travel decisions. Travelers face a tension between their desire for escape and these environmental realities. Just as 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 playing an essential role in the choice of destination – Evolutions between 2021 & 2025 of the "ecological footprint of the trip" item. (% an essential role)



Factors playing an essential role in the choice of destination – Evolutions between 2022 & 2025 of the "natural disaster when travelling" item. (% an essential role)



02

The irresistible appeal of travel

The irresistible appeal of travel

2.1 Record-high travel intentions

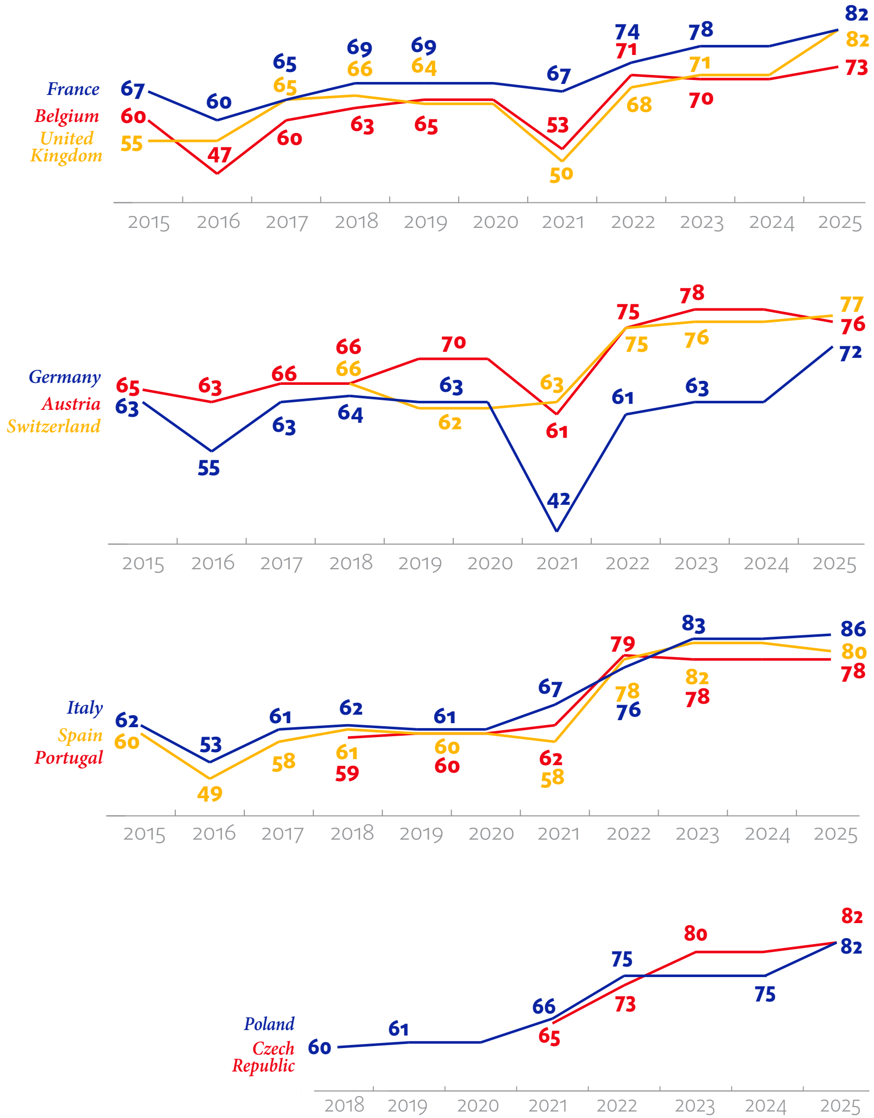
In 2025, the desire to travel reaches unprecedented heights among Europeans and North Americans. Nearly 8 out of 10 Europeans (79%) and over 7 out of 10 Americans (71%) plan to travel between June and September this year, marking the highest levels ever measured since the barometer was established and highlighting an undeniable and increasing desire for travel over time.

Just a decade ago, in 2015, 63% of Europeans intended to travel during summer. This number stayed stable until COVID-19 changed travel plans drastically. Lockdowns and restrictions during the pandemic-era increased demand for travel, highlighting the urge to live in the present and the value of experiences overall. Since 2022, summer trip intentions have steadily risen, surpassing pre-pandemic levels, reaching a record of 79% this year (+16 points vs 2015).

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 (+24 pts) and Spain (+20 pts) are the ones in which travel intentions during the summer have increased the most (France +15 pts, Belgium +13 pts, Austria +11 pts, Germany +9 pts.).

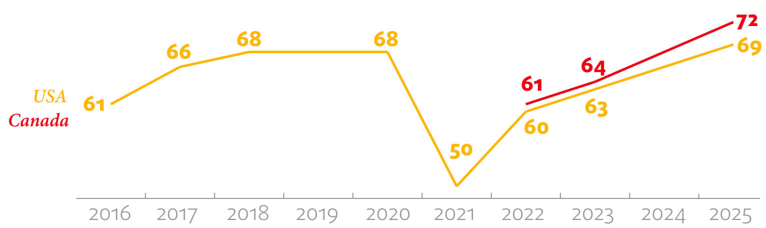
Nearly 8 out of 10 Europeans (79%) and over 7 out of 10 Americans (71%) plan to travel between June and September this year

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



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-pandemic. **This year marks a significant milestone, as North American travel intentions have not only recovered but surpassed pre-pandemic levels, reaching 69% for the USA (+8 pts versus 2016).**

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



What about travel intentions this summer in other regions of the world?

- In line with Europeans, a bit over three quarters **(76%) of individuals in Middle East countries** (United Arab 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%.**

Which traveler profiles demonstrate the highest intention to travel this summer?

- **Youth continue to significantly influence summer travel plans.** Indeed, younger Europeans are far more likely to travel this summer, with 85% of those under age 65 planning trips compared to 72% of those under age 65 and older. This youthful wanderlust is further amplified by their propensity for multiple trips: over 4 in 10 (41%) plan several getaways compared to only 27% of those 65 and older.

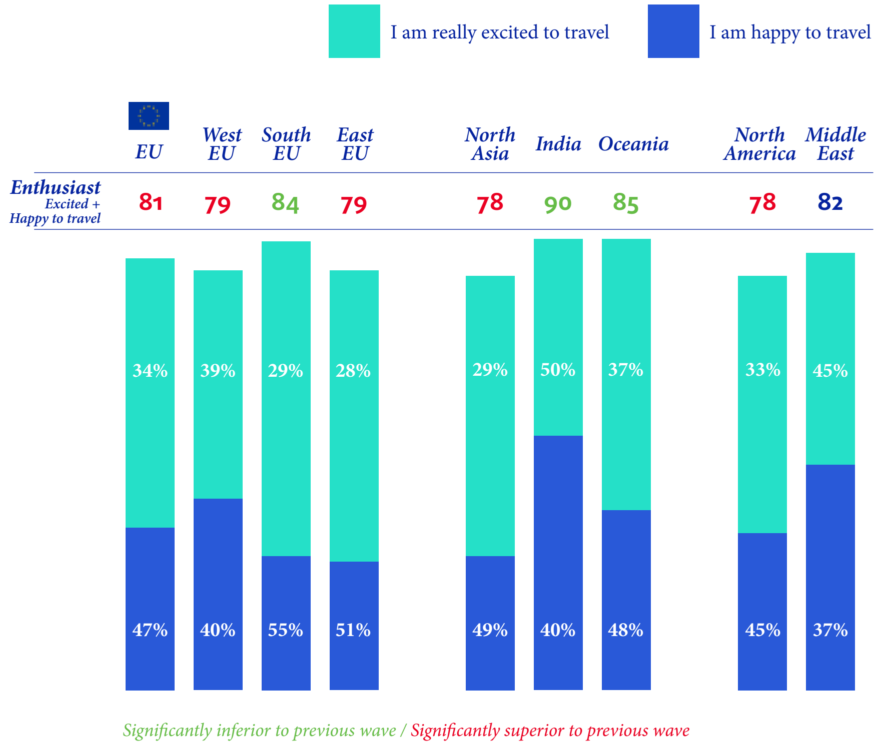
- **Similarly, the likelihood of planning one or multiple trips increases with income level, which remains a key determinant of summer travel intentions.** A significant gap exists between high and low earners in Europe: 89% of high-income individuals intend to travel this summer (44% planning more than one trip), compared to just 68% of low-income individuals (22% planning more than one trip). This highlights how economic realities keep shaping travel aspirations and demonstrates the impact of economic status on travel decisions.

2.2 Unstoppable travel enthusiasm

Reflecting the unprecedented surge in travel intentions, enthusiasm for travel remains at its peak. 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.

- 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. 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 points) and India the highest (90%, -2 points).

Travel enthusiasm (%)



2.3 Ideal vacation: making memories

Reconnecting to life's joys: relaxation, exploration, and meaningful connection are common goals

Across all regions, whether traveling domestically or internationally, four key dimensions shape vacation expectations:

- Gather with family & friends
- Exploring nature
- Relaxation
- Discovering new cultures

The enduring appeal of international travel resonates with a key element of the ideal vacation experience: a willingness to experience new things.

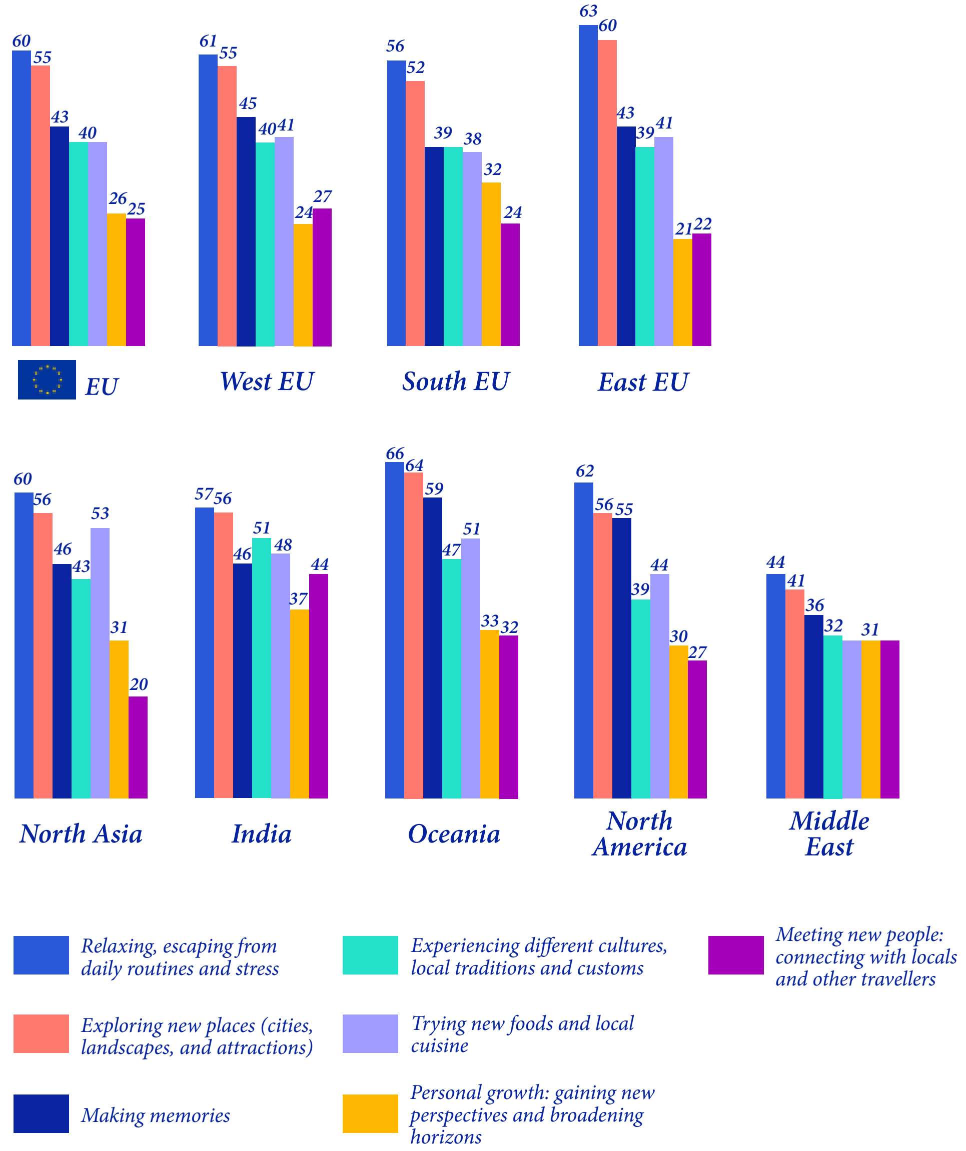
People value spending time with loved ones and relaxing on vacation but exploring the outdoors and experiencing different cultures are also top priorities. For Europeans, vacations are increasingly about creating lasting memories. When asked what they enjoy most about traveling, 43% cite making memories, while 40% highlight experiencing new cultures and foods. This reflects a shift towards experiential travel, focusing on unique and unforgettable experiences.

Travelers prioritize meaningful experiences: "dancing like there is no tomorrow"

In a world filled with geopolitical tensions, environmental concerns, and economic uncertainties, what drives travelers to explore the world despite these challenges?

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.

Favourite aspects of traveling (%)

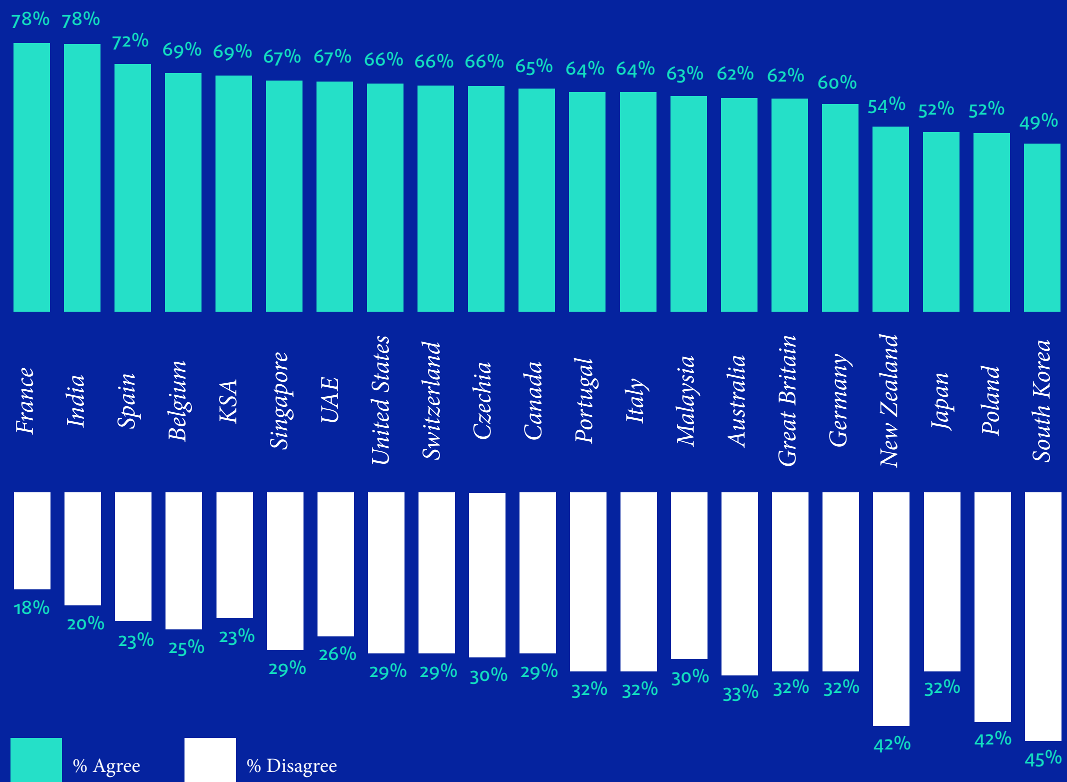


It is particularly strong among 18-24 year-olds, especially in Europe (47% vs. 43%), North Asia (52% vs. 46%)

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 widespread sentiment suggests that individuals feel it's better to live for today, either because tomorrow is uncertain or because they feel powerless to take control of their future.

I live for today because the future is uncertain

To what extent do you agree or disagree with the statement…



Source: Ipsos Global trends 2024

Individuals feel it's better to live for today, either because tomorrow is uncertain or because they feel powerless to take control of their future

Two distinct traveler profiles shaped by their ideal vacations

Culture Explorers

WHO ARE THEY AND WHAT DRIVES THEIR QUEST FOR DIVERSE EXPERIENCES?

Travel frequency: they **travel more frequently than others**, with 35% traveling more than three times a year versus 26% of the general population. They are also **more likely to take multiple trips** this summer (41% vs. 32%).

Seasonal travel: they are **less likely to travel during the peak summer** months of July and August.

Abroad or own country travels: they **strongly favor international travel** for their ideal vacation (79% vs. 50% overall). Furthermore, 93% plan to travel abroad this summer, compared to 81% of the general population, with 69% planning only international trips versus 56% overall.

Travel enthusiasm: they are **significantly more likely to be very excited** about traveling.

Travel companions: they are more likely to travel solo but also comprise a larger share of traveling families.

Age: they skew **slightly younger (under 35), but not significantly more** so than the overall sample.

Income: they tend to have **higher incomes**.

Travel insurance: they are **more likely to have travel insurance**.

Environmental concerns: they are more aware of and concerned about their environmental impact (39% are concerned by their carbon footprint vs 35% overall) and overall travel risks.

Sustainable practices: they are **more inclined to adopt sustainable travel** practices, exceeding the general population in all areas **except traveling to closer destinations** (where they align with the overall sample).

Relaxation Seekers

WHO ARE THEY AND WHAT FUELS THEIR PURSUIT OF RESTFUL ESCAPES?

Travel frequency: two-thirds travel one to two times per year, and their preferred travel period is the peak season from June to September, with a **higher preference for July and August** than other groups.

Primary trip timing: they are more likely to take their longest trip between June and September.

Number of trips: They are **more likely to plan only one trip this summer** and less likely to plan trips at other times of the year.

Ideal vacation: their ideal vacation is more evenly split between international and domestic destinations. While they still prefer international travel, it is less pronounced than the «Culture Explorers» group.

Other ideal vacation dimensions: They are more likely to **prioritize relaxing activities like reading and enjoying their home**, even though a notable portion still values discovering new cultures (26%) and exploring nature (35%).

Travel trends: they are **less inclined to try new travel trends**.

Travel companions: they are more likely to travel with their partner.

Destination preference: the **beach is their preferred destination** (74% vs. 63% overall).

Domestic vs. International: they are more likely to travel within their own country.

Travel motivation: climate is a stronger motivator for them (50% vs. 42% overall).

Mode of transportation: they are more likely to **travel using a personal car** (54% vs. 48%), although they will also take planes (46% vs. 50% overall).

Sustainable travel: while they still demonstrate some interest in sustainable travel, they are less likely to engage in sustainable practices across all dimensions compared to other groups.

Travel concerns: they express **slightly higher levels of concern** but focus on specific issues (unrelated to conflicts/social unrest, geopolitical context), such as bad experiences, getting robbed, bad weather, getting sick, not being able to return home, inadequate medical facilities, and scams.

Travel enthusiasm: they are not the most excited about traveling.

Demographics: they skew **slightly older**, with fewer 18–24-year-olds and more 35–54-year-olds. They also have a higher proportion of men.

03
Growing attractiveness of faraway destinations and city trips

Growing attractiveness
of faraway destinations
and city trips

3.1 International travel rebounds to pre-pandemic levels

The data from this year reinforces the trend of growing desire for international travel, a trend initially identified in the previous barometer wave, and which remains at its highest level.

- Indeed, **the surge in international travel intentions observed last year continues to hold strong**: among Europeans who already know their travel destination, **over 8 out of 10 (81%, +1 point) confirmed their intention to travel internationally during the summer,** whereas only 44% (-2 points) plan to travel within their own country. **In other regions of the world, travel intentions abroad remain also stable** generally at or near record highs among those who have chosen their destination: Middle East, (98%, =), North Asia (94%, +1), India (89%, =), Oceania (75%, +7) and North America (65%, -3).

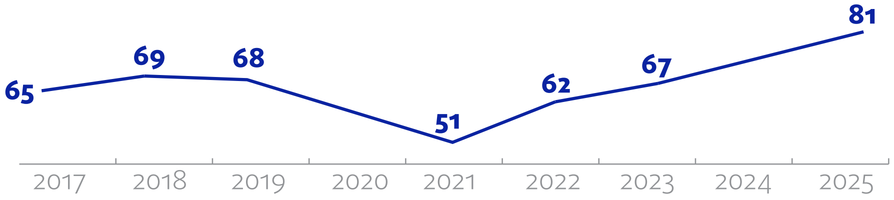
- **The COVID-19 pandemic has undeniably reshaped international travel patterns,** mirroring its impact on overall travel intentions. In the pre-pandemic era, approximately two-thirds of Europeans opted for international summer vacations. This trend experienced a sharp decline during the pandemic, followed by a gradual recovery in 2023, and finally a surge beyond pre-pandemic levels last year.

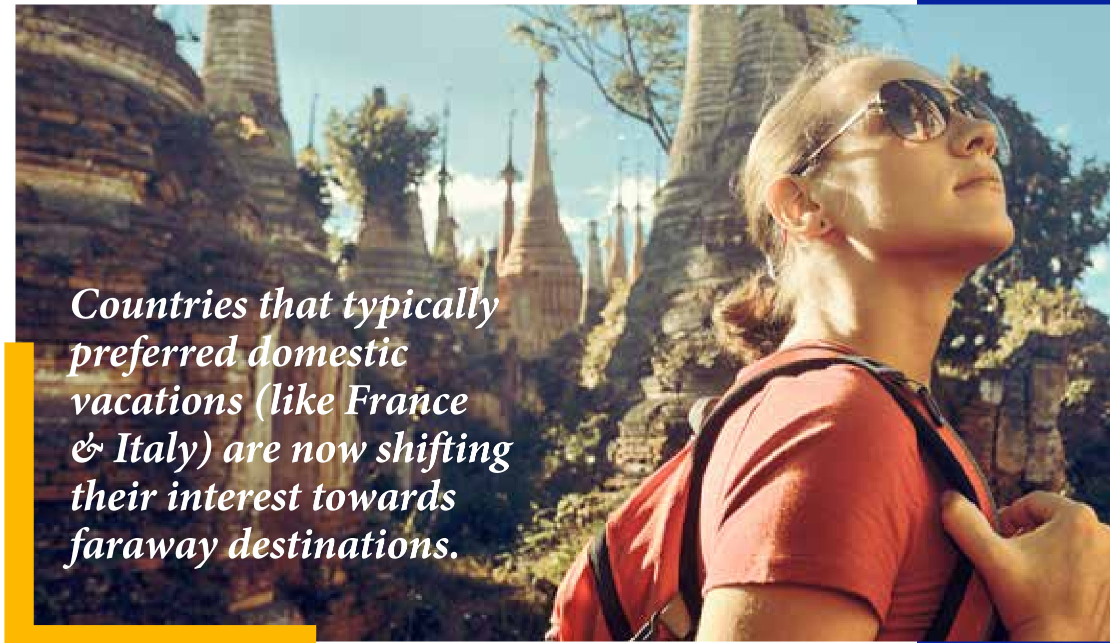
- What we have observed over the last two years is that the appetite for **international travel has not ceased to grow, a trend that we have observed, for example, among UK & German citizens;** furthermore, countries that typically preferred domestic vacations (like France & Italy) are now shifting their interest towards faraway destinations.

The allure of international travel is reshaping Europeans' vision of the perfect summer getaway.

International travel is now the preferred summer vacation for 50% of people, showing a growing desire for global exploration. Domestic vacations are less popular at 35%, and only 8% consider staying home ideal. This indicates a shift toward associating vacations with distant travel.

Destination - Plan to travel abroad (% among European travelers who already know their destination)





Countries that typically preferred domestic vacations (like France & Italy) are now shifting their interest towards faraway destinations.

3.2 Preferred destinations by regions

Spain, Italy, and France maintain their top trio status, consistently ranking as the top three preferred destinations in four European countries (UK, Switzerland, Portugal, and Belgium), though in different orders.

- **Spain:** present in the Top 3 destinations in every other European country, and in first position in 5 of them
- **Italy:** also, in the Top 3 of all countries in Europe, in first position in 5 of them
- **France:** among the top 3 in 6 countries out of 10, top one destination in Belgium. To be noted, despite geopolitical tensions, Americans are still very fond of France, placing it as the first foreign destination they will visit this summer.

Outside of this winning trio, Portugal, Greece and Croatia are also popular destination for European travelers.

The growing appeal of distant destinations is evident, with an 8-point increase in travel to Asian destinations and a 6-point rise in travel to African destinations since 2017

Foreign destinations planned this summer (Top 3)

West EU

France	Spain 23%, Italy 21%, Portugal 11%
Uk	Spain 25%, France 15%, Italy 14%
Belgium	France 34%, Spain 22%, Italy 11%
Germany	Spain 26%, Italy 26%, Greece 16%
Switzerland	Italy 33%, Spain 25%, France 22%
Austria	Italy 38%, Croatia 24%, Spain 17%

South EU

Spain	Italy 13%, France 11%, Portugal 8%
Portugal	Spain 34%, France 19%, Italy 13%
Italy	Spain 24%, France 13%, Greece 11%

East EU

CZ	Italy 21%, Slovakia 14%, Spain 12%
Poland	Italy 19%, Spain 16%, Greece 15%

North Asia

Malaysia	Thailand 34%, Japan 29%, Indonesia 25%
Hong-Kong	Japan 58%, China 25%, Thailand 19%
Japan	USA 27%, South Korea 20%, Australia 12%
Singapore	Japan 38%, Malaysia 26%, China 22%
South Korea	Japan 46%, Vietnam 22%, Thailand 20%

India

India	Singapore 19%, Australia 16%, UAE 15%

Oceania

Australia	Japan 16%, Thailand 9%, Singapore 9%
New Zealand	Australia 32%, UK 9%, Japan 8%

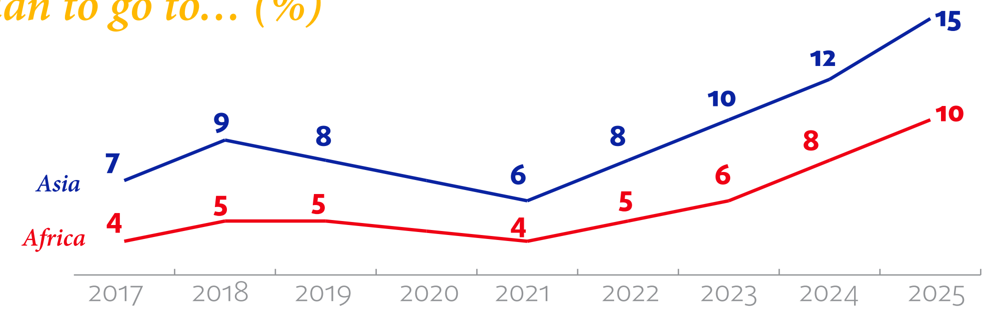
North America

USA	France 12%, Italy 10%, Canada 10%
Canada	USA 14%, France 8%, Mexico 8%

Middle East

KSA	Egypt 32%, UAE 22%, Turkey 22%
UAE	KSA 19%, Egypt 16%, India 15%

European travelers who already have planned their trip for next summer, plan to go to... (%)



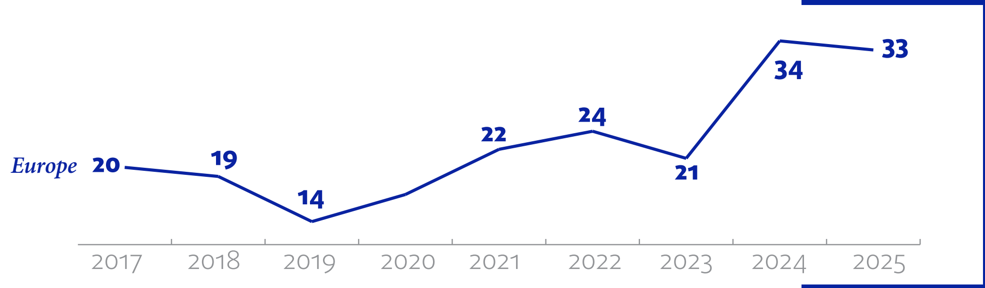
If most Europeans stay on the continent, **a significant number of them choose to go much further: Asia for 15%, Africa for 10%** (the total adding up to more than 100% because of multiple answers to this question).

The growing appeal of distant destinations is evident, with an 8-point increase in travel to Asian destinations and a 6-point rise in travel to African destinations since 2017, confirming a strong appetite for discovery.

Same thing among North American travelers: the proportion of those choosing to cross the Atlantic Ocean and go to Europe has been growing significantly since 2017 (+13 pts, reaching a third of travelers who have already chosen their destination).

Outside Europe, some regional preferences appear: Japan confirms its popularity as a destination for Asian travelers (South Korea, Singapore, Hong-Kong, Malaysia…) but also in Oceania – particularly in Australia where Japan is the top foreign country chosen.

North American travelers who already have planned their trip for next summer, plan to go to… (%)

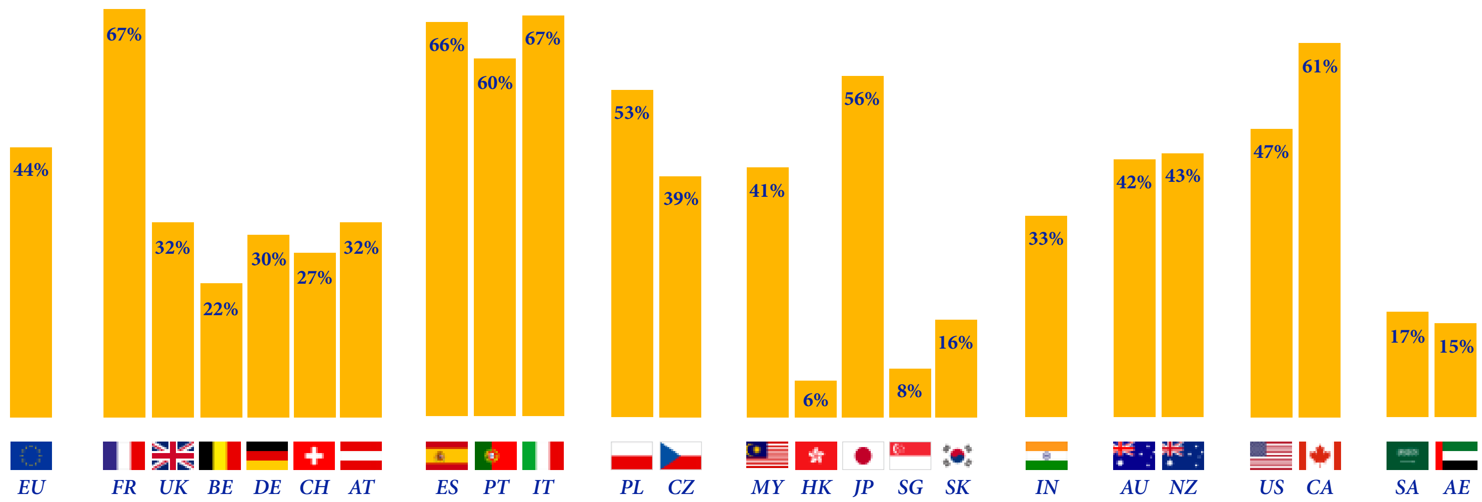


3.3 Staying in one's country is still a common choice, particularly in some geographies

Indeed, 44% of European travelers 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	35	64	45	21	33	42	55	16



Significantly inferior to previous wave / Significantly superior to previous wave

3.4 While most Europeans still favor seaside holidays, city trips, already popular in other zones, are gaining popularity in Europe over the years

In terms of holiday setting, **the 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.

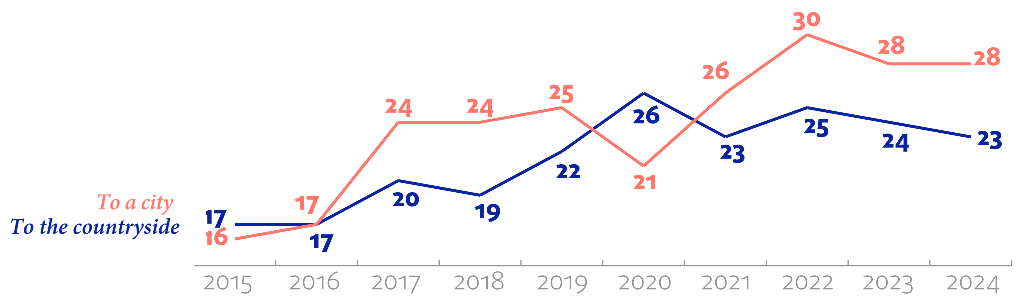
City trips come second as holiday destinations for Europeans, with an **increase over the past 10 years**, however they are still at a much lower level than seaside (28%)

The countryside has also **gained attractiveness** over the past years in Europe (+6 pts since 2015).

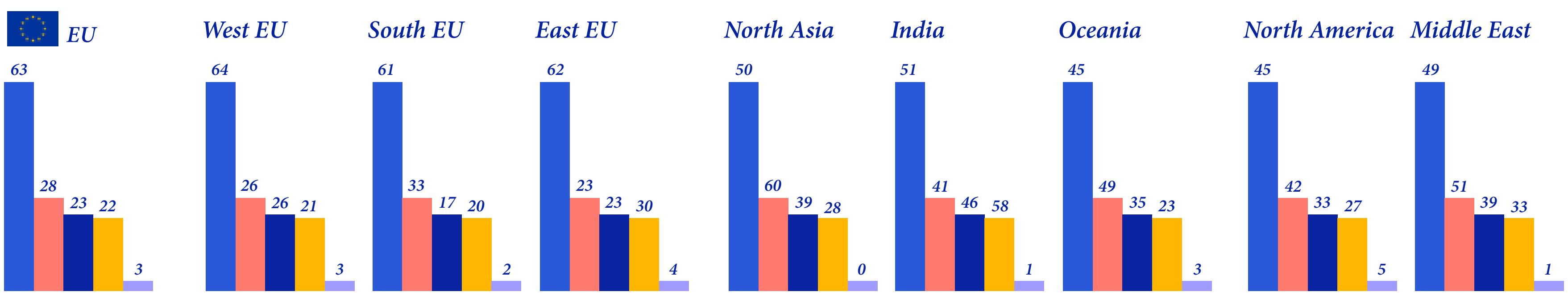
Outside Europe, city trips are much more popular already, with less concentration on the seaside.

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

European travelers' place of destination (intend to go mainly to a city or the countryside, %)



Planned destination for the trip (%)



Significantly inferior to previous wave / Significantly superior to previous wave

3.5 Outside Europe, adventure travel is less concentrated in summer and more evenly spread throughout the year.

Travel intentions concentrate around summer for Europe and North America

When analyzing preferred travel 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.

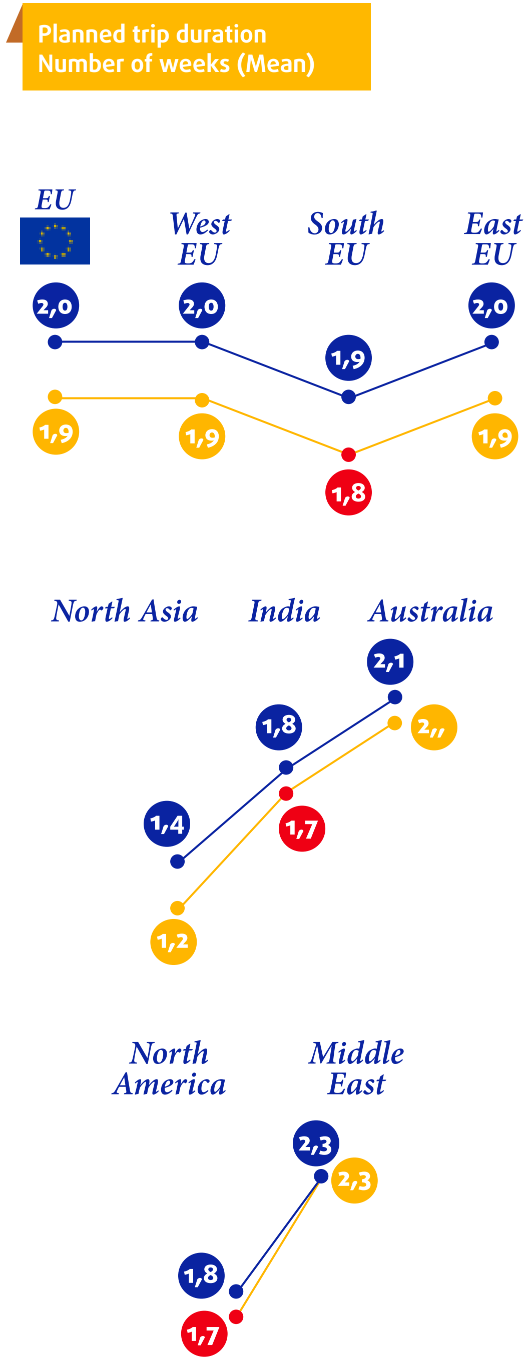
The same phenomenon shows for North America even though less strongly: June to September period is mentioned by 72% of North Americans.

However, travel intentions are much more spread during the year in zones where seasons are different, making preferred travel time less concentrated between June and September.

This period is mentioned as the preferred travelling period only by 55% of travelers in North Asia, whereas other months stand out: October 29%, and December 27%.

Similar trend in Oceania: June to September is only preferred by 57% of travelers, who are keener to travel in "European winter": 31% mention December as their preferred period, and 30% January.

For those who will take a trip between June and September, the duration of the trip is quite like previous editions of the barometer: 1,9 weeks for Europe (stable), 2 weeks in Oceania, and 2,3 weeks for the Middle East. North Asians, Indians and North Americans tend to take shorter trips.



3.6 The role of digitalization and Artificial Intelligence (AI) in holiday planning

In today's evolving travel landscape, digitalization and AI seem to gradually integrate into how travelers plan and organize their holidays.

Focus on digital booking channels: We have observed, through newly introduced questions this year, that travelers are turning to digital platforms for holiday planning, with 36% using online travel agencies like Expedia and Booking.com. This trend is evident across age groups, 43% of travelers under 35 rely on these channels, along with 38% of those aged 35-54 and 30% of senior travelers over 55. Even 25% of travelers over 65 use online booking tools, highlighting widespread adoption.

AI usage in travel planning: The younger travelers lead the charge: The younger generation is pioneering in exploring AI tools for holiday planning. 25% of respondents have already used or are open to using AI to plan their trips, with 46% of those under 35 engaging with these technologies. In contrast, only 19% of travelers aged 35 and older would be ready to use AI, revealing a generational division in adoption. Rather than a radical transformation, the presence of AI in travel planning reflects a broader trend of technology becoming a normal part of everyday life. Much like digital booking tools, AI is gradually integrating into the travel experience, offering new conveniences while coexisting with traditional planning methods.

Conclusion

The 2025 Europ Assistance Holiday Barometer shows that while travelers are more cautious, their desire to explore remains stronger than ever. Safety and political climate have become pivotal factors in choosing travel destinations, leading to the potential avoidance of certain countries due to the significant influence these elements exert. Despite financial constraints, travel intentions have reached record highs, especially among Europeans and North Americans.

Environmental concerns have remained steady, and they seem to have little impact on personal travel decisions compared to safety and cost. Europeans still favor seaside destinations, while international travel is gaining popularity, even in traditionally domestic-focused nations. Meanwhile, air travel has surged back to pre-pandemic levels, reflecting an eagerness for adventure and cultural discovery. As the climate crisis worsens, will travelers prioritize sustainability over convenience or continue to ignore environmental impact?

Survey Methodology

The 2025 edition of the Europ Assistance Holiday Barometer was conducted with the support of Ipsos in 23 countries including the United States, Canada, United Kingdom, Italy, France, Spain, Switzerland, Germany, Austria, Portugal, Belgium, Poland, Czech Republic, Malaysia, Australia, Hong-Kong, Japan, Singapore, India, Saudi Arabia, United Arab countries, South Korea and New Zealand. In each country, 1,000 consumers aged 18 years and older took part in an online questionnaire. Each sample was put together using the quota method (gender, age, profession) after stratification by region and by city size. The survey was conducted between February 24th and March 26th and investigated consumers' holiday plans and travel preferences.

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