



# Holiday Barometer among Europeans, North Americans, Asians & Oceanians

IPSOS/EUROP ASSISTANCE SURVEY  
21<sup>TH</sup> EDITION



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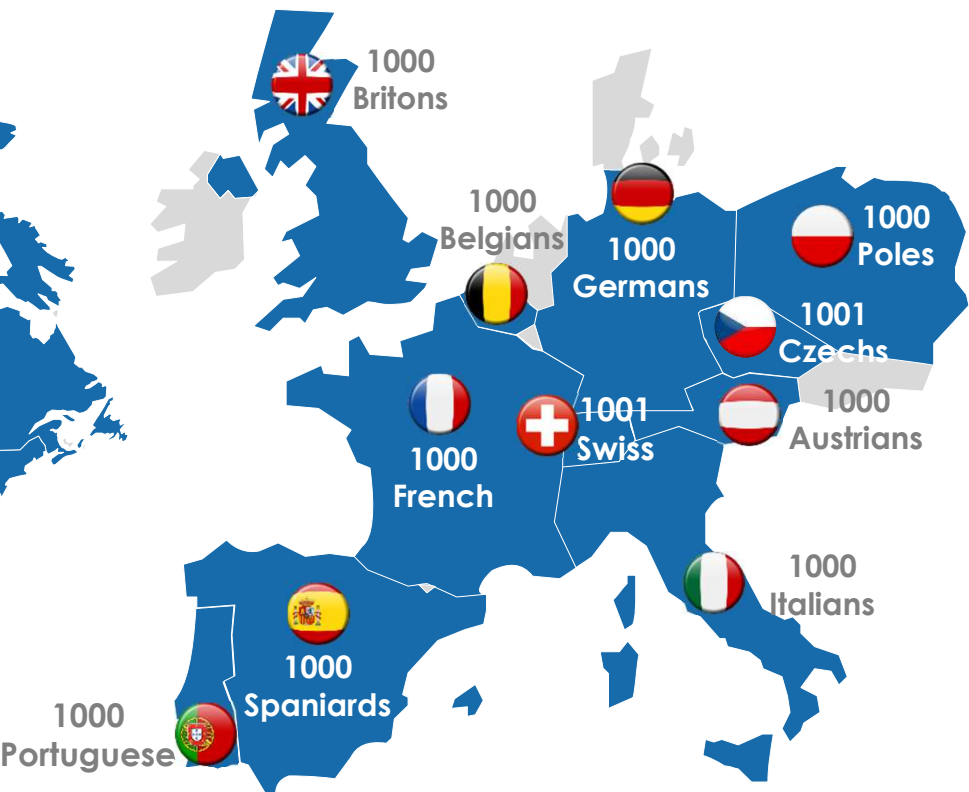
# SCOPE OF THE SURVEY

15 COUNTRIES  
15,000 INTERVIEWS

## American scope



## European scope



## Asian/Oceanian scope



GAME CHANGERS

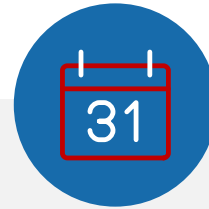
Ipsos

# METHODOLOGY



## 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 April 26th and May 16th 2022



## Method of data collection

Online survey in the 15 countries

# CONTENT

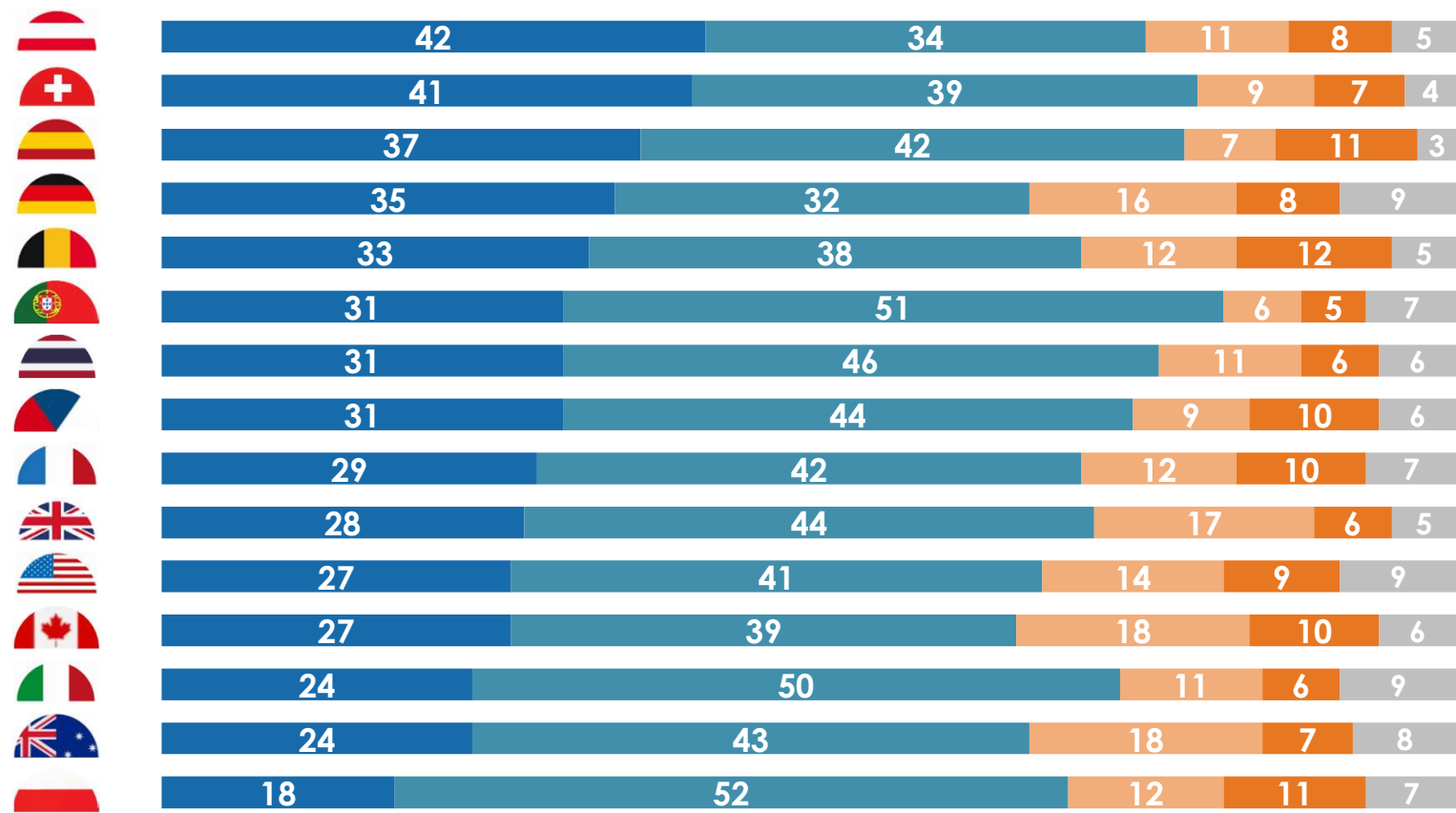
|  |                                      |                                  |  |   |                                 |                    |
|--|--------------------------------------|----------------------------------|--|---|---------------------------------|--------------------|
| CURRENT STATE OF<br>MIND & CONCERNS<br>P.5 |                                      | FAVORITE<br>DESTINATIONS<br>P.39 |  | BACK TO 2021 SUMMER<br>HOLIDAYS<br>P.69 |                                 | APPENDICES<br>P.83 |
| 1  | 2                                    | 3                                | 4  | 5                                       | 6                               | 7                  |
|  | 2022 SUMMER<br>HOLIDAY PLANS<br>P.23 |                                  | 2022 SUMMER HOLIDAYS<br>ORGANIZATION<br>P.51 |   | NEW TRAVEL<br>PRACTICES<br>P.74 |                    |

# 1. CURRENT STATE OF MIND & CONCERNS

- > Travel enthusiasm
- > Main concerns regarding the global situation
- > Main concerns when travelling
- > Conditions to fulfill to travel

GLOBALLY, THE RESPONDENTS ARE EXCITED TO TRAVEL AGAIN. IT'S MOSTLY THE CASE IN AUSTRIA, SWITZERLAND, SPAIN, GERMANY AND BELGIUM

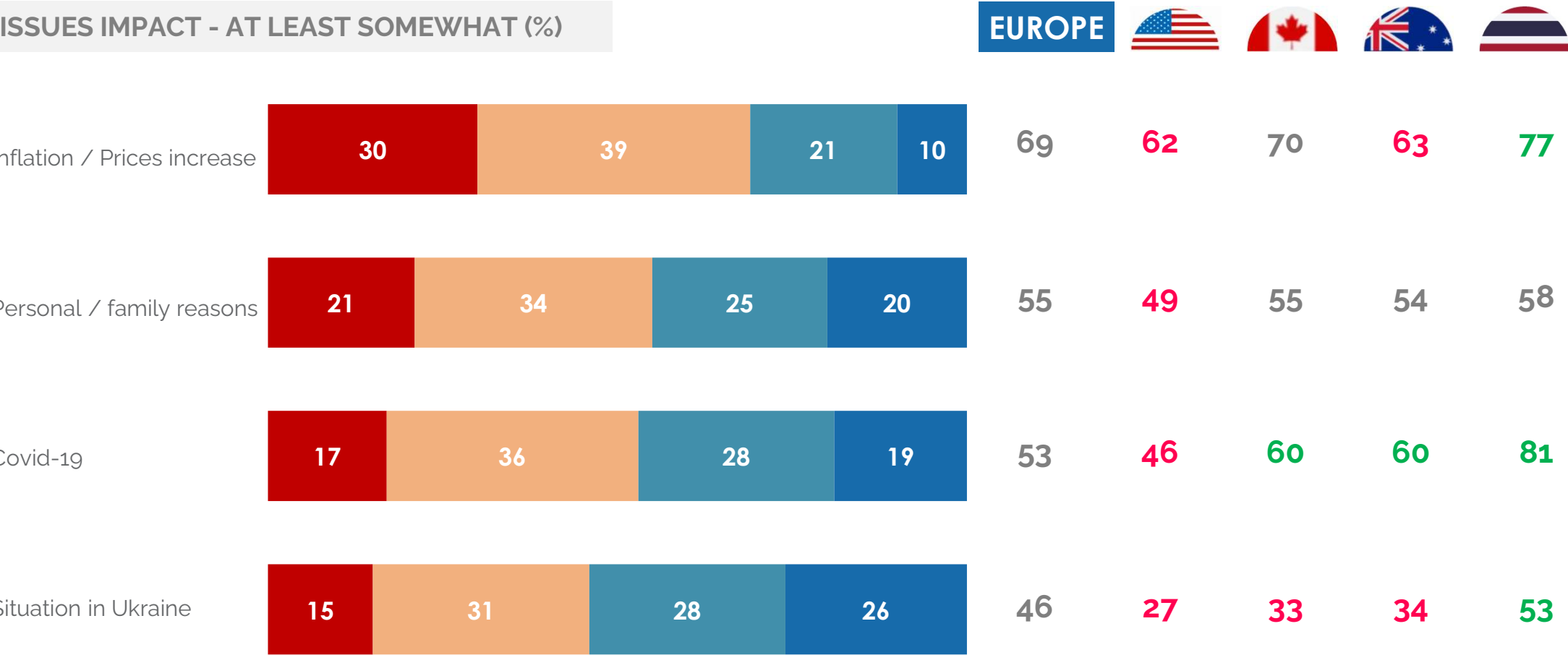
TRAVEL ENTHUSIASM (%)



How would you describe your enthusiasm and desire to travel this year?

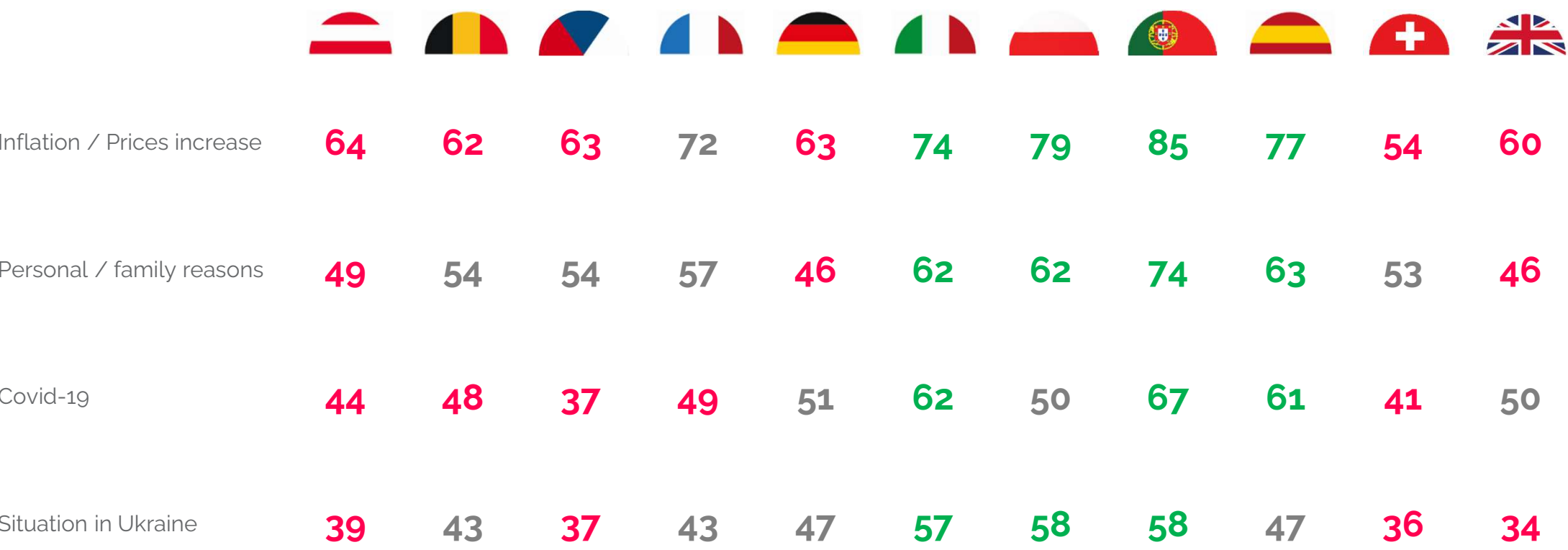
Really excited to travel Happy to travel Don't want to travel Don't care No opinion

INFLATION HAS THE GREATEST IMPACT ON THE RESPONDENTS' ENTHUSIASM REGARDING TRAVEL.  
COVID-19 HAS A STRONG IMPACT ON ONLY 1 EUROPEAN OUT OF 6



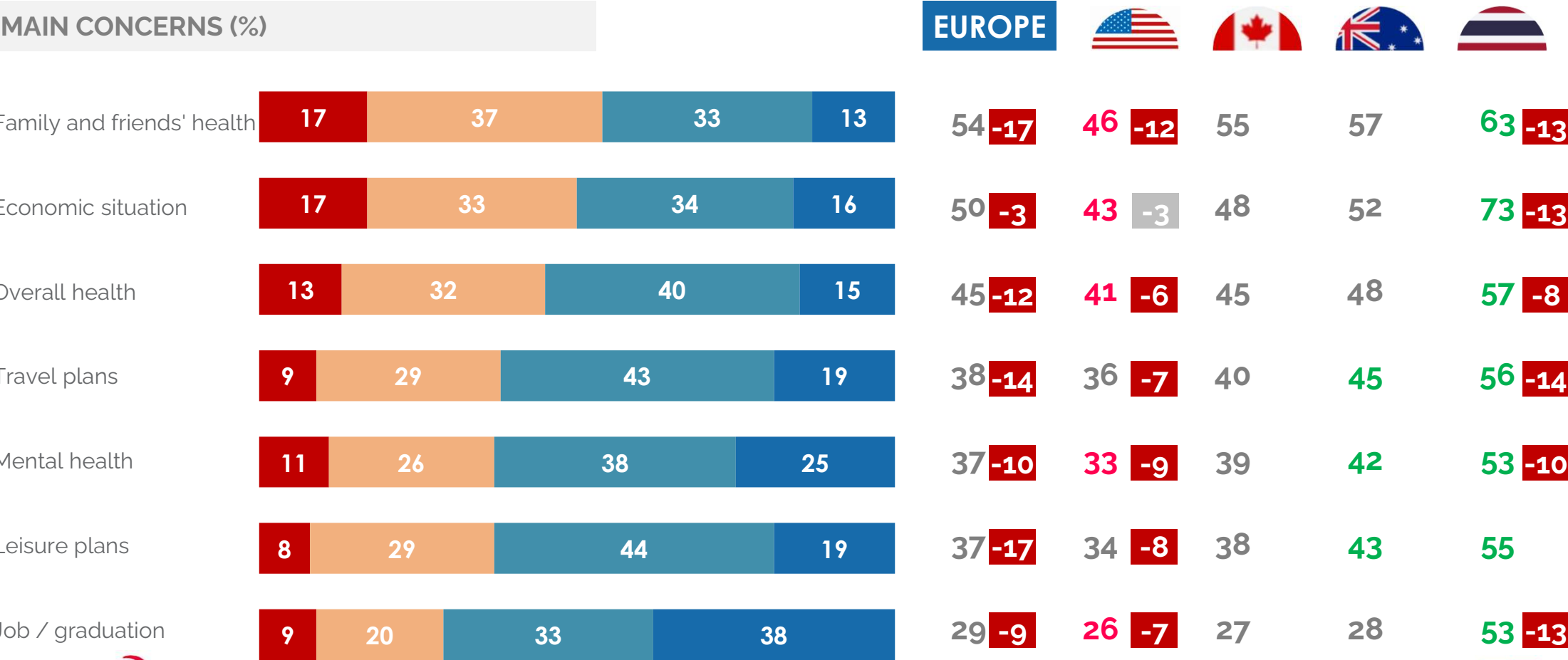
THE IMPACT OF INFLATION IS PARTICULARLY STRONG IN PORTUGAL, POLAND, SPAIN AND ITALY

ISSUES IMPACT - AT LEAST SOMEWHAT (%)
















# THE GLOBAL LEVEL OF CONCERN REGARDING COVID-19 RELATED TOPICS IS STRONGLY DECREASING COMPARED TO LAST YEAR, WHILE THE LEVEL OF CONCERN ABOUT THE ECONOMIC SITUATION REMAINS RELATIVELY STABLE IN EUROPE AND THE US



# THE DEGREE OF CONCERN VARIES BETWEEN EUROPEAN COUNTRIES: THE ITALIANS, POLES, PORTUGUESE AND SPANIARDS ARE THE MOST WORRIED OVERALL

## MAIN CONCERNS (%)

|                            |  |  |  |  |  |  |  |  |  |  |  |
|----------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Family and friends' health | 42  | 55  | 41  | 56   | 40  | 59  | 58  | 73  | 75  | 42  | 51  |
| Economic situation         | 41  | 46  | 41  | 51   | 36  | 53  | 57  | 71  | 66  | 36  | 47  |
| Overall health             | 31  | 45  | 34  | 42   | 33  | 51  | 52  | 63  | 67  | 30  | 42  |
| Travel plans               | 23  | 35  | 26  | 37   | 26  | 44  | 38  | 51  | 53  | 28  | 39  |
| Mental health              | 27  | 38  | 25  | 33   | 29  | 43  | 40  | 55  | 55  | 29  | 35  |
| Leisure plans              | 26  | 32  | 24  | 38   | 27  | 41  | 40  | 52  | 51  | 25  | 34  |
| Job / graduation           | 18  | 24  | 20  | 25   | 19  | 36  | 30  | 43  | 47  | 23  | 26  |

Are you concerned about the following regarding COVID-19? Very + quite concerned

GAME CHANGERS

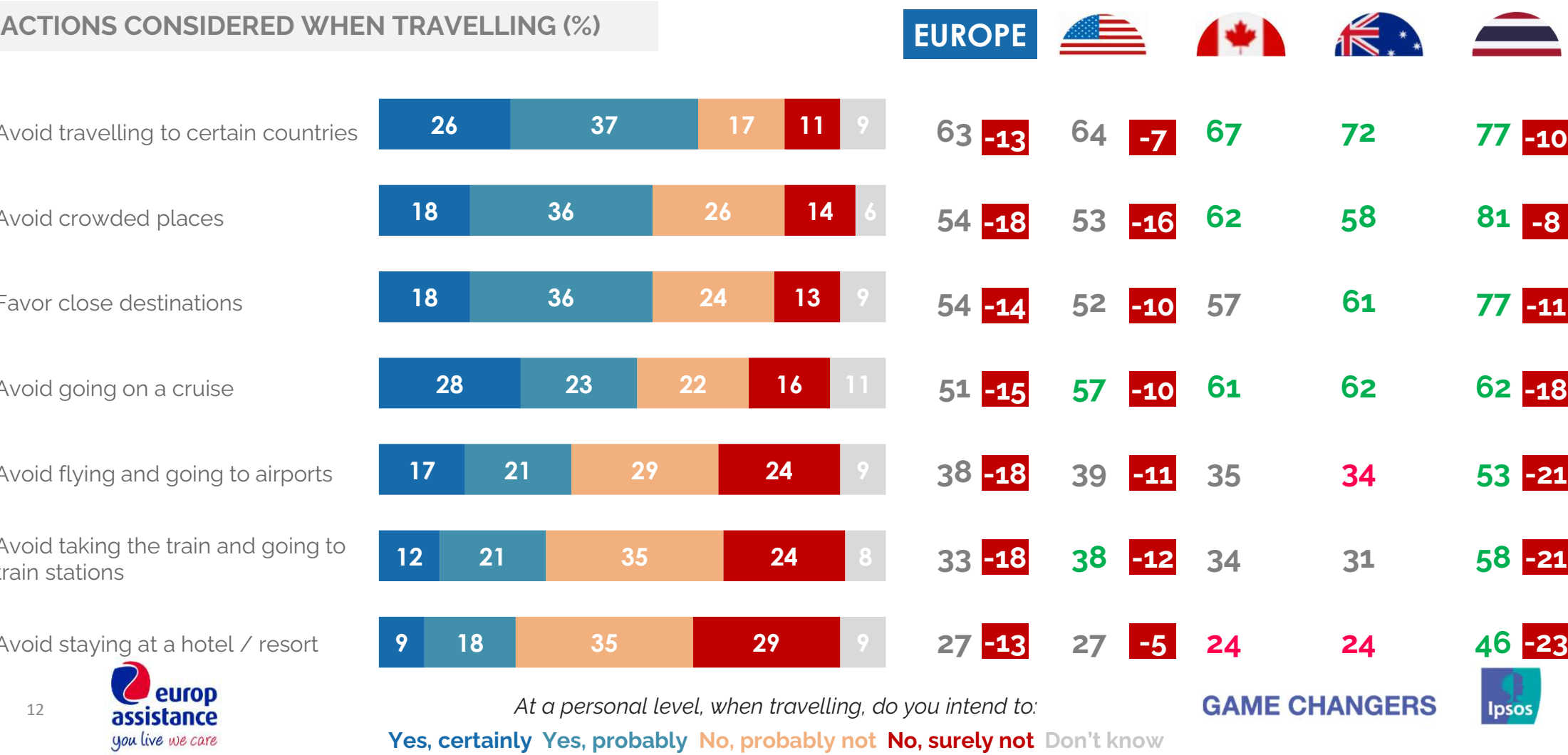


THE LEVEL OF CONCERN DECREASES, ESPECIALLY WHEN IT COMES TO HEALTH AND TRAVEL RELATED TOPICS. COMPARATIVELY, CONCERNS ABOUT THE ECONOMIC SITUATION REMAIN FAIRLY STABLE

MAIN CONCERNS – EVOLUTION VS 2021 (%)












|                            |  |  |  |  |  |  |  |  |  |  |  |
|----------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Family and friends' health | -8  | -15   | -19   | -17  | -18   | -16   | -17   | -15   | -16   | -13   | -17   |
| Economic situation         | +3  | =   | -2  | -5   | -3  | -6  | -4  | -4  | -5  | -6  | +1  |
| Overall health             | -4  | -8  | -12   | -13  | -14   | -11   | -13   | -12   | -15   | -6  | -8  |
| Travel plans               | -20   | -19   | -25   | -17  | -22   | -15   | -15   | -4  | +4  | -27   | -13   |
| Mental health              | -7  | -10   | -11   | -11  | -11   | -7  | -11   | -9  | -10   | -6  | -10   |
| Leisure plans              | -13   | -22   | -17   | -22  | -24   | -17   | -14   | -7  | -1  | -23   | -20   |
| Job / graduation           | -7  | -5  | -9  | -9   | -7  | -13   | -9  | -14   | -14   | -10   | -6  |

# WHEN TRAVELLING, RESPONDENTS ARE STILL WILLING TO PICK CAREFULLY THEIR DESTINATION BY AVOIDING CERTAIN COUNTRIES AND FAVORING CLOSE DESTINATIONS, HOWEVER THE LEVEL OF CAUTION DECREASED STRONGLY VS 2021



# ITALIANS, PORTUGUESE AND SPANIARDS ARE THE MOST CAREFUL EUROPEAN POPULATIONS WHEN IT COMES TO PRECAUTIONARY MEASURES

## ACTIONS CONSIDERED WHEN TRAVELLING (%)

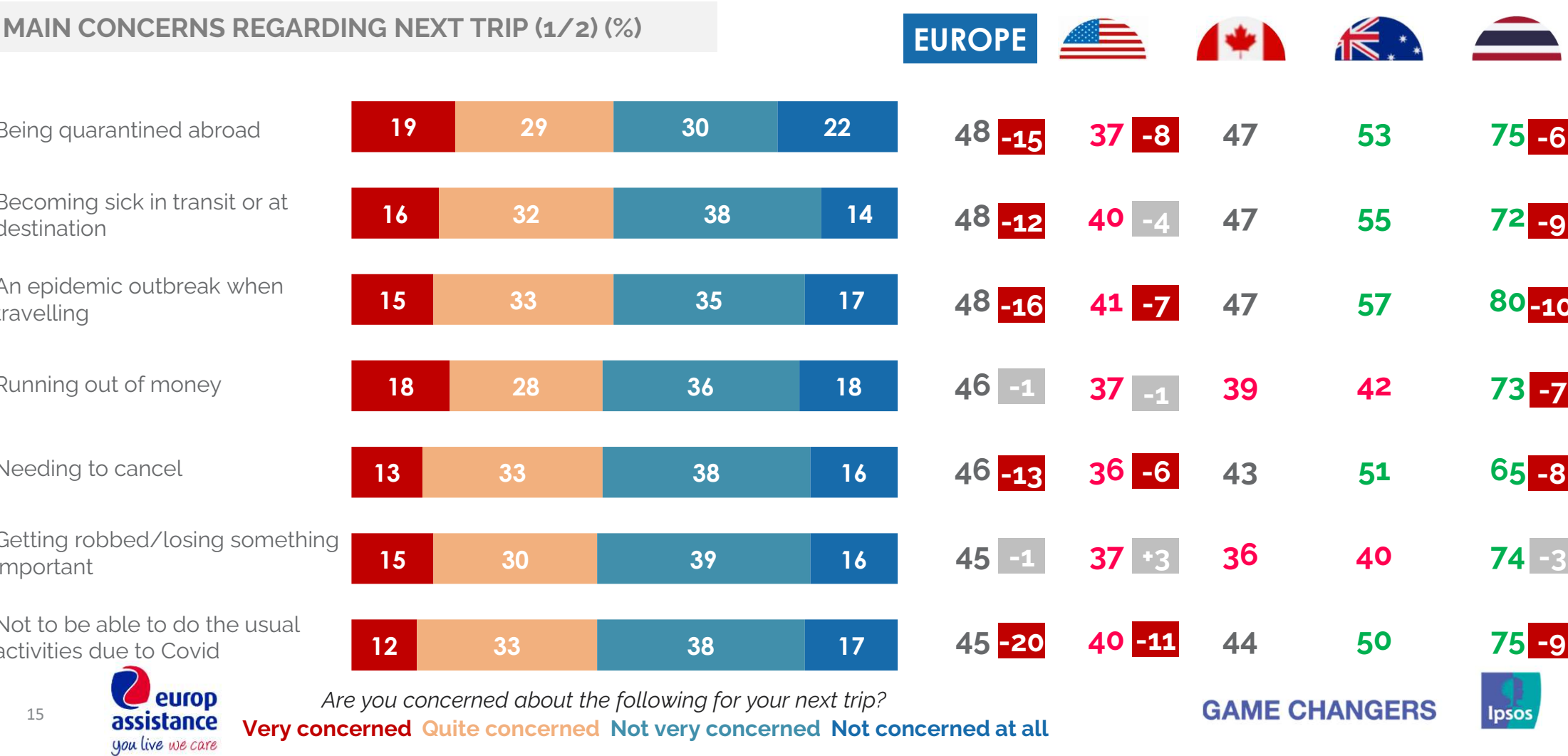
|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Avoid travelling to certain countries              | 65  | 58  | 52  | 64   | 62  | 67  | 51  | 71  | 67  | 59  | 63  |
| Avoid crowded places                               | 40  | 50  | 51  | 53   | 45  | 68  | 49  | 75  | 59  | 37  | 54  |
| Favor close destinations                           | 55  | 50  | 46  | 53   | 54  | 62  | 44  | 69  | 63  | 50  | 52  |
| Avoid going on a cruise                            | 58  | 45  | 23  | 55   | 57  | 55  | 32  | 48  | 50  | 50  | 55  |
| Avoid flying and going to airports                 | 36  | 37  | 29  | 41   | 41  | 43  | 36  | 35  | 37  | 34  | 35  |
| Avoid taking the train and going to train stations | 28  | 30  | 19  | 32   | 35  | 42  | 30  | 36  | 31  | 25  | 28  |
| Avoid staying at a hotel / resort                  | 22  | 24  | 16  | 30   | 27  | 30  | 25  | 28  | 28  | 22  | 23  |

# COMPARED TO LAST YEAR, THE LEVEL OF CAUTION INTENDED WHEN TRAVELLING IS STRONGLY DECREASING IN ALL THE EUROPEAN COUNTRIES

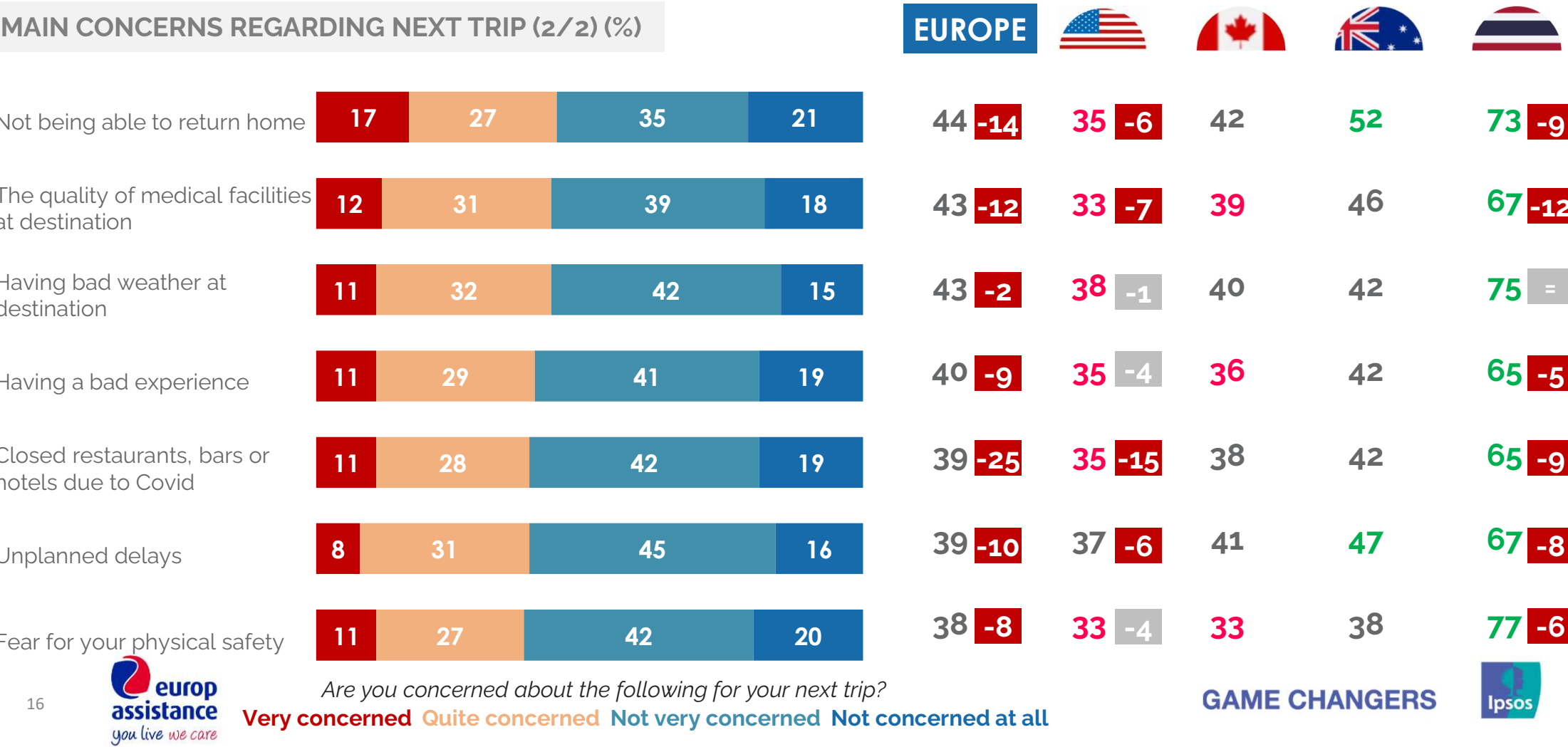
ACTIONS CONSIDERED WHEN TRAVELLING – EVOLUTION VS 2021 (%)

|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Avoid travelling to certain countries              | -11   | -15   | -17   | -12  | -11   | -13   | -11   | -14   | -14   | -11   | -19   |
| Avoid crowded places                               | -19   | -22   | -20   | -18  | -18   | -17   | -17   | -14   | -22   | -21   | -19   |
| Favor close destinations                           | -14   | -13   | -18   | -12  | -9  | -15   | -12   | -14   | -16   | -13   | -14   |
| Avoid going on a cruise                            | -12   | -16   | -14   | -13  | -14   | -14   | -12   | -19   | -17   | -12   | -18   |
| Avoid flying and going to airports                 | -17   | -14   | -16   | -16  | -16   | -18   | -13   | -22   | -21   | -10   | -20   |
| Avoid taking the train and going to train stations | -15   | -19   | -13   | -17  | -18   | -18   | -14   | -17   | -21   | -11   | -23   |
| Avoid staying at a hotel / resort                  | -12   | -12   | -17   | -12  | -14   | -9  | -10   | -15   | -14   | -9  | -15   |

# WHEN THINKING ABOUT THEIR NEXT TRIP, THE RESPONDENTS FEEL MAINLY CONCERNED ABOUT ISSUES RELATED TO THE SANITARY CRISIS, BUT TO A LESSER EXTEND THAN LAST YEAR



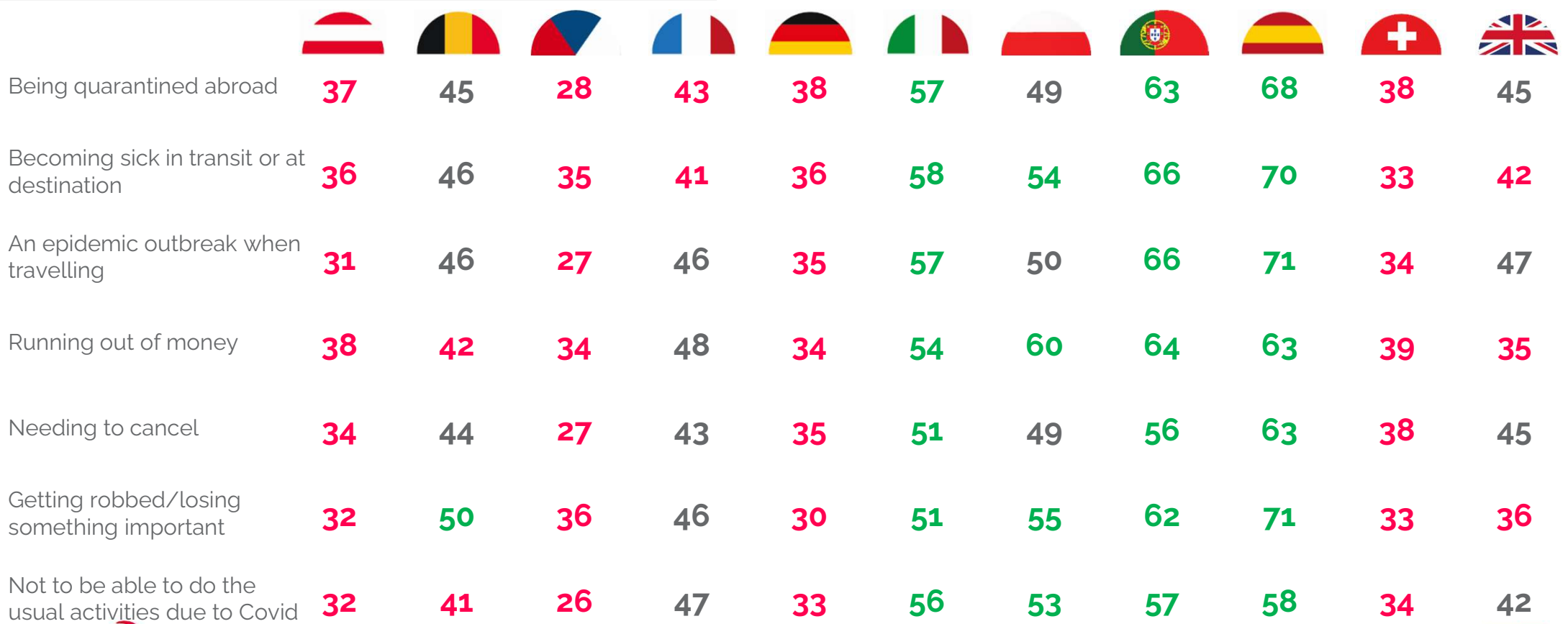
# WHEN THINKING ABOUT THEIR NEXT TRIP, THE RESPONDENTS FEEL MAINLY CONCERNED ABOUT ISSUES RELATED TO THE SANITARY CRISIS, BUT TO A LESSER EXTEND THAN LAST YEAR
















PORTUGUESE, SPANIARDS AND ITALIANS ARE THE MOST FRIGHTENED BY MEDICAL RISKS SUCH AS BEING QUARANTINED OR BECOMING SICK. CZECH, SWISS, GERMANS AND AUSTRIANS ARE THE LEAST FRIGHTENED.

MAIN CONCERNS REGARDING NEXT TRIP (1/2) (%)














PORTUGUESE, SPANIARDS AND ITALIANS ARE THE MOST FRIGHTENED BY MEDICAL RISKS SUCH AS BEING QUARANTINED OR BECOMING SICK. CZECH, SWISS, GERMANS AND AUSTRIANS ARE THE LEAST FRIGHTENED.

MAIN CONCERNS REGARDING NEXT TRIP (2/2) (%)

|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Not being able to return home                    | 32  | 40  | 24  | 39   | 32  | 49  | 51  | 62  | 68  | 34  | 42  |
| The quality of medical facilities at destination | 31  | 41  | 29  | 40   | 30  | 56  | 47  | 60  | 63  | 34  | 38  |
| Having bad weather at destination                | 32  | 44  | 37  | 47   | 29  | 54  | 51  | 59  | 54  | 35  | 37  |
| Having a bad experience                          | 28  | 38  | 21  | 34   | 28  | 52  | 30  | 58  | 67  | 29  | 40  |
| Closed restaurants, bars or hotels due to Covid  | 29  | 40  | 24  | 38   | 30  | 46  | 45  | 48  | 53  | 31  | 38  |
| Unplanned delays                                 | 26  | 32  | 23  | 32   | 28  | 43  | 43  | 51  | 56  | 29  | 44  |
| Fear for your physical safety                    | 26  | 35  | 27  | 35   | 28  | 46  | 50  | 55  | 57  | 27  | 29  |

# COMPARED TO LAST YEAR, THE LEVEL OF CONCERN REGARDING MEDICAL RISKS HAS STRONGLY DECREASED ACROSS ALL EUROPEANS COUNTRIES, BUT THE OTHER CONCERNS HAVE REMAINED STABLE

MAIN CONCERNS – EVOLUTION VS 2021 (%)

|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Being quarantined abroad                               | -19   | -21   | -23   | -13  | -24   | -14   | -12   | -10   | -8  | -20   | -14   |
| Becoming sick in transit or at destination             | -10   | -8  | -12   | -13  | -15   | -13   | -12   | -9  | -12   | -11   | -8  |
| An epidemic outbreak when travelling                   | -17   | -18   | -23   | -17  | -19   | -11   | -15   | -15   | -11   | -13   | -17   |
| Running out of money                                   | +1  | +3  | +1  | -1   | -3  | -4  | -1  | -3  | -1  | +3  | +4  |
| Needing to cancel                                      | -14   | -11   | -17   | -17  | -19   | -11   | -10   | -8  | -3  | -13   | -15   |
| Getting robbed/losing something important              | -2  | +9  | -2  | -1   | -4  | -1  | -1  | -4  | +2  | +3  | =   |
| Not to be able to do the usual activities due to Covid | -19   | -22   | -26   | -23  | -26   | -12   | -19   | -14   | -9  | -19   | -22   |

COMPARED TO LAST YEAR, THE LEVEL OF CONCERNS REGARDING MEDICAL RISKS HAS STRONGLY DECREASED ACROSS ALL EUROPEANS COUNTRIES, BUT THE OTHER CONCERNS HAVE REMAINED STABLE

MAIN CONCERNS – EVOLUTION VS 2021 (%)

|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Not being able to return home                    | -16   | -13   | -20   | -17  | -22   | -7  | -11   | -10   | -9  | -11   | -15   |
| The quality of medical facilities at destination | -15   | -8  | -10   | -11  | -21   | -7  | -11   | -10   | -10   | -7  | -11   |
| Having bad weather at destination                | -3  | +5  | -2  | -2   | -3  | +1  | -5  | -1  | +4  | 4   | -5  |
| Having a bad experience                          | -9  | -3  | -11   | -9   | -18   | -7  | +1  | -8  | -4  | -3  | -12   |
| Closed restaurants, bars or hotels due to Covid  | -26   | -28   | -28   | -28  | -34   | -17   | -20   | -16   | -11   | -27   | -26   |
| Unplanned delays                                 | -16   | -5  | -10   | -5   | -22   | -7  | -8  | -9  | -6  | -11   | -10   |
| Fear for your physical safety                    | -9  | -5  | -5  | -8   | -13   | -9  | -6  | -9  | -6  | -2  | -6  |

# 2.

## 2022 SUMMER HOLIDAY PLANS

- > Summer holiday plans
- > Budget
- > Summer trip duration



## SUMMER PLANS ARE INCREASING COMPARED TO 2021

### SUMMER HOLIDAY PLANS

EUROPE

**71%**  
(+14 versus 2021)

USA

**60%**  
(+10 vs 2021)

CANADA

**61%**

THAILAND

**69%**  
(+25 vs 2021)

AUSTRALIA

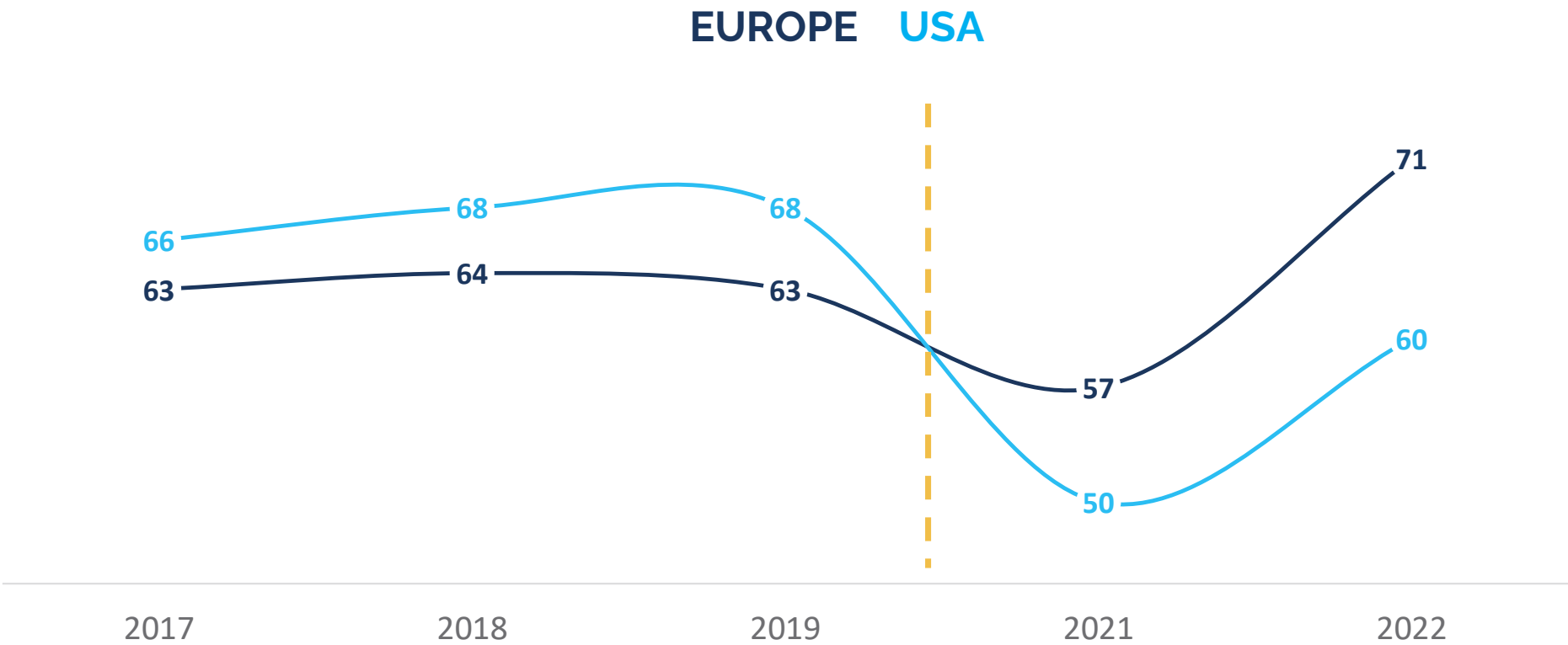
**52%**

Do you plan to go on a trip this summer, in other words between June and September?  
Several trips + only one trip

GAME CHANGERS

IN EUROPE, THE POSITIVE TREND IS PARTICULARLY STRONG, WHILE THE US IS NOT YET BACK TO THE LEVEL OF 2019

EVOLUTION OF HOLIDAY PLANS (%)



AMONG EUROPEANS, THE SITUATION IS UNIFORMLY POSITIVE

## SUMMER HOLIDAY PLANS

AUSTRIA

75%

+14pts vs 2021

BELGIUM

71%

+18pts

CZECH REP

73%

+8pts

FRANCE

74%

+7pts

GERMANY

61%

+19pts

ITALY

76%

+9pts

POLAND

75%

+9pts

PORTUGAL

79%

+17pts

SPAIN

78%

+20pts

SWITZERLAND

75%

+12pts

UNITED  
KINGDOM

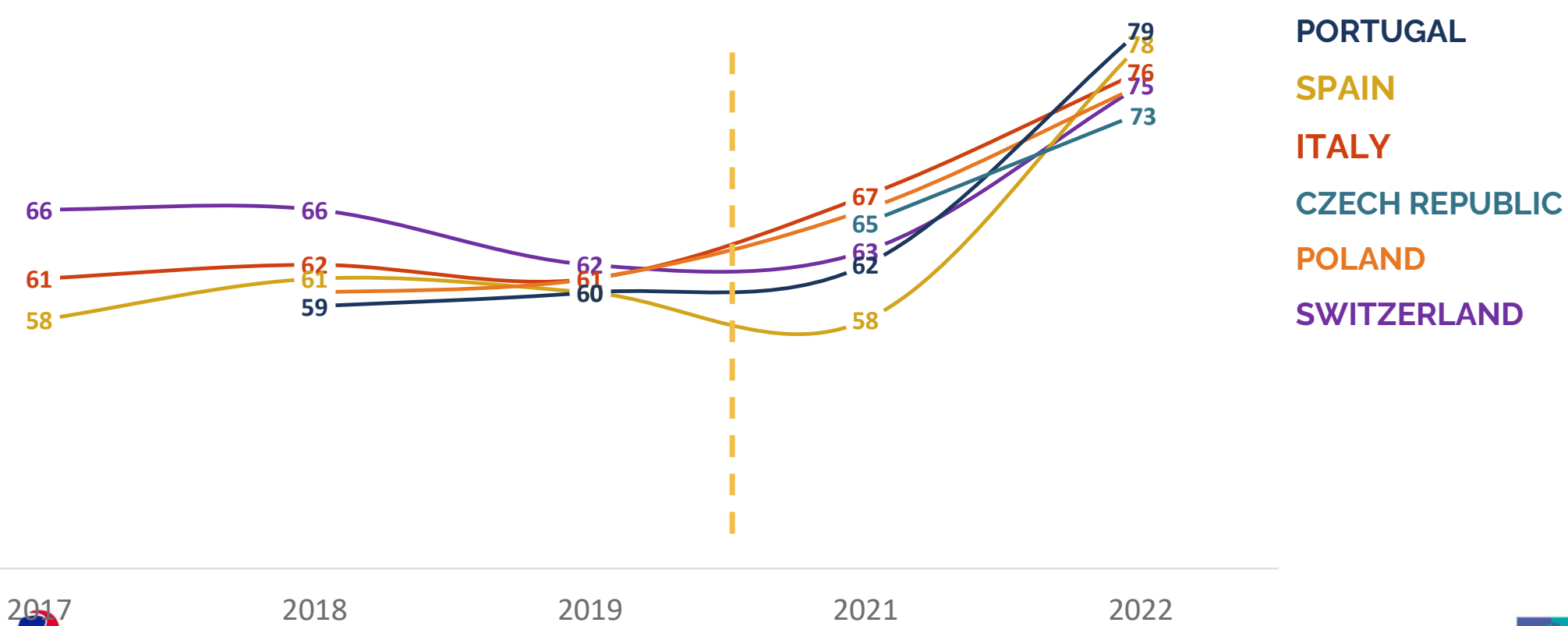
68%

+18pts



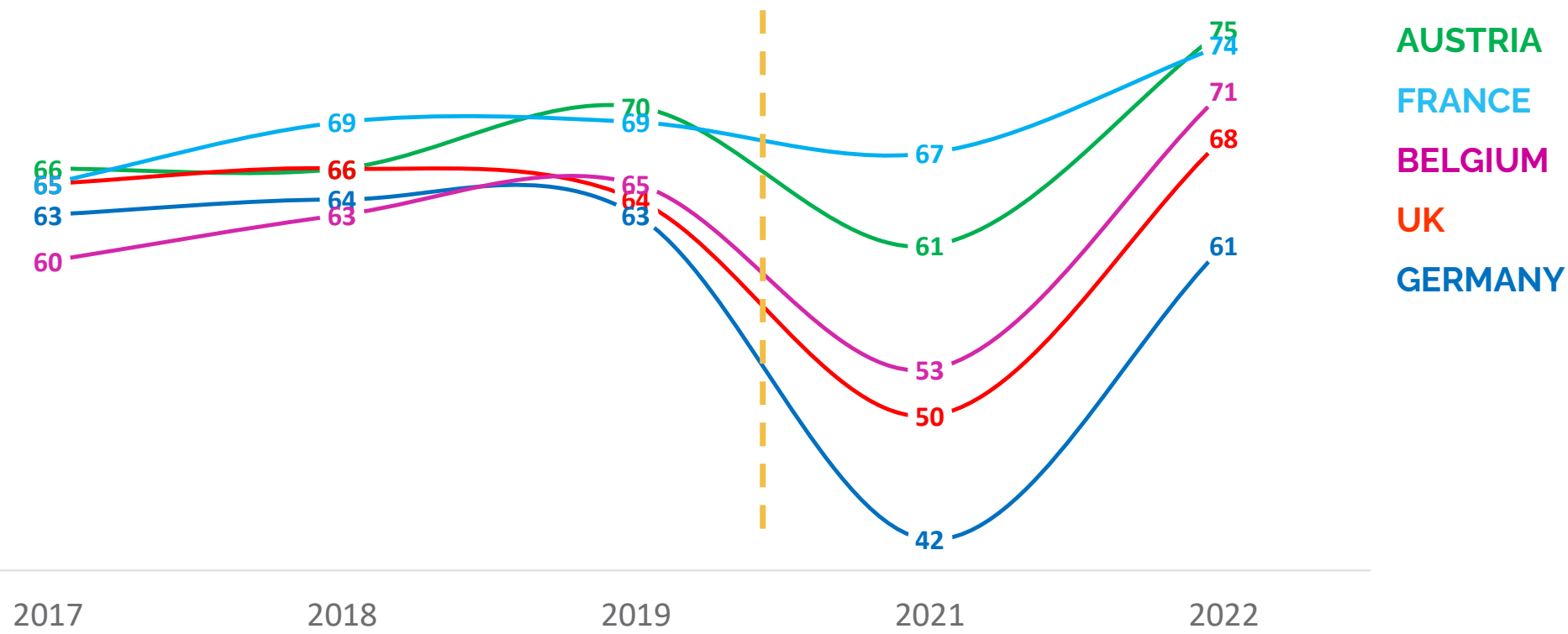
THE LEVEL OF INTENTION TO GO ON HOLIDAY EXCEEDS THE ONE FROM 2019 IN PORTUGAL, SPAIN, ITALY, POLAND AND SWITZERLAND

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)







THE POSITIVE TREND VS 2019 IS MORE MODERATE IN FRANCE, AUSTRIA, BELGIUM, UK AND GERMANY

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)



# BUDGET RESTRICTIONS ARE INCREASINGLY IMPACTING THOSE WHO DON'T GO ON VACATION VS 2021. THE PANDEMICS PLAYS A LESS IMPORTANT ROLE THAN LAST YEAR

## MAIN REASONS NOT TO TRAVEL IN 2022 (%)

|                                     | EUROPE        |  |  |  |  |
|-------------------------------------|---------------|---|---|---|---|
| Couldn't afford it                  | 41 <b>+14</b> | 45 <b>+9</b>  | 41  | 43  | 34 <b>+10</b>   |
| Saving money                        | 26 <b>+10</b> | 33  | 34  | 30  | 37 <b>+7</b>  |
| Will go at another time of the year | 14            | 21  | 14  | 25  | 13  |
| Want to enjoy a staycation          | 14            | 16  | 19  | 5   | 10  |
| Afraid of the Covid pandemic        | 11 <b>-15</b> | 15 <b>-11</b>   | 22  | 14  | 34 <b>-23</b>   |

THE GLOBAL HOLIDAY BUDGET INCREASES STRONGLY VS 2021

SUMMER HOLIDAY BUDGET

EUROPE

€ 1,805

+14% VS 2021

|          |           |
|----------|-----------|
| USA      | CANADA    |
| \$2 758  | \$3 225   |
| +19%     | €2 391    |
| €2 620   |           |
| THAILAND | AUSTRALIA |
| ฿62 800  | \$3 788   |
| +18%     | €2 808    |
| €1 725   |           |

THE BUDGET INCREASE COMPARED TO 2021 IS PARTICULARLY IMPORTANT IN SPAIN, GERMANY, PORTUGAL, BELGIUM AND POLAND

## SUMMER HOLIDAY BUDGET

### AUSTRIA

€2 162

+4%

### BELGIUM

€2 289

+15%

### CZECH REP

Kč 28 421

+6%

€1 153

### FRANCE

€1 806

+11%

### GERMANY

€2 128

+15%

### ITALY

€1 740

+10%

### POLAND

Zł 4 499

+14%

€969

### PORTUGAL

€1 543

+15%

### SPAIN

€1 503

+20%

### SWITZERLAND

CHF 2 912

+7%

€2 776

### UNITED KINGDOM

£1 833

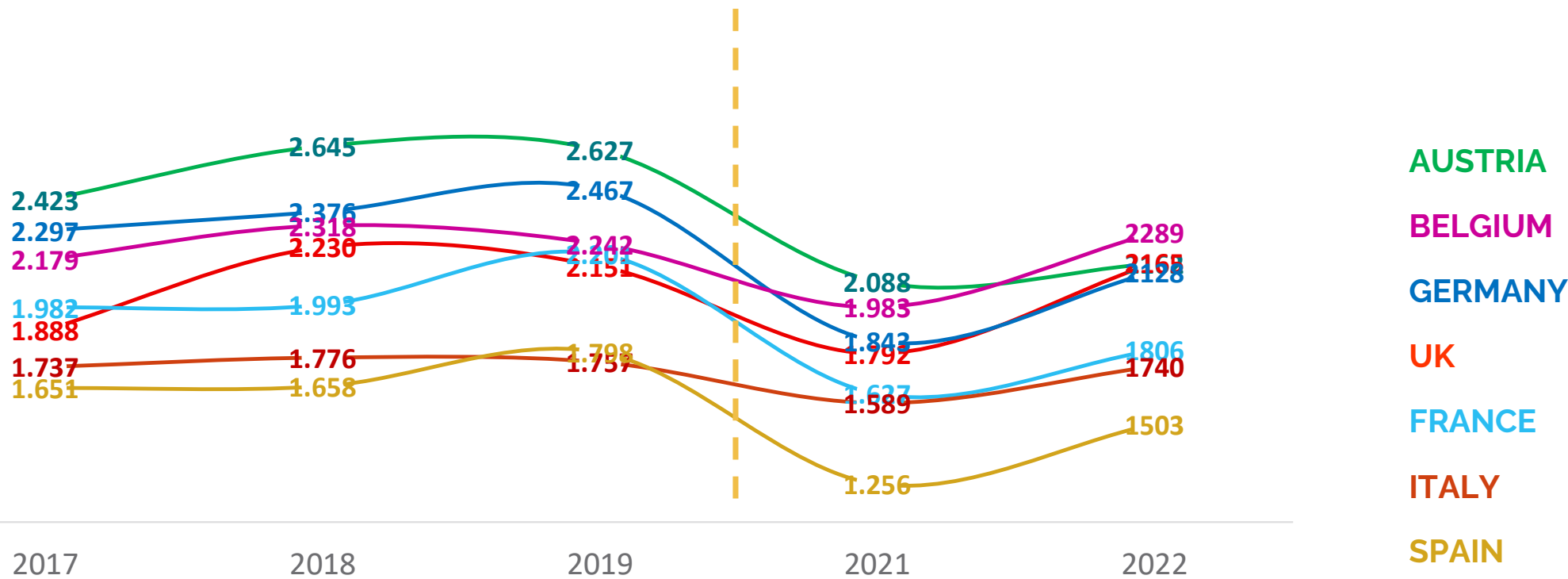
+19%

€2 165

Exchange rate applied

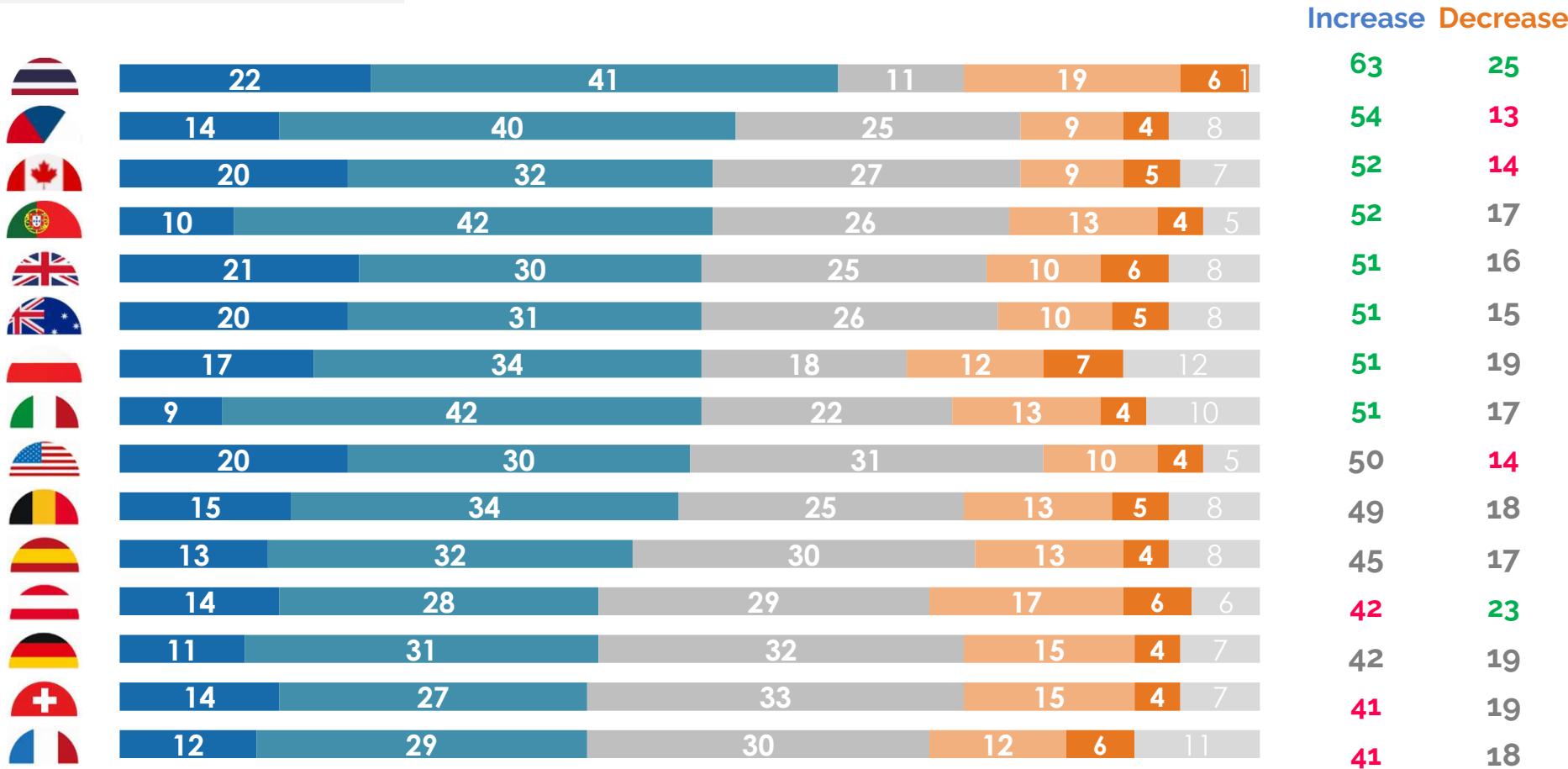
HOWEVER, SPENDING LEVELS REMAIN GLOBALLY BELOW 2019 LEVELS

SUMMER HOLIDAY BUDGET BY EUROPEAN COUNTRY (€)



# BUDGET INCREASE VS LAST YEAR IS RECOGNIZED BY RESPONDENTS

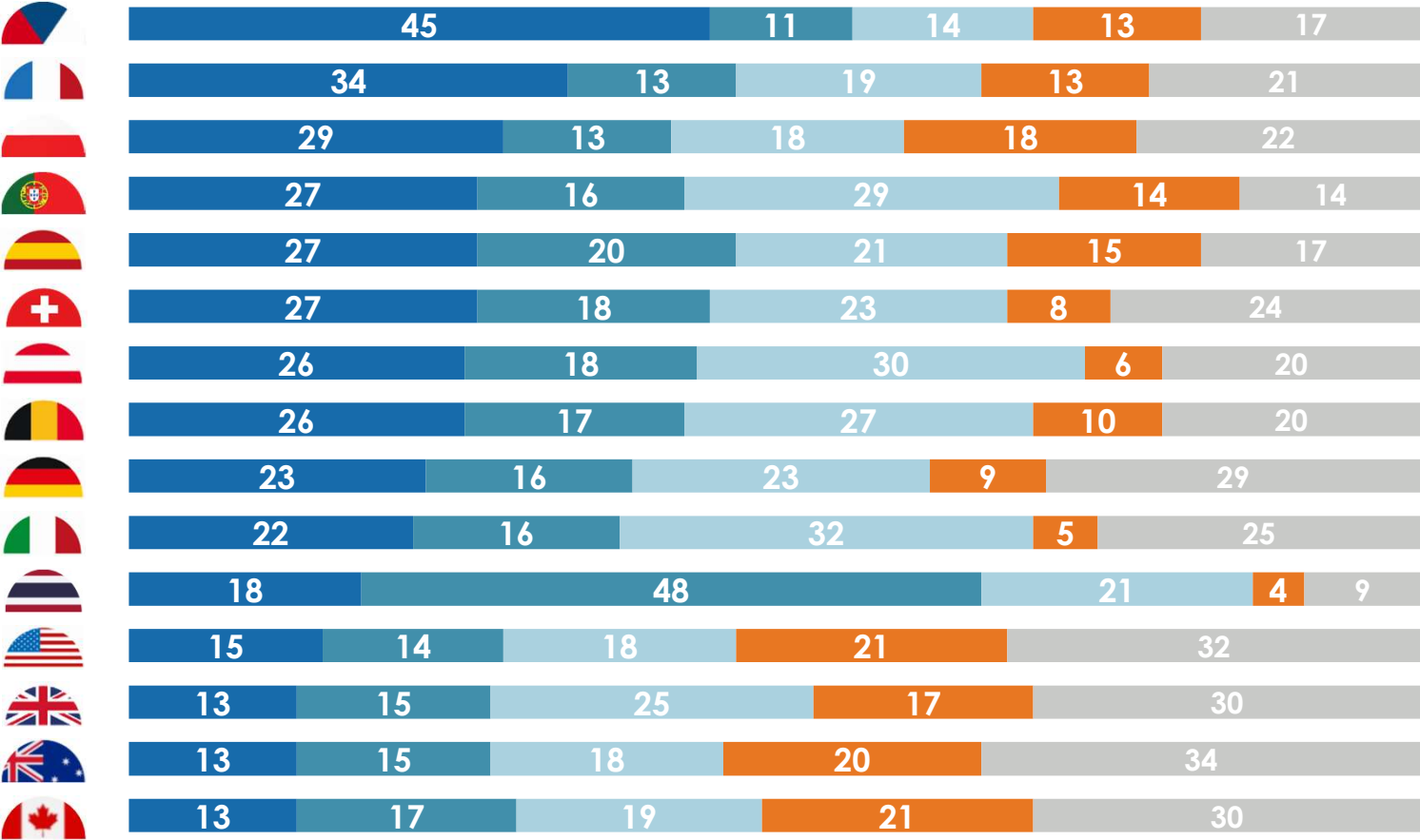
## EVOLUTION OF HOLIDAY BUDGET (%)



How might your budget for your summer trip change compared to what you spent last year? Will it : **GAME CHANGERS**  
Increase a lot Increase slightly Stay as usual Decrease slightly Decrease a lot DK

IN ALMOST ALL COUNTRIES, HOLIDAY IS A BUDGET CATEGORY THEY DON'T WANT TO TOUCH OR WILL CUT SLIGHTLY. IT IS PARTICULARLY THE CASE IN THE CZECH REPUBLIC, FRANCE AND POLAND

IMPORTANCE OF HOLIDAY BUDGET (%)





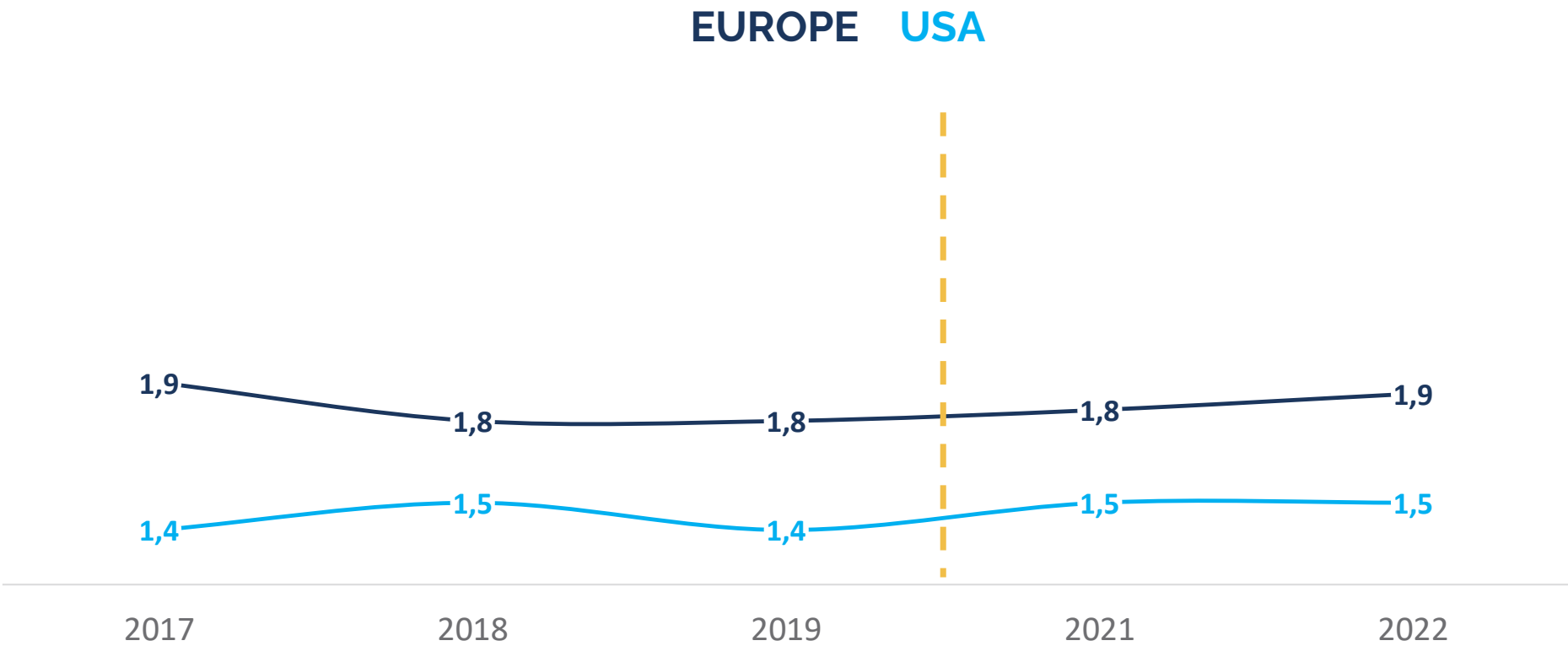
FRANCE, SWITZERLAND, POLAND & BELGIUM ARE THE ONLY COUNTRIES TO TAKE 2 WEEKS OR MORE OF SUMMER HOLIDAYS

SUMMER HOLIDAY DURATION  
(weeks on average)



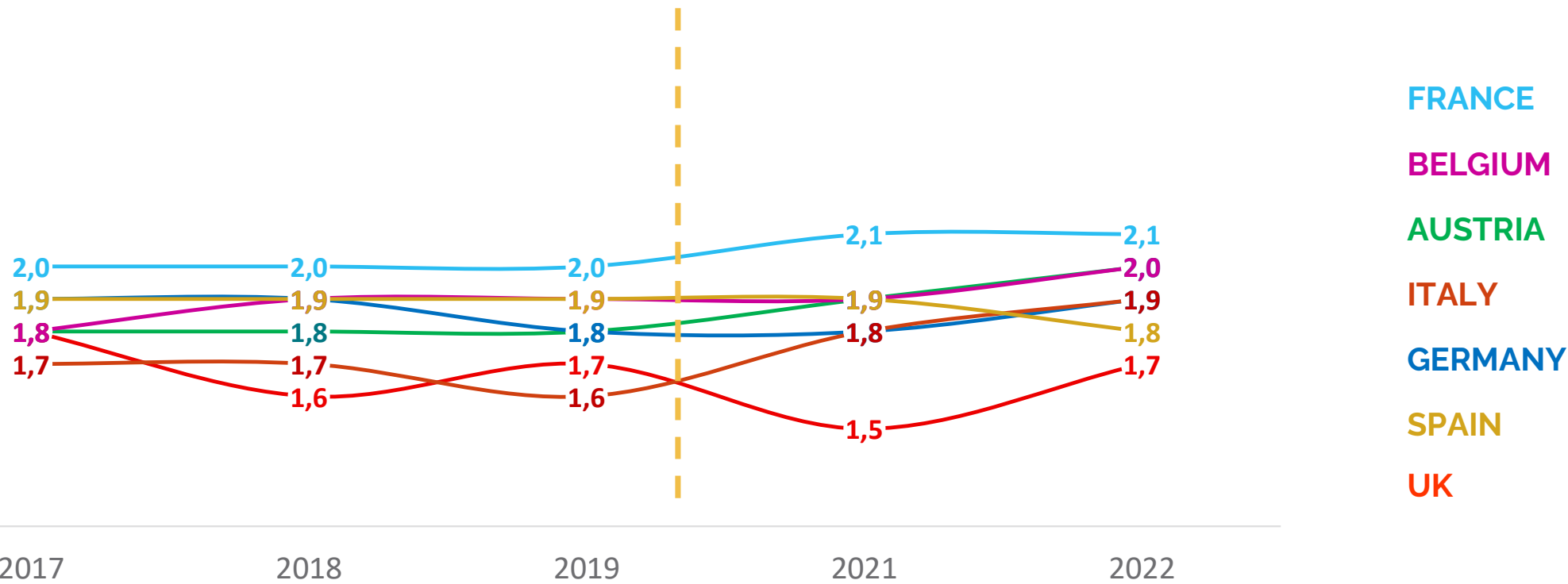
# HOLIDAY LENGTH REMAINS STABLE IN EUROPE AND THE US

EVOLUTION OF HOLIDAY DURATION  
(WEEKS ON AVERAGE)



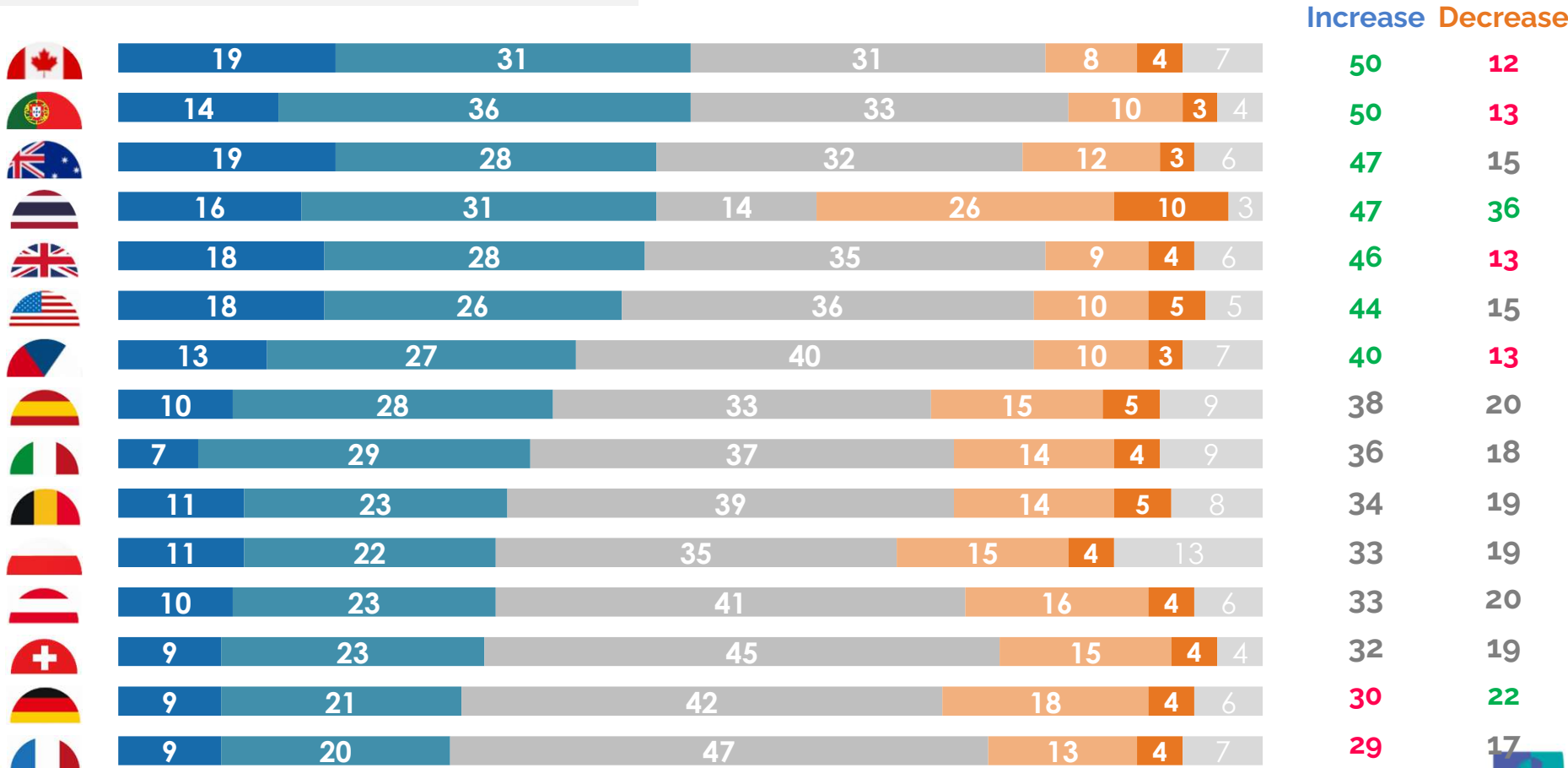
# HOLIDAY LENGTH REMAINS STABLE

EVOLUTION OF HOLIDAY DURATION BY EUROPEAN COUNTRY  
(WEEKS ON AVERAGE)



# HOLIDAYMAKERS FROM CANADA AND PORTUGAL CONSIDER THE MOST THAT THEIR HOLIDAY DURATION WILL INCREASE THIS YEAR

EVOLUTION OF SUMMER HOLIDAY DURATION (%)





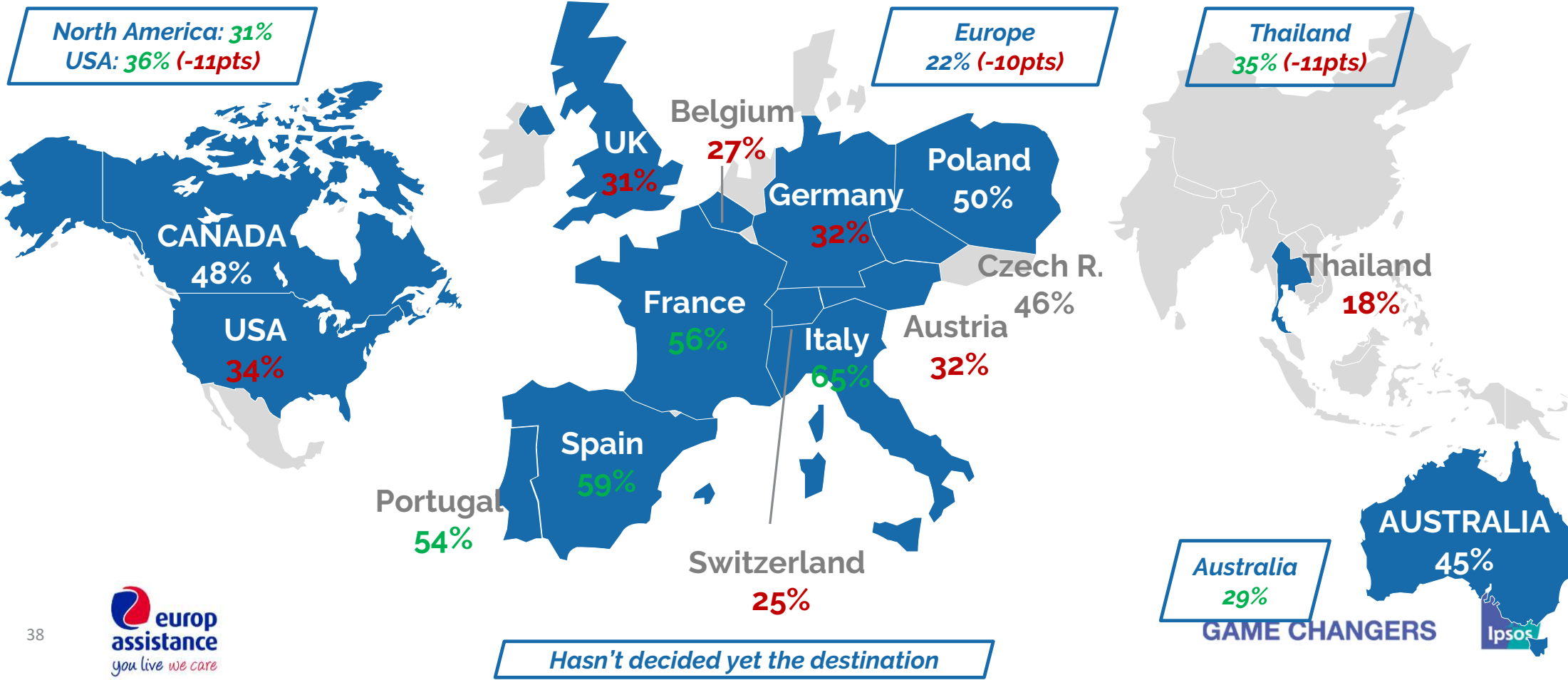
3.

## FAVORITE DESTINATIONS

- > Summer destinations (country)
- > Summer destinations (type of location)
- > Choice criteria for destination

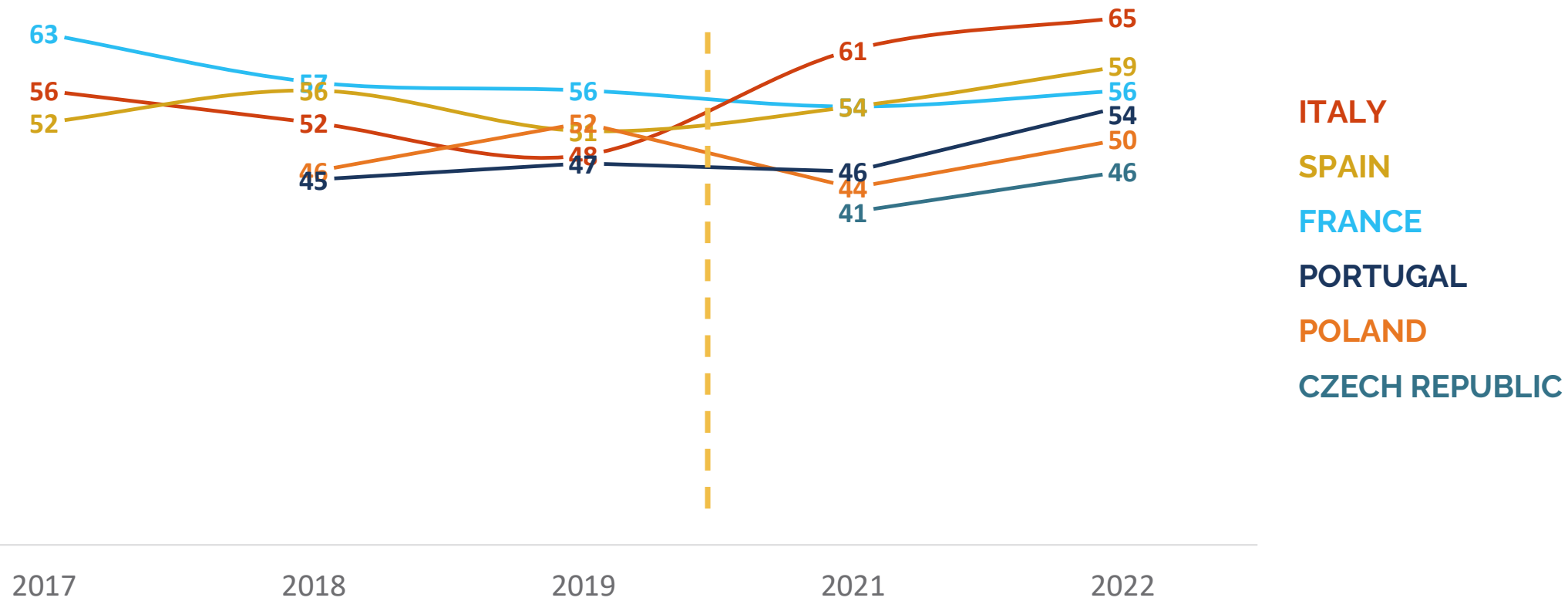
# ITALIAN, SPANISH & FRENCH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



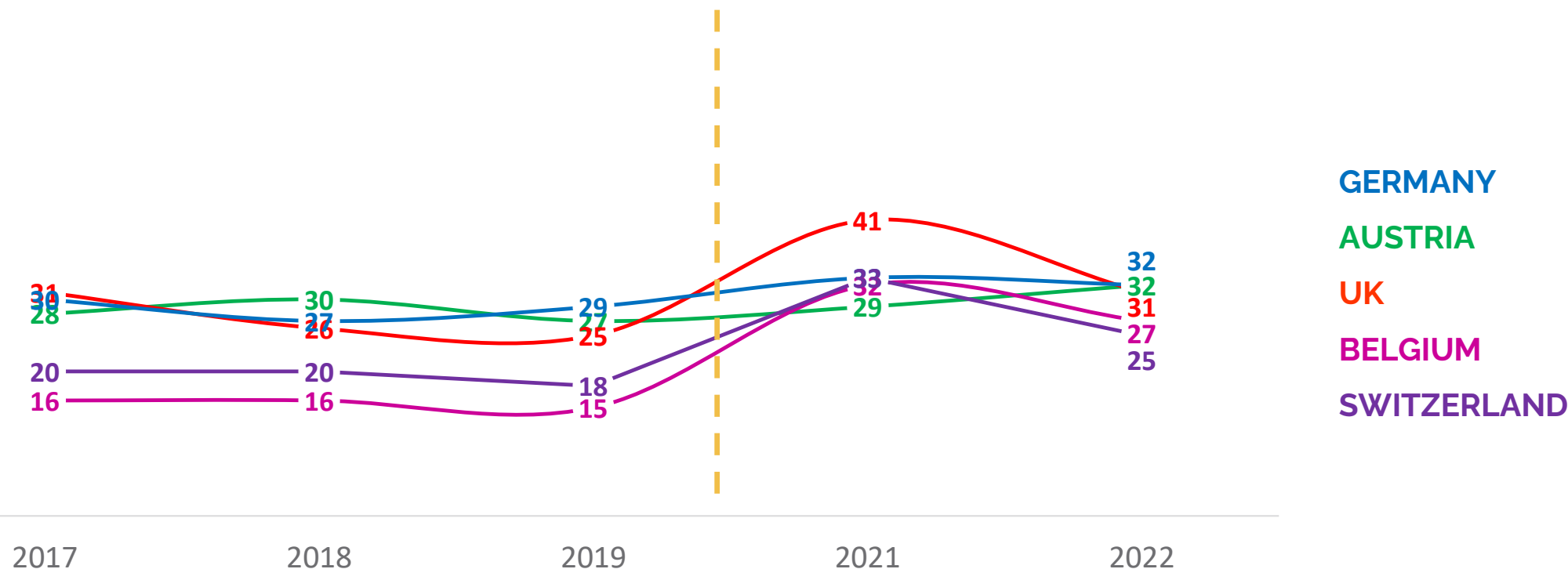
EUROPEAN HOLIDAYMAKERS ARE STILL MORE LIKELY TO STAY IN THEIR OWN COUNTRY THAN THEY WERE IN 2019

HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)



EUROPEAN HOLIDAYMAKERS ARE STILL MORE LIKELY TO STAY IN THEIR OWN COUNTRY THAN THEY WERE IN 2019

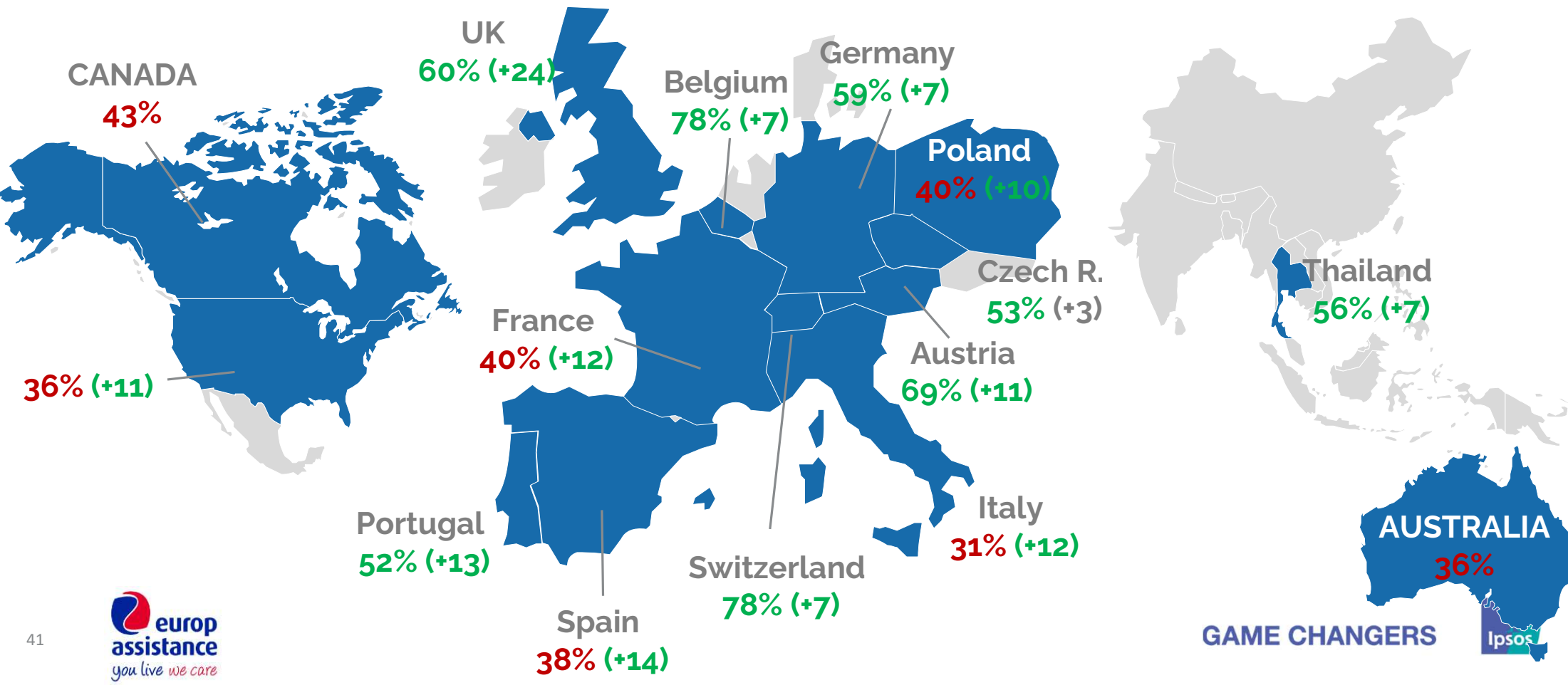
HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)





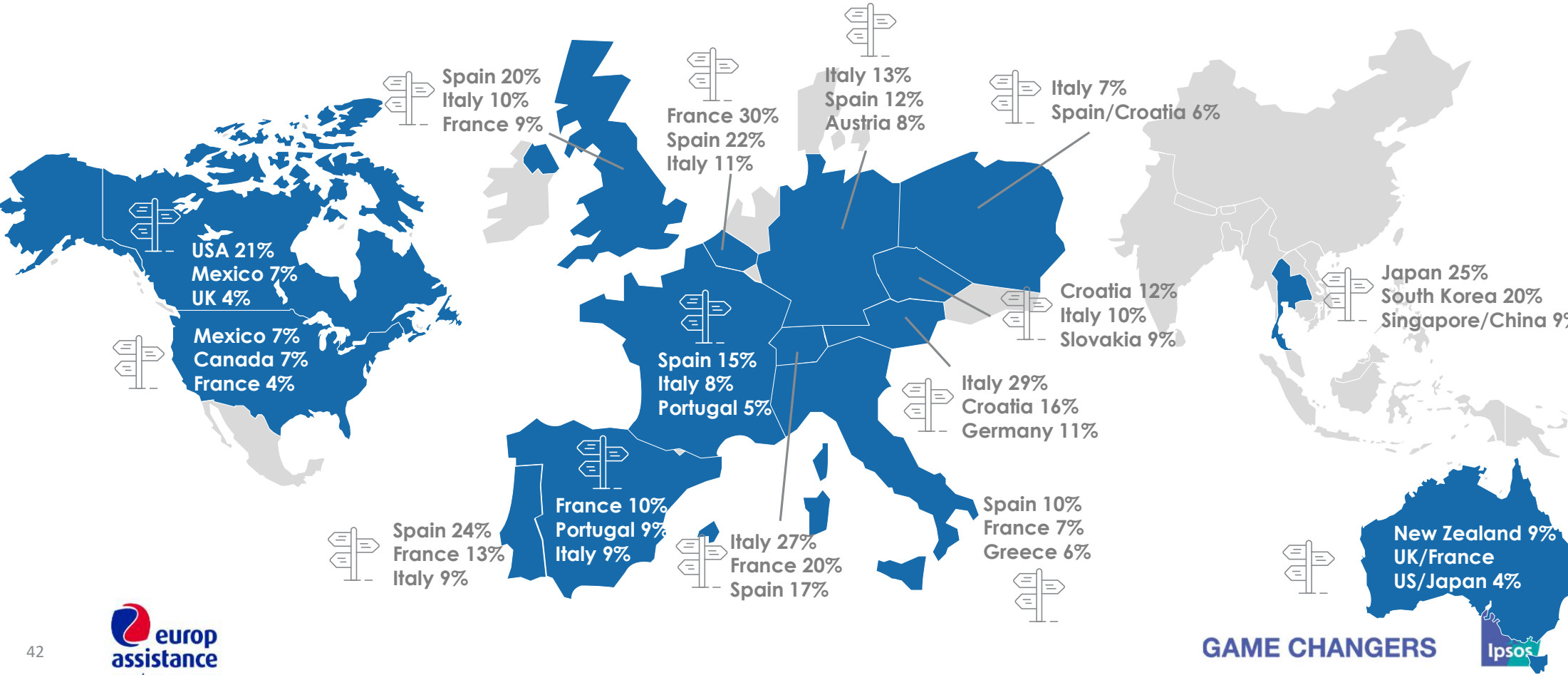
# HOLIDAYMAKERS ARE INCREASINGLY PLANNING TO TRAVEL ABROAD COMPARED TO LAST YEAR

## HOLIDAY PLANS ABROAD THIS SUMMER



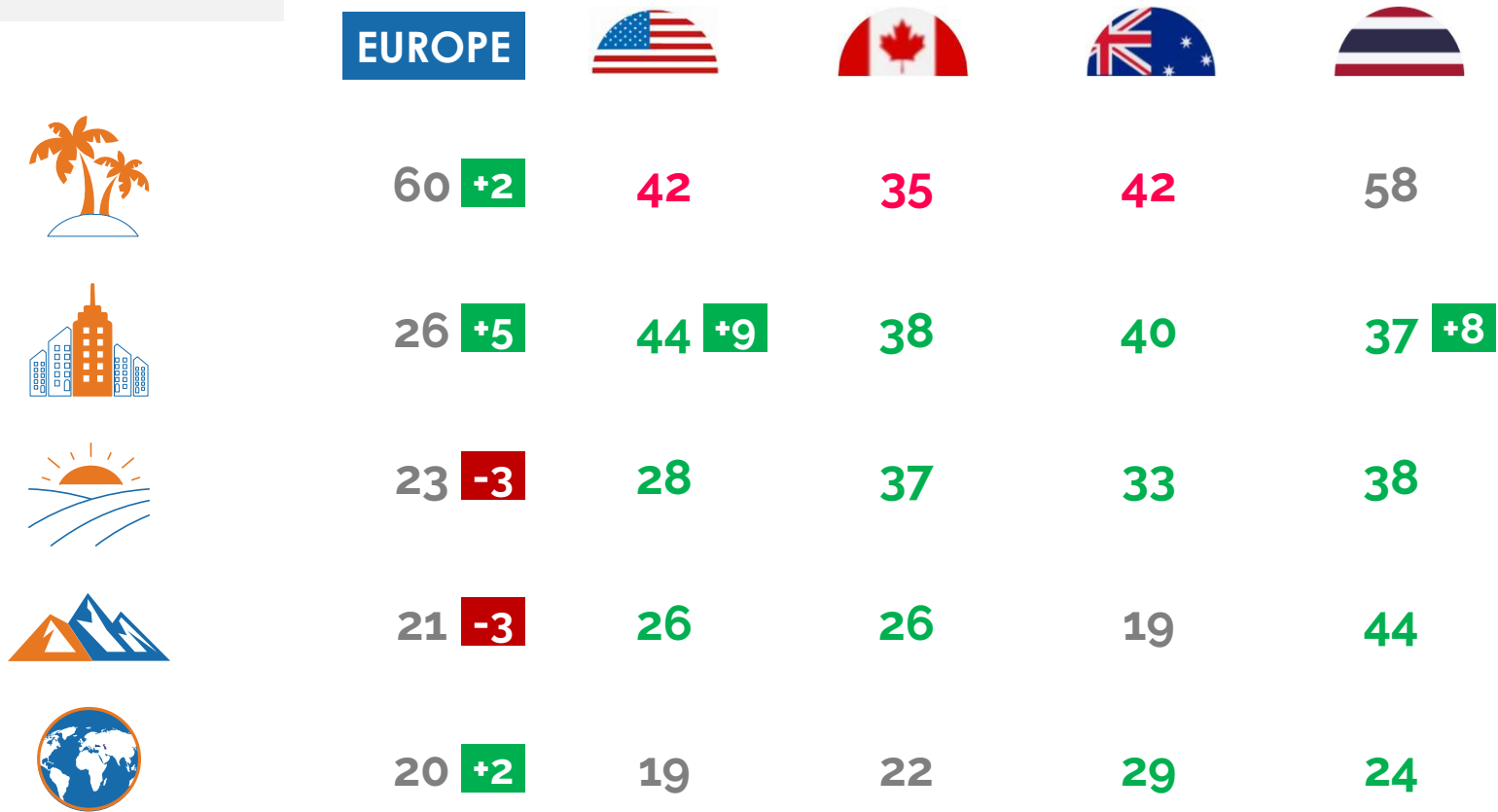
# WHEN CHOOSING TO TRAVEL ABROAD, HOLIDAYMAKERS MOSTLY CHOOSE NEIGHBORING COUNTRIES

## FOREIGN DESTINATIONS PLANNED THIS SUMMER



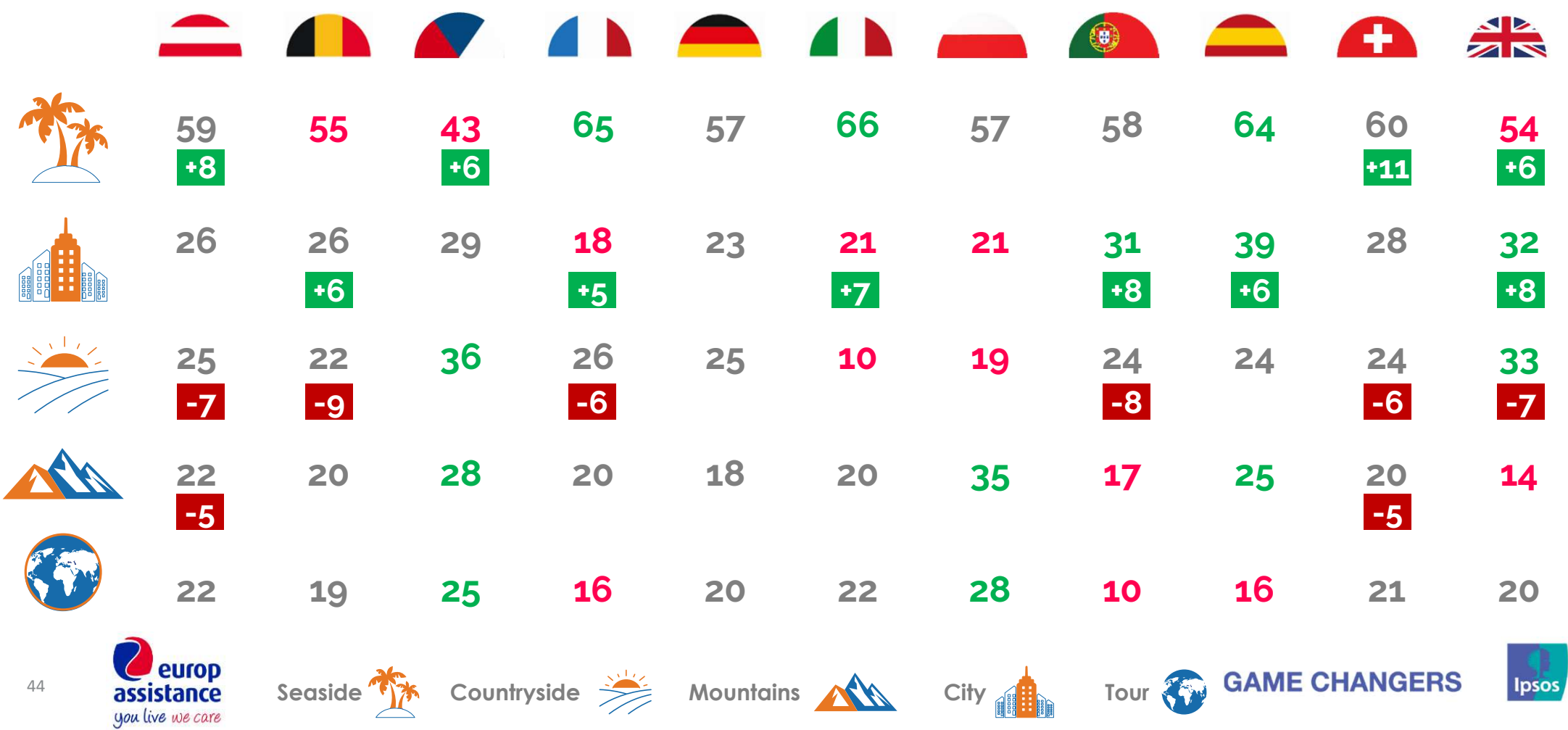
THE SEASIDE REMAINS THE MOST ATTRACTIVE DESTINATION FOR THE SUMMER HOLIDAYS, EXCEPT IN CANADA, WHERE URBAN AND COUNTRYSIDE DESTINATIONS ARE PREFERRED

SUMMER HOLIDAY PREFERENCES (%)



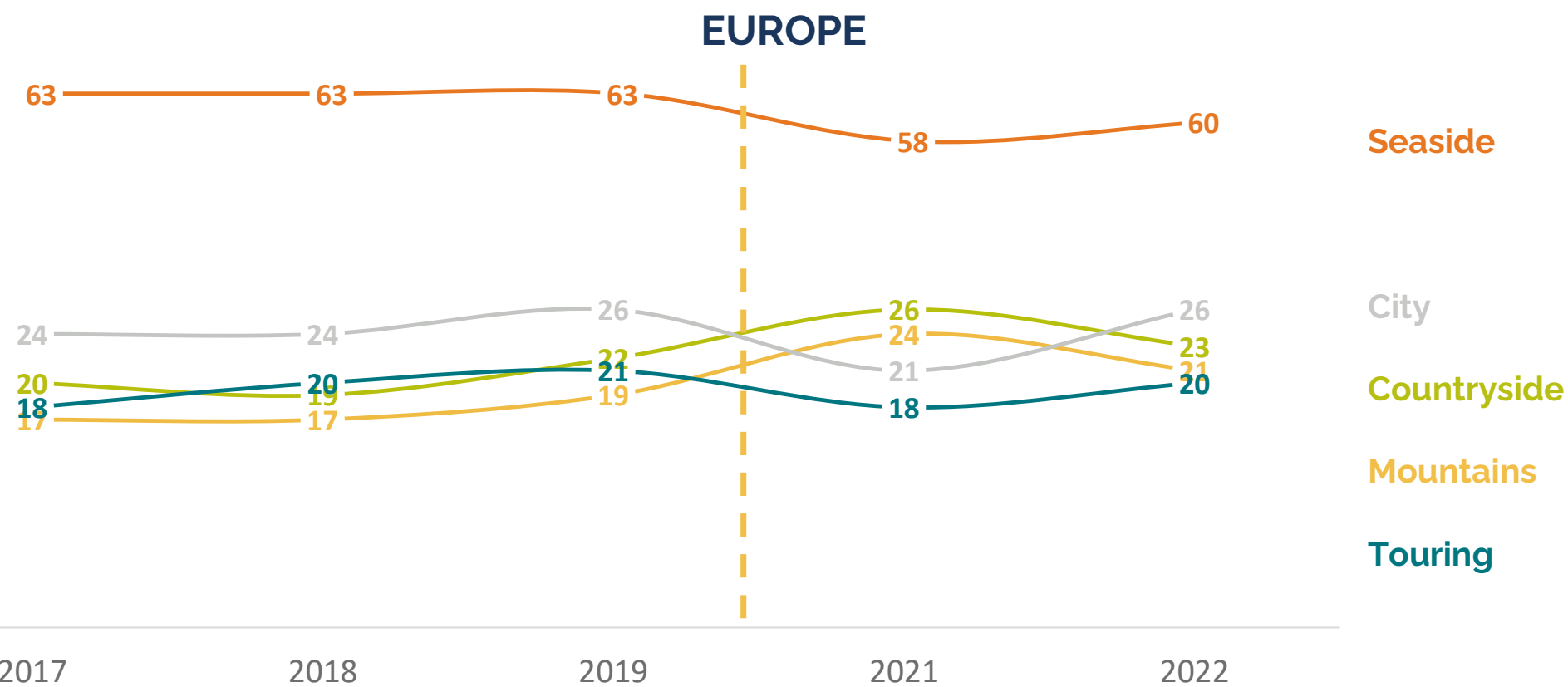
THIS YEAR, EUROPEANS ARE INCREASINGLY ATTRACTED BY SEASIDE AND CITIES

SUMMER HOLIDAY PREFERENCES (%)



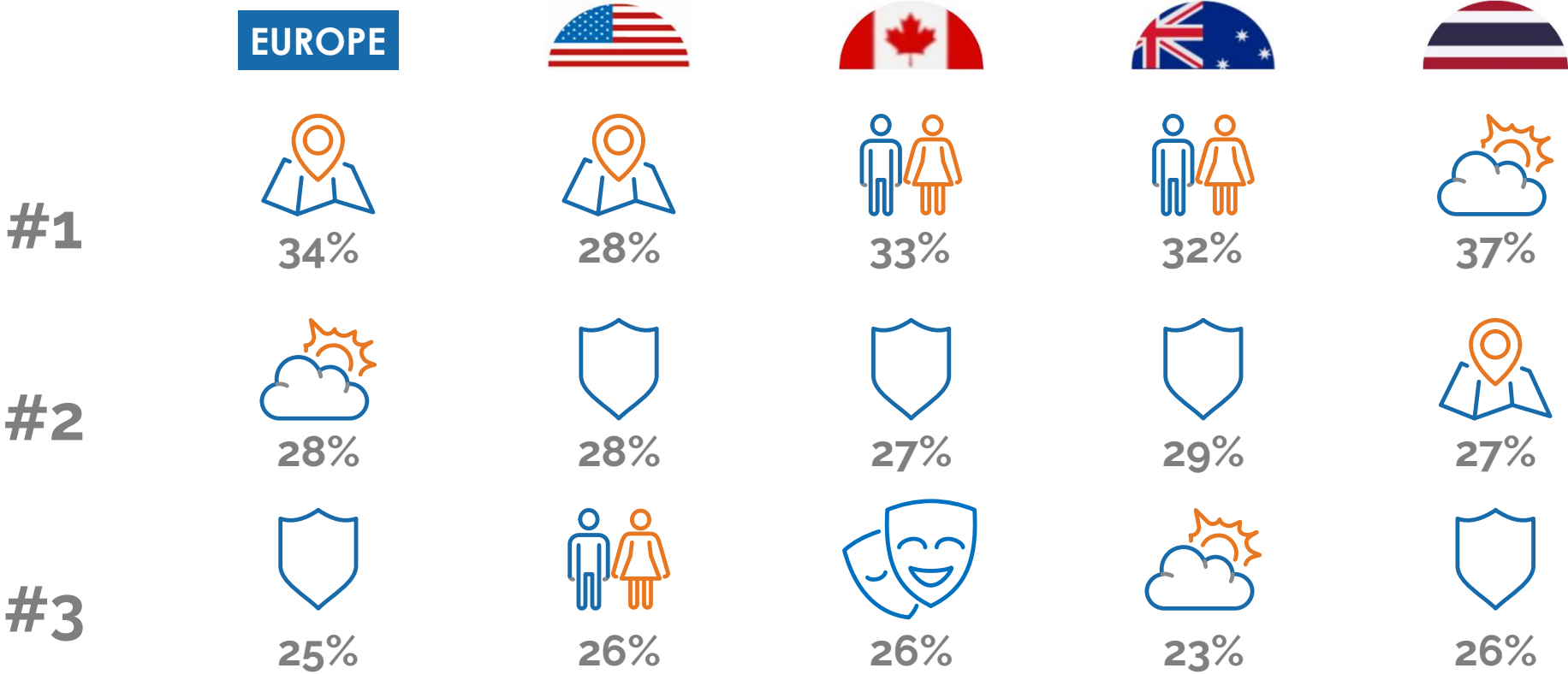
OVER THE YEARS, SEASIDE HAS REMAINED EUROPEANS' FAVORITE HOLIDAY LOCATION. HOWEVER, THE INTEREST FOR URBAN DESTINATIONS IS INCREASING THIS YEAR

FAVORITE SUMMER DESTINATION (%)




SECURITY AND ALREADY KNOWING THE DESTINATION ARE THE MOST IMPORTANT CRITERIA TO CHOOSE THE DESTINATION

MOTIVATIONS FOR THE CHOICE OF DESTINATION



MOST HOLIDAYMAKERS CHOOSE THEIR DESTINATION ACCORDING THEIR BUDGET, THE CLIMATE AND THE ACTIVITIES ON SITE, EXCEPT FOR THE THAIS, WHO PRIORITIZE ON RISKS

FACTORS THAT PLAY AN 'ESSENTIAL' ROLE  
IN CHOOSING A DESTINATION 1/2

| CHOOSING A DESTINATION 1/2                       |        | RANK 2022   |   |   |   |  |
|--|--------|---|---|---|---|--|
|  | EUROPE |  |  |  |  |  |
| My intended budget                               | 50     | #2  | #1  | #1  | #3  |  |
| The climate                                      | 47     | #3  | #3  | #3  | #6  |  |
| Opportunities for leisure or cultural activities | 42     | #1  | #2  | #2  | #14   |  |
| The quality of on-site tourist infrastructures   | 38     | #4  | #6  | #6  | #7  |  |
| Travel time to my trip destination               | 33     | #5  | #5  | #3  | #11   |  |
| The risk of a terrorist attack                   | 32     | #11   | #9  | #9  | #7  |  |
| The risk of a personal attack                    | 31     | #6  | #8  | #6  | #4  |  |
| Health risks (other than COVID)                  | 30     | #8  | #6  | #6  | #2  |  |
| The risk of a coronavirus infection              | 28     | #9  | #4  | #3  | #1  |  |
| The political climate in the destination country | 27     | #14   | #10   | #11   | #12   |  |

# MOST HOLIDAYMAKERS CHOOSE THEIR DESTINATION ACCORDING THEIR BUDGET, THE CLIMATE AND THE ACTIVITIES ON SITE, EXCEPT FOR THE THAIS, WHO PRIORITIZE ON RISKS

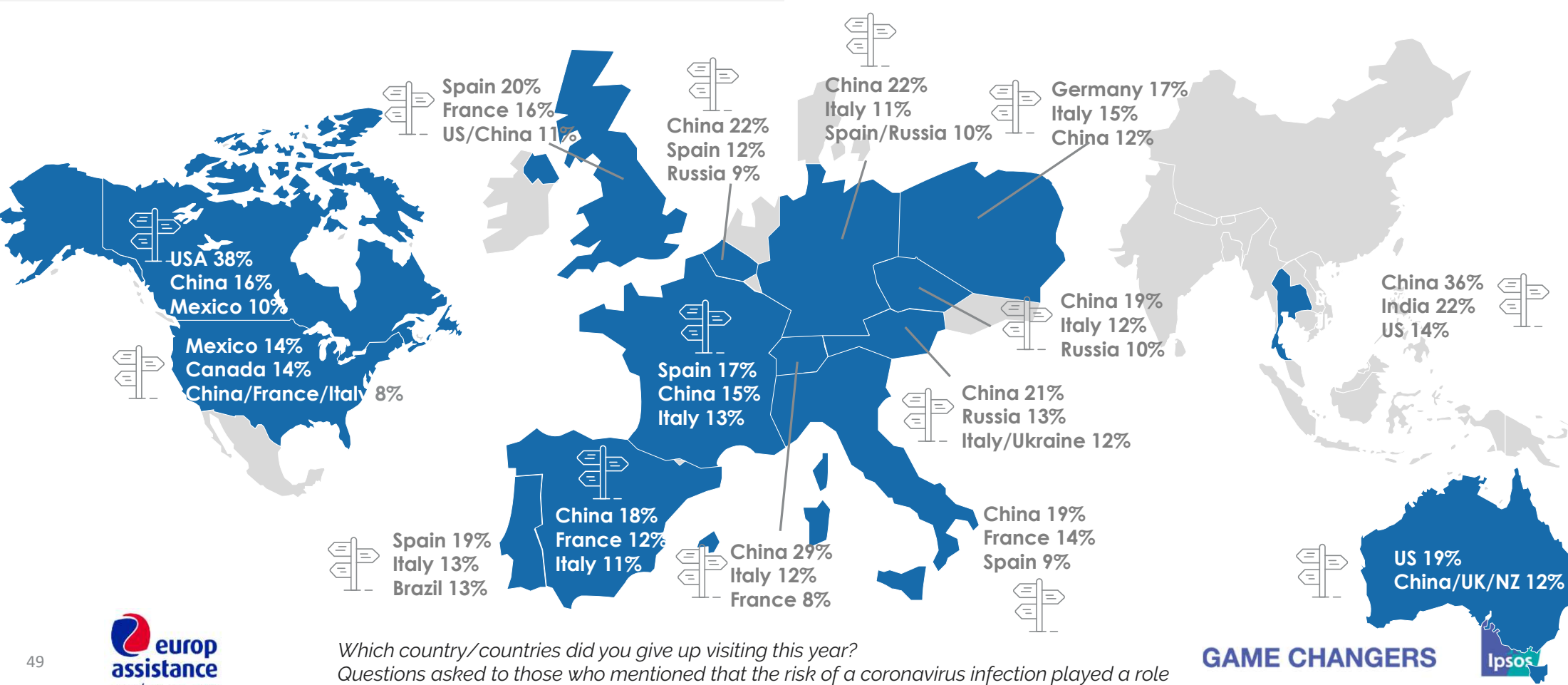
## FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION 2/2

|  |        | RANK 2022   |   |   |   |
|--|--------|---|---|---|---|
|  | EUROPE |  |  |  |  |
| The risk of a natural disaster                           | 25     | #11   | #13   | #10   | #4  |
| The risks of social unrest                               | 25     | #11   | #14   | #11   | #12   |
| Your ability to speak the destination country's language | 23     | #7  | #11   | #11   | #15   |
| The war in Ukraine                                       | 23     | #17   | #17   | #15   | #18   |
| The quality of the internet access                       | 22     | #9  | #11   | #11   | #9  |
| The economic situation in the destination country        | 20     | #15   | #16   | #16   | #17   |
| The exchange rates of the destination country's currency | 17     | #15   | #15   | #17   | #15   |
| The ecological footprint of the trip                     | 17     | #17   | #18   | #18   | #9  |



BECAUSE OF COVID-19, HOLIDAYMAKERS WILL MOSTLY AVOID TRAVELING TO CHINA THIS SUMMER

FOREIGN DESTINATIONS AVOIDED THIS SUMMER



Which country/countries did you give up visiting this year?  
Questions asked to those who mentioned that the risk of a coronavirus infection played a role in their choice of destination

GAME CHANGERS

Ipsos



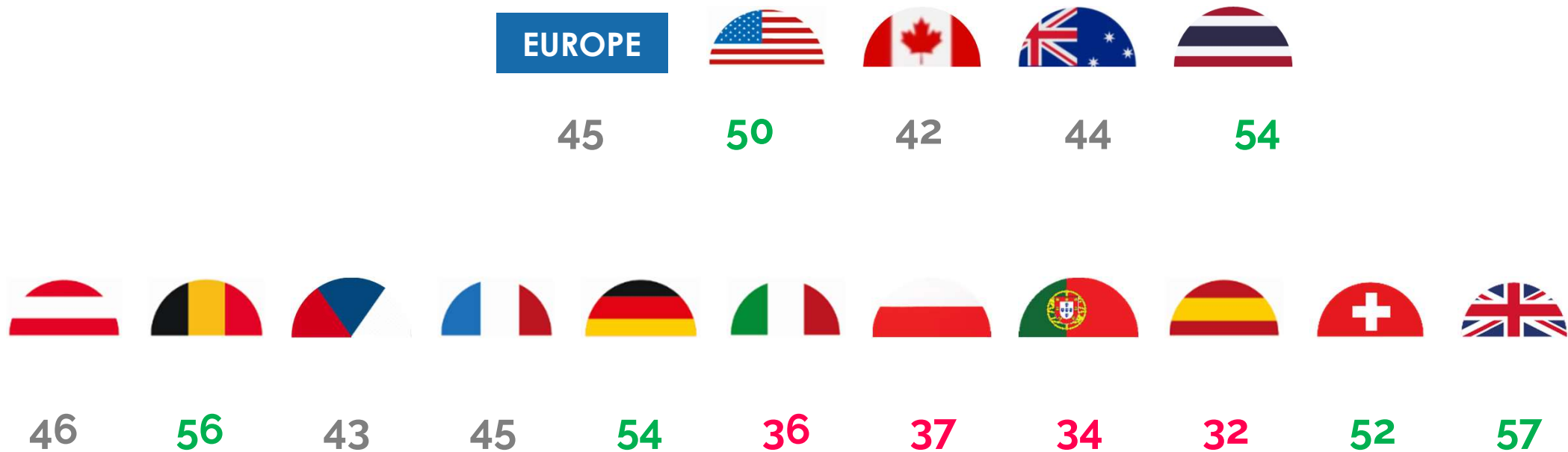
# 4.

## 2022 SUMMER HOLIDAYS ORGANIZATION

- > Holiday reservation
- > Travel partners
- > Children's holidays
- > Transportation
- > Accommodation
- > Activities

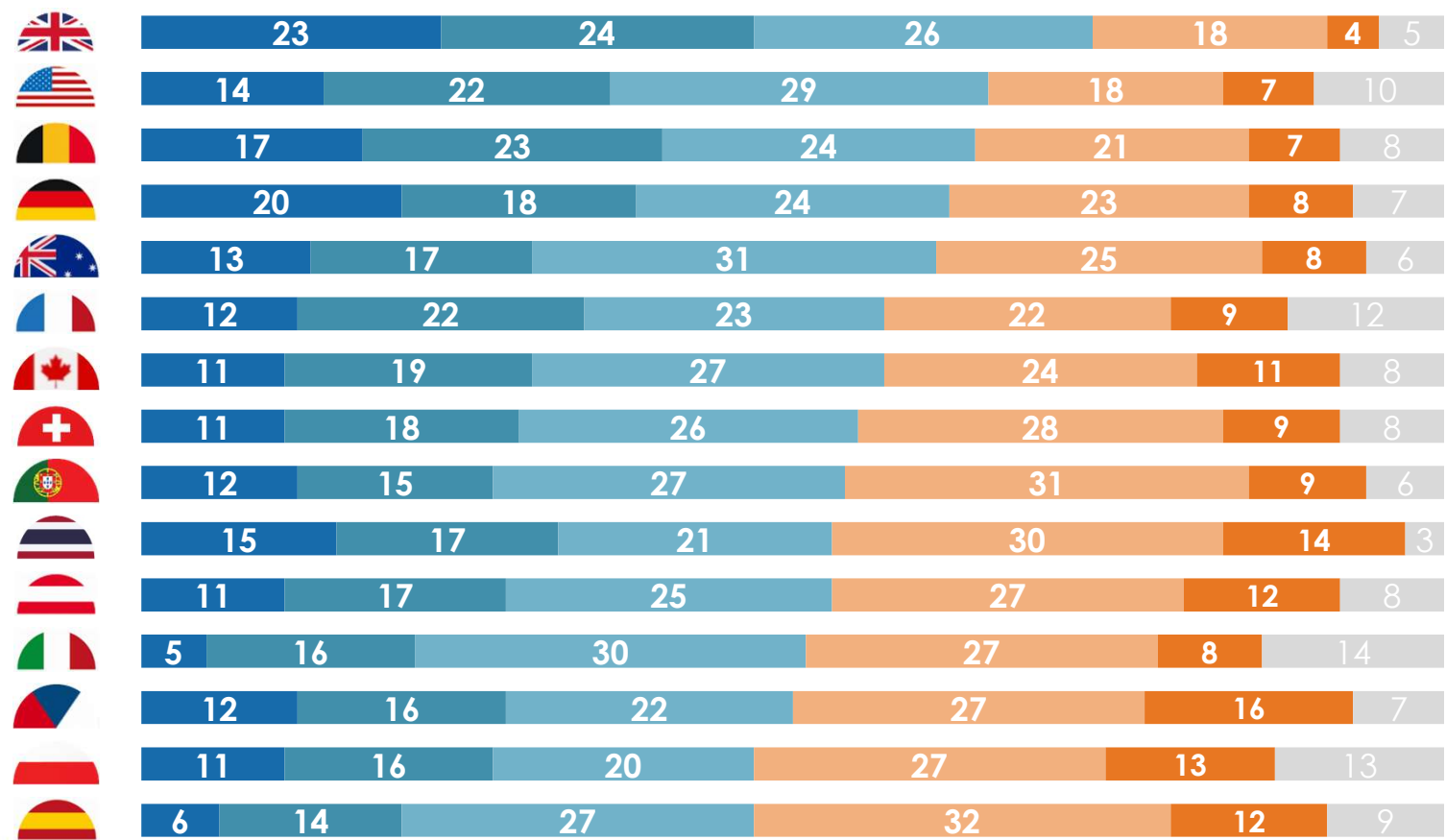
HOLIDAYMAKERS FROM THE UK, BELGIUM, THAILAND, GERMANY, SWITZERLAND AND THE US ARE THE MOST ORGANIZED, AS MORE THAN HALF OF THEM HAVE ALREADY BOOKED AT LEAST PART OF THEIR TRIP

SUMMER HOLIDAY RESERVATION (%)



# HOLIDAYMAKERS FROM THE UK, THE US, BELGIUM AND GERMANY ARE THE MOST FAR SIGHTED PLANNERS

## SUMMER HOLIDAY RESERVATION (%)



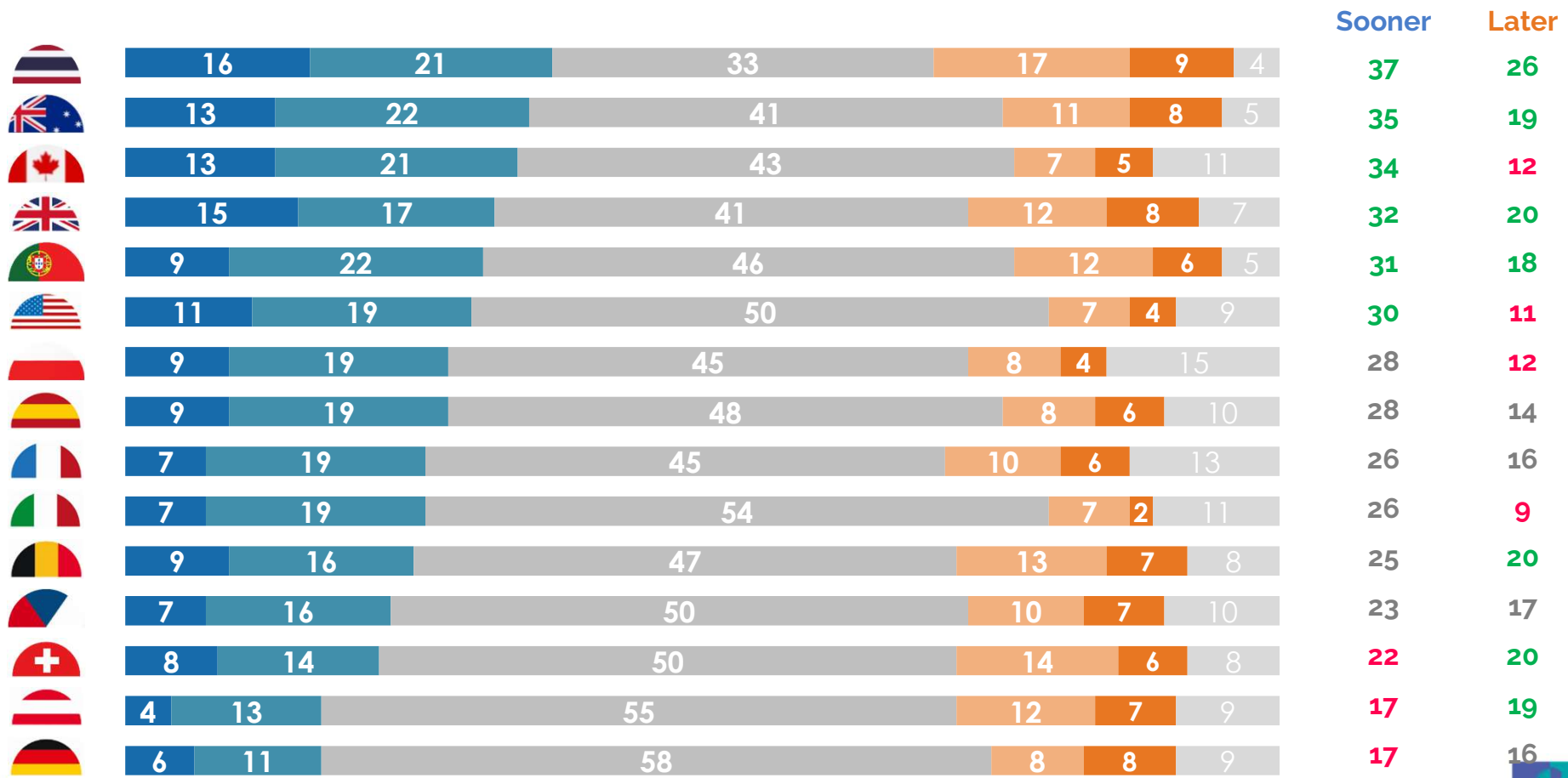
How much in advance have you planned, or do you plan to book your trip?  
> 6 months 4-6 months 2-4 months 2 months - 15 days <15 days DK

GAME CHANGERS







IN MOST COUNTRIES, HOLIDAYMAKERS WILL BOOK THEIR TRIP IN THE SAME TIMELINE AS LAST YEAR

SUMMER HOLIDAY RESERVATION (%)














# SUMMER HOLIDAYS ARE MOSTLY SHARED WITH THE CLOSEST MEMBERS OF THE FAMILY (PARTNER AND CHILDREN)

| TRAVEL PARTNERS (%) | EUROPE |  |  |  |  |
|---------------------|--------|---|---|---|---|
| Partner             | 65     | 55  | 57  | 58  | 28  |
| Children            | 33     | 34  | 26  | 26  | 52  |
| Friends             | 18     | 21  | 19  | 16  | 21  |
| Alone               | 11     | 17  | 16  | 17  | 12  |
| Parents             | 9      | 12  | 10  | 8   | 20  |
| Extended family     | 8      | 11  | 6   | 8   | 22  |
| Siblings            | 7      | 13  | 10  | 6   | 19  |





# SUMMER HOLIDAYS ARE MOSTLY SHARED WITH THE CLOSEST MEMBERS OF THE FAMILY (PARTNER AND CHILDREN)

## TRAVEL PARTNERS (%)

|                 |  |  |  |  |  |  |  |  |  |  |  |
|-----------------|---|---|---|--|---|---|---|---|---|---|---|
| Partner         | 65  | 60  | 68  | 64   | 66  | 67  | 64  | 66  | 69  | 61  | 62  |
| Children        | 29  | 31  | 41  | 37   | 25  | 33  | 38  | 37  | 34  | 31  | 33  |
| Friends         | 19  | 16  | 24  | 15   | 16  | 24  | 21  | 15  | 17  | 20  | 19  |
| Alone           | 11  | 10  | 12  | 12   | 15  | 8   | 9   | 10  | 10  | 14  | 11  |
| Parents         | 8   | 11  | 9   | 9  | 8   | 7   | 9   | 11  | 11  | 10  | 12  |
| Extended family | 6   | 10  | 5   | 9  | 6   | 5   | 9   | 8   | 7   | 6   | 10  |
| Siblings        | 5   | 8   | 7   | 7  | 7   | 6   | 8   | 7   | 7   | 7   | 8   |

# CHILDREN MOSTLY TRAVEL WITH THEIR PARENTS DURING SUMMER HOLIDAYS. STAYING AT HOME AND GOING TO SUMMER CAMP IS MORE POPULAR IN THE US AND CANADA

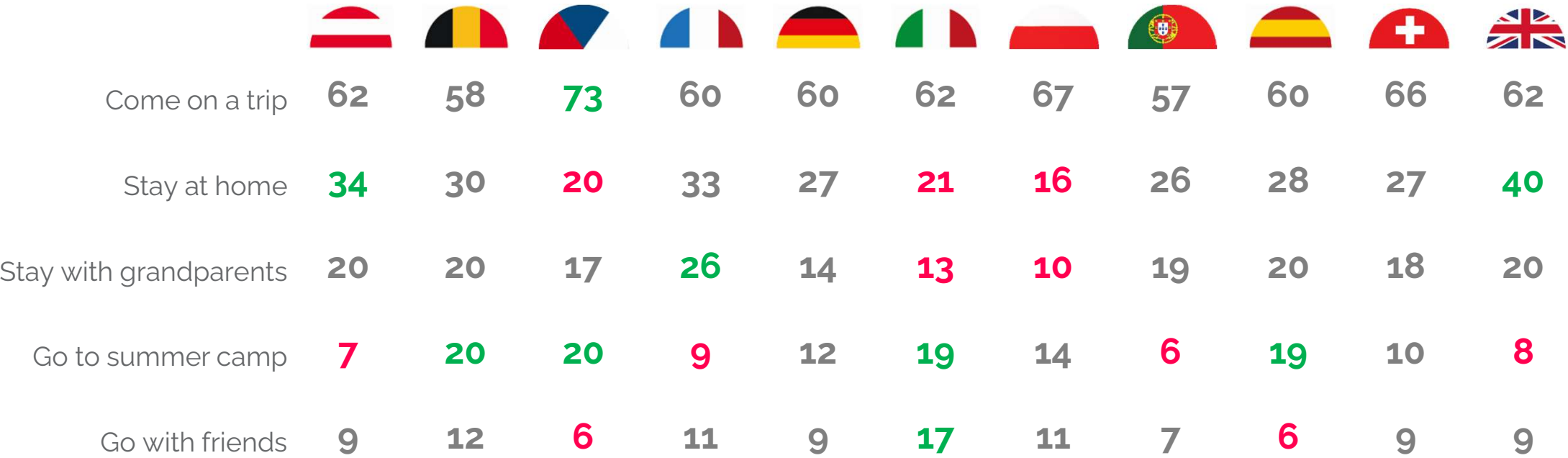
CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS (%)

|                             | EUROPE |  |  |  |  |
|-----------------------------|--------|---|---|---|---|
| Come on a trip              | 62     | 58  | 53  | 46  | 43  |
| Stay at home                | 28     | 38  | 42  | 39  | 28  |
| Stay with grandparents      | 18     | 19  | 16  | 18  | 19  |
| Go to summer camp           | 13     | 22  | 21  | 6   | 7   |
| Go on holidays with friends | 10     | 17  | 7   | 9   | 10  |







# STAYING WITH GRANDPARENTS IS PARTICULARLY COMMON IN FRANCE

CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS (%)














EUROPEANS PREFER TO USE THE CAR TO GO TO THEIR HOLIDAY DESTINATION WHILE AUSTRALIANS AND THAIS PREFER TO USE THE PLANE. PLANE WILL BE INCREASINGLY USED VS LAST YEAR IN EUROPE

| TRANSPORTATION (%)                     | EUROPE        |  |  |  |  |
|--|---------------|---|---|---|---|
| Personal car                           | 55 <b>-9</b>  | 48 <b>-7</b>  | 49  | 39  | 45 <b>-3</b>  |
| Plane                                  | 33 <b>+11</b> | 43 <b>+5</b>  | 40  | 48  | 46 <b>+4</b>  |
| Train                                  | 15            | 7   | 8   | 10  | 9 <b>+2</b>   |
| Bus                                    | 7 <b>+2</b>   | 6   | 4   | 8   | 8   |
| Rental car through an agency           | 4             | 11  | 12  | 12  | 7   |
| Boat                                   | 4             | 5   | 3   | 4   | 5   |
| Rental car between private individuals | 3             | 7   | 4   | 6   | 6   |
| Carpooling                             | 3             | 8   | 4   | 3   | 7   |
| Bike                                   | 3             | 4   | 3   | 4   | 4   |
| Camper van                             | 3             | 5   | 5   | 5   | 6   |
| Motorbike                              | 2             | 4   | 2   | 3   | 7   |





# PERSONAL CAR IS THE PREFERRED TRANSPORTATION MODE ACROSS EUROPE. PLANE IS INCREASINGLY APPRECIATED THIS YEAR ACROSS EUROPEAN COUNTRIES

## TRANSPORTATION (%)

|                                  |  |  |  |  |  |  |  |  |  |  |  |
|----------------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Personal car                     | 60  | 48 -14  | 60  | 68   | 54  | 58 -12  | 57 -8   | 51 -7   | 59 -11  | 43 -8   | 38 -19  |
| Plane                            | 32 +7   | 37 +7   | 27 +6   | 22 +6  | 33 +7   | 30 +12  | 27 +8   | 41 +7   | 34 +14  | 43 +9   | 51 +23  |
| Train                            | 16  | 11  | 17  | 15   | 14  | 16  | 18  | 8   | 15  | 17  | 14  |
| Bus                              | 5   | 5   | 17  | 4 +2   | 5 +3  | 5   | 11  | 6   | 9   | 7   | 7   |
| Rental car - agency              | 1   | 3   | 1   | 3  | 2   | 4   | 2   | 5   | 5   | 5 +3  | 6   |
| Boat                             | 2   | 4   | 2   | 3  | 5   | 6   | 1   | 3   | 3   | 5   | 6   |
| Rental car - private individuals | 2   | 3   | 2   | 3 +2   | 3   | 2   | 1   | 3   | 2   | 4   | 3   |
| Carpooling                       | 2   | 3   | 3   | 3  | 3   | 2   | 1   | 3   | 4   | 2   | 2   |
| Bike                             | 2   | 3   | 4 -3  | 2  | 4   | 3   | 2   | 1   | 2   | 3   | 3   |
| Camper van                       | 4   | 2   | 1 -3  | 2  | 5   | 3   | 3   | 3   | 1   | 3   | 4   |
| Motorbike                        | 2   | 1   | 2   | 1  | 2   | 4   | 2   | 1   | 1   | 2   | 2   |





# HOLIDAYMAKERS ARE MAINLY CHOOSING THEIR MODE OF TRANSPORTATION BY CONVENIENCE OR HABIT

## CRITERIA OF CHOICE OF TRANSPORTATION MODE (%)

|  | EUROPE              |  |  |  |  |
|--|---------------------|---|---|---|---|
| Most convenient way to reach destination   | 62 <span>+5</span>  | 57 <span>-6</span>  | 64  | 68  | 66 <span>+15</span>   |
| Used to taking this mode of transportation | 38 <span>-5</span>  | 40  | 37  | 31  | 40  |
| More affordable                            | 25                  | 39  | 35  | 26  | 35  |
| Less risk for infection                    | 11 <span>-11</span> | 12 <span>-11</span>   | 16  | 15  | 31 <span>-5</span>  |
| Less risk to infect others                 | 7 <span>-6</span>   | 10 <span>-7</span>  | 9   | 12  | 22 <span>-6</span>  |

## HOTEL REMAINS THE MOST POPULAR ACCOMMODATION AMONG HOLIDAYMAKERS. ITS APPEAL IS INCREASING IN EUROPE VS LAST YEAR

### PREFERRED TYPE OF ACCOMMODATION (%)

|  | EUROPE       |  |  |  |  |
|--|--------------|---|---|---|---|
| Hotel  | 46 <b>+9</b> | 52  | 46  | 51  | 48 <b>+8</b>  |
| Rental of a house or apartment                   | 30 <b>-2</b> | 20  | 16  | 22  | 16  |
| Friends'/family's houses or in your holiday home | 21 <b>-6</b> | 27 <b>-6</b>  | 29  | 25  | 27  |
| A bed & breakfast                                | 14 <b>+2</b> | 12  | 14  | 17  | 45  |
| Camping  | 10 <b>-2</b> | 14  | 20  | 10  | 15  |
| Boat (e.g. cruise)                               | 5 <b>+2</b>  | 10  | 5   | 8   | 9   |
| A motor home, camping trailer or mobile home     | 4            | 10  | 8   | 9   | 10  |












Regarding your accommodations during your summer trip in 2022, do you mostly intend to:

GAME CHANGERS







## AMONG EUROPEANS, HOTEL IS INCREASINGLY APPRECIATED, WHILE FAMILY'S & FRIENDS' HOUSES ARE LESS POPULAR

### PREFERRED TYPE OF ACCOMMODATION (%)





|                          |  |  |  |  |  |  |  |  |  |  |  |
|--------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Hotel                    | 57  | 47 +12  | 48 +9   | 29   | 50 +9   | 44 +6   | 50 +7   | 41 +6   | 55 +10  | 46  | 48 +17  |
| Rental                   | 23  | 29 -10  | 15  | 39   | 33  | 29  | 23  | 30  | 30  | 26  | 28  |
| Friends'/family's houses | 17  | 18 -7   | 21 -8   | 29 -8  | 14 -7   | 21 -5   | 22  | 25  | 24 -5   | 28  | 17 -6   |
| A bed & breakfast        | 12  | 9   | 33  | 5  | 12  | 23  | 17 +6   | 21  | 12  | 11  | 14  |
| Camping                  | 8   | 7   | 15  | 19   | 8 -5  | 6   | 6 -3  | 7   | 6   | 10  | 10  |
| Boat (e.g. cruise)       | 4   | 4 +3  | 3   | 3  | 6   | 5   | 3   | 2 -2  | 4   | 5   | 7   |
| A motor home             | 3   | 5   | 3   | 5  | 5   | 3   | 3   | 3   | 4   | 4   | 5   |

# HOLIDAYMAKERS ARE MAINLY CHOOSING THEIR MODE OF ACCOMMODATION BY HABIT OR FOR FINANCIAL REASONS

## CRITERIA OF CHOICE OF ACCOMODATION (%)

|   | EUROPE |  |  |  |  |
|---|--------|---|---|---|---|
| Used to taking this mode of accommodation | 47     | 44  | 42  | 45  | 34  |
| More affordable                           | 38     | 40  | 46  | 40  | 47  |
| Proposed services & activities            | 25     | 28  | 24  | 26  | 30  |
| Safe / well protected                     | 23     | 30  | 31  | 30  | 51  |
| Less risk for infection                   | 11     | 13  | 16  | 15  | 30  |
| Less risk to infect others                | 8      | 11  | 11  | 11  | 25  |


## HOLIDAYMAKERS STILL DREAM OF ENJOYING A RELAXING SUMMER VACATION SURROUNDED BY THEIR FAMILY MEMBERS

| IDEAL ACTIVITIES DURING SUMMER HOLIDAYS (%)            | EUROPE |  |  |  |  |
|--|--------|---|---|---|---|
| Relax, have peace of mind                              | 56     | 45  | 47  | 46  | 40  |
| Come together as a family or with friends              | 45     | 44  | 47  | 43  | 49  |
| Discover new cultures, enjoy a total change of scenery | 41     | 37  | 36  | 41  | 44  |
| Enjoy your home  | 12     | 15  | 16  | 14  | 37  |
| Take time to read, learn new things                    | 11     | 17  | 12  | 12  | 8   |
| Make new friendly or romantic acquaintances            | 11     | 11  | 12  | 13  | 7   |
| Play sports (rambling, mountain climbing, etc.)        | 10     | 11  | 11  | 8   | 7   |







## MOST EUROPEAN HOLIDAYMAKERS DREAM OF SPENDING TIME WITH THEIR FAMILY. SPANISH, PORTUGUESE AND BRITISH HOLIDAYMAKERS ENJOY MORE THAN OTHERS DISCOVERING NEW CULTURES

### IDEAL ACTIVITIES DURING SUMMER HOLIDAYS (%)












|                        |  |  |  |  |  |  |  |  |  |  |  |
|------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Relax                  | 52  | 55  | 60  | 56   | 56  | 58  | 55  | 65  | 63  | 56  | 50  |
| Family time            | 51  | 48  | 54  | 45   | 46  | 49  | 52  | 37  | 33  | 48  | 44  |
| Discover cultures      | 34  | 34  | 33  | 42   | 31  | 40  | 38  | 59  | 50  | 36  | 53  |
| Enjoy home             | 19  | 15  | 10  | 13   | 17  | 11  | 11  | 6   | 9   | 14  | 11  |
| Read, learn            | 8   | 14  | 7   | 13   | 10  | 8   | 11  | 10  | 12  | 11  | 12  |
| Make new acquaintances | 12  | 10  | 8   | 10   | 11  | 17  | 14  | 6   | 10  | 10  | 9   |
| Do sports              | 13  | 9   | 17  | 12   | 10  | 7   | 13  | 11  | 10  | 11  | 7   |

# HOLIDAYMAKERS WILL ACTUALLY TAKE TIME TO RELAX AND SPEND TIME WITH THEIR FAMILY MEMBERS. THEY ARE INCREASINGLY WILLING TO DISCOVER NEW CULTURES, AFTER 2 YEARS OF SUCCESSIVE LOCKDOWNS

| ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS (%)           | EUROPE              |  |  |  |  |
|--|---------------------|---|---|---|---|
| Relax, have peace of mind                              | 38 <span>+4</span>  | 32  | 33  | 30  | 28  |
| Come together as a family or with friends              | 35 <span>-5</span>  | 34  | 40  | 29  | 36  |
| Discover new cultures, enjoy a total change of scenery | 21 <span>+10</span> | 20  | 16  | 21  | 33  |
| Enjoy your home  | 16 <span>-8</span>  | 20  | 24  | 20  | 33  |
| Take time to read, learn new things                    | 9                   | 13  | 10  | 10  | 11  |
| Play sports (rambling, mountain climbing, etc.)        | 8                   | 9   | 9   | 7   | 7   |
| Make new friendly or romantic acquaintances            | 6                   | 7   | 6   | 8   | 4   |

PORTUGUESE, SPANISH, ITALIAN AND CZECH HOLIDAYMAKERS WILL MOSTLY SPEND TIME RELAXING WHILE THE AUSTRIANS AND THE BRITISH WILL PRIORITIZE ON SPENDING TIME WITH THEIR FAMILY

ACTUAL ACTIVITIES DURING SUMMER HOLIDAYS (%)

|                        |  |  |  |  |  |  |  |  |  |  |  |
|------------------------|---|---|---|--|---|---|---|---|---|---|---|
| Relax                  | 37+13   | 37+7  | 42  | 37+9   | 37+7  | 42  | 37  | 46  | 48  | 40+10   | 31  |
| Family time            | 39  | 36-8  | 43  | 33-13  | 38  | 37-6  | 34  | 33  | 30-11   | 39  | 36  |
| Discover cultures      | 19+7  | 19+6  | 20+12   | 22+8   | 16+8  | 24+11   | 16+6  | 30+16   | 24+12   | 21+10   | 27+16   |
| Enjoy home             | 22-8  | 22-9  | 16-8  | 13   | 21-13   | 10-4  | 15-4  | 12-10   | 13-4  | 14-14   | 19-13   |
| Read, learn            | 9   | 12  | 6   | 10   | 9   | 7   | 9   | 8   | 11  | 9   | 10  |
| Do sports              | 11  | 8   | 15  | 11   | 9   | 7   | 10  | 8   | 8   | 9   | 5   |
| Make new acquaintances | 6   | 9   | 4   | 6  | 6   | 9   | 7   | 4   | 6   | 6   | 6   |

# 5.

## BACK TO 2021 SUMMER HOLIDAYS

> Summer travels

> Destinations



LAST SUMMER, 3 EUROPEANS OUT OF 5 TOOK A TRIP DURING THE SUMMER. IT WAS THE CASE FOR AROUND HALF OF THE AMERICANS AND THE THAIS BUT ONLY OF 3 AUSTRALIANS OUT OF 10

SUMMER HOLIDAY TRIPS IN 2021

EUROPE

61%

USA

54%

CANADA

47%

THAILAND

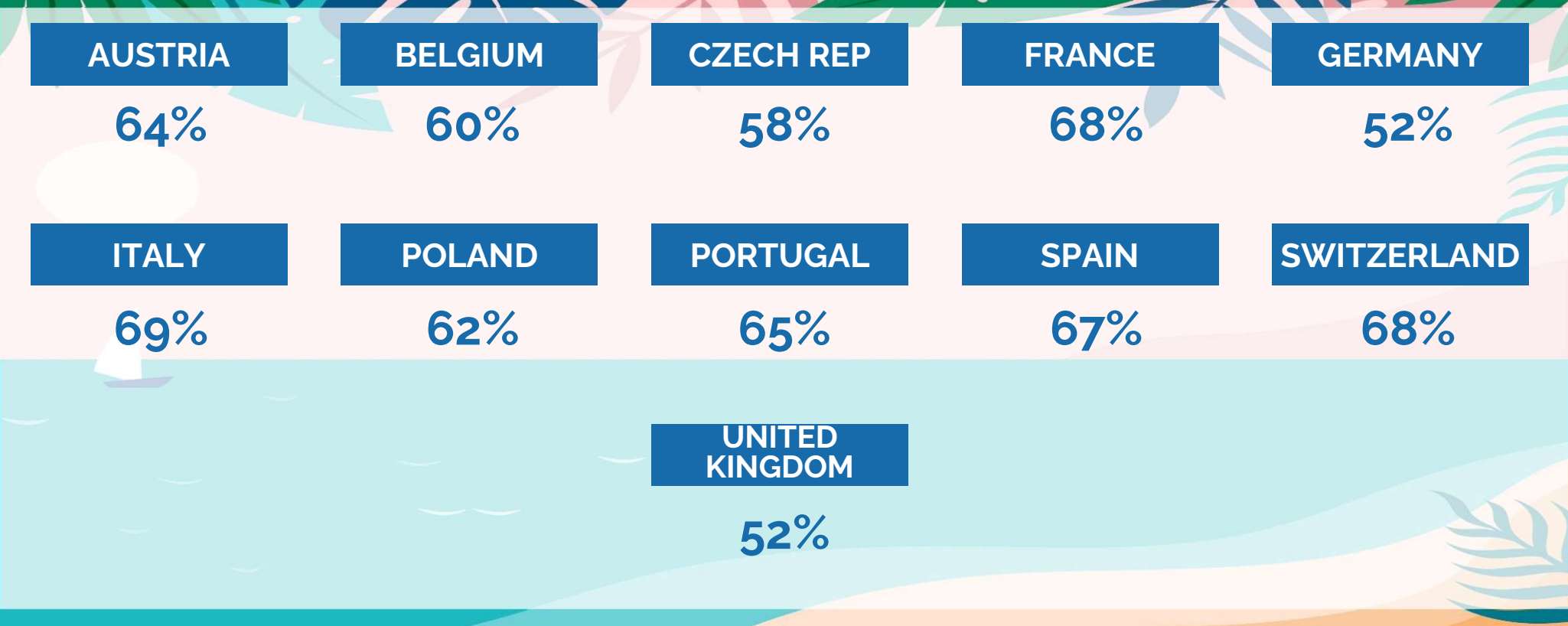
58%

AUSTRALIA

36%





AMONG THE EUROPEANS, SITUATIONS ARE QUITE DIVERSE: THE GERMANS, THE BRITISH AND THE CZECHS ARE THE ONES WHO WENT THE LEAST ON HOLIDAYS

SUMMER HOLIDAY TRIPS IN 2021



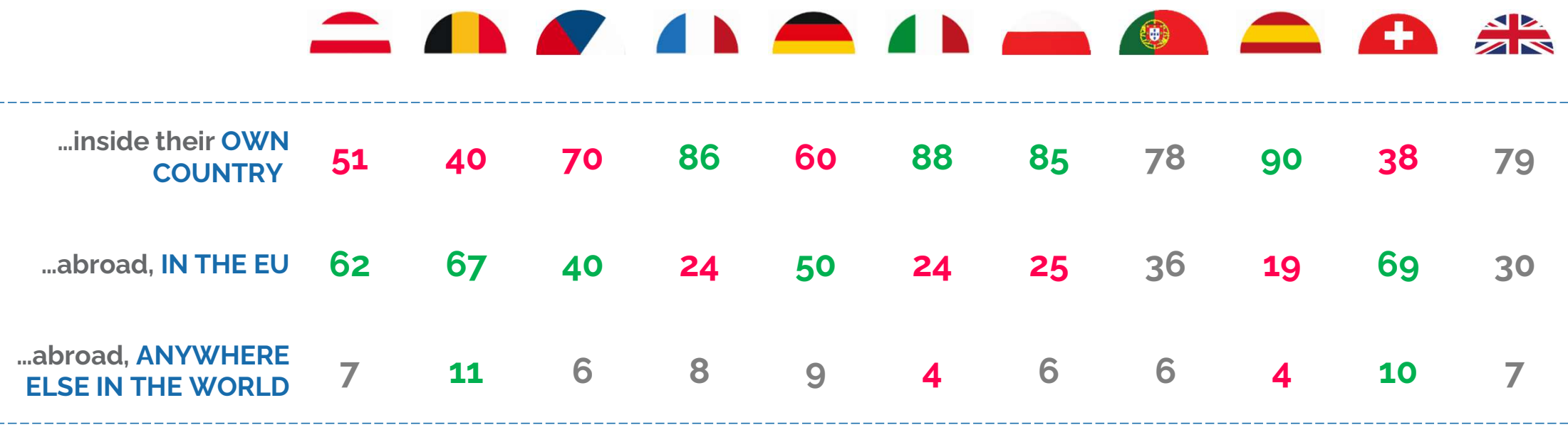
LAST SUMMER, HOLIDAYMAKERS MOSTLY TRAVELED INSIDE THEIR OWN COUNTRY

2021 SUMMER DESTINATION (%)

|  | EUROPE |  |  |  |  |
|--|--------|---|---|---|---|
| ...inside their <b>OWN COUNTRY / STATE</b>     | 77%    | 56%   | 84%   | 90%   | 95%   |
| ...abroad, <b>IN BORDER COUNTRIES / STATES</b> | 33%    | 55%   | 18%   | 14%   | 23%   |
| ...abroad, <b>ANYWHERE ELSE IN THE WORLD</b>   | 7%     | 11%   | 10%   | 6%  | 7%  |

SAME GOES FOR THE EUROPEANS HOLIDAYMAKERS, EXCEPT FOR THE BELGIANS, THE AUSTRIANS AND THE SWISS, WHO MAINLY TRAVELED WITHIN THE EU

2021 SUMMER DESTINATION (%)





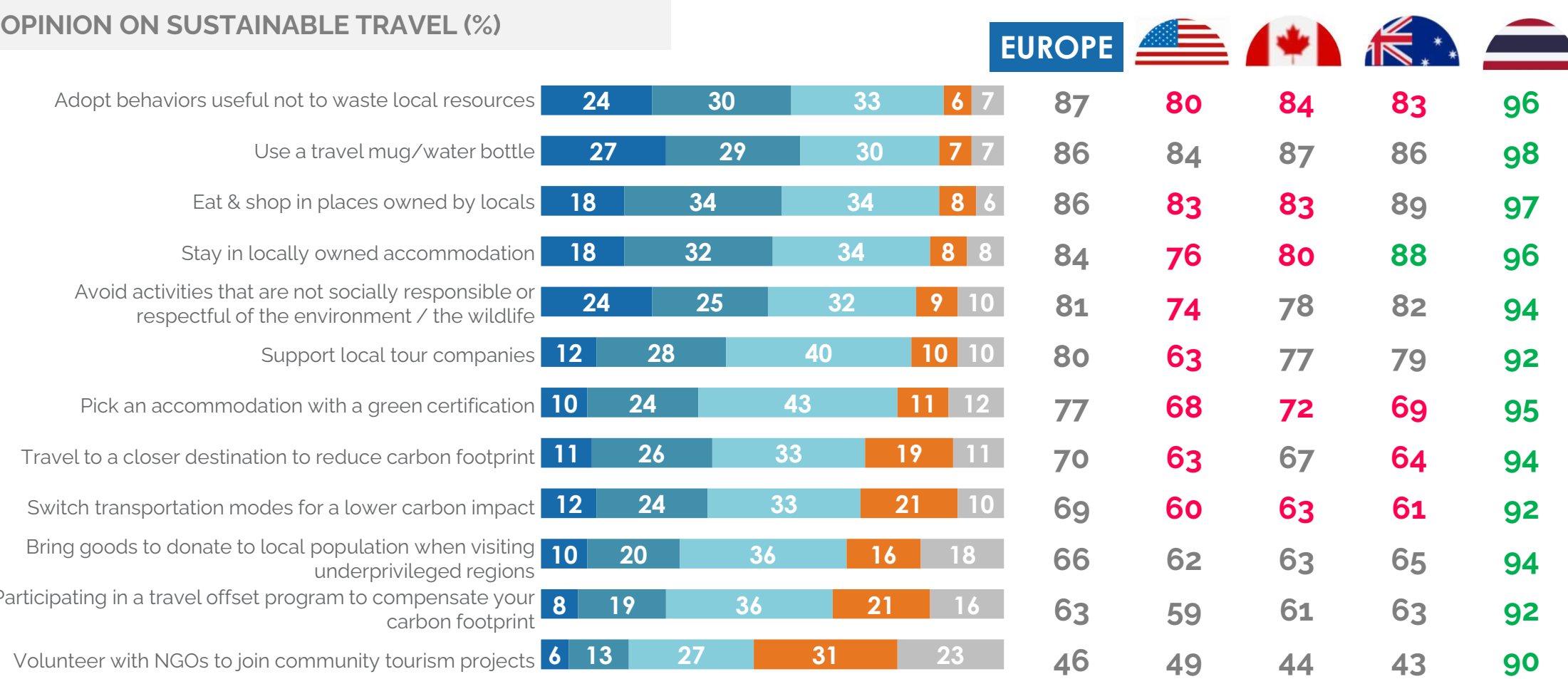
# 6.

## NEW TRAVEL PRACTICES

- > Sustainable travel
- > Workation
- > Optimism regarding the return to normal



# SOME ACTIONS ARE ALREADY WELL ROOTED IN THE TRAVELERS' HABITS SUCH AS AVOIDING EXTRA USE OF PLASTIC, AVOIDING ACTIVITIES NOT RESPECTFUL OF THE ENVIRONMENT AND THE WILDLIFE OR NOT WASTING LOCAL RESOURCES












Yes, and I am already doing it every time    Yes, and I am doing it when I can  
Yes, I would be ready to do it    No, I would not want to do it    Not concerned

Sustainable travel is defined as trying to make a positive impact on the environment, society, and economy when going on a trip. Here are some initiatives for a more sustainable way of travelling. Would you be ready to adopt them?

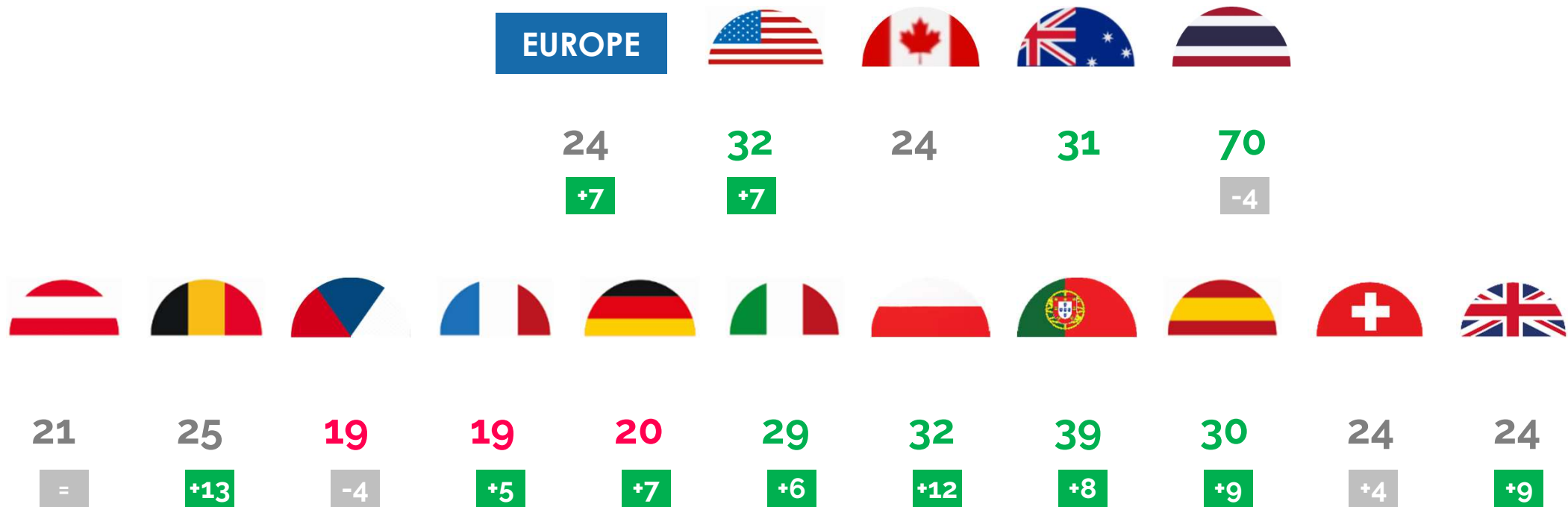
ITALIANS, SPANIARDS AND PORTUGUESE ARE THE MOST WILLING TO ORGANIZE THEIR TRAVEL MORE SUSTAINABLY AND MORE RESPECTFULLY

OPINION ON SUSTAINABLE TRAVEL (%)

|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|---|---|--|---|---|---|---|---|---|---|
| Adopt behaviors useful not to waste local resources  | 84  | 81  | 62  | 90   | 84  | 93  | 87  | 96  | 92  | 84  | 82  |
| Use a travel mug/water bottle  | 84  | 78  | 79  | 86   | 83  | 89  | 89  | 94  | 89  | 83  | 84  |
| Eat & shop in places owned by locals   | 90  | 83  | 87  | 80   | 84  | 91  | 85  | 90  | 89  | 86  | 87  |
| Stay in locally owned accommodation  | 87  | 74  | 81  | 75   | 85  | 88  | 88  | 89  | 90  | 80  | 82  |
| Avoid activities that are not socially responsible or respectful of the environment / the wildlife | 78  | 76  | 64  | 79   | 76  | 89  | 78  | 91  | 88  | 79  | 79  |
| Support local tour companies   | 79  | 67  | 57  | 83   | 78  | 82  | 80  | 89  | 90  | 78  | 73  |
| Pick an accommodation with a green certification   | 70  | 69  | 63  | 75   | 70  | 86  | 78  | 90  | 87  | 70  | 71  |
| Travel to a closer destination to reduce carbon footprint  | 59  | 64  | 56  | 69   | 63  | 81  | 71  | 83  | 78  | 62  | 65  |
| Switch transportation modes for a lower carbon impact  | 60  | 61  | 57  | 64   | 61  | 80  | 68  | 78  | 80  | 60  | 67  |
| Bring goods to donate to local population when visiting underprivileged regions                    | 56  | 60  | 56  | 67   | 54  | 76  | 69  | 81  | 75  | 62  | 60  |
| Participating in a travel offset program to compensate your carbon footprint                       | 49  | 49  | 41  | 55   | 51  | 76  | 72  | 79  | 74  | 54  | 61  |
| Volunteer with NGOs to join community tourism projects   | 40  | 40  | 34  | 38   | 41  | 57  | 56  | 63  | 53  | 40  | 39  |





WORKATION INTENTION IS PARTICULARLY HIGH AMONG THAIS, AMERICANS AND PORTUGUESE

WORKATION INTENTION AMONG THE ACTIVES (%)














# FOR WORKATION, RESPONDENTS PREFER TO BOOK A HOTEL, EXCEPT FOR THE THAIS WHO WOULD RATHER STAY AT A FRIEND'S PLACE

PREFERRED ACCOMMODATION FOR WORKATION (%)

|   | EUROPE |  |  |  |  |
|---|--------|---|---|---|---|
| Book a hotel  | 27     | 37  | 34  | 35  | 18  |
| Rent an apartment/a house                                       | 26     | 20  | 21  | 17  | 8   |
| Stay at a friend's place, at my family's or at my vacation home | 26     | 23  | 24  | 28  | 36  |
| Stay at a bed and breakfast                                     | 18     | 18  | 15  | 17  | 36  |
| Other   | 3      | 2   | 6   | 3   | 2   |

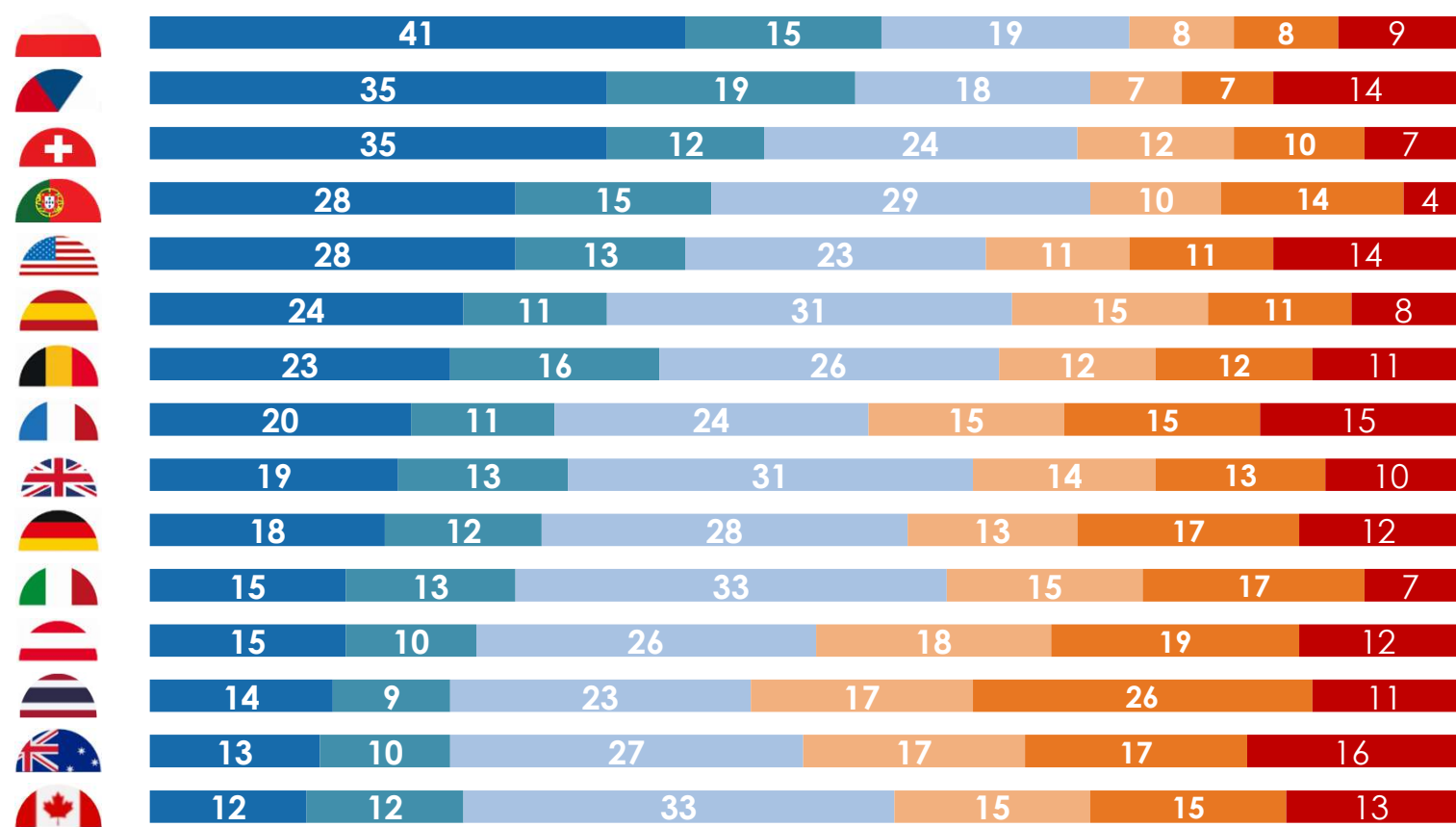
## HABITS FOR WORKATION ARE RATHER HOMOGENEOUS AMONG EUROPEANS

### PREFERRED ACCOMMODATION FOR WORKATION (%)

|   |  |  |  |  |  |  |  |  |  |  |  |
|---|---|---|---|--|---|---|---|---|---|---|---|
| Book a hotel  | 33  | 30  | 21  | 24   | 23  | 28  | 24  | 24  | 34  | 31  | 28  |
| Rent an apartment/a house                                       | 28  | 29  | 17  | 33   | 29  | 28  | 15  | 32  | 24  | 27  | 23  |
| Stay at a friend's place, at my family's or at my vacation home | 19  | 27  | 35  | 24   | 26  | 18  | 37  | 27  | 26  | 27  | 27  |
| Stay at a bed and breakfast                                     | 16  | 14  | 17  | 15   | 19  | 25  | 19  | 14  | 14  | 14  | 20  |
| Other   | 4   | 0   | 10  | 4  | 3   | 1   | 5   | 3   | 2   | 1   | 2   |

THE POLES, CZECH, SWISS, PORTUGUESE AND AMERICANS ARE THE MOST OPTIMISTIC REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL. THE AUSTRALIANS & FRENCH ARE THE MOST WHO THINK THAT WE CAN NEVER GO BACK TO THE WAY WE WERE BEFORE THE PANDEMIC

OPTIMISM REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL (%)



When do you think that we will be able to travel under "normal conditions" again, and without necessity of masks or tests?

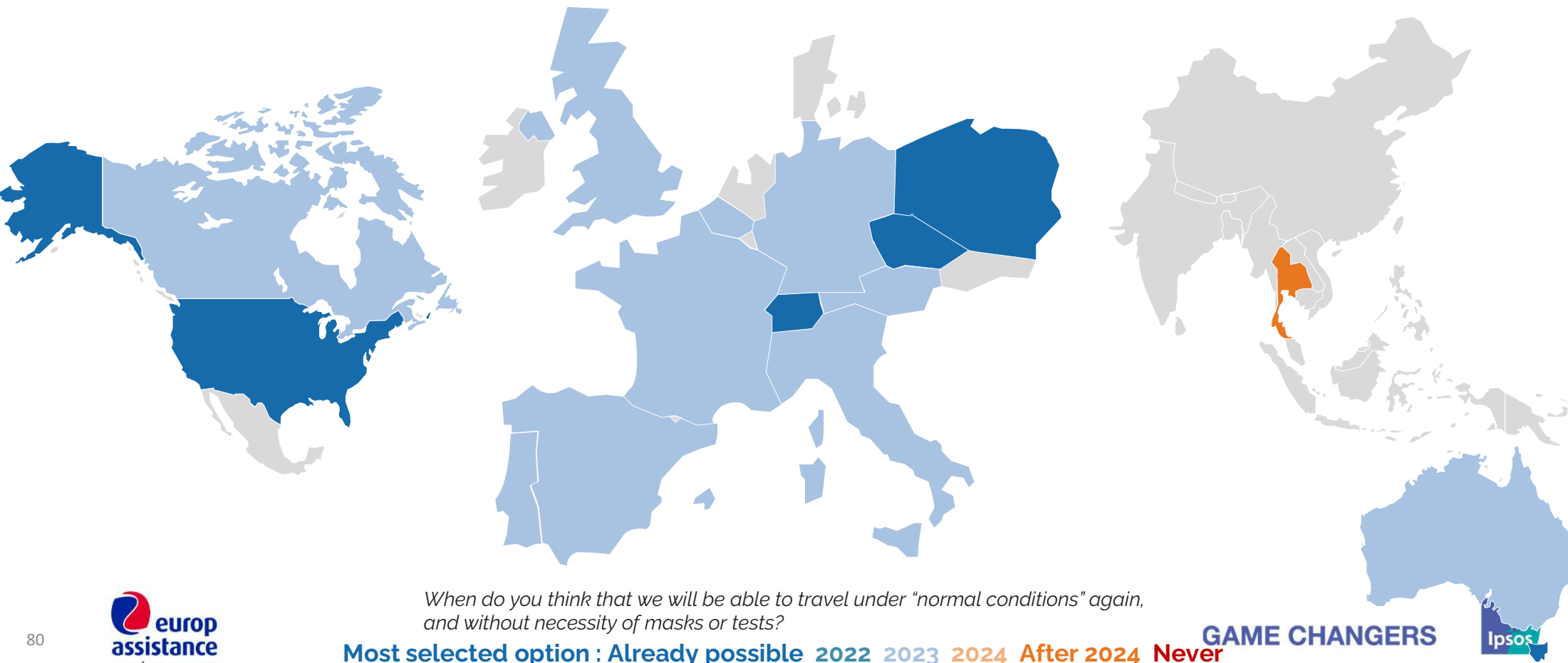
It is already possible 2022 2023 2024 After 2024 Never

GAME CHANGERS



THE POLES, CZECH, SWISS AND AMERICANS ARE THE MOST OPTIMISTIC REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL.

OPTIMISM REGARDING THE RETURN TO NORMAL CONDITIONS OF TRAVEL (%)







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