

HOLIDAY

BAROMETER 2026

AMONG EUROPEANS, AMERICANS, ASIANS & OCEANIANS



Summary



Key takeaways

P3

Methodology

P5

00 **Introductory data**

P9

01 **An enthusiasm for travel that remains undiminished: the record levels reached last year are confirmed, and the desire to travel is intact...**

P26

02 **...even as travel now unfolds against a challenging security backdrop.**

P59

03 **The rise of AI in leisure travel : a clear divide in global adoption**

P89

04 **Budgets, accommodation choices, transport options, preferred settings... everything you need to know about travelers' intentions across our 26 countries**

P138

Key takeaways

- This year's study took place against a backdrop of war.
 - In every region, **wars and armed conflict are more likely to be factors impacting people's enthusiasm to travel this year** compared to 2025
 - **Safety continues to grow in importance** in people's holiday plans. More people in Europe (30%, up from 28% in 2025) and North Asia (37%, up from 34% in 2025) mention safety as a reason for choosing a holiday destination. Safety is the top criterion for destination choice in North Asia, India (37%) and North America (32%).
 - Although financial reasons continue to be the main reason for not traveling this summer, **more people in Europe, North America, the Middle East and Oceania cite concerns about safety and security as a reason not to travel**
- Despite these concerns, **intentions to travel remain high and enthusiasm to travel is as strong as ever**: in some regions, we even see an increase in how many people plan to take at least one leisure trip this year: North Asia, India, Middle East
- However there have been some changes to where travelers will visit this year. More people who have planned a trip will be vacationing in their own country rather than abroad this summer. Nevertheless, **travelling abroad is the more popular choice for the *ideal* destination for summer vacations** in 2026.
- **Geopolitical uncertainty may also be a factor in cutting down planning times** for travel.
- As well as impacting on travel planning, **the uncertain geopolitical climate may also be influencing what people want to get out of their vacations. Relaxation and escapism** are already the aspects of travelling that people are most likely to enjoy the most and this has become more important to travelers in Europe and North America in 2026
- **Travelers are more likely to expect to increase rather than decrease their travel budgets** this year

Key takeaways

AI is growing in importance in leisure travel. In every region and country in the study, **more people have used AI tools to plan or book their holidays** compared to 2025.

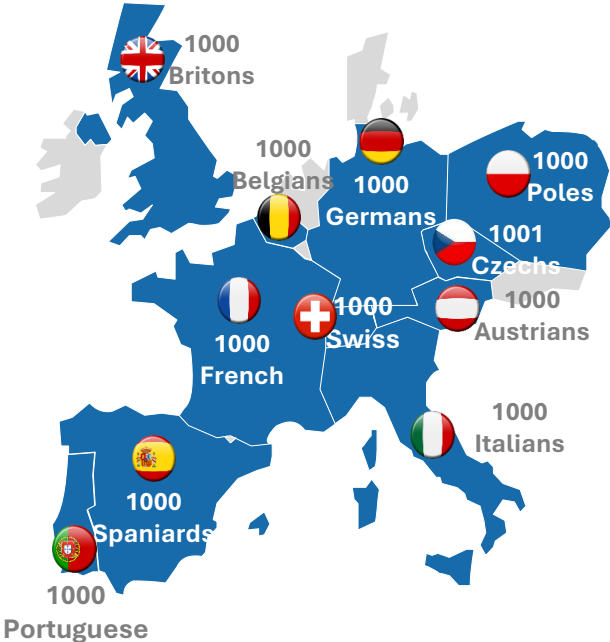
- **Adoption of AI has been greater in some parts of the world compared to others.** In some countries, a majority have used AI for travel planning or booking: India (69%, up from 51%), UAE (60% up from 46%), Malaysia (54%, up from 37%), and Saudi Arabia (54% up from 40%). France, the UK and Canada (all 19%) score the lowest.
- The **main barrier to using AI search tools** for holiday planning is a preference for human interaction, although in some regions (Oceania, North America) and countries (UK, Poland, Japan, New Zealand, USA) a lack of trust in the accuracy and reliability of information is also a prominent issue.
- The use of AI in travel planning is likely to continue to increase and **some travelers may decide to only use AI tools.** There is a strong appetite to rely exclusively on AI tools to plan leisure trips in India (79% would consider this) and the Middle East (70%). In other parts of the world, people are less keen. Interest is lowest in Eastern Europe (25%), Western Europe (26%) and Oceania (27%).
- There is also enthusiasm for **delegating booking trips** to AI, although people are reluctant to give up all oversight. Only in India (29%) and the Middle East (25%) would a significant proportion be comfortable to *totally* rely on AI to book trips. People are much more reluctant in Europe (6%), North America (6%) and Oceania (4%). Many people would be happy to consider relying exclusively on AI if they could review and approve options before purchase. India (80%) and the Middle East (74%) again lead the way, with enthusiasm lowest in Western Europe (31%), and Oceania (30%).

Methodology (1/4)

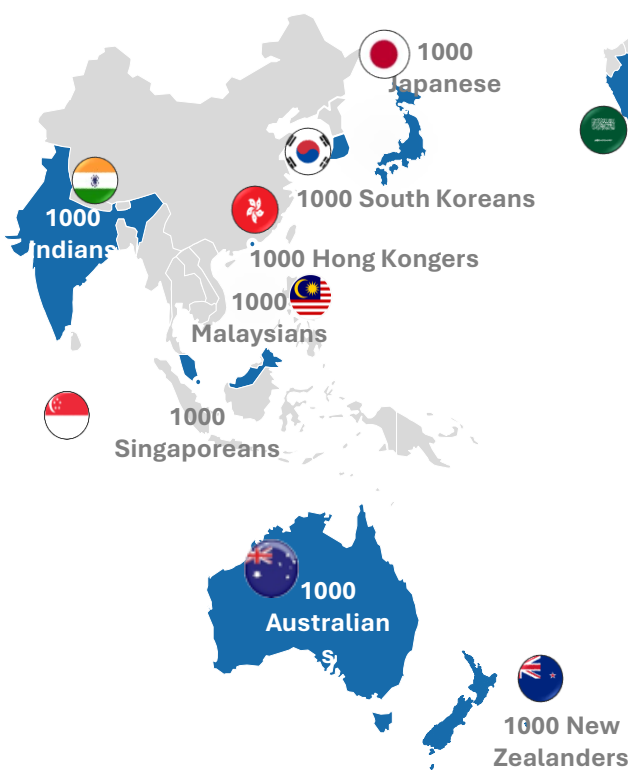
American scope



European scope



Asian/Oceanian scope



MENA scope



Scope of the survey

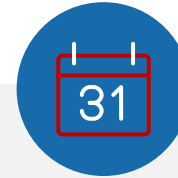


Methodology (2/4)



Samples

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



Timeline

The field studies were carried out between February 27th and April 7th



Method of data collection

Online survey in the 26 countries

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

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

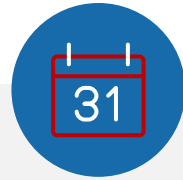
XX Significantly lower result in the country compared to EUROPE

Evolutions between 2026 and 2025 results

XX Significantly better result in 2026 compared to 2025

XX Significantly lower result in 2026 compared to 2025

Methodology (3/4)



Note on the timeline


Important note regarding the survey field dates: the start of the survey coincided with the beginning of the war in Iran. Due to its media coverage, our respondents' perceptions were inevitably impacted. The consequences on global tourism are still incalculable: Countries closing to tourists for security reasons, closure of some Gulf airports - hubs for Africa and Asia, rising fuel prices...

Samples & data
collection



Methodology (4/4)

Where do you intend to spend your workation?

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2025

Absolute scores and significance

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

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

Evolutions and significance

In South Europe, the proportion of respondents intend to work remotely from both their own countries and from abroad is decreasing by 6 point. This decrease is statistically significant compared to the score of 2025.

In Eastern Europe, the proportion of people who do not know yet from where they will work remotely is increasing by 3 points – making this proportion significantly higher than what we had for Eastern Europe in 2025.

How to read the results?

2 ways



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INTRODUCTORY DATA



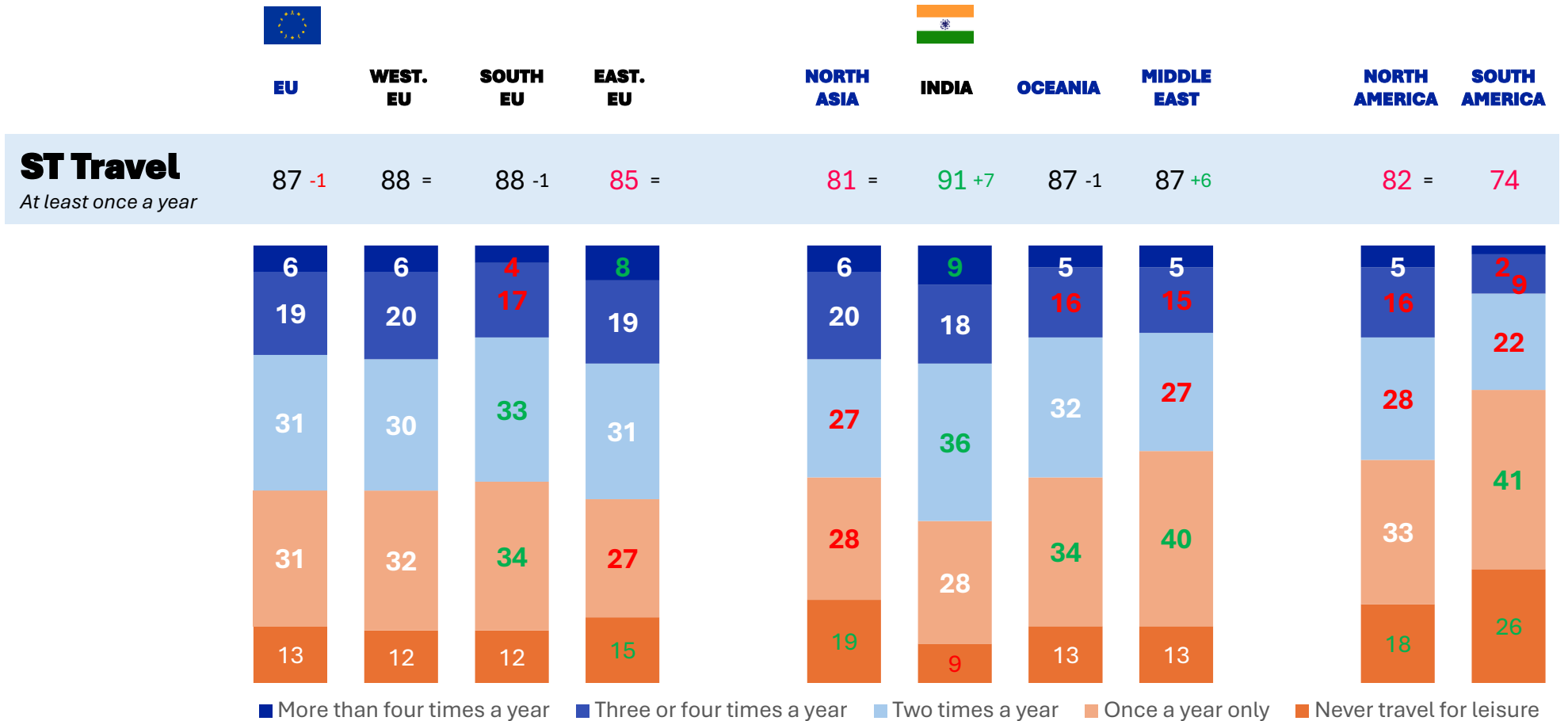
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Traveling is a well-established habit: in all regions except South America—a new addition to the Holiday Barometer in 2026—at least 8 out of 10 citizens travel for leisure at least once a year.

In Europe, North Asia, India, and Oceania, approximately 1 in 4 people even qualify as frequent travelers, with at least three travel occasions a year. It is noteworthy that the proportion of travelers in India and the Middle East has increased significantly compared to 2025.



1/4 Frequency of leisure travel (%)



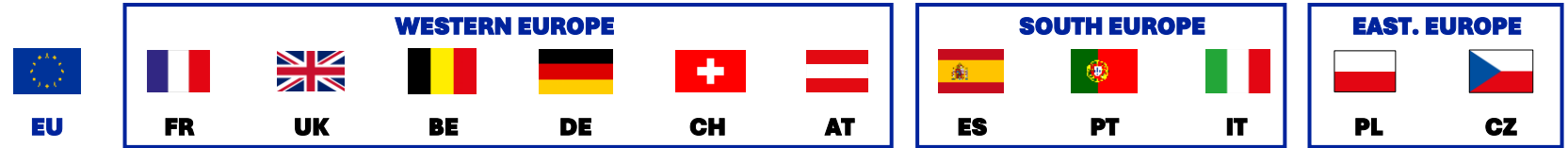
Q25Q1. On average, how many times a year do you travel for leisure? By travel we mean a stay of 4 nights or more away from home, and excluding business trips. Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

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The frequency of leisure travel remains very stable for all the European countries studied, with very high rates ranging from 83% in Poland to 91% in Switzerland.

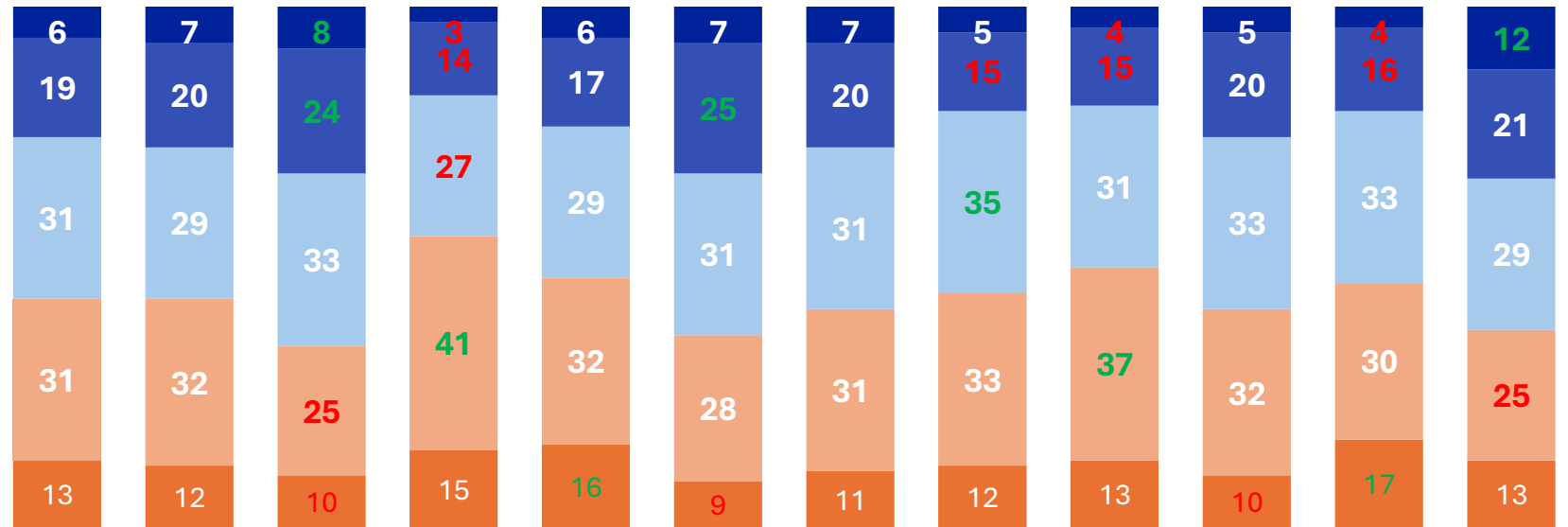
2/4 Frequency of leisure travel (%)



ST Travel

At least once a year

87 -1 88 -1 90 = 85 +1 84 = 91 = 89 = 88 -1 87 = 90 -1 83 -1 87 +1



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



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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

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North Asia remains characterized by significant contrasts, with the Japanese being by far the least likely to travel—4 out of 10 never travel.

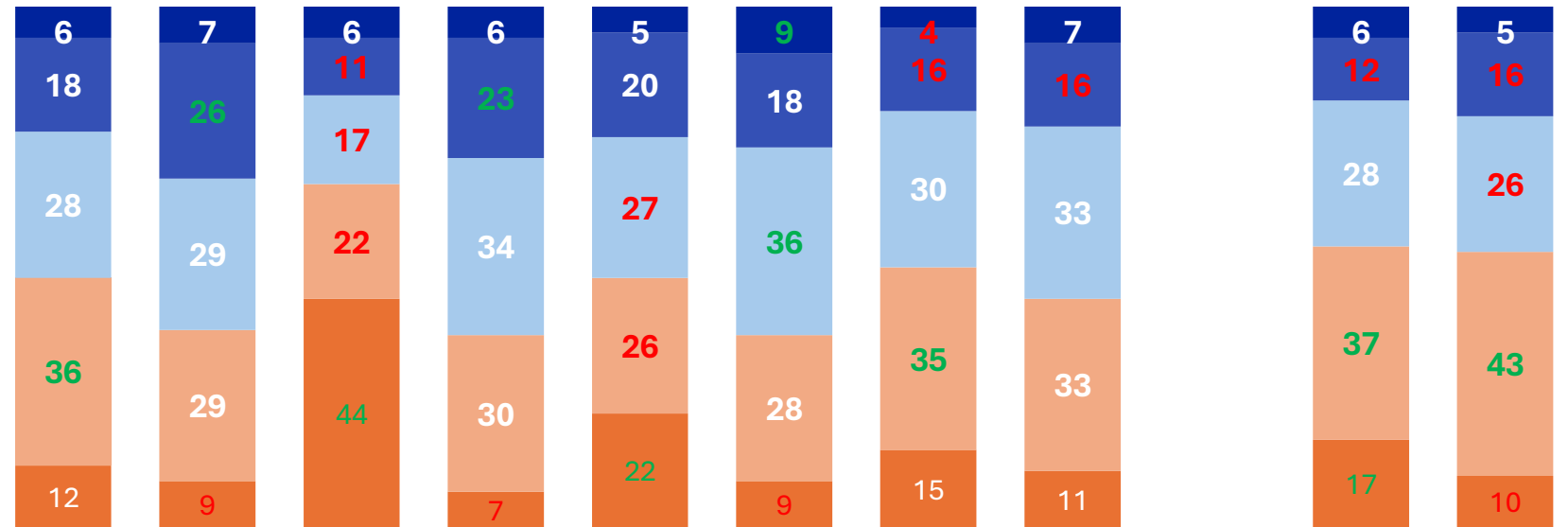
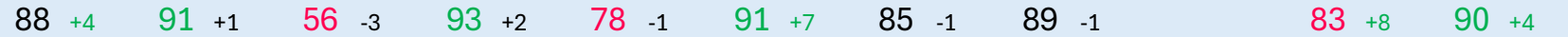
It is noteworthy that the proportion of travelers in India and the Middle East has increased significantly compared to 2025.

3/4 Frequency of leisure travel (%)



ST Travel

At least once a year



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



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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

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In Mexico and Brazil, 3 out of 10 people report never traveling for leisure, a relatively high proportion compared to the other countries studied—with the exception of Japan.

4/4 Frequency of leisure travel (%)



ST Travel

At least once a year

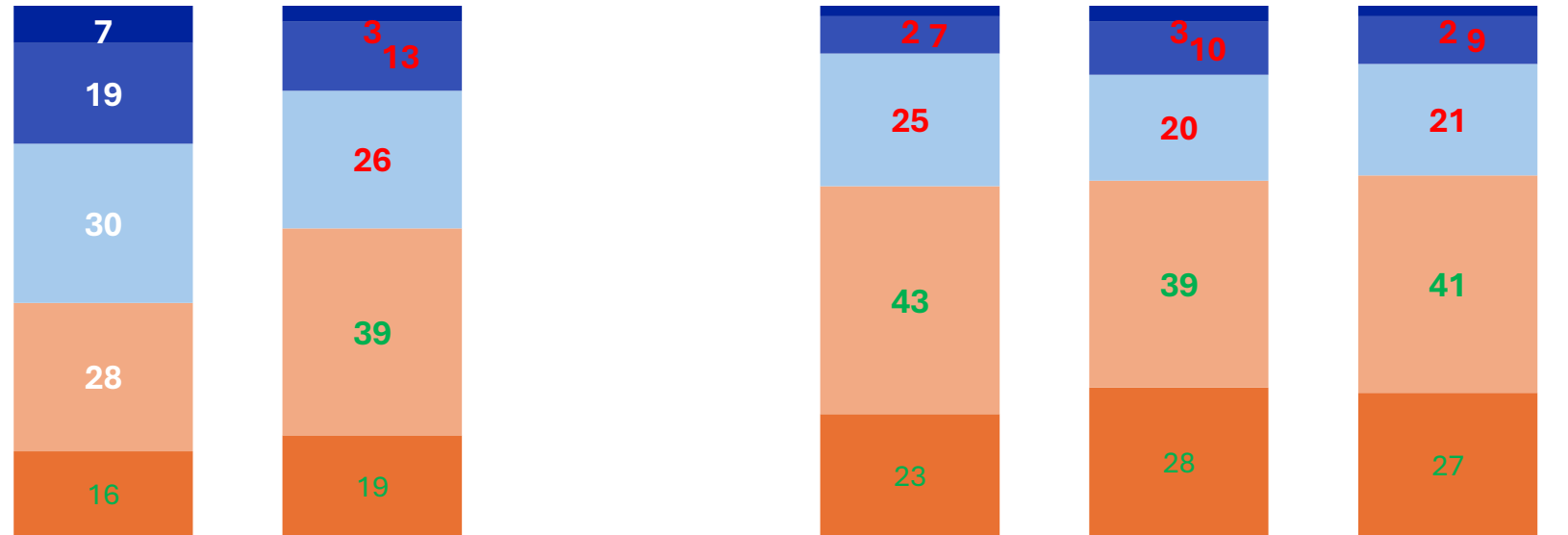
84 +4

81 -4

77

72

73



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



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



XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

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



1/4 Preferred months for leisure travel (%)













	 EU							 INDIA									
	EU	WEST. EU	SOUTH EU	EAST. EU				NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST			NORTH AMERICA	SOUTH AMERICA		
January	4 -1	5 =	4 =	4 =				8 -2	17 -4	28 -2	13 -1			8 -3	23		
February	6 =	7 =	4 +1	7 =				9 -1	13 -1	17 -1	11 =			13 -1	18		
March	7 =	7 -1	7 +1	5 =				16 =	13 -4	15 -1	14 +2			13 =	12		
April	13 -1	15 -1	14 -1	7 =				20 +1	18 -2	19 =	12 -2			16 +1	12		
May	23 =	26 +1	19 -2	20 -1				21 =	26 +4	12 +1	13 +2			21 +2	7		
June	29 =	27 -1	28 =	34 +1				18 +1	18 -1	19 +1	18 +1			25 -1	12		
July	34 =	31 +1	31 =	48 -2				15 +3	9 =	20 -2	24 -1			31 =	21		
August	34 +1	30 =	32 =	46 =				17 =	11 =	15 +1	23 -1			28 +1	10		
September	36 -1	37 -1	35 -1	34 -1				18 -2	13 -2	18 -2	13 -2			24 +2	11		
October	14 +1	15 -1	13 +1	9 +1				26 -3	21 =	17 =	13 -1			18 =	11		
November	5 =	5 =	5 =	3 +1				20 -1	23 +2	15 =	10 =			9 -2	11		
December	9 =	9 =	11 =	5 =				29 +2	27 -2	31 =	21 +2			16 +1	30		
ST July or August	52 +1	48 +1	52 +2	65 -1				28 +2	19 +1	31 =	39 -1			47 +1	29		

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When analyzing preferred travelling seasons, the European summer habits clearly stand out

Half mention July and August (and even two-thirds in Eastern Europe) as favored months for travel, with September—and to a lesser extent June—also being quite popular.

2/4 Preferred months for leisure travel (%)











	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
January	4 ⁻¹	4 =	5 ⁻²	4 ⁺¹	5 ⁺¹	7 =	5 =	4 ⁺¹	4 =	4 ⁻¹	4 =	4 ⁺¹
February	6 =	8 =	8 ⁺¹	5 =	6 =	7 ⁻²	7 ⁻¹	4 ⁺¹	4 ⁺¹	3 =	7 ⁻¹	7 ⁺¹
March	7 =	6 =	9 ⁻²	6 ⁻³	7 ⁻¹	9 ⁻²	8 ⁺²	7 ⁻¹	8 ⁺²	7 ⁺²	3 =	7 ⁺¹
April	13 ⁻¹	19 =	22 ⁺³	13 =	12 ⁻³	15 ⁻⁴	9 ⁻¹	14 ⁻¹	14 ⁺²	14 ⁻⁴	7 =	8 =
May	23 =	28 ⁺¹	30 ⁺¹	23 ⁺²	29 ⁺²	21 ⁺¹	24 ⁻⁴	19 ⁻³	18 ⁺¹	21 ⁻²	21 ⁻³	20 ⁺¹
June	29 =	31 ⁻¹	31 ⁻²	25 =	25 =	25 ⁺³	28 ⁻⁴	23 ⁻¹	30 ⁺²	32 ⁺¹	32 ⁺¹	36 ⁺¹
July	34 =	30 ⁻²	28 ⁺¹	39 ⁺⁶	24 ⁻²	33 ⁻¹	33 ⁺⁴	26 ⁻⁵	33 ⁺¹	33 ⁺⁵	44 ⁻⁵	52 ⁺¹
August	34 ⁺¹	32 ⁻³	28 =	33 ⁺⁴	29 ⁻²	28 ⁺³	32 =	33 ⁺²	32 ⁻⁵	31 ⁺²	45 =	47 ⁺¹
September	36 ⁻¹	35 ⁻²	36 ⁻¹	37 ⁺²	40 ⁻¹	37 ⁺²	36 ⁻⁵	34 ⁻²	36 ⁺²	36 ⁻³	34 ⁻¹	34 ⁻¹
October	14 ⁺¹	12 ⁺³	20 ⁺¹	10 ⁻¹	16 ⁻¹	23 ⁻¹	11 ⁻³	15 ⁻¹	14 ⁺⁴	11 ⁺¹	9 =	9 ⁺¹
November	5 =	4 ⁺¹	7 ⁻²	6 ⁺¹	5 ⁺¹	6 =	5 =	6 ⁺²	6 ⁺¹	4 ⁻¹	3 ⁺²	3 =
December	9 =	10 ⁺²	11 ⁻⁴	6 =	8 ⁻¹	13 ⁺³	6 ⁻¹	11 =	10 ⁻¹	11 =	5 ⁺¹	6 ⁻¹
ST July or August	52 ⁺¹	49 ⁻³	45 ⁺¹	52 ⁺⁵	43 ⁻²	48 ⁺¹	50 ⁺³	48 =	55 ⁻¹	53 ⁺⁶	64 ⁻²	66 =

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The same phenomenon shows for North America.

However, in zones where seasons are different, such as Asia, Oceania, South America, preferred travel time is much more spread out and less concentrated between June and September, whereas fall and winter months stand out. December is particularly popular in Malaysia, Singapore, India, Australia, New Zealand, Brazil and Mexico.

3/4 Preferred months for leisure travel (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
January	13 -1	6 -3	6 -1	9 -2	7 -2	17 -4	23 -1	33 -3	13 -1	12 -1
February	8 -6	13 +1	7 +1	9 -1	8 +2	13 -1	13 +1	20 -4	11 -1	10 +1
March	14 =	18 -2	16 =	18 =	12 =	13 -4	14 -1	15 -1	16 +2	12 +1
April	12 -1	23 +1	26 +3	17 -1	23 +1	18 -2	19 -2	18 =	12 -3	13 =
May	20 +5	15 -1	35 +1	14 -2	28 -3	26 +4	15 +1	9 +1	14 +4	12 +1
June	19 =	18 +1	12 +1	26 +1	9 =	18 -1	20 +2	18 =	16 -2	19 +3
July	13 +4	27 +9	12 =	8 =	14 =	9 =	22 =	19 -3	19 =	28 -1
August	13 +1	21 +1	22 +1	10 =	21 -1	11 =	17 +2	13 =	24 +3	21 -6
September	16 =	16 -3	19 -5	18 -3	22 +1	13 -2	21 -4	17 +1	12 -3	13 -2
October	14 -3	25 -1	40 -3	24 -1	33 -5	21 =	17 -3	17 +2	12 -2	13 -1
November	24 -1	16 -5	19 -1	29 +1	9 -1	23 +2	14 -1	16 +1	9 +1	12 =
December	45 -3	22 +3	12 =	41 +1	16 +5	27 -2	30 +3	32 -3	16 +3	25 +1
ST July or August	24 +5	39 +6	31 =	17 -1	31 -1	19 +1	34 +3	28 -2	37 +2	41 -3

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The same phenomenon shows for North America.

However, in zones where seasons are different, such as Asia, Oceania, South America, preferred travel time is much more spread out and less concentrated between June and September, whereas fall and winter months stand out. December is particularly popular in Malaysia, Singapore, India, Australia, New Zealand, Brazil and Mexico.

4/4 Preferred months for leisure travel (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
January	7 -1	10 -2	39	26	3
February	9 -1	16 -1	36	12	6
March	13 =	13 =	17	7	11
April	21 +2	12 +1	10	6	21
May	22 -2	20 +6	5	5	12
June	27 -3	22 -1	6	17	12
July	30 =	33 =	20	23	20
August	26 =	31 +2	6	6	17
September	24 +2	23 +1	12	10	12
October	20 +1	15 -1	13	12	9
November	10 =	9 -2	10	12	10
December	18 +2	15 =	19	37	37
ST July or August	45 =	48 +1	25	29	35



Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe



+X / -X Significant evolution vs 2025

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

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The same concentration around summer is observed in Europe for the actual period usually chosen for the longest trip of the year, July and August being particularly dominant.

1/4 Usual months of longest trip of the year (%)













	 EU								OCEANIA		MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA							
January	2 -1	3 =	1 -1	2 =	7 -1	12 -2			22 -2	8 -1	5 -3	21	
February	2 -1	3 =	2 =	2 =	7 =	9 -1			10 +1	8 -1	8 =	15	
March	3 =	3 =	3 =	2 =	8 -1	12 =			9 +1	11 =	7 -1	9	
April	5 =	5 =	5 -1	3 =	11 =	13 -1			8 -1	10 -1	8 =	8	
May	10 =	12 =	9 =	9 =	13 =	23 +3			8 =	10 -1	12 =	5	
June	18 =	18 =	18 +1	21 =	11 =	15 -2			10 -1	17 -2	16 -2	7	
July	29 =	28 +1	25 =	40 -1	12 +2	9 -1			13 =	22 -5	25 -2	15	
August	30 -1	28 =	31 -1	37 =	15 -1	10 -1			10 =	23 -1	20 -3	8	
September	25 -1	26 =	24 -2	22 -1	13 -1	12 +1			13 =	12 -2	17 +1	7	
October	7 -1	8 -1	7 =	5 =	19 -3	15 -2			10 =	11 -2	11 -1	8	
November	3 =	3 =	3 =	2 +1	16 -2	18 +1			9 +1	10 +2	6 =	9	
December	4 -1	5 =	5 -2	3 +1	26 +1	22 -2			27 -1	17 +1	13 +1	28	
ST July or August	50 +1	46 +1	50 =	60 -1	23 -1	18 -1			20 =	38 -4	38 -3	22	

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Regarding departure months, some interesting national particularities to note are:

- The month of September is highly popular among Germans.
- July is predominantly favored by Belgians, Poles, and Czechs.
- The height of summer (July-August) is less favored by the English.

2/4 Usual months of longest trip of the year (%)

		WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU											
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
January	2 -1	2 -1	4 =	3 +1	3 =	4 -1	3 =	2 =	1 -1	2 =	2 =	2 +1
February	2 -1	2 -1	3 =	3 +1	3 =	2 -2	3 -1	2 =	2 =	1 -2	2 -1	2 =
March	3 =	3 +2	3 =	3 +1	3 =	3 -3	4 +2	3 =	3 +1	2 -1	1 -1	2 =
April	5 =	7 =	7 +1	3 =	5 =	6 =	4 -1	4 -1	5 =	5 -2	3 =	2 -1
May	10 =	11 +2	12 =	12 +2	14 -1	8 -1	13 -3	9 +1	7 =	10 -1	10 =	8 =
June	18 =	18 -2	19 =	17 +2	18 +1	15 +1	21 -2	15 +1	17 =	21 =	20 -2	22 +1
July	29 =	27 -1	21 +2	38 +4	23 +1	32 -2	29 +4	23 -3	24 +1	27 +1	39 =	42 =
August	30 -1	32 -1	25 +1	29 -1	28 =	26 +3	27 -3	31 -1	31 -5	31 +2	38 -1	37 +1
September	25 -1	23 -2	23 -1	26 =	32 +2	28 +4	25 -5	23 -2	24 -2	23 -5	25 +1	19 -4
October	7 -1	6 +1	9 -1	6 -1	11 +1	13 -1	6 -1	9 =	6 =	6 =	4 -2	6 +2
November	3 =	3 +1	4 -1	2 -1	2 -1	3 -1	4 +1	4 +2	4 +1	2 =	2 +1	1 -1
December	4 -1	3 =	5 -4	4 +1	4 -1	7 +1	4 -1	6 =	4 -4	5 -1	2 =	3 =
ST July or August	50 +1	50 +1	39 +1	50 -3	42 +1	46 -1	47 +2	47 -3	50 -2	52 +4	59 -2	61 +1

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- More than 4 out of 10 Malaysian and Singaporean travelers take their longest leisure trip in December.

- While Hong Kong, Middle Eastern countries, and to a lesser extent South Korea, are relatively close to European practices, with the months of July-August being preferred.

3/4 Usual months of longest trip of the year (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
January	8 -3	9 =	7 +2	6 =	7 +1	12 -2	17 -1	27 -2	8 -1	9 =
February	6 -6	9 +1	6 +1	4 =	7 +1	9 -1	8 +1	12 +1	9 =	7 -2
March	8 +1	9 -4	12 +1	7 =	6 -1	12 =	9 +1	8 +1	13 +2	9 -1
April	8 =	13 -1	14 +4	8 -1	11 -1	13 -1	9 -1	7 -2	10 -1	11 +1
May	11 =	9 -3	24 +4	9 =	15 +1	23 +3	10 +1	6 =	10 -1	9 -2
June	12 -1	13 =	9 +2	12 -2	7 +1	15 -2	12 =	8 -2	16 -2	17 -2
July	9 +2	22 +5	10 =	3 -3	13 +1	9 -1	15 +1	11 -1	18 -8	26 -2
August	10 -1	20 +1	21 -2	5 -1	22 =	10 -1	11 =	10 +1	24 +2	22 -4
September	13 =	12 -3	14 -2	12 =	15 =	12 +1	14 -2	11 +1	13 -2	12 -1
October	11 -6	19 -3	27 -1	18 -1	25 =	15 -2	11 -1	10 +2	11 -2	11 -1
November	22 -1	13 -6	14 -3	22 -1	8 =	18 +1	10 +1	9 +1	8 +1	12 +3
December	45 -4	15 +2	10 =	41 +2	10 =	22 -2	26 =	28 -2	15 +3	19 -1
ST July or August	18 +2	34 +4	28 -3	8 -4	32 =	18 -1	22 +1	17 -2	37 -3	40 -3

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- The vacations of Argentinians are particularly concentrated in the months of January and February.



4/4 Usual months of longest trip of the year (%)



	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
January	4 -2	6 -4	37	22	4
February	5 =	12 +2	34	8	3
March	6 =	8 -1	14	5	8
April	10 =	7 =	8	4	13
May	13 -2	11 +2	3	3	10
June	18 -5	14 =	4	9	9
July	23 -3	27 -1	10	16	20
August	18 -3	21 -5	4	5	15
September	17 +2	16 -1	5	7	8
October	14 +2	9 -2	6	8	9
November	6 +1	5 -1	7	10	9
December	14 +2	12 =	20	34	31
ST July or August	36 -3	41 -2	13	21	33

00

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

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

1/4 Trips plans outside of summer (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
I'm planning to travel between April and May 2026	33 -1	35 =	32 -2	28 -4	28 +2	47 +5	27 -1	29 +1	30 -1	18
I'm planning to travel between October and November 2026	22 =	24 -1	22 +3	20 =	29 -3	34 -2	22 -3	27 +4	24 =	20
I already travelled this year between January & March 2026	16 -1	19 -1	14 -1	14 =	20 +1	26 -3	26 -3	26 +1	16 -2	20
I'm planning to travel in December 2026	10 -1	10 -1	12 -2	8 =	20 +1	20 =	21 -5	19 +1	15 -1	25
None of these answers	39 +2	37 +1	37 +2	46 +3	28 -2	9 -1	29 +10	17 -7	37 +4	30











00

2/4 Trips plans outside of summer (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I'm planning to travel between April and May 2026	33 -1	40 +1	42 +1	29 +2	35 -2	35 +1	32 -3	32 -3	28 +2	36 -5	27 -6	29 -2
I'm planning to travel between October and November 2026	22 =	22 =	25 -6	19 -1	22 -2	28 +1	25 =	25 +2	20 +3	20 +2	18 -1	23 +2
I already travelled this year between January & March 2026	16 -1	19 -3	17 +1	15 -1	17 -1	23 -4	21 +3	14 -2	13 -1	14 -2	13 -1	15 +1
I'm planning to travel in December 2026	10 -1	10 -1	12 -3	8 +1	9 -3	13 +2	7 -3	12 =	11 -4	11 -3	6 -2	9 +1
None of these answers	39 +2	35 +2	34 +7	48 +1	41 +4	31 =	37 -3	33 +1	41 -1	36 +4	48 +6	44 -1

00

3/4 Trips plans outside of summer (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
I'm planning to travel between April and May 2026	27 +1	31 +2	21 =	31 +6	29 =	47 +5	28 =	26 -2	32 +6	27 -3
I'm planning to travel between October and November 2026	28 -2	36 -3	23 -5	30 =	29 -5	34 -2	21 -7	22 =	25 +2	29 +5
I already travelled this year between January & March 2026	25 +1	19 +1	13 +2	24 -2	17 +1	26 -3	23 -2	30 -4	25 +2	27 -1
I'm planning to travel in December 2026	30 -2	22 +7	7 -1	30 +1	12 =	20 =	19 -7	23 -4	16 -1	22 +3
None of these answers	15 -3	21 -5	53 +3	17 -5	34 +1	9 -1	33 +12	25 +8	20 -10	14 -5

00

4/4 Trips plans outside of summer (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
I'm planning to travel between April and May 2026	35 -2	24 -1	16	13	25
I'm planning to travel between October and November 2026	29 +1	20 -1	17	22	22
I already travelled this year between January & March 2026	17 -1	16 -2	30	20	11
I'm planning to travel in December 2026	16 -2	13 -1	20	30	26
None of these answers	31 +5	43 +3	30	32	28

01

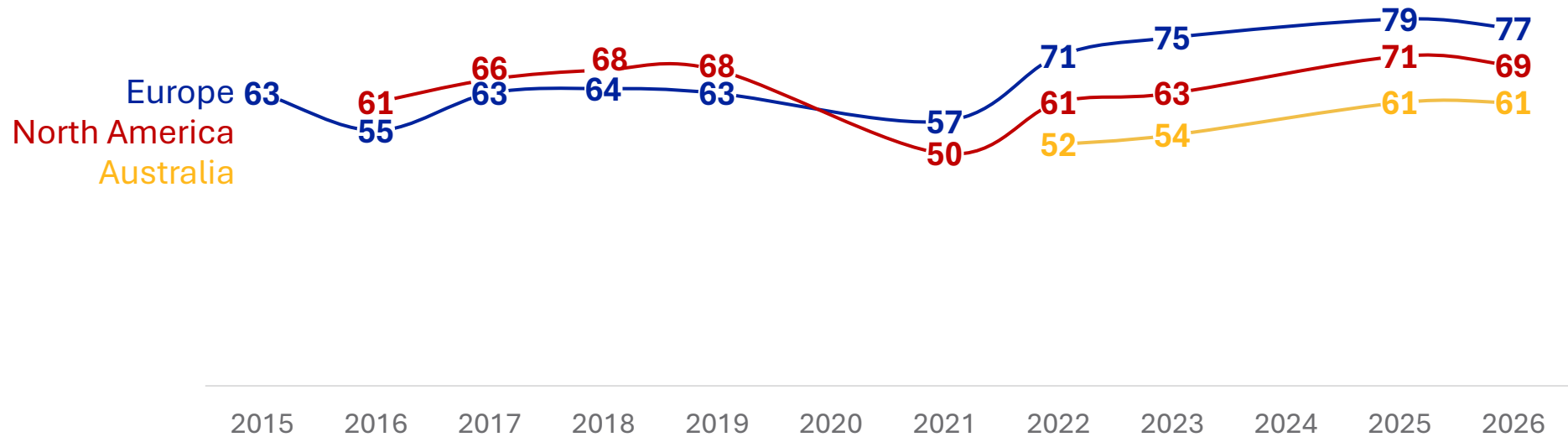
An enthusiasm for travel that remains undiminished: the record levels reached last year are confirmed, and the desire to travel is intact...



01

Following the record levels recorded in 2025, travel intentions have stabilized this year. In North America and Australia, however, they remain significantly higher than in 2022 and 2023.

1/8 Plans to go away on a trip this year – Trend over several years % Yes (one or several trips)



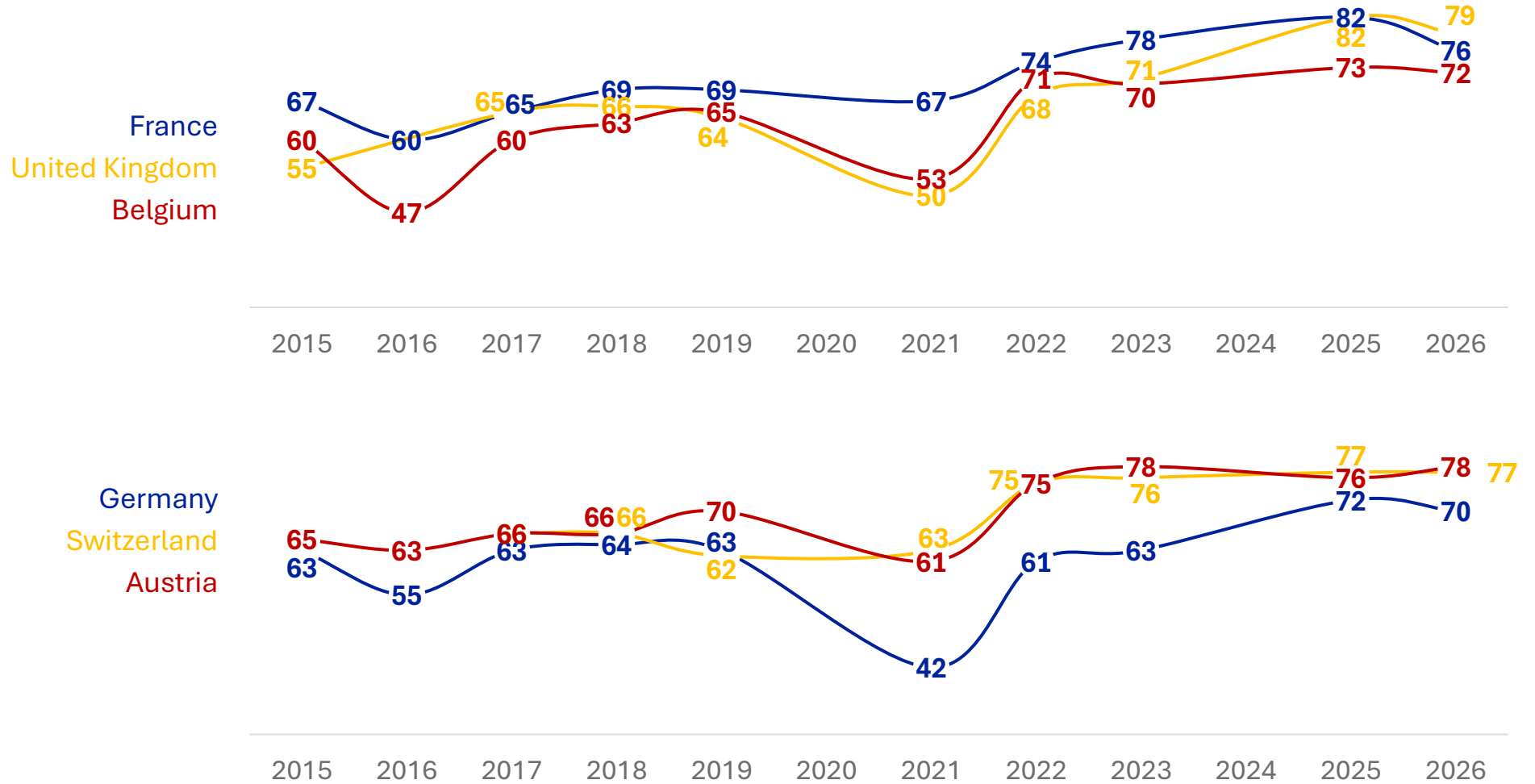
01

In general, there is great stability for the European countries studied, with two exceptions:

- Still, 3/4 of the French intend to go on vacation this summer, but this is 6 points less than in 2025.
- There is also a marked decline in Poland, with a return to the levels observed in 2022 and 2023 (75%, down 7 points from 2025).

2/8 Plans to go away on a trip this year – Trend over several years

% Yes (one or several trips)

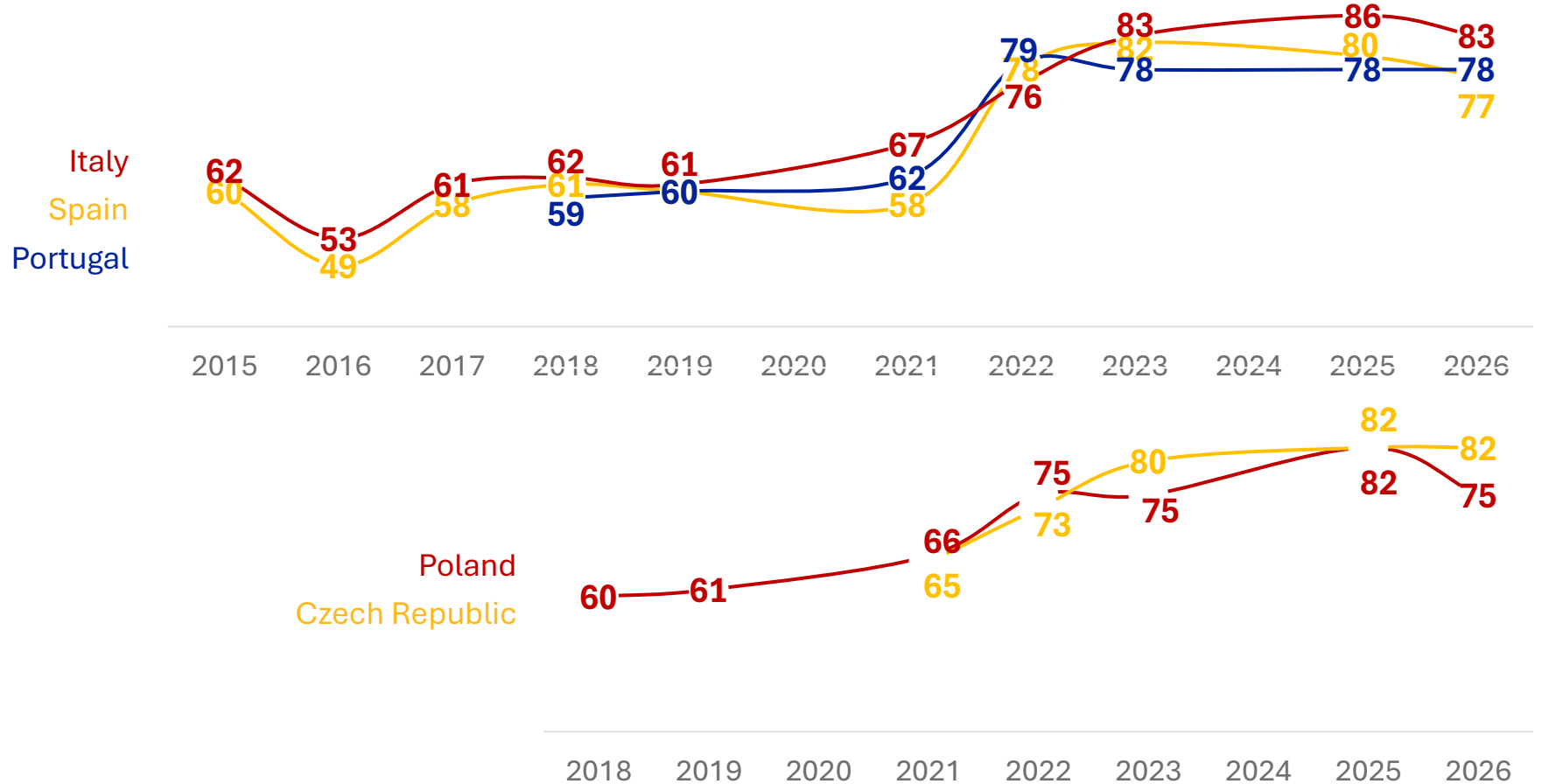


01

In general, there is great stability for the European countries studied, with two exceptions:

- Still, 3/4 of the French intend to go on vacation this summer, but this is 6 points less than in 2025.
- There is also a marked decline in Poland, with a return to the levels observed in 2022 and 2023 (75%, down 7 points from 2025).

3/8 Plans to go away on a trip this year – Trend over several years % Yes (one or several trips)



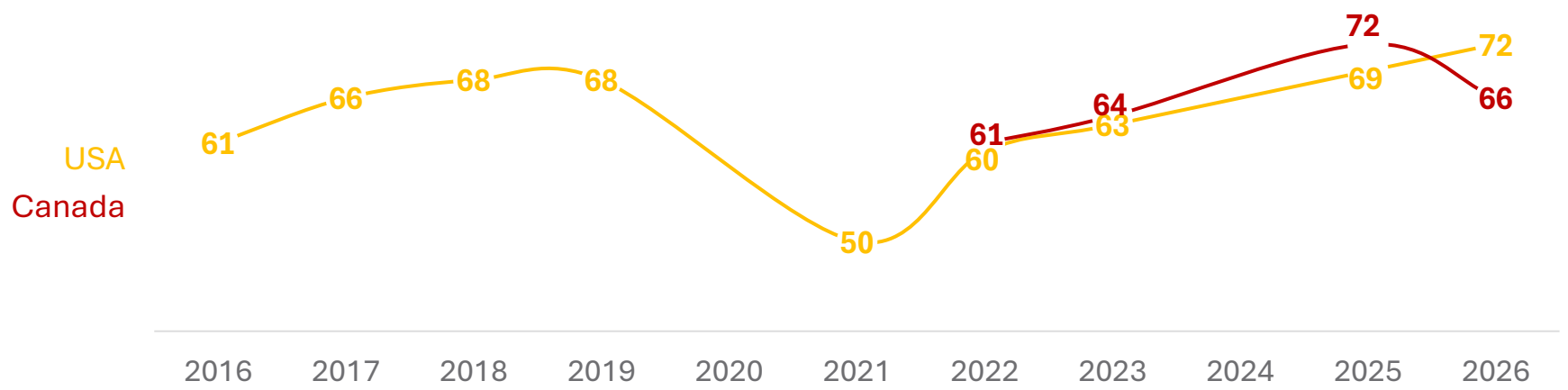


01

Different dynamics within the North America region:

- The desire to travel has reached a new record in the US, with 72% of Americans stating an intention to travel this summer.
- Conversely, while the proportion remains high in Canada—with 2/3 intending to travel this summer—it has dropped by 6 points compared to 2025.

4/8 Plans to go away on a trip this year – Trend over several years % Yes (one or several trips)



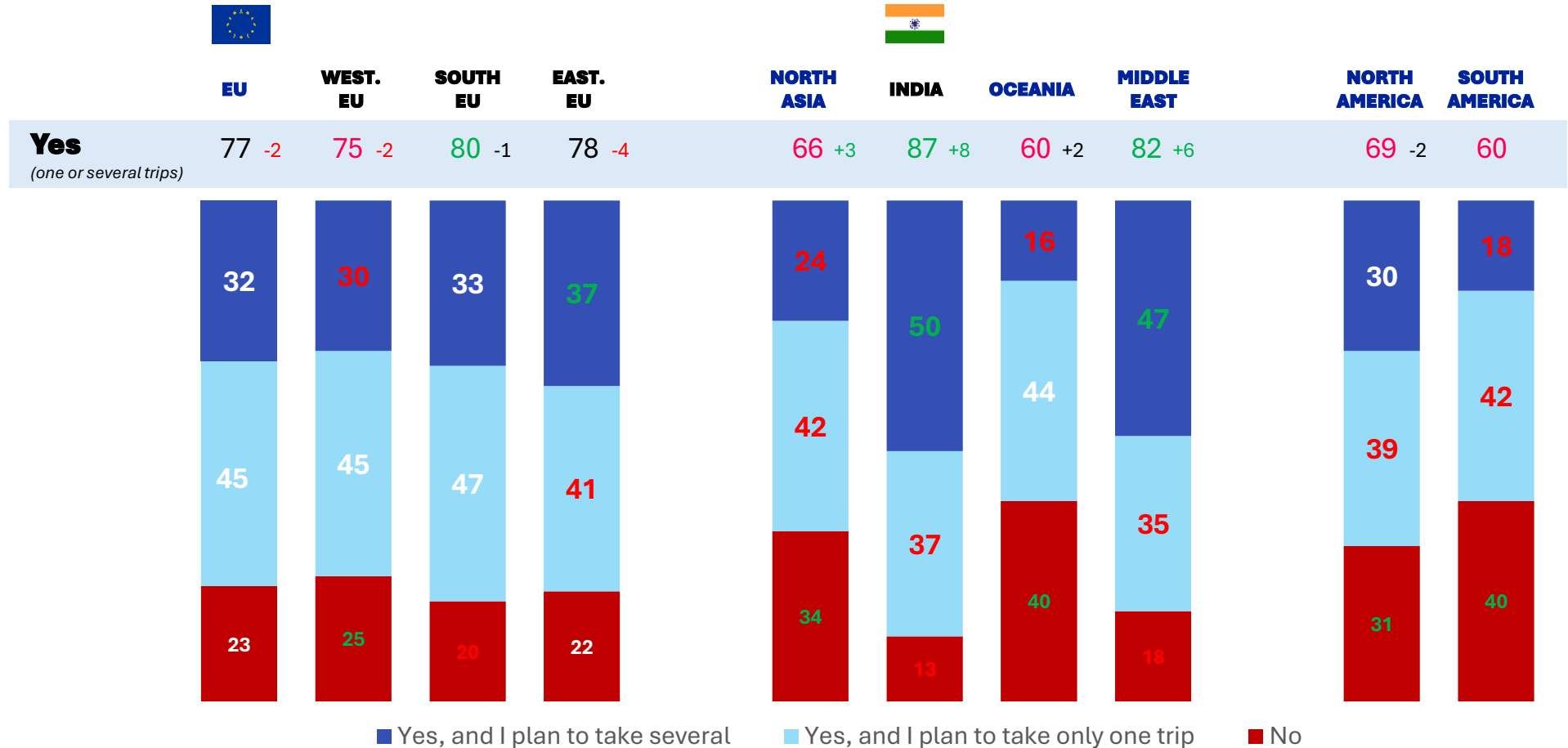
Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

01

Logically, the intentions to go on vacation between June and September are significantly lower in the southern hemisphere, as this period corresponds to winter.

It is noteworthy that travel intentions in India and the Middle East (UAE and Saudi Arabia) have seen a sharp increase compared to 2025.

5/8 Plans to go away on a trip this year (%)



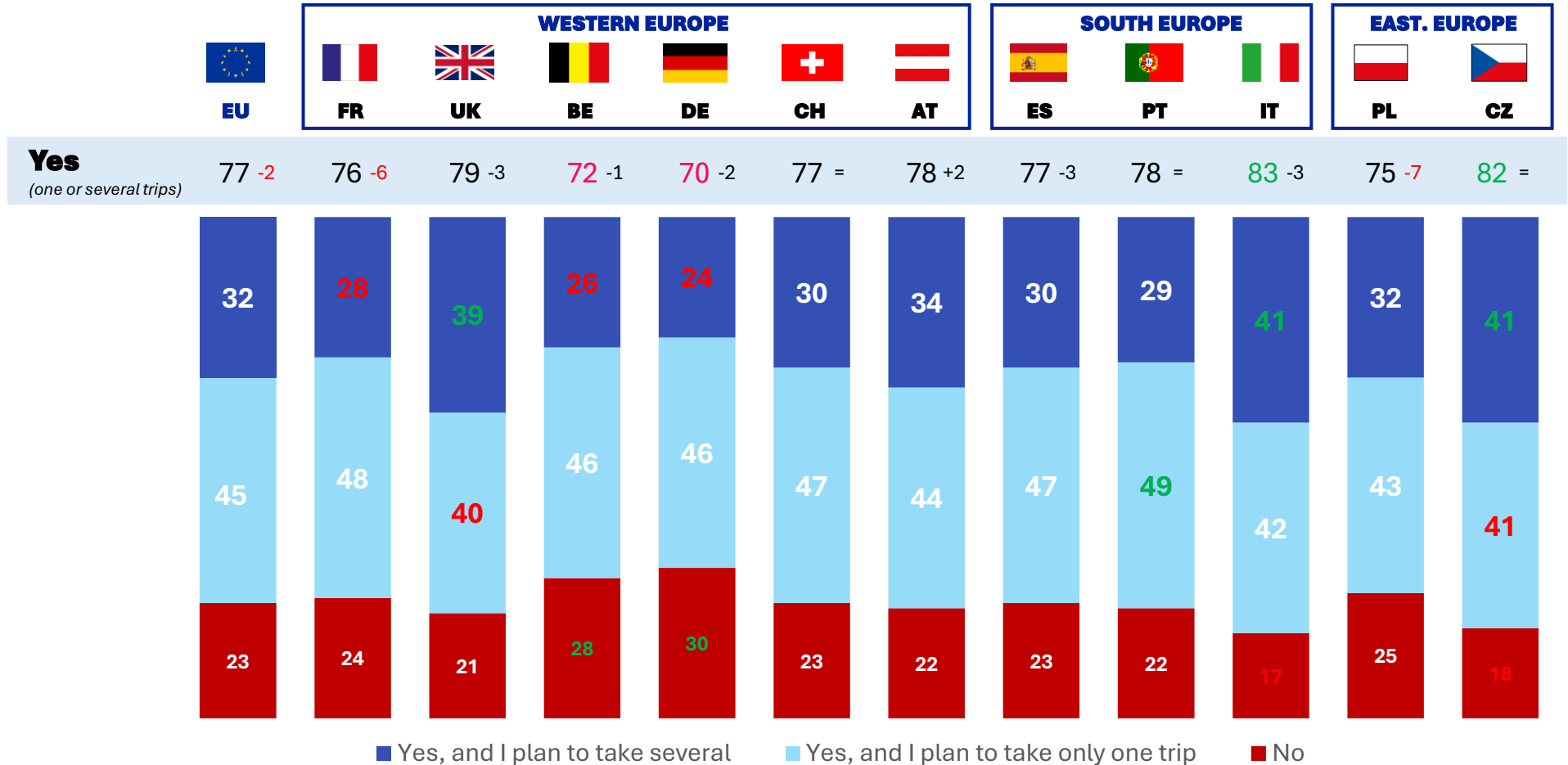


01

In general, there is great stability for the European countries studied, with two exceptions:

- Still, 3/4 of the French intend to go on vacation this summer, but this is 6 points less than in 2025.
- There is also a marked decline in Poland, with a return to the levels observed in 2022 and 2023 (75%, down 7 points from 2025).

6/8 Plans to go away on a trip this year (%)



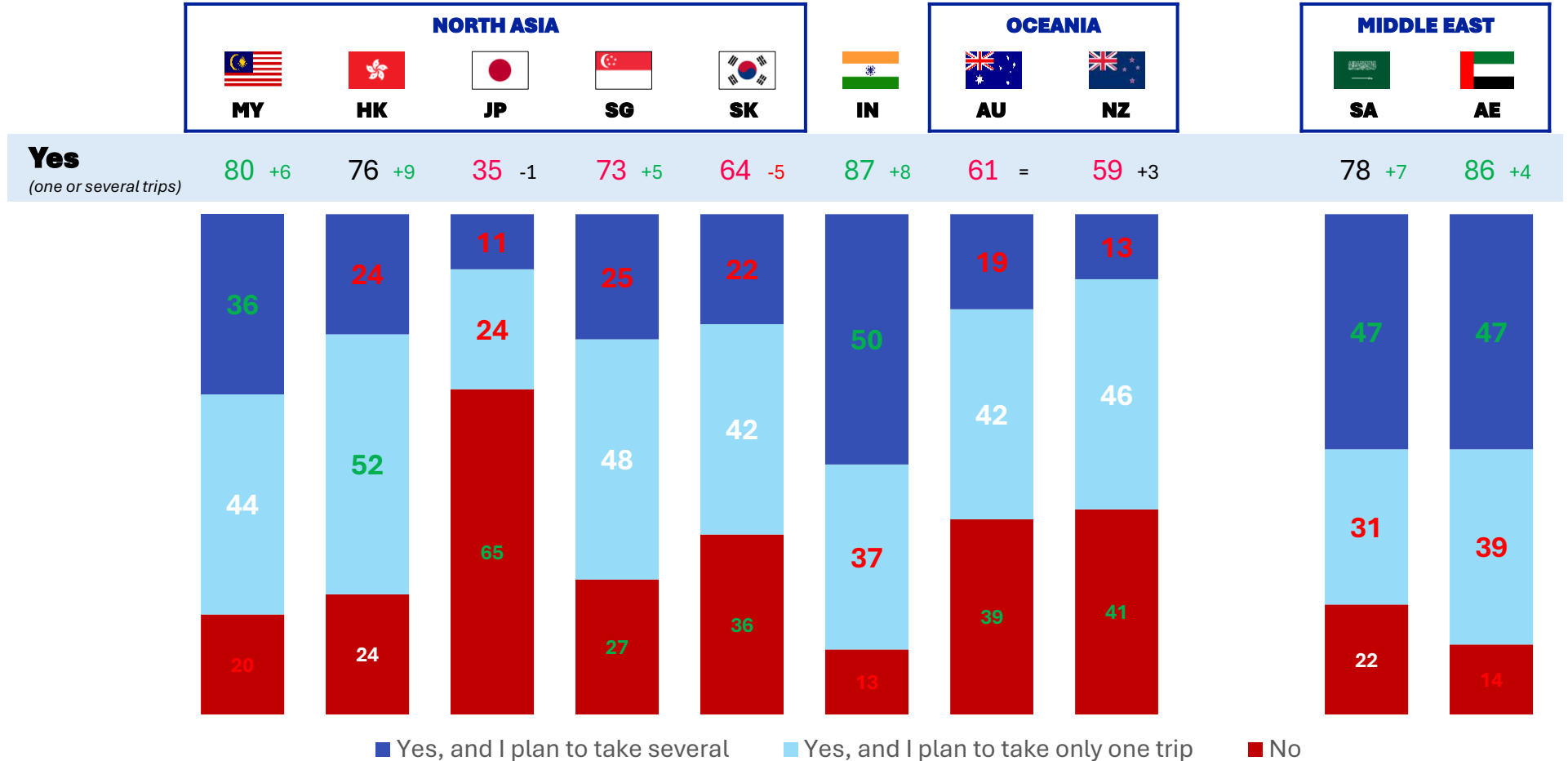
Q15. Do you plan to go [on a trip this summer / away on holiday this year between June and September]? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

01

Apart from India and the Middle East, increases in vacation departure intentions are also observed in Malaysia, Hong Kong, and Singapore.

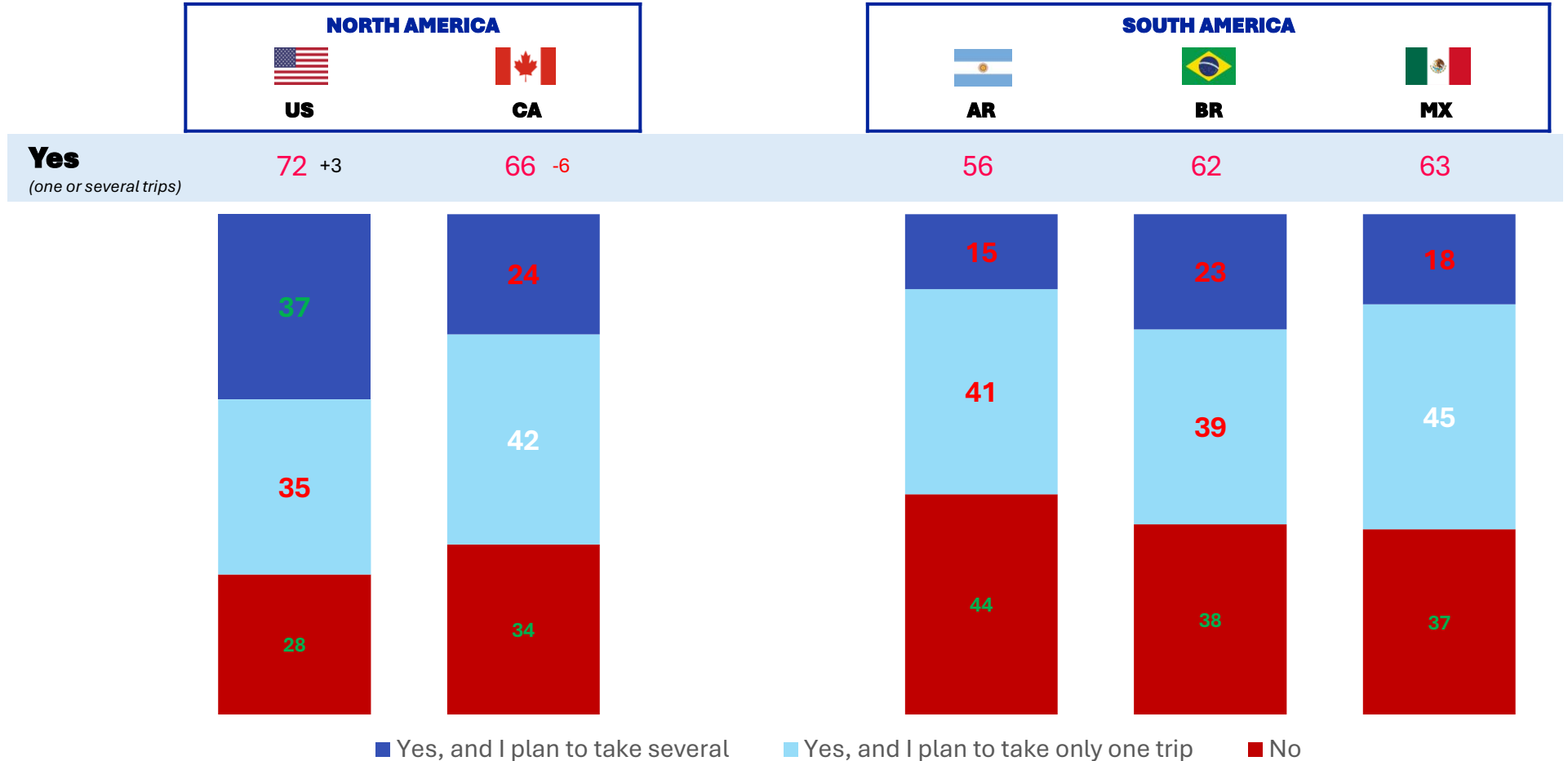
7/8 Plans to go away on a trip this year (%)



01

The newly introduced South American countries in the barometer this year unsurprisingly show vacation departure intentions for the June-September period to be well below what is observed in the Northern Hemisphere.

8/8 Plans to go away on a trip this year (%)



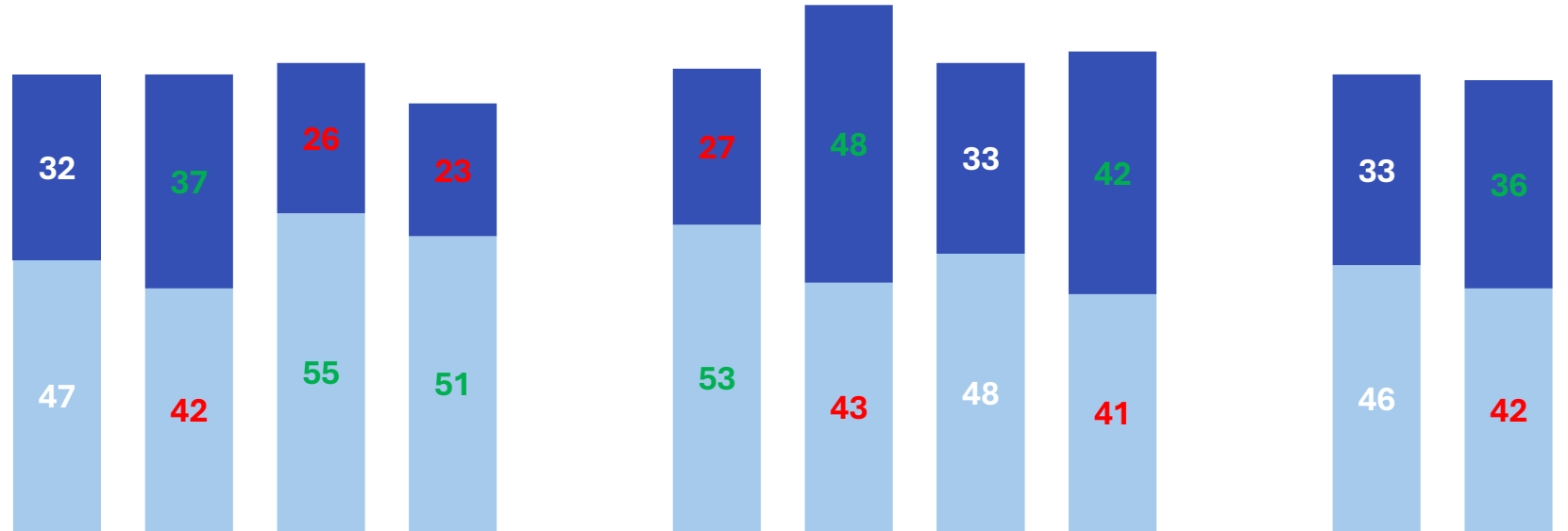


01

Another key measure of the barometer, the level of enthusiasm for traveling this year remains extremely high across all regions, with at least 8 out of 10 expressing enthusiasm.

1/8 Travel enthusiasm (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Enthusiast <i>Excited + Happy to travel</i>	79 <small>-2</small>	79 =	81 <small>-3</small>	74 <small>-5</small>	80 <small>+2</small>	91 <small>+1</small>	81 <small>-4</small>	83 <small>+1</small>	79 <small>+1</small>	78



■ I am really excited to travel

■ I am happy to travel



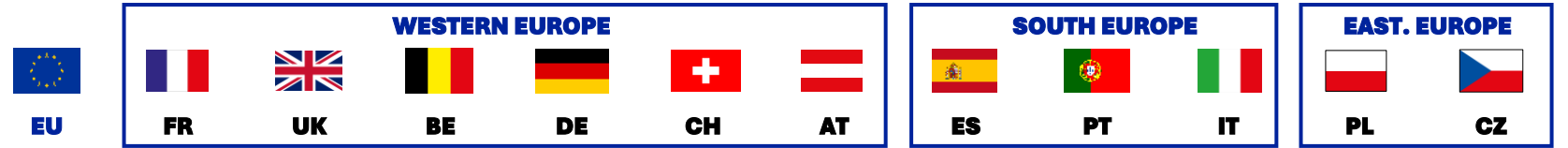
NQ5. How would you describe your enthusiasm and desire to travel this year? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

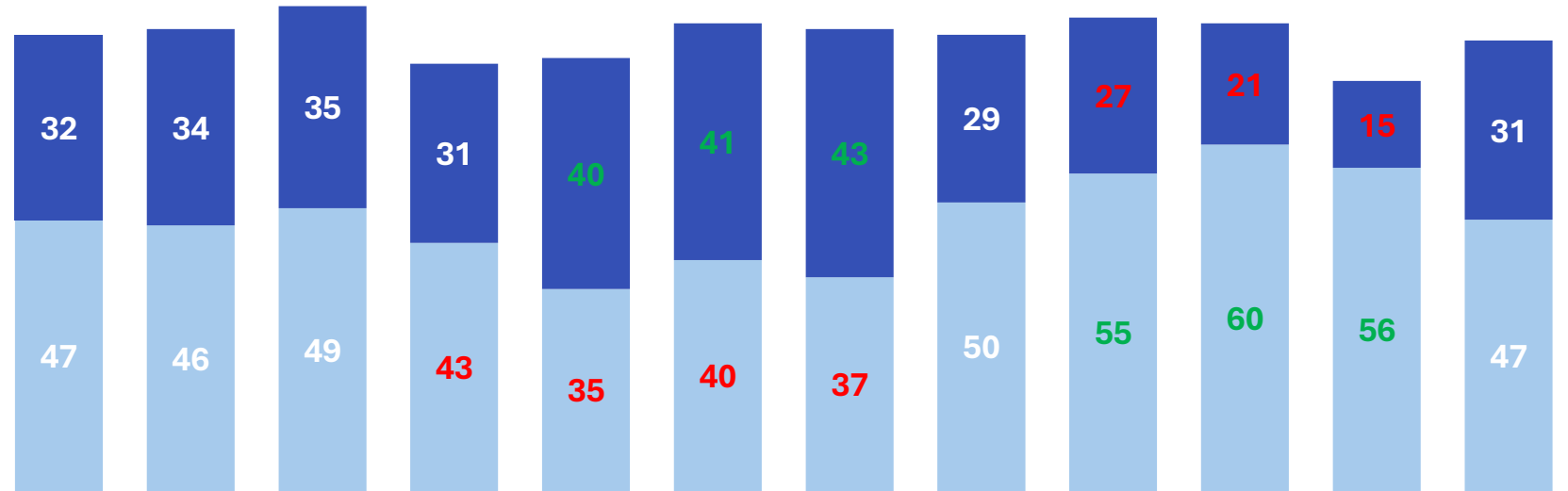
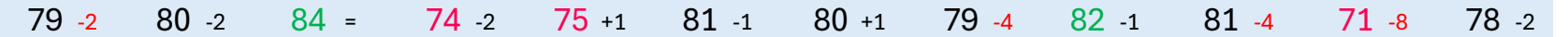
01

An especially strong enthusiasm is noticeable in Germany, Switzerland, and Austria, with 4 out of 10 declaring themselves “really excited” to travel.

2/8 Travel enthusiasm (%)



Enthusiast *Excited + Happy to travel*



■ I am really excited to travel

■ I am happy to travel

01

Japan, and to a lesser extent South Korea, remain exceptions with much less enthusiasm for travel, although it still remains the majority view.

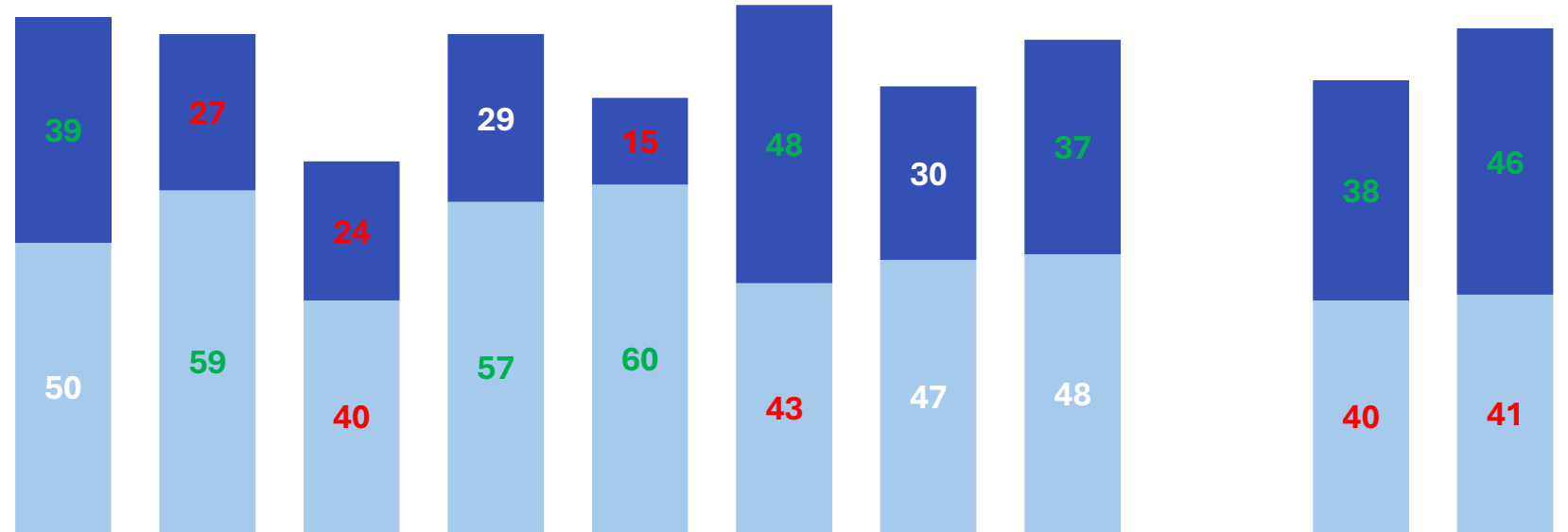


3/8 Travel enthusiasm (%)



Enthusiast *Excited + Happy to travel*

89 +3	86 +9	64 -2	86 =	75 =	91 +1	77 -4	85 -3	78 +2	87 -1
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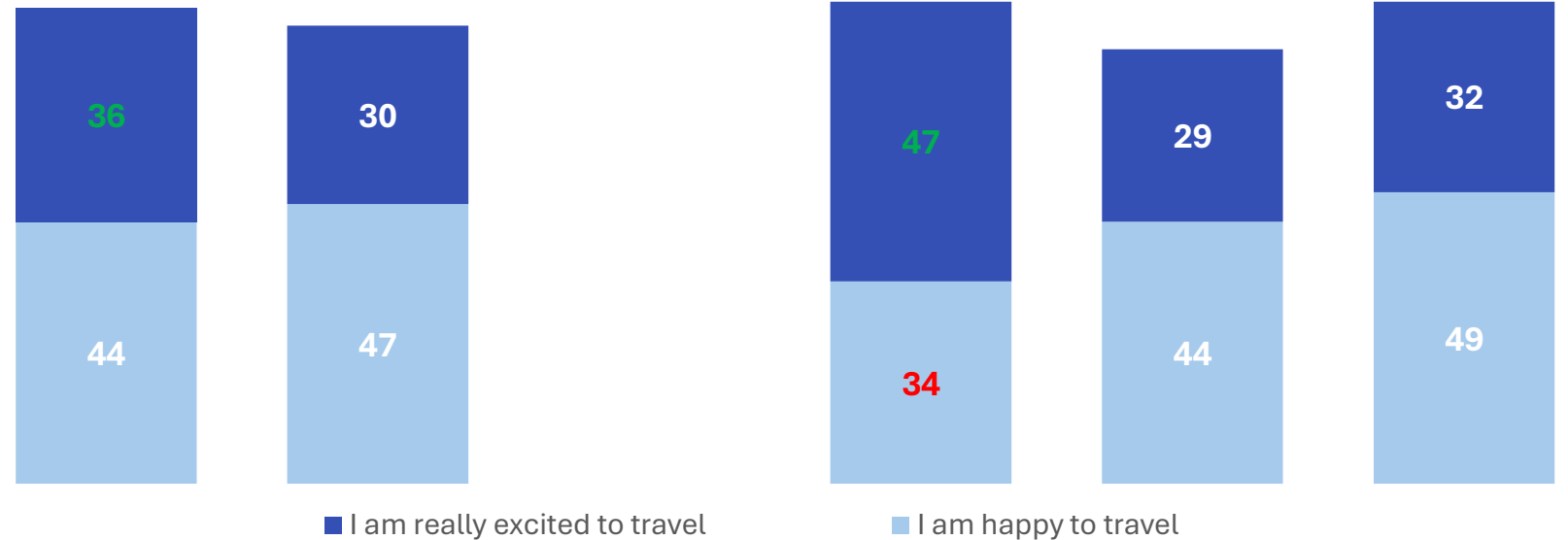
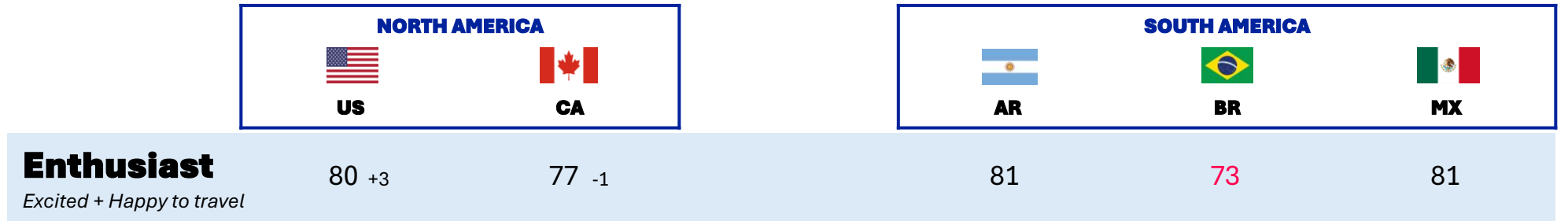


■ I am really excited to travel

■ I am happy to travel

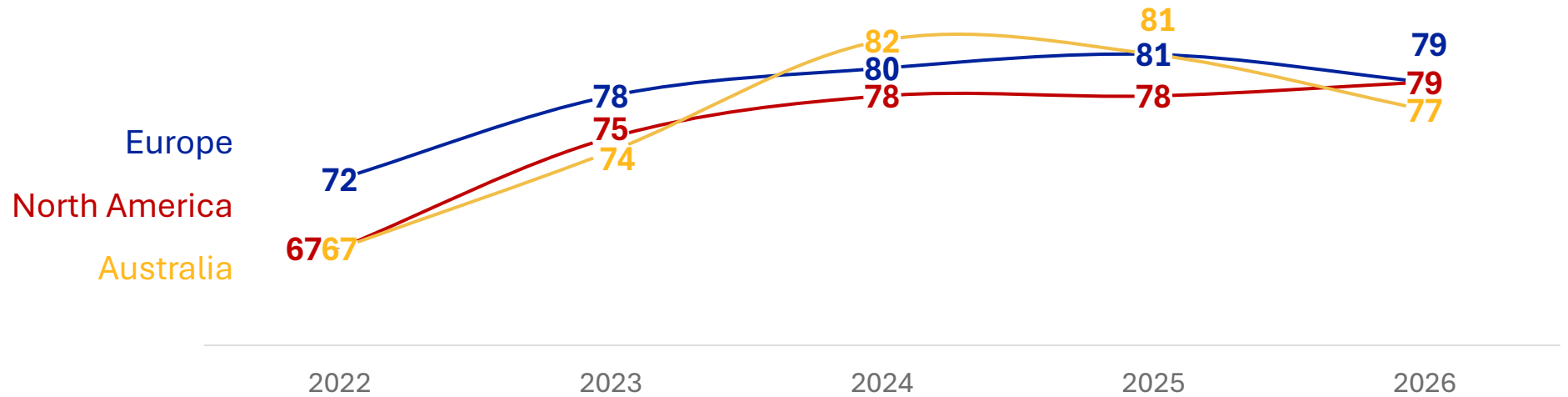
01

4/8 Travel enthusiasm (%)



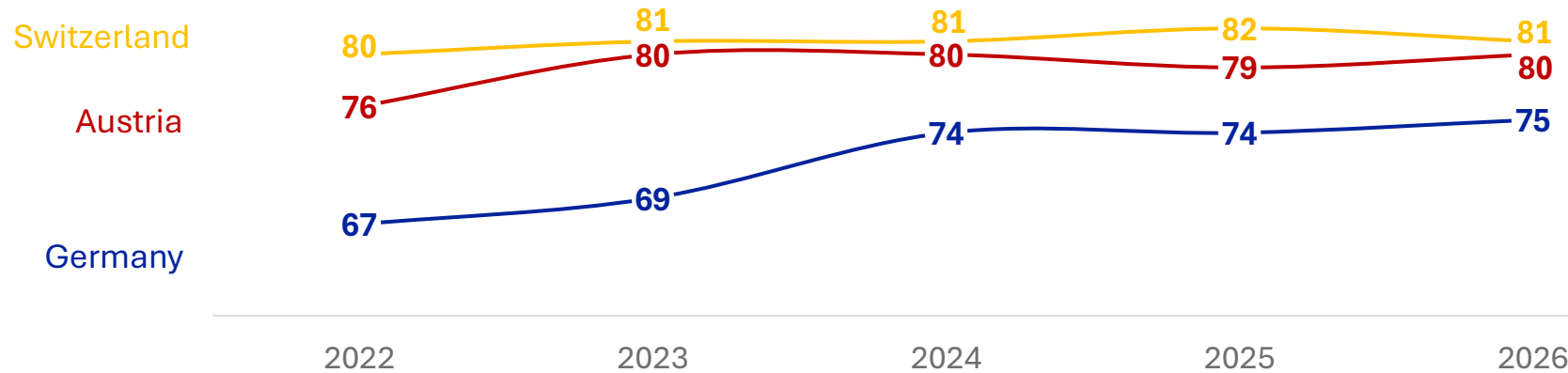
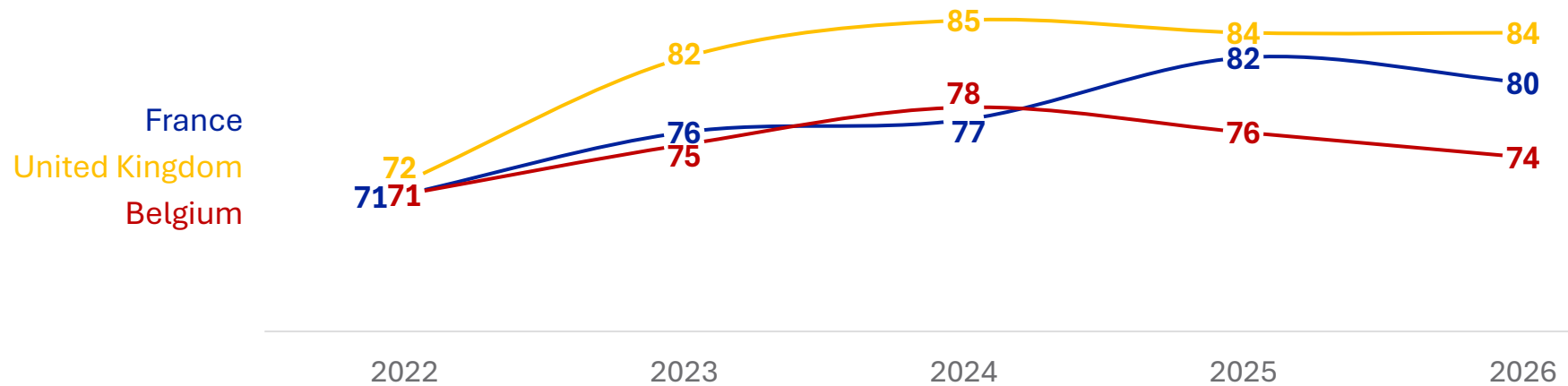
01

5/8 Travel enthusiasm – Trend over several years % Enthusiast (Excited + Happy to travel)



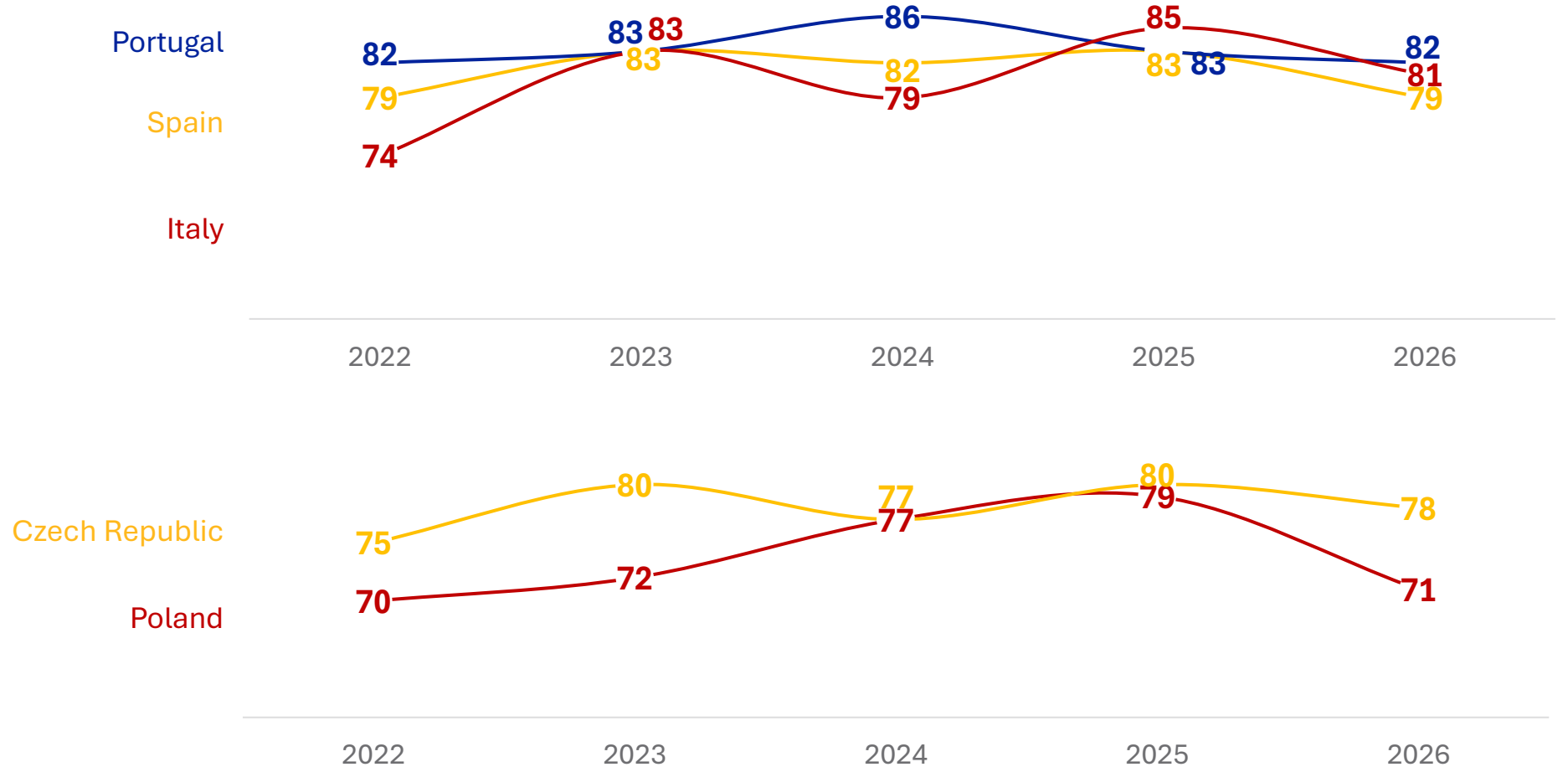
01

6/8 Travel enthusiasm – Trend over several years % Enthusiast (Excited + Happy to travel)



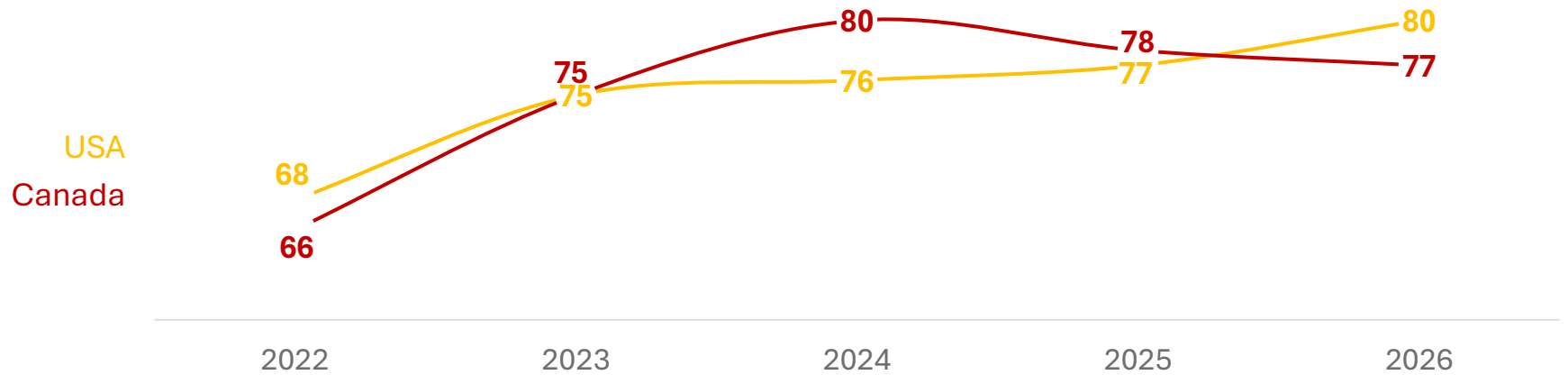
01

7/8 Travel enthusiasm – Trend over several years % Enthusiast (Excited + Happy to travel)



01

8/8 Travel enthusiasm – Trend over several years % Enthusiast (Excited + Happy to travel)





01

The allure of travel remains strong, with no more than 1 in 10 in any region considering staying at home for their holidays as ideal.

International travel continues to be preferred (even gaining ground in North Asia, India, Oceania), with the trend of a growing desire for global exploration observed in 2025 being confirmed.

In contrast, India and the Americas predominantly lean towards domestic holidays, as does Southern Europe—a region comprising highly sought-after tourist destinations.



1/4 Ideal destination for summer vacation in 2026 (%)



EU

WEST. EU

SOUTH EU

EAST. EU

NORTH ASIA



INDIA

OCEANIA

MIDDLE EAST

NORTH AMERICA

SOUTH AMERICA

ST Travel

Abroad or in their country

85 =

84 =

86 -1

83 -2

83 +2

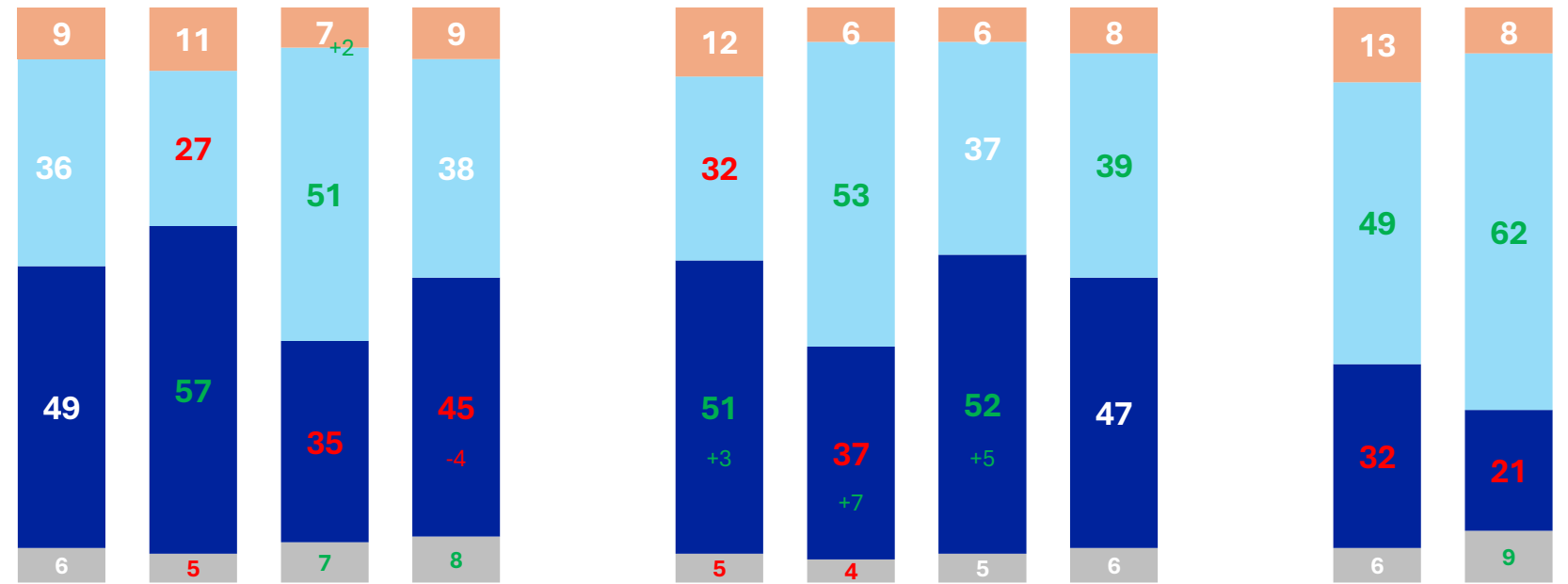
90 +3

89 -1

86 +6

81 =

83



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

NEWQ2. When you think of the ideal [summer vacation / vacation] in 2026, where would you primarily want to go? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

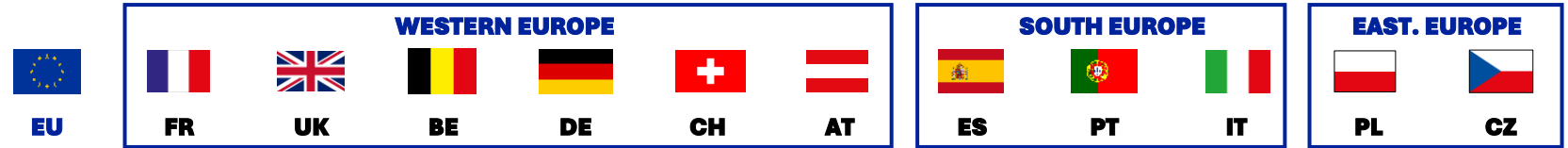
01

Two Europes stand out:

- one clearly attracted to foreign travel, where nearly two-thirds of Belgians, Swiss, and Austrians see their ideal vacations abroad.

- The other, where the majority sees their ideal holidays taking place in their own country, forms a southern arc consisting of Spain, Portugal, and Italy, as well as France and Poland.

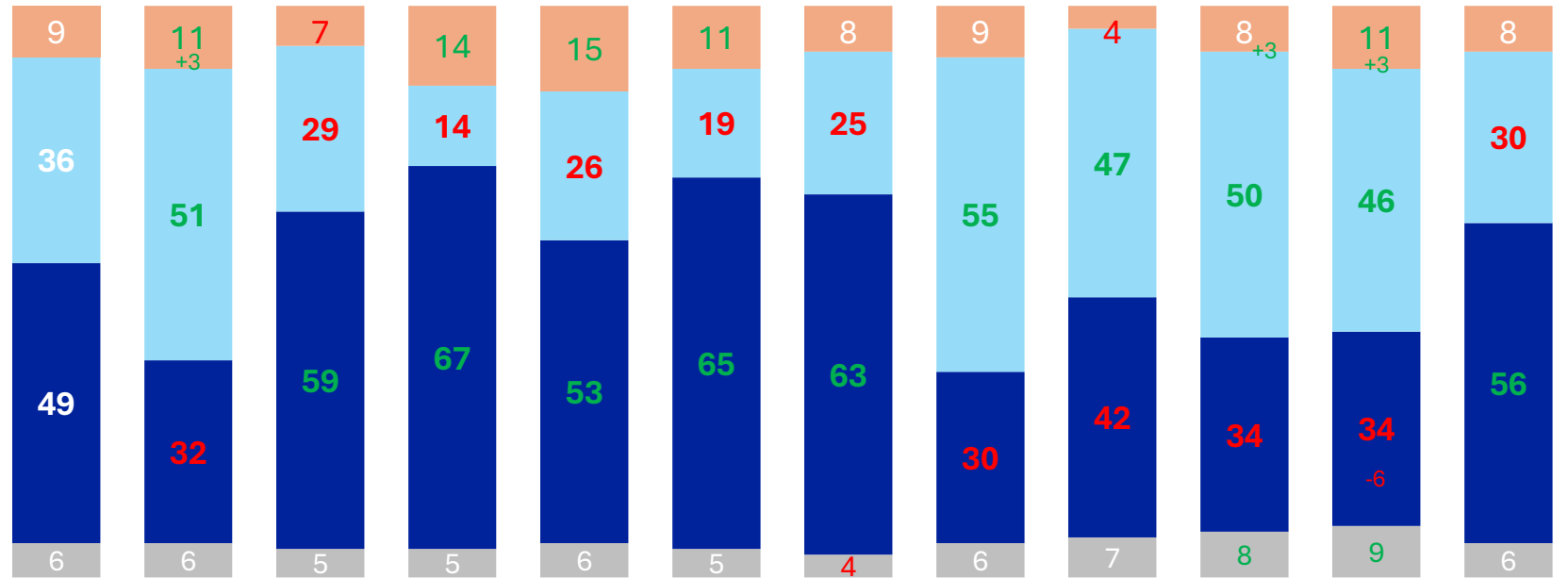
2/4 Ideal destination for summer vacation in 2026 (%)



ST Travel

Abroad or in their country

EU	85 =	FR	83 -3	UK	88 +1	BE	81 =	DE	79 =	CH	84 =	AT	88 +3	ES	85 -1	PT	89 =	IT	84 -2	PL	80 -5	CZ	86 -1
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Nowhere, I stay home | Travel in my own country | Travel abroad | I don't know



NEWQ2. When you think of the ideal [summer vacation / vacation] in 2026, where would you primarily want to go? Basis: To all

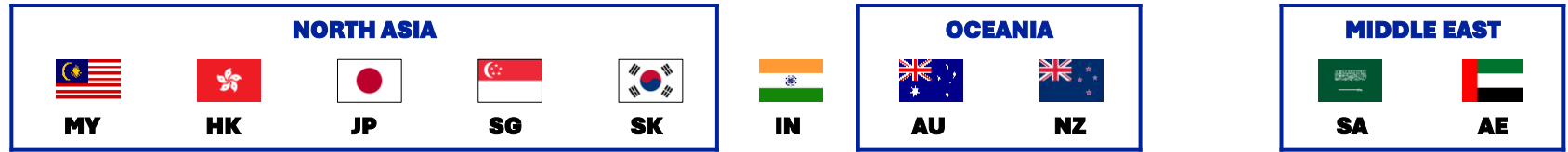
XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

01

The relationship with travel remains incredibly diverse within the North Asia region:

- the Japanese stand out, with more than a quarter considering staying at home as ideal, and only 12% wishing to travel abroad.
- Conversely, in Singapore and Hong Kong, more than three-quarters would ideally like to travel abroad.

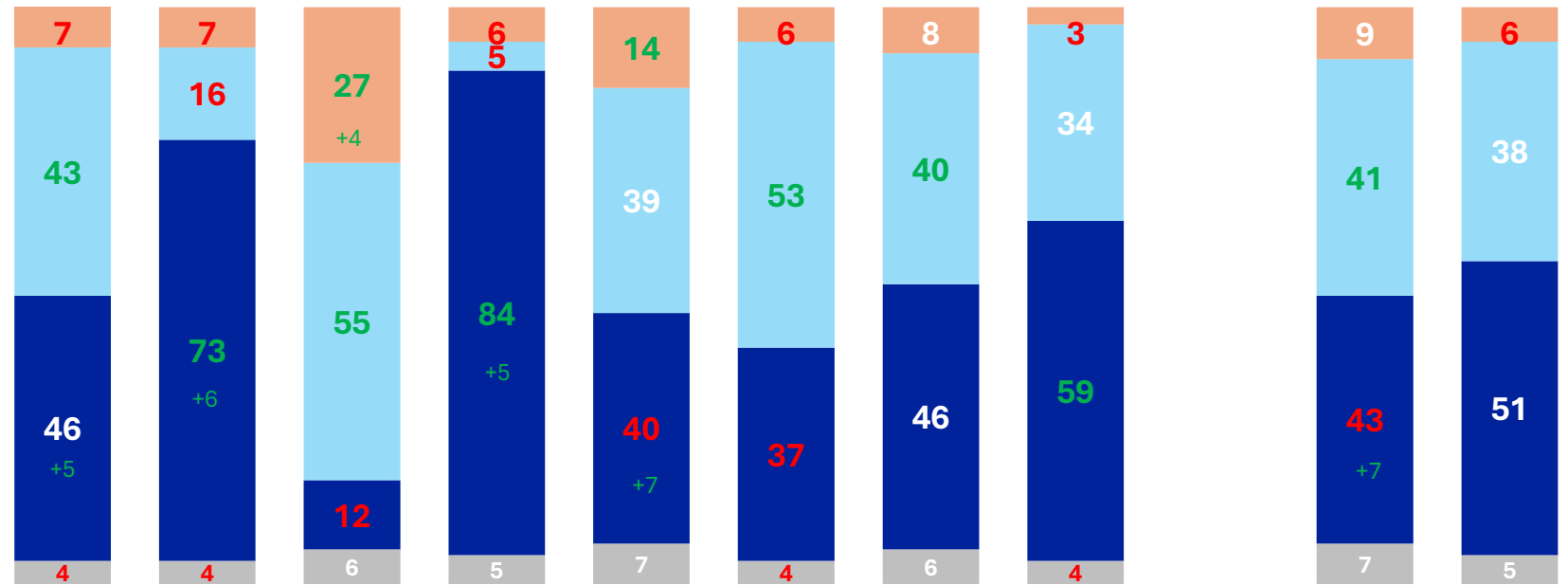
3/4 Ideal destination for summer vacation in 2026 (%)



ST Travel

Abroad or in their country

89 +3	89 +4	67 -5	89 +2	79 +3	90 +3	86 =	93 =	84 +11	89 +2
-------	-------	-------	-------	-------	-------	------	------	--------	-------



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



NEWQ2. When you think of the ideal [summer vacation / vacation] in 2026, where would you primarily want to go? Basis: To all

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

01

Brazil and Mexico, studied for the first time in the history of the barometer this year, stand out for having a very low interest in international travel.

4/4 Ideal destination for summer vacation in 2026 (%)



ST Travel

Abroad or in their country

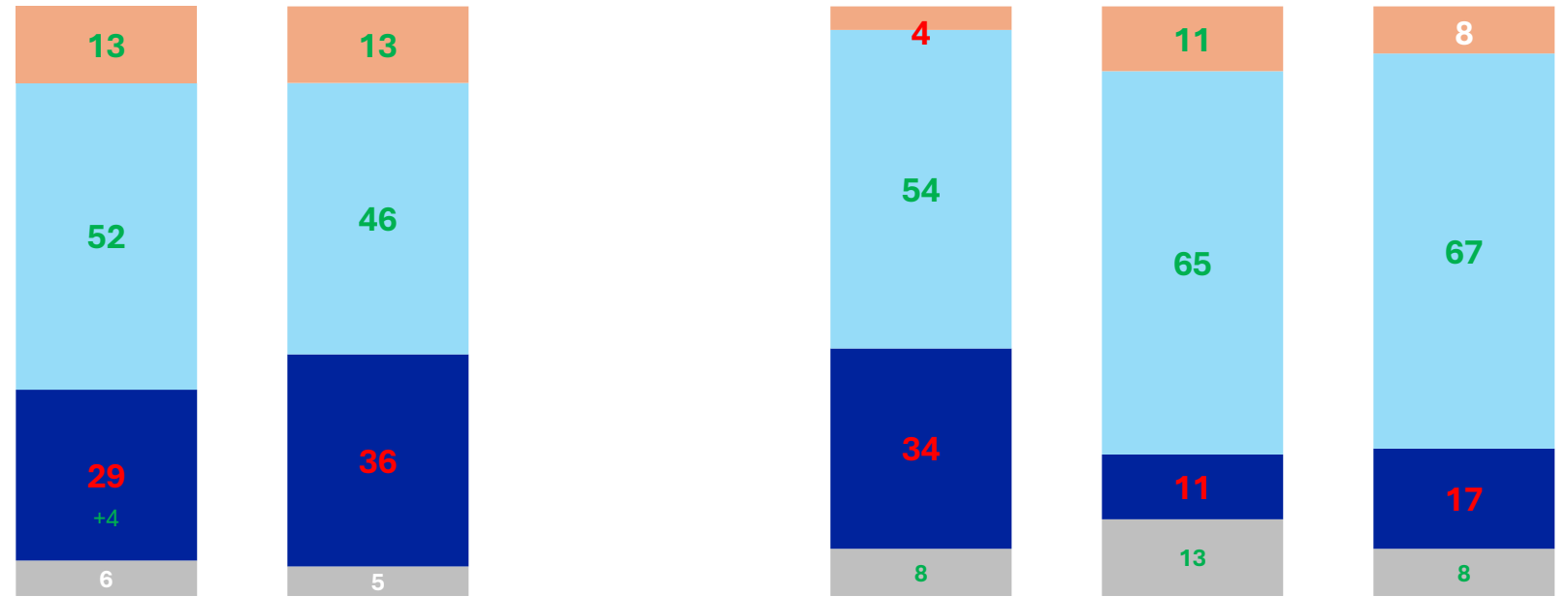
81 +3

82 -1

88

76

84



Nowhere, I stay home

Travel in my own country

Travel abroad

I don't know



NEWQ2. When you think of the ideal [summer vacation / vacation] in 2026, where would you primarily want to go? Basis: To all

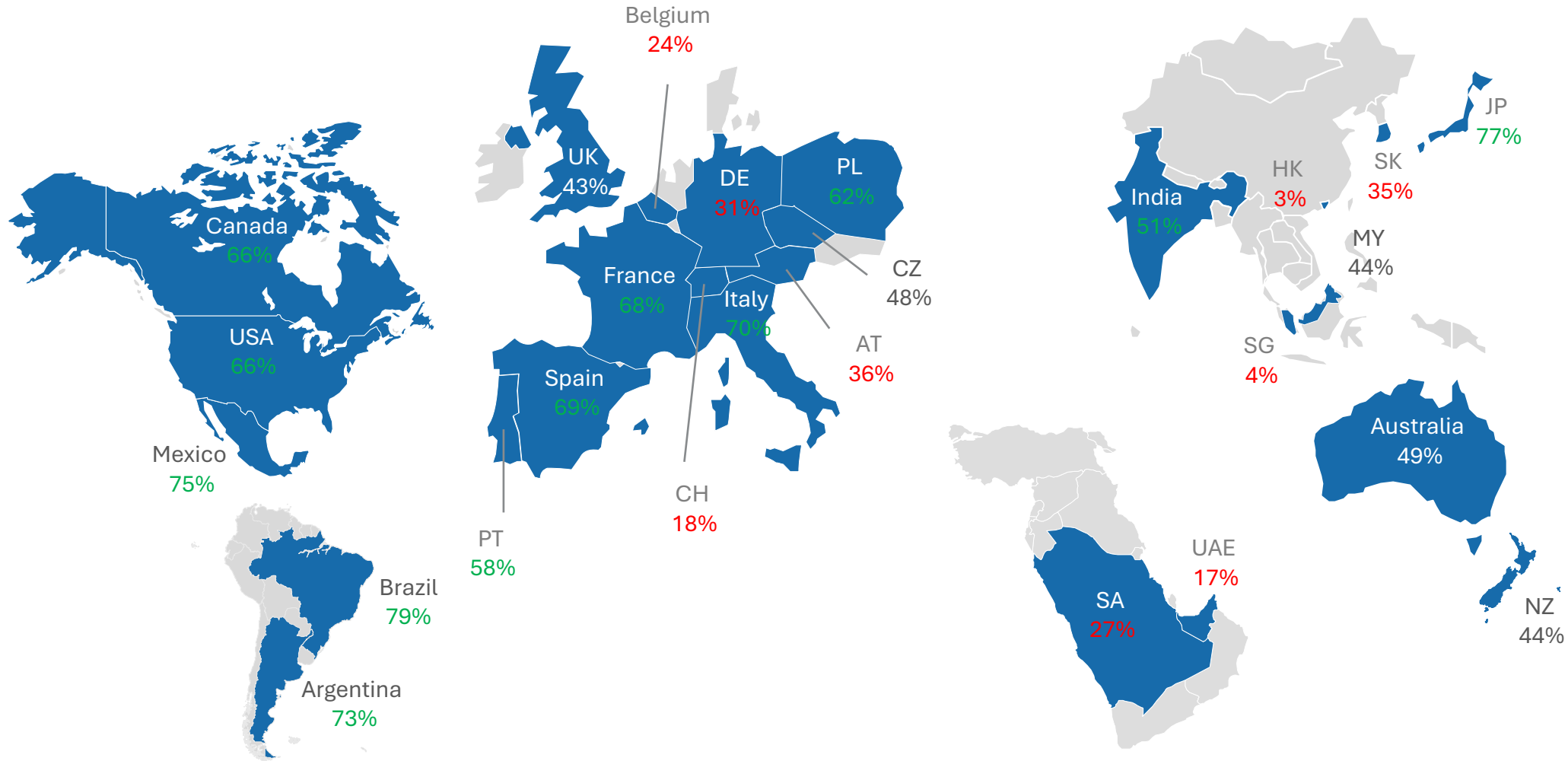
XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

01

Very different realities from one country to another:

- There is a strong tendency to travel within one's own country across the entire American continent, as well as in Japan, and in Europe, specifically in France, Italy, and Spain.
- Conversely, less than 5% of travelers from Hong Kong and Singapore plan to travel within their own country, and less than 1 in 5 Emiratis and Swiss do.

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



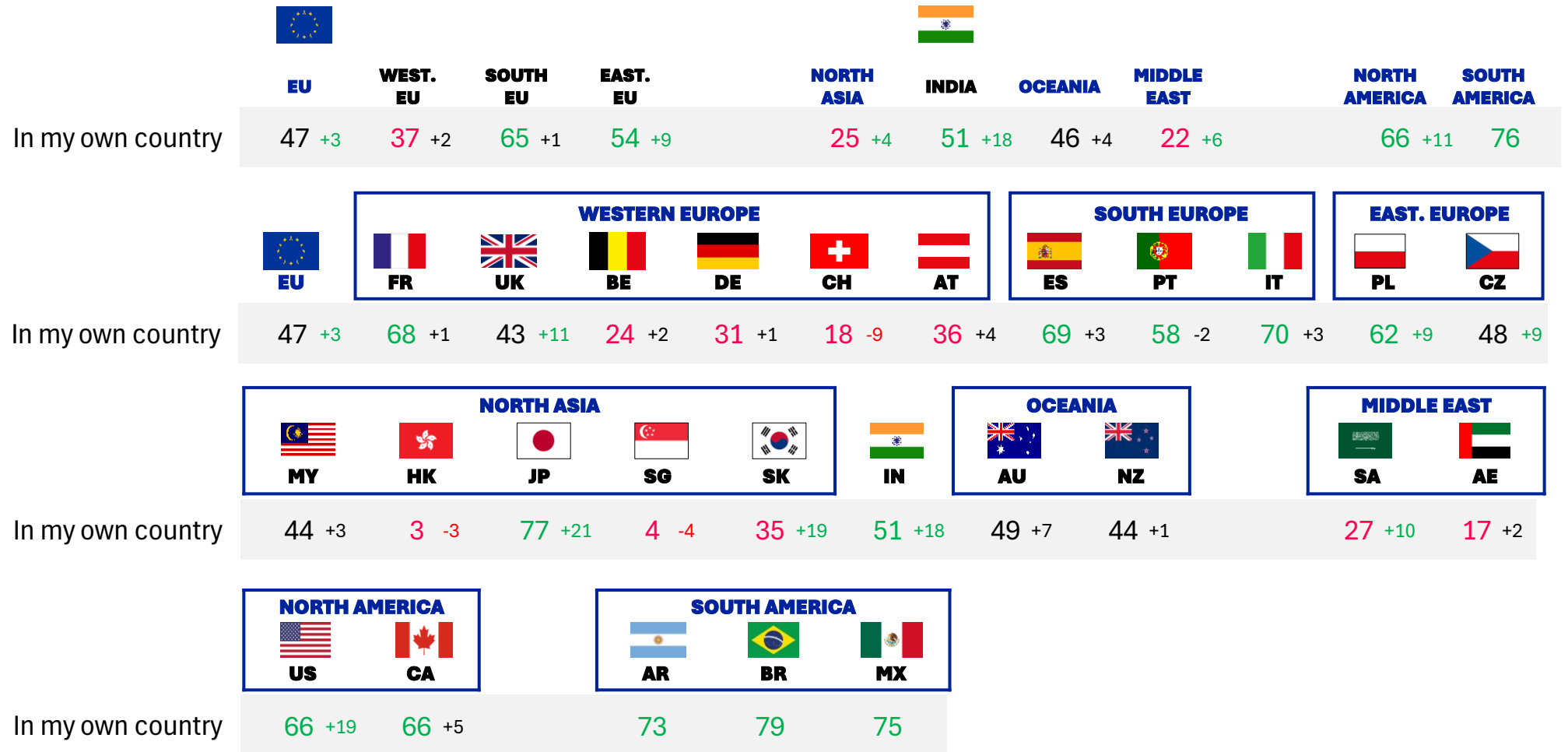


01

A significant increase in domestic travel intentions is observed in Japan, the US, India, the UK, and Saudi Arabia.



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

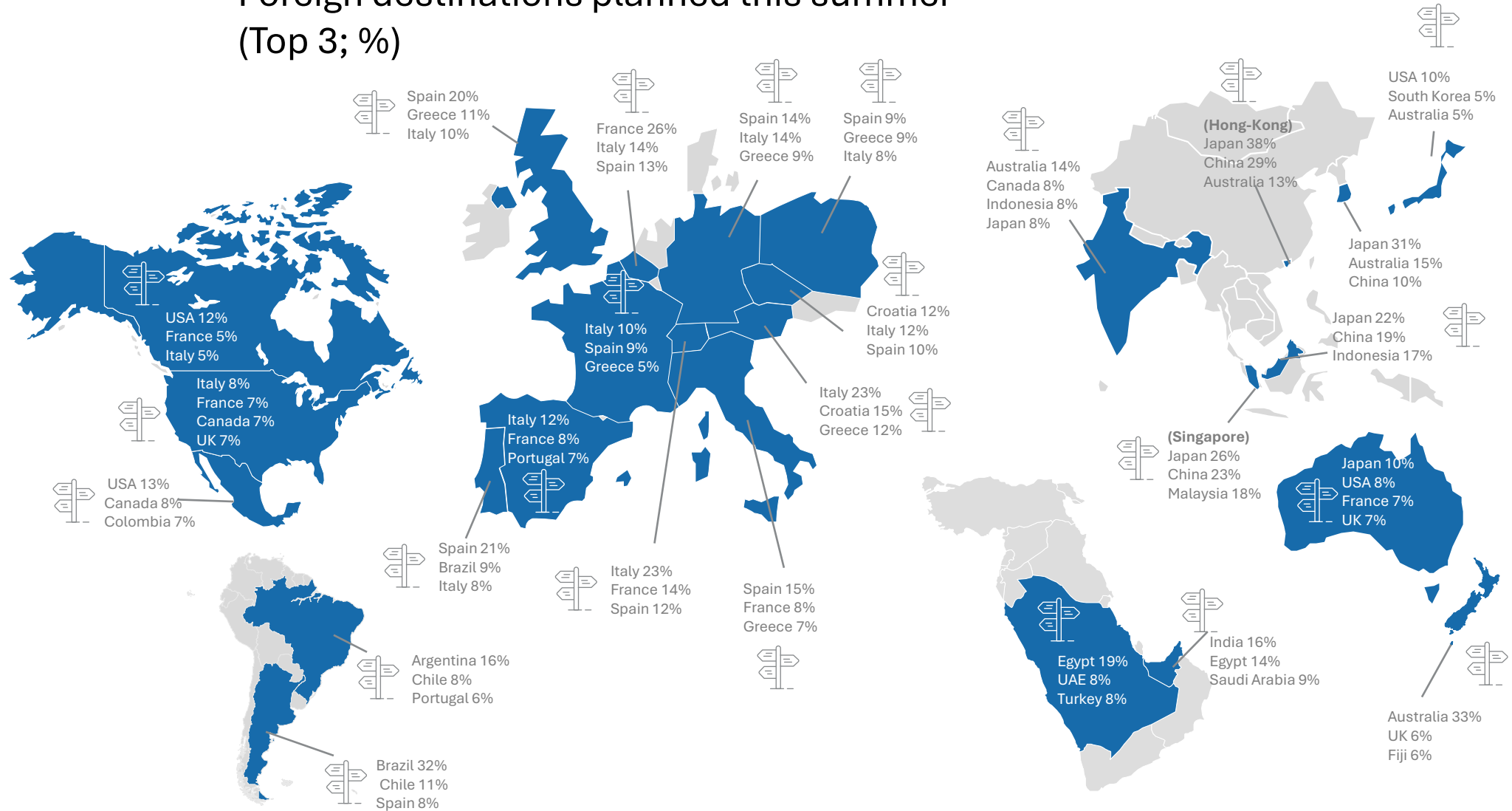


Q21BIS. Where do you plan to go on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip and already know their destination

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

01

Foreign destinations planned this summer (Top 3; %)

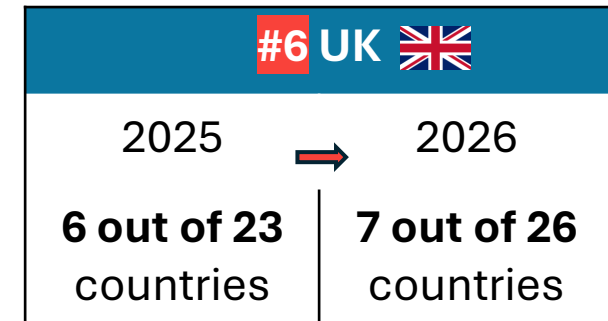
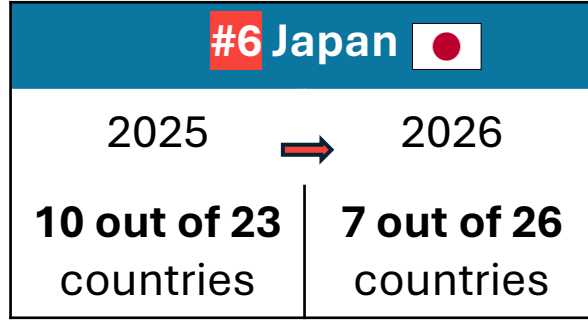
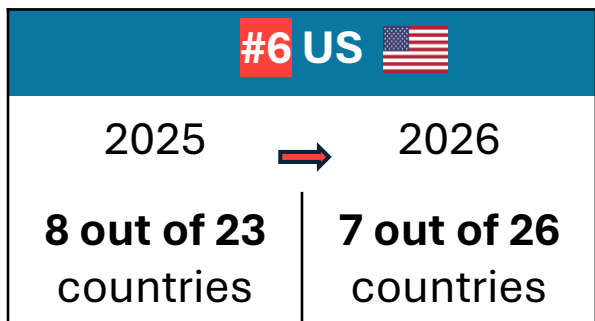
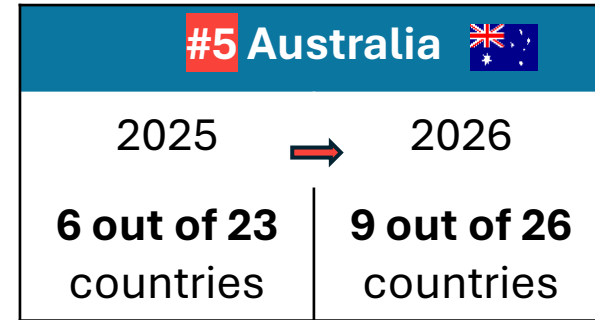
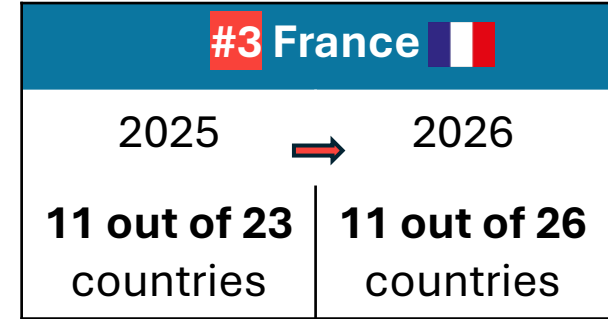
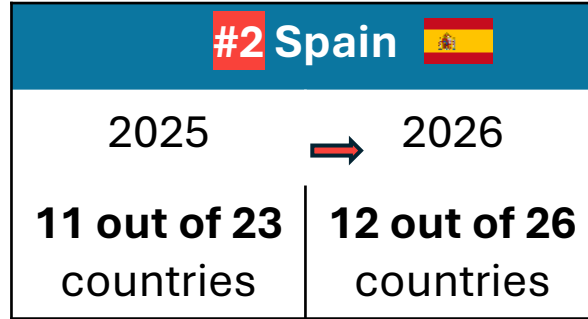
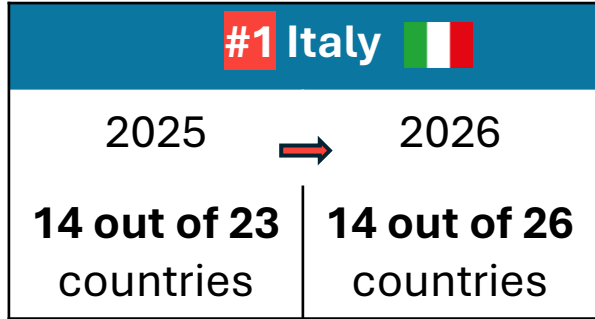




01

France, Italy, and Spain remain key destinations, attracting visitors well beyond just European countries.

Foreign destinations planned this summer
(n° of times they are mentioned in the top 6)







01

The trend towards the experiential aspect observed last year is not only confirmed but even intensified: beyond the relaxing and de-stressing dimension of travel and the joy of discovering new places, there is a growing desire to create memorable experiences.

This statement also illustrates the universal nature of the desire for elsewhere, discovery, and new experiences, with a hierarchy of preferred aspects of travel that is remarkably similar across geographies.

1/4 Favourite aspects of traveling (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Relaxing, escaping from daily routines and stress	64 +4	64 +3	62 +6	65 +2	60 =	56 -1	68 +2	46 +2	69 +7	62
Exploring new places (cities, landscapes, and attractions)	57 +2	56 +1	57 +5	60 =	58 +2	57 +1	61 -3	43 +2	60 +4	48
Making memories	45 +2	48 +3	40 +1	44 +1	47 +1	47 +1	60 +1	39 +3	57 +2	41
Trying new foods and local cuisine	41 +1	43 +2	38 =	40 -1	54 +1	45 -3	48 -3	35 +4	44 =	37
Experiencing different cultures, local traditions and customs	40 =	40 =	41 +2	40 +1	44 +1	50 -1	44 -3	36 +4	42 +3	37
Personal growth: gaining new perspectives and broadening horizons	26 =	24 =	32 =	22 +1	28 -3	40 +3	33 =	33 +2	30 =	24
Meeting new people: connecting with locals and other travellers	24 -1	25 -2	24 =	21 -1	19 -1	44 =	30 -2	32 +1	27 =	26
Learning new languages or improving your language skills	12 -1	12 -2	12 -2	11 =	13 -1	30 -1	14 =	25 +1	13 =	16



Top answers per country: #1 #2 #3
 XX / XX Significantly higher or lower score vs Europe

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

01











2/4 Favourite aspects of traveling (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Relaxing, escaping from daily routines and stress	64 ⁺⁴	64 ⁺⁴	69 ⁺¹	67 ⁺⁶	66 ⁺⁵	63 ⁺⁴	57 ⁻³	58 ⁺¹	70 ⁺⁶	57 ⁻¹¹	63 ⁺³	67 ⁼
Exploring new places (cities, landscapes, and attractions)	57 ⁻²	59 ⁺¹	59 ⁻³	54 ⁺³	54 ⁺³	58 ⁺⁵	50 ⁻⁴	57 ⁺³	60 ⁺⁴	53 ⁺⁵	57 ⁼	63 ⁼
Making memories	45 ⁻²	49 ⁺⁵	57 ⁼	45 ⁺⁵	49 ⁺⁵	47 ⁺⁷	41 ⁻²	31 ⁻¹	53 ⁺³	36 ⁺³	43 ⁺²	45 ⁻¹
Trying new foods and local cuisine	41 ⁺¹	41 ⁺²	46 ⁺¹	43 ⁺⁶	41 ⁺²	45 ⁺¹	40 ⁻¹	37 ⁻²	43 ⁺¹	35 ⁺¹	41 ⁺¹	39 ⁻³
Experiencing different cultures, local traditions and customs	40 ⁼	44 ⁺²	42 ⁻⁴	38 ⁺²	36 ⁺¹	43 ⁺²	38 ⁺¹	35 ⁻¹	51 ⁺⁵	38 ⁺²	38 ⁺²	42 ⁼
Personal growth: gaining new perspectives and broadening horizons	26 ⁼	18 ⁻²	26 ⁻¹	21 ⁺¹	26 ⁺¹	30 ⁺³	26 ⁻¹	30 ⁺¹	36 ⁼	31 ⁼	23 ⁼	21 ⁺¹
Meeting new people: connecting with locals and other travellers	24 ⁻¹	28 ⁻²	24 ⁻⁶	23 ⁻¹	23 ⁻¹	26 ⁻²	27 ⁺²	22 ⁻¹	24 ⁻³	26 ⁺⁴	21 ⁻⁴	20 ⁼
Learning new languages or improving your language skills	12 ⁻¹	9 ⁻³	14 ⁻⁴	10 ⁻¹	12 ⁼	14 ⁻²	15 ⁺³	13 ⁺¹	13 ⁻²	12 ⁻²	10 ⁻¹	12 ⁺¹

Top answers per country: #1 #2 #3
 XX / XX Significantly higher or lower score vs Europe

01

3/4 Favourite aspects of traveling (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Relaxing, escaping from daily routines and stress	65 ⁻¹	65 ⁺²	41 ⁻²	68 ⁼	62 ⁺³	56 ⁻¹	66 ⁺¹	70 ⁺²	44 ⁺⁴	48 ⁺¹
Exploring new places (cities, landscapes, and attractions)	62 ⁼	57 ⁺⁴	51 ⁼	64 ⁺³	54 ⁺¹	57 ⁺¹	57 ⁻¹	66 ⁻⁴	41 ⁼	45 ⁺⁴
Making memories	56 ⁺¹	43 ⁺⁸	45 ⁻³	51 ⁻²	42 ⁺³	47 ⁺¹	55 ⁺¹	65 ⁺¹	37 ⁺²	41 ⁺⁵
Trying new foods and local cuisine	58 ⁺³	63 ⁼	48 ⁼	58 ⁻²	42 ⁺¹	45 ⁻³	45 ⁻²	52 ⁻²	31 ⁺⁴	38 ⁺⁴
Experiencing different cultures, local traditions and customs	58 ⁺⁷	49 ⁻¹	27 ⁻¹	53 ⁻²	31 ⁼	50 ⁻¹	41 ⁻¹	47 ⁻⁵	31 ⁺¹	41 ⁺⁶
Personal growth: gaining new perspectives and broadening horizons	38 ⁺²	32 ⁼	15 ⁻²	31 ⁻⁵	27 ⁻⁵	40 ⁺³	29 ⁻¹	37 ⁺¹	30 ⁼	35 ⁺⁴
Meeting new people: connecting with locals and other travellers	32 ⁻²	17 ⁺⁵	10 ⁼	23 ⁻⁶	16 ⁺¹	44 ⁼	28 ⁻²	32 ⁻²	28 ⁻²	36 ⁺⁴
Learning new languages or improving your language skills	24 ⁻¹	13 ⁺¹	5 ⁻²	13 ⁻⁵	9 ⁼	30 ⁻¹	13 ⁼	16 ⁺¹	23 ⁻¹	26 ⁺²

01

4/4 Favourite aspects of traveling (%)



Aspect	US	CA	AR	BR	MX
Relaxing, escaping from daily routines and stress	69 +8	69 +6	64	61	60
Exploring new places (cities, landscapes, and attractions)	58 +5	62 +3	56	46	42
Making memories	56 +3	59 +3	39	45	39
Trying new foods and local cuisine	44 -3	44 +4	39	34	39
Experiencing different cultures, local traditions and customs	41 +4	42 +2	39	40	33
Personal growth: gaining new perspectives and broadening horizons	30 =	29 -1	27	26	20
Meeting new people: connecting with locals and other travellers	27 -2	27 +1	26	27	24
Learning new languages or improving your language skills	13 -1	13 =	18	16	15





01

The reasons expressed by those who will not be traveling this year between June and September? Some trends:

- Financial reasons remain the primary obstacle.
- Once again, the distinction between the northern and southern hemispheres is evident. In the latter, many will take vacations at a different time of the year.
- Although it remains a minority reason, concerns about safety have skyrocketed, doubling in Europe, North America, and the Middle East, and tripling in Oceania.



1/4 Reasons for not travelling this summer (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
I cannot afford it	41 -1	41 =	40 -2	43 -1	35 +1	23 -16	43 -1	33 -3	42 -3	40
I am saving money	29 +2	26 +1	31 +3	33 +1	29 -3	19 -6	39 +3	25 -4	35 +1	26
I will go at another time of the year	19 -3	21 -5	18 -3	10 =	27 -2	34 -1	36 -8	25 =	24 =	22
I prefer to stay home, I do not enjoy traveling	15 -3	17 -2	9 -3	16 -4	18 =	13 =	10 +2	8 -2	19 +2	12
My health condition does not allow me to travel	12 -1	12 -1	7 =	19 =	7 -1	11 +2	6 +1	4 =	8 -1	3
I don't have a companion to travel with	8 -1	8 =	8 -1	10 -2	9 -1	9 -3	6 =	9 -2	7 -1	6
I cannot take vacations from my job	7 =	7 +1	8 -2	5 +2	16 +3	14 +2	10 -1	17 -2	7 =	17
I am in charge of a relative that I cannot leave behind	7 =	5 -1	10 +1	10 +1	7 -2	3 -4	4 -1	7 -3	6 -1	6
I'm concerned about safety & security in potential travel destinations	7 +4	7 +4	7 +5	4 -1	4 -1	7 +1	6 +4	10 +4	11 +4	6
I want to reduce as much as possible my carbon footprint	4 +1	5 +1	3 +1	1 -1	2 =	8 +2	1 =	4 +2	4 +2	1
Travelling makes me anxious (flying, unfamiliar places...)	3 =	3 =	3 =	4 =	4 =	5 +4	3 +2	3 -1	8 =	2
I had negative past experiences while traveling	1 =	2 +1	1 =	1 -2	1 =	2 -3	0 =	4 +1	1 =	2
TOTAL Financial reasons	59 +1	56 =	62 +1	63 +2	53 =	36 -15	64 +1	49 -7	60 -3	59
TOTAL Personal obligations	32 -1	29 -2	32 =	41 +2	35 -2	36 =	24 -1	34 -5	25 -3	31
TOTAL Personal choices	35 -7	40 -7	29 -5	26 -6	46 -1	52 +5	45 -7	36 +1	44 +3	34
TOTAL Anxiety to travel	9 +3	10 +4	9 +4	7 -1	8 -1	11 +5	9 +6	12 +3	16 +2	7

Top answers per country: #1 #2 #3

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

XX / XX Significantly higher or lower score vs Europe

01

2/4

Reasons for not travelling this summer

(%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I cannot afford it	41 -1	43 -4	42 -5	36 -3	48 +2	34 +1	42 +6	39 -2	35 -9	48 +6	43 =	42 -2
I am saving money	29 +2	26 -2	30 -4	24 =	26 +2	24 +3	28 +6	20 -1	49 +10	24 +4	36 +3	30 -1
I will go at another time of the year	19 -3	27 -2	19 -4	16 -6	17 -3	30 -6	20 -8	26 +3	14 -5	13 -7	11 -2	7 -1
I prefer to stay home, I do not enjoy traveling	15 -3	13 -5	20 +3	20 -1	18 -2	15 -4	16 -2	8 -3	7 -6	12 -2	18 -2	14 -6
My health condition does not allow me to travel	12 -1	9 +1	12 -1	14 =	13 -4	9 -3	14 +1	4 -3	6 -1	11 +3	18 =	21 +1
I don't have a companion to travel with	8 -1	5 -1	7 -2	9 -1	8 =	8 +2	7 -2	6 -4	9 -1	10 +4	9 -2	12 -2
I cannot take vacations from my job	7 =	10 +4	3 +1	4 -3	6 =	10 -1	5 =	8 -1	9 =	6 -6	4 +2	6 +1
I am in charge of a relative that I cannot leave behind	7 =	5 =	6 +3	9 -1	4 -3	3 =	5 -1	12 +1	11 +4	6 -2	8 +2	12 +1
I'm concerned about safety & security in potential travel destinations	7 +4	7 +5	5 +4	9 +5	10 +6	6 +3	6 +2	8 +5	7 +5	6 +4	3 -2	4 -1
I want to reduce as much as possible my carbon footprint	4 +1	3 +1	3 =	4 -1	5 -1	5 +2	9 +3	2 =	5 +2	4 +3	2 =	1 -1
Travelling makes me anxious (flying, unfamiliar places...)	3 =	3 -1	4 -2	5 +2	2 =	2 -2	1 =	4 +1	1 -3	3 +1	3 -1	5 =
I had negative past experiences while traveling	1 =	0 -2	1 =	4 +3	2 +2	1 =	1 -1	1 =	1 =	0 -2	2 =	0 -3
TOTAL Financial reasons	59 +1	58 -5	60 -6	52 -2	61 +1	49 +2	57 +10	51 -5	70 =	66 +14	65 +4	62 +1
TOTAL Personal obligations	32 -1	26 +3	26 +1	33 -5	29 -6	30 =	29 -2	29 -5	33 +3	33 =	36 +3	46 =
TOTAL Personal choices	35 -7	42 -5	40 -2	38 -7	38 -5	47 -11	40 -8	35 =	25 -8	28 -6	30 -5	22 -7
TOTAL Anxiety to travel	9 +3	10 +4	8 +2	13 +8	12 +6	7 +1	7 +2	12 +6	8 +4	8 +4	6 -2	9 +1

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

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

01

3/4 Reasons for not travelling this summer (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
I cannot afford it	32 +1	20 -3	39 +1	26 -1	45 -2	23 -16	46 +3	40 -5	35 -1	30 -7
I am saving money	41 -6	26 +7	32 -5	31 -7	18 -2	19 -6	37 +4	40 +2	23 -4	28 -4
I will go at another time of the year	35 +2	38 -1	19 =	43 +3	17 -5	34 -1	32 -7	40 -8	24 =	26 =
I prefer to stay home, I do not enjoy traveling	18 +1	13 -9	20 +1	9 +3	26 -3	13 =	12 +2	7 =	10 -3	6 =
My health condition does not allow me to travel	3 -5	6 +2	8 -1	7 -1	9 -3	11 +2	7 +1	5 +1	5 +1	3 -2
I don't have a companion to travel with	10 -1	12 -2	7 -1	11 -4	6 =	9 -3	6 -2	5 +1	11 -2	7 =
I cannot take vacations from my job	14 -1	19 +8	12 +3	17 -1	22 +5	14 +2	8 -4	13 +3	12 -4	24 =
I am in charge of a relative that I cannot leave behind	9 -4	8 -4	5 -1	8 +1	7 -4	3 -4	5 =	4 -1	7 -3	6 -4
I'm concerned about safety & security in potential travel destinations	10 +3	4 -6	2 =	10 +2	1 -2	7 +1	9 +6	3 +2	6 -1	15 +10
I want to reduce as much as possible my carbon footprint	3 +1	2 =	1 +1	4 =	1 -3	8 +2	1 =	2 +1	4 +3	3 =
Travelling makes me anxious (flying, unfamiliar places...)	4 +2	2 -4	5 -1	3 =	5 +1	5 +4	4 +3	3 +1	3 -2	2 =
I had negative past experiences while traveling	3 +1	0 -1	1 =	0 -2	1 -1	2 -3	0 =	1 +1	4 +1	4 +1
TOTAL Financial reasons	58 -3	38 +2	56 -2	49 =	56 +1	36 -15	64 +5	63 -3	50 -6	48 -8
TOTAL Personal obligations	33 -5	40 +2	29 -2	37 -4	42 +1	36 =	24 -4	25 +3	31 -6	37 -6
TOTAL Personal choices	53 +3	51 -7	39 +1	56 +7	42 -10	52 +5	43 -5	47 -8	38 +1	33 =
TOTAL Anxiety to travel	13 +5	6 -8	6 -1	13 +2	6 =	11 +5	12 +8	5 +3	9 -2	17 +11

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

Top answers per country: #1 #2 #3
XX / XX Significantly higher or lower score vs Europe

01

4/4 Reasons for not travelling this summer (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
I cannot afford it	37 -10	46 +3	48	42	28
I am saving money	31 -3	38 +4	25	25	29
I will go at another time of the year	25 =	23 -1	22	23	22
I prefer to stay home, I do not enjoy traveling	22 +3	17 +2	7	12	18
My health condition does not allow me to travel	11 +3	5 -6	3	4	3
I don't have a companion to travel with	8 -1	6 -2	5	5	8
I cannot take vacations from my job	7 +1	7 -1	16	21	15
I am in charge of a relative that I cannot leave behind	7 -1	4 -2	6	5	6
I'm concerned about safety & security in potential travel destinations	11 +6	10 =	4	4	10
I want to reduce as much as possible my carbon footprint	4 +2	5 +2	2	1	0
Travelling makes me anxious (flying, unfamiliar places...)	7 -1	8 =	2	3	1
I had negative past experiences while traveling	1 -1	1 +1	2	3	1
TOTAL Financial reasons	55 -10	65 +3	63	60	51
TOTAL Personal obligations	30 +2	20 -9	29	33	30
TOTAL Personal choices	47 +4	42 +4	31	34	38
TOTAL Anxiety to travel	16 +4	16 =	5	6	11

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

Top answers per country: #1 #2 #3
 XX / XX Significantly higher or lower score vs Europe

02

...even as travel now unfolds against a challenging security backdrop.







02

Security is now more than ever a key reason for choosing a vacation destination:

- Increasing in India and North Asia, it is now the number one reason for choice in these areas.
- It also remains the top reason in North America.
- In Europe, it still ranks behind climate and the habit of returning to a familiar place, but significantly more people than in 2025 consider security a key criterion (30%, up 2 points).



1/5 Motivations for the choice of destination (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
I like the weather/climate in this/these country (ies)	39 -3	40 -2	38 -3	34 -7	30 -1	36 -3	27 =	32 -1	29 -3	32
I have already been there and wanted to return	37 -2	41 -3	28 +2	38 -1	32 -2	16 -1	30 +1	18 -2	30 +3	27
It is a safe destination (in terms of security)	30 +2	28 +2	30 -1	33 =	37 +3	37 +3	30 +4	24 -3	32 =	18
It offers activities I like (e.g. hiking, monuments to visit...)	24 -3	24 -1	23 -4	26 -8	24 -1	22 -3	20 -5	26 +1	29 =	22
I have friends / family to visit there	19 =	20 =	20 -1	17 +3	18 -1	24 =	37 +1	28 +1	32 =	31
I have friends / family that recommended it	13 -2	13 -2	13 -1	14 -1	20 =	26 -1	16 -1	24 -2	16 +1	17
I found a good deal to go there	13 =	12 +1	15 +1	16 -3	27 -4	19 -3	15 +1	15 -3	12 =	17
It is a country with good healthcare infrastructures	8 -1	7 -1	9 -3	7 =	9 -1	21 -3	8 +2	16 -3	10 =	9
I saw a documentary / movie / read an article / a book about this country	6 -2	6 -2	7 -1	6 -2	13 -2	20 =	6 -2	14 =	7 -3	7
A social media influencer posted a story on this country and it made me want to go there	3 -1	4 =	3 -1	3 =	12 -3	26 +1	5 =	17 =	6 -2	5
Other	6 =	7 =	6 =	5 =	3 -1	3 +2	11 -3	1 -1	11 +1	5

Top answers per country: #1 #2 #3

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

02

2/5 Motivations for the choice of destination (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I like the weather/climate in this/these country (ies)	39 -3	37 -1	38 -4	40 +3	45 -2	41 +1	40 -7	36 -3	43 =	35 -6	36 -9	32 -6
I have already been there and wanted to return	37 -2	40 -4	41 +1	39 -3	43 -3	41 -3	42 -8	24 -2	24 =	35 +8	35 +2	40 -4
It is a safe destination (in terms of security)	30 +2	26 +3	30 +1	22 =	34 +3	29 +7	29 +2	30 +1	34 =	26 -3	38 +4	29 -4
It offers activities I like (e.g. hiking, monuments to visit...)	24 -3	28 -7	25 +2	31 -2	19 +1	20 +3	19 -3	27 -4	22 -1	22 -5	20 -3	31 -12
I have friends / family to visit there	19 =	24 -1	22 +1	16 -2	17 -1	23 +1	18 +4	22 +3	22 -6	17 =	18 +3	16 +3
I have friends / family that recommended it	13 -2	14 +1	14 +1	13 -3	11 -5	15 =	13 -4	12 -3	15 +1	11 -2	15 -2	13 =
I found a good deal to go there	13 =	11 +2	18 -1	13 =	10 +3	8 -1	10 +3	19 +3	12 -1	13 +1	19 -5	13 -2
It is a country with good healthcare infrastructures	8 -1	6 -3	6 =	6 =	10 =	8 -1	9 +2	9 -3	11 =	9 -3	9 =	5 =
I saw a documentary / movie / read an article / a book about this country	6 -2	5 -1	5 -5	4 -3	7 -2	8 =	7 =	7 -1	7 +1	8 -2	7 -2	5 -1
A social media influencer posted a story on this country and it made me want to go there	3 -1	1 -3	5 =	2 -4	3 =	4 -1	6 +3	3 -1	4 =	3 =	3 =	2 =
Other	6 =	5 +2	9 +1	8 +2	6 =	7 -1	5 -5	8 +1	6 -1	5 =	5 =	6 +1











Top answers per country: #1 #2 #3

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

02

3/5 Motivations for the choice of destination (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
I like the weather/climate in this/these country (ies)	30 -2	32 +2	20 -6	36 +2	25 -4	36 -3	29 -2	24 +1	30 -7	34 +3
I have already been there and wanted to return	25 =	35 -6	36 -11	38 -2	30 +1	16 -1	29 -1	30 +1	16 -4	21 +1
It is a safe destination (in terms of security)	40 +4	38 +1	44 +4	33 +3	32 +1	37 +3	32 +4	28 +4	27 -3	22 -3
It offers activities I like (e.g. hiking, monuments to visit...)	22 =	23 -5	20 -5	24 +6	29 -8	22 -3	17 -8	22 -3	30 =	23 +1
I have friends / family to visit there	23 -2	18 +3	14 =	20 =	11 =	24 =	30 -2	44 +3	23 +1	32 +1
I have friends / family that recommended it	23 +3	18 -1	11 =	21 -2	22 +5	26 -1	14 -6	17 +3	21 -4	27 +1
I found a good deal to go there	29 -1	32 -1	29 -4	19 -3	30 -12	19 -3	18 +3	11 -1	14 -3	16 -2
It is a country with good healthcare infrastructures	14 -1	6 -1	5 -6	8 -2	7 +1	21 -3	10 =	6 +3	20 =	13 -5
I saw a documentary / movie / read an article / a book about this country	18 -2	16 +4	5 -8	11 -2	10 -3	20 =	7 -2	5 -3	14 +2	14 -2
A social media influencer posted a story on this country and it made me want to go there	16 -4	10 -4	5 -12	10 =	14 +2	26 +1	5 -1	4 -1	17 +3	17 -1
Other	1 -2	5 +2	6 +2	4 -4	1 -1	3 +2	10 -2	12 -3	1 -1	1 -1

02

4/5 Motivations for the choice of destination (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
I like the weather/climate in this/these country (ies)	33 -1	25 -7	29	33	34
I have already been there and wanted to return	33 +10	27 -2	35	19	26
It is a safe destination (in terms of security)	29 =	35 +2	15	24	15
It offers activities I like (e.g. hiking, monuments to visit...)	29 +1	30 +1	25	22	20
I have friends / family to visit there	31 +1	33 -1	29	31	32
I have friends / family that recommended it	17 -1	15 +2	15	17	21
I found a good deal to go there	12 -2	13 +3	20	15	16
It is a country with good healthcare infrastructures	8 -4	12 +4	7	8	11
I saw a documentary / movie / read an article / a book about this country	10 -1	3 -6	6	6	9
A social media influencer posted a story on this country and it made me want to go there	9 -1	3 -3	5	3	8
Other	7 -1	14 +2	6	7	3

Top answers per country: #1 #2 #3

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

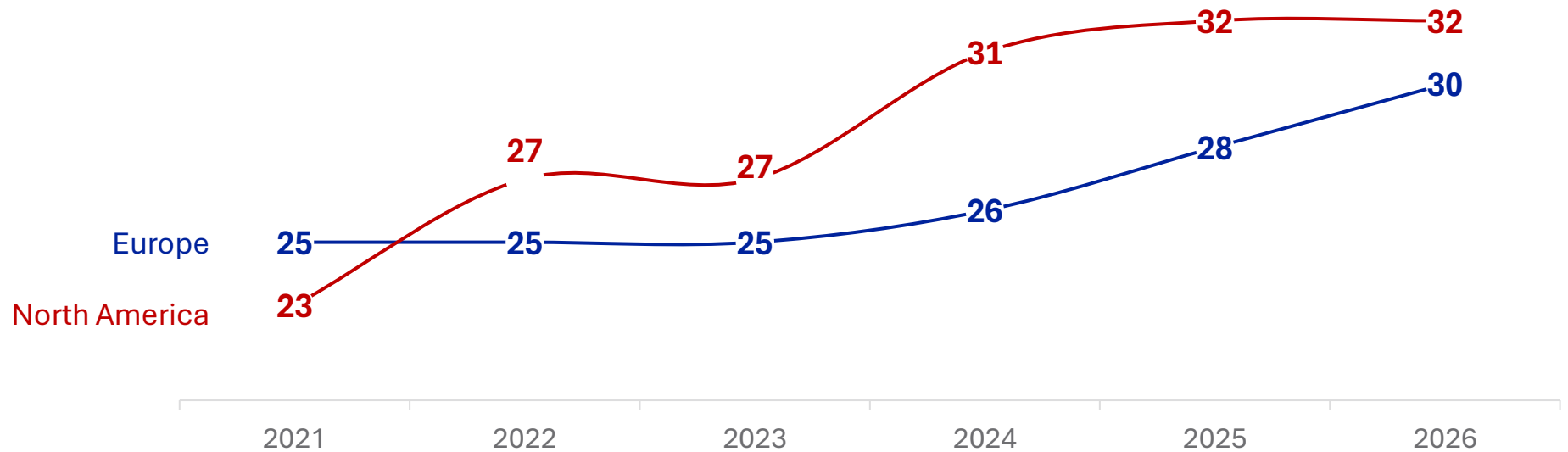
02

The consideration of security as a key factor in choosing a travel destination has reached record levels in North America and Europe.



5/5 Motivations for the choice of destination – Trend over several years (%)

It is a **safe** destination
(in terms of security)



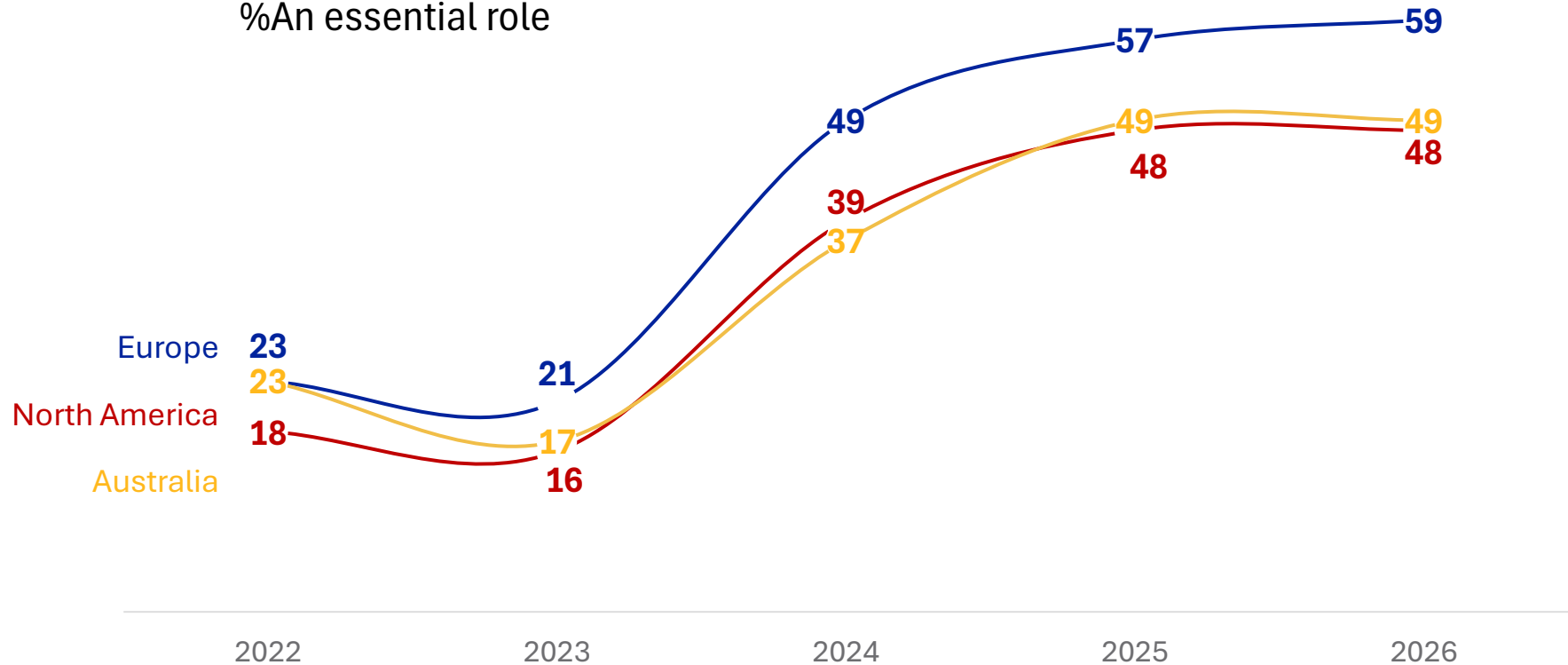
02

A look in the rear-view mirror: security considerations have become an unavoidable reality.

If we go back to 2023, the proportion of travelers who consider the risk related to armed conflict in the destination area as essential in their choice of destination has tripled in Europe, North America, and Australia.

1/7 Factors that play an 'essential' role in choosing a destination – Trend over several years (%)

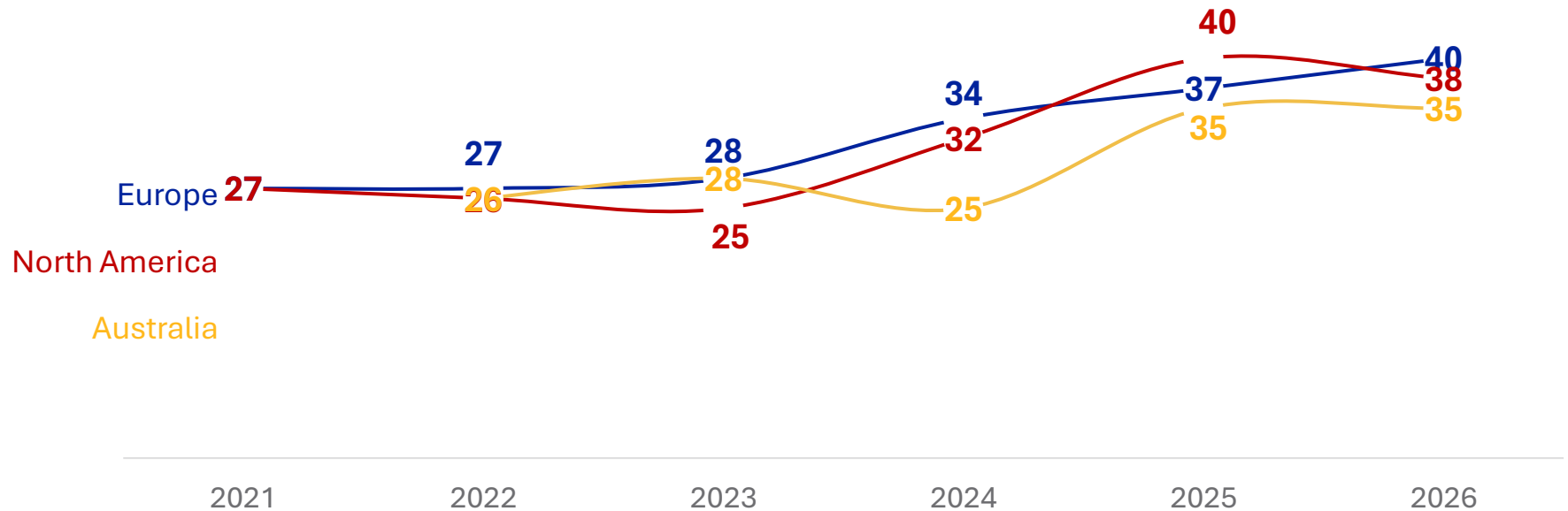
The risk related to **armed conflict** in the destination zone
%An essential role



02

2/7 Factors that play an 'essential' role in choosing a destination – Trend over several years (%)

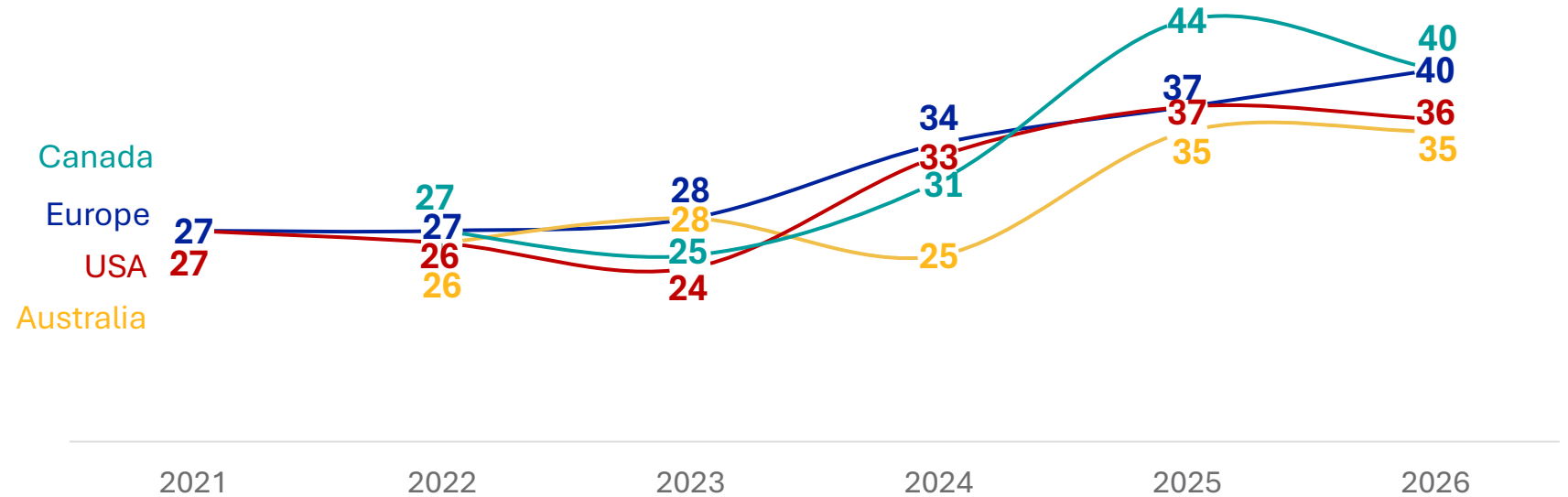
The **political and social climate** in the destination country
%An essential role



02

3/7 Factors that play an 'essential' role in choosing a destination – Trend over several years (%)

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







02

Among the “essential” factors for choosing a travel destination, the risk related to armed conflict in the destination area remains the number one factor in Europe, North America, the Middle East, and Oceania. It is increasingly prevalent, with an increase in Europe and North Asia, and stable in other areas while other factors such as health risks and the risk of natural disasters are declining.

4/7 Factors that play an “essential” role in choosing a destination (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
The risk related to armed conflict in the destination zone	59 +2	55 =	65 +3	61 +6	64 +3	55 -1	51 -1	59 +3	48 =	53
The risk of a terrorist attack *	53 +1	48 -1	60 +1	58 +5	68 +4	62 =	48 +1	58 -1	47 -1	55
The risk of a personal attack (hold-up, attempted theft, etc.)	45 -1	42 -1	54 -1	41 -1	60 -2	56 =	41 -4	58 +1	44 -4	52
The political climate in the destination country (latest elections, respect of human rights...) **	40 +3	41 +3	45 +2	31 +2	41 +2	49 +2	34 +1	54 +8	38 -2	37
The risk of a natural disaster (flood, heat wave, wild fires, storms)	38 -2	33 -3	47 -1	40 =	57 -3	58 -1	32 -1	51 -3	32 -6	51
The risks of social unrest (strikes, demonstrations, etc.)	37 -1	35 -2	40 -2	36 +1	56 +2	52 -2	38 +3	51 =	37 =	40
Health risks	34 -7	31 -6	42 -6	31 -10	59 =	58 -1	37 -4	55 -4	36 -7	51
The cost of living in the destination country	30 -3	26 -2	38 -3	28 -4	35 -2	50 -3	27 =	45 -6	26 -3	42
The possibility that the destination will be overcrowded	30 -3	28 -4	34 -4	28 -2	29 -1	42 -2	20 -4	34 -4	24 -4	34
Your ability to speak the destination country's language	21 -2	19 =	25 -5	22 =	24 +1	41 +1	20 -2	36 -4	27 -4	39
The ecological footprint of the trip	16 -2	15 -2	18 -4	15 -1	18 -5	42 -1	15 +3	37 -1	14 -5	31

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

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

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

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

+X / -X Significant evolution vs 2025

02

5/7 Factors that play an 'essential' role in choosing a destination (%)

	EU	FR	UK	WESTERN EUROPE				SOUTH EUROPE			EAST. EUROPE	
				BE	DE	CH	AT	ES	PT	IT	PL	CZ
The risk related to armed conflict in the destination zone	59 +2	55 -1	52 -2	57 =	55 +4	59 +9	55 -6	71 +8	70 +2	56 -2	63 +5	60 +8
The risk of a terrorist attack *	53 +1	42 -5	50 =	48 -6	46 +2	50 +3	51 =	64 +6	67 =	49 -2	58 +3	57 +5
The risk of a personal attack (hold-up, attempted theft, etc.)	45 -1	38 -7	44 -1	39 +1	42 -1	42 +1	45 -1	57 +4	64 +2	44 -6	37 -6	44 +3
The political climate in the destination country (latest elections, respect of human rights...) **	40 +3	40 +1	32 =	35 =	48 +5	43 +7	45 +3	49 +4	43 =	44 +3	35 +3	27 +2
The risk of a natural disaster (flood, heat wave, wild fires, storms)	38 -2	29 -7	35 -4	32 -8	32 -2	33 +1	39 +3	53 +4	51 -4	38 -4	44 =	37 +2
The risks of social unrest (strikes, demonstrations, etc.)	37 -1	23 -7	40 +1	27 -6	40 +3	38 +3	42 -3	47 +5	38 -5	35 -6	30 -1	41 +3
Health risks	34 -7	25 -11	39 =	33 -11	28 =	28 -7	33 -7	50 +5	47 -11	32 -8	33 -15	31 -3
The cost of living in the destination country	30 -3	34 =	21 -3	27 +1	25 -7	22 -4	29 +1	38 =	42 -6	34 -4	33 -5	24 -2
The possibility that the destination will be overcrowded	30 -3	31 -4	20 -8	30 -4	29 -4	28 +1	35 =	35 -1	37 -2	30 -8	27 -4	28 -1
Your ability to speak the destination country's language	21 -2	23 =	15 +1	19 =	18 -5	18 -2	23 +8	29 -4	23 -7	24 -3	26 +2	19 -2
The ecological footprint of the trip	16 -2	15 -3	11 -4	15 -1	16 =	13 -4	19 +2	18 -2	17 -6	19 -3	20 -5	10 +2

02

6/7 Factors that play an 'essential' role in choosing a destination (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
The risk related to armed conflict in the destination zone	58 +1	69 +2	56 +7	63 +2	71 +7	55 -1	49 =	52 -3	61 +4	57 +1
The risk of a terrorist attack *	64 +1	72 +4	63 +14	67 +3	75 +6	62 =	50 +6	46 -4	57 -2	59 =
The risk of a personal attack (hold-up, attempted theft, etc.)	55 -4	60 -9	50 +1	57 +1	76 +4	56 =	43 =	40 -8	57 =	58 +2
The political climate in the destination country (latest elections, respect of human rights...) **	40 +2	39 +1	51 +12	40 +1	42 +3	49 +2	35 =	34 +2	54 +4	54 +12
The risk of a natural disaster (flood, heat wave, wild fires, storms)	57 -2	54 -10	46 +2	57 -3	67 +3	58 -1	34 -4	31 +3	51 -3	50 -4
The risks of social unrest (strikes, demonstrations, etc.)	53 +2	55 -5	49 +6	63 +7	58 +4	52 -2	40 +5	36 +1	53 +2	50 =
Health risks	56 -4	56 -2	48 +3	59 =	69 +4	58 -1	39 -7	35 -1	56 -6	54 -2
The cost of living in the destination country	38 -6	26 -4	42 +2	27 +2	45 -2	50 -3	29 -1	27 +4	45 -9	45 -4
The possibility that the destination will be overcrowded	33 =	25 -3	31 +2	25 -3	32 =	42 -2	21 -3	18 -6	32 -6	35 -3
Your ability to speak the destination country's language	27 -4	19 =	37 +12	19 +2	25 +2	41 +1	21 -2	20 -1	39 -3	34 -5
The ecological footprint of the trip	25 -3	15 -9	22 +1	12 -4	18 -4	42 -1	18 +3	13 +4	39 -2	36 =

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

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

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

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

+X / -X Significant evolution vs 2025

02

7/7 Factors that play an 'essential' role in choosing a destination (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
The risk related to armed conflict in the destination zone	48 +2	47 -3	51	59	48
The risk of a terrorist attack *	49 +5	46 -6	56	62	49
The risk of a personal attack (hold-up, attempted theft, etc.)	44 -4	43 -5	48	61	49
The political climate in the destination country (latest elections, respect of human rights...) **	36 -1	40 -4	31	45	35
The risk of a natural disaster (flood, heat wave, wild fires, storms)	33 -2	32 -8	49	58	46
The risks of social unrest (strikes, demonstrations, etc.)	38 +3	35 -5	35	46	37
Health risks	36 -6	36 -9	47	59	46
The cost of living in the destination country	25 -4	27 -2	37	51	37
The possibility that the destination will be overcrowded	25 -2	24 -4	25	43	32
Your ability to speak the destination country's language	30 -6	23 -3	33	46	38
The ecological footprint of the trip	17 -4	11 -7	18	40	33



02

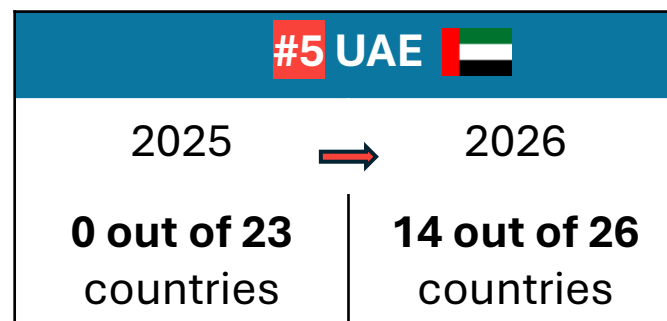
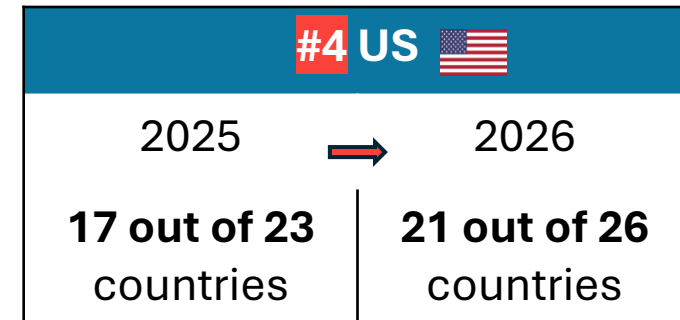
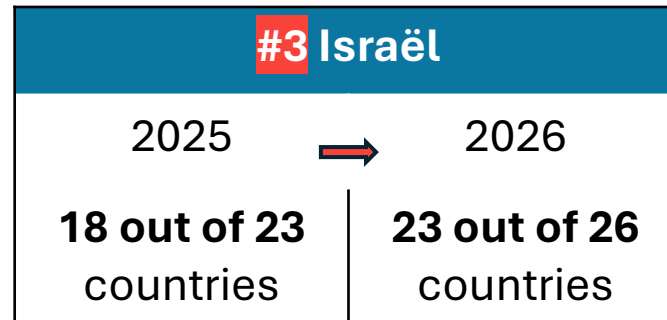
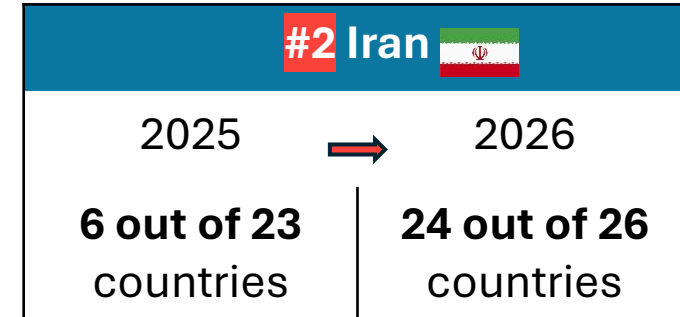
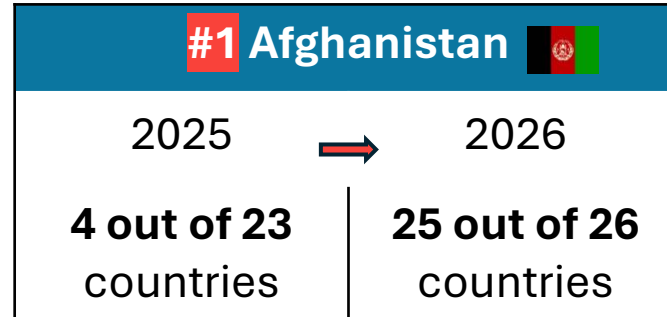
As in 2025, this question reveals country-specific responses driven more by risk assessment than tourist appeal:

Conflict Zones: Countries experiencing active conflict top the list

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



However, after their entry into this unenviable ranking in 2025, the United States are more than ever firmly rooted in it. The UAE makes a notable appearance on the list of countries that travelers might avoid this year due to the security climate.

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



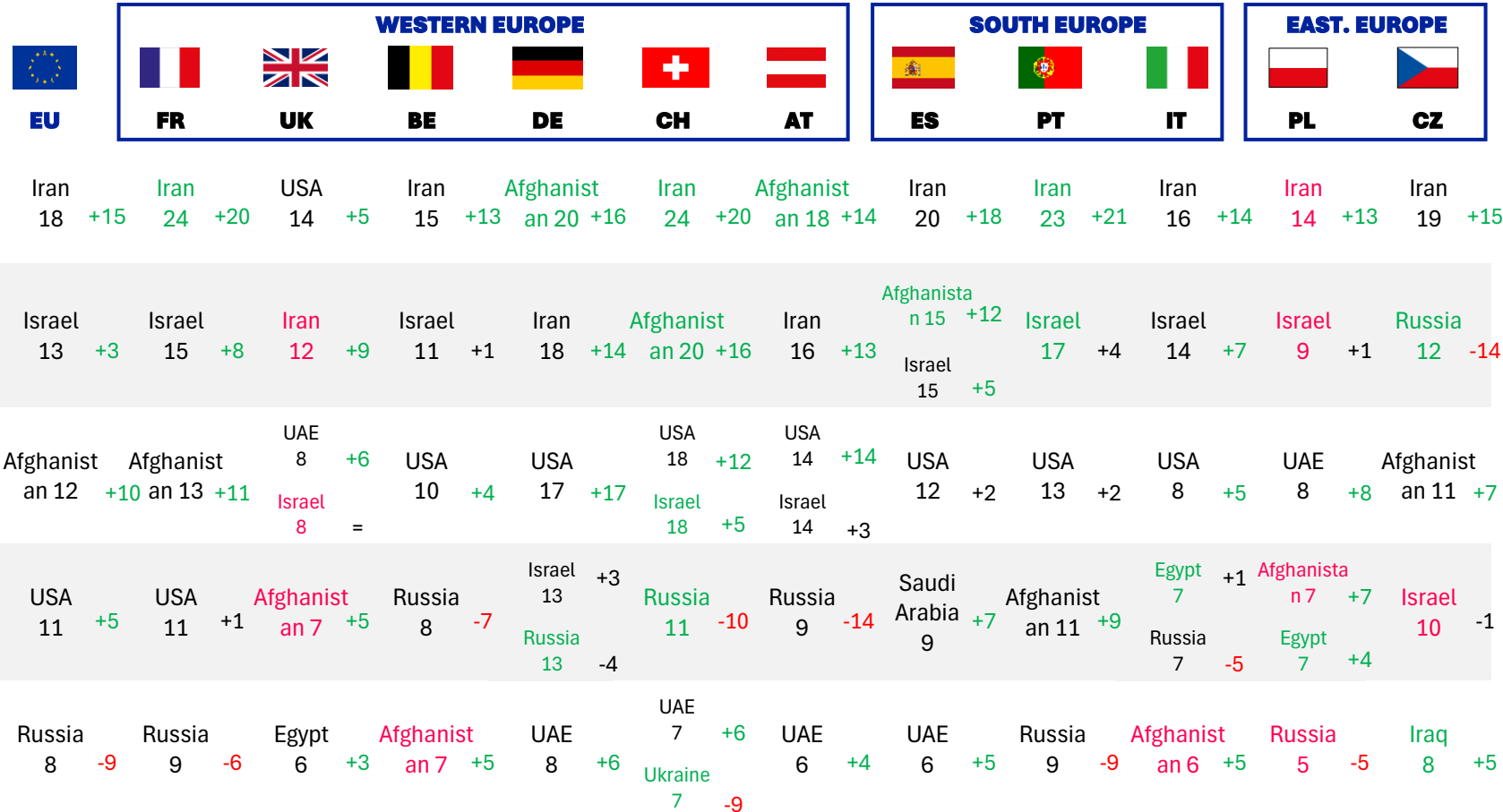
02

2/5 Destinations that travelers could give up due to political / social climate Top 5 countries mentioned (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
#1	Iran 18 +15	Iran 18 +15	Iran 19 +17	Iran 16 +14	Iran 18 +16	Iran 12 +10	USA 25 +6	Afghanistan 10 +9	USA 18 -1	Iran 15
#2	Israel 13 +3	Afghanistan 14 +9 USA 14 +9	Israel 15 +5	Israel 10 +1	USA 13 +5	UAE 8 +4	Iran 15 +12	Argentina 7 +4	Iran 17 +15	Afghanistan 13 Israel 13
#3	Afghanistan 12 +10	Israel 13 +3	Afghanistan 11 +9 USA 11 +3	Afghanistan 9 +7	Israel 11 +6	Israel 8 +3	UAE 10 +9 Israel 10 =	Australia 6 +6	Israel 12 +4	USA 11
#4	USA 11 +5	Russia 9 -8	Russia 7 -9	Russia 8 -10	Afghanistan 8 +7	Afghanistan 7 +3 Australia 7 +2	Afghanistan 7 +4	Armenia 5 +5 Egypt 5 +2	Afghanistan 8 +6 Mexico 8 +4	Cuba 7 Iraq 7 Venezuela 7
#5	Russia 8 -9	UAE 6 +5	UAE 6 +6	UAE 7 +7	China 5 +1	Bangladesh 7 +4 China 7 =	China 5 -1 Russia 5 -10	USA 5 +1 Iraq 5 +1	Russia 6 -4	Argentina 5 Russia 5

02


3/5 Destinations that travelers could give up due to political / social climate Top 5 countries mentioned (%)



02

4/5 Destinations that travelers could give up due to political / social climate Top 5 countries mentioned (%)

NORTH ASIA



MY **HK** **JP** **SG** **SK**



IN

OCEANIA



AU **NZ**

MIDDLE EAST



SA **AE**



	MY	HK	JP	SG	SK	IN	AU	NZ	SA	AE
#1	Iran 20 +18	Iran 23 +21	China 11 +7	USA 22 +13	Iran 21 +21	Iran 12 +10	USA 17 +2	USA 33 +9	Afghanista n 9 +9	Afghanista n 10 +9
#2	USA 15 +2	USA 12 +6	USA 4 +2	Iran 18 +15	Afghanista n 12 +11	UAE 8 +4	Iran 15 +12	Iran 15 +12	Argentina 8 +2	USA 7 +2
#3	Israel 14 +7	Israel 11 +4	Hong Kong 4 +2	Israel 14 +5	Israel 9 +9	Israel 8 +3	Israel 11 +2	UAE 10 +8	Australia 6 +1	Iraq 6 +2
#4	India 7 -4 Indonesia 7 +1	Afghanista n 9 +9	Russia 4 +1	Afghanista n 9 +8	China 6 +2	Afghanistan 7 +3 Australia 7 +2	UAE 10 +9	Israel 9 -2	Egypt 6 +2 UAE 6 +4	Argentina 5 +4 Armenia 5 =
#5	Afghanistan 6 +4 Burma 6 +3	Iraq 7 +6	Taiwan 3 +3	Iran 3 +2	UAE 7 +6	Cambodia 5 +4 UAE 5 +5 USA 5 -1	Bangladesh 7 +4 China 7 =	Afghanistan 8 +5 Iraq 8 +6	Angola 5 -1 Bahrain 5 +2	Australia 5 +2 UK 5 =



02

Among the challenges that might dampen travelers' enthusiasm this year, armed conflicts are taking a predominant place, making an even stronger impression on people's minds compared to 2025 across all observed geographic areas.

1/4 Issues impacting travel enthusiasm Impacting at least somewhat (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Inflation / high prices affecting my leisure budget	73 +3	69 +5	83 +3	72 +2	75 +2	74 -4	68 +2	76 +3	68 +2	76
Wars, armed conflicts worldwide *	65 +8	60 +8	75 +6	67 +9	72 +7	75 +1	58 +11		51 +5	70
Personal / family reasons	58 +4	50 +3	71 +3	59 +6	65 +2	72 -3	52 +4	70 -2	51 +3	62
Some places becoming too hot in the summer due to climate change	54 +2	48 =	64 +2	54 =	65 +1	76 -3	43 +5	71 +3	42 +1	60
My available time to take vacations	51 +3	46 +3	62 +3	52 +4	64 =	73 -3	49 =	68 -2	46 +1	62
Health concerns (e.g epidemic outbreak)	49 =	41 -1	65 =	50 +4	67 +1	73 -3	39 =	70 =	39 -4	68
Bureaucratic hassles (Dealing with visas, customs, other travel documentation...)	47 +2	41 +2	57 =	49 +3	59 =	72 -1	42 +2	71 +1	41 +2	61
The rise of extreme / populist parties in democratic countries *	46 +2	42 +2	58 +3	40 +2	54 +3	72 +3	43 +5		43 +1	56
Professional workload **	45 =	37 -2	61 +5	47 -5	58 =	75 +2	48 +5	69 =	43 =	59
The ecological impact of travelling (carbon footprint)	37 -1	34 =	50 -3	29 -3	41 +1	68 -3	27 +1	61 +1	30 =	53

* Not asked in Saudi Arabia and the UAE

** Asked to Active people only

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

+X / -X Significant evolution vs 2025

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



02

2/4 Issues impacting travel enthusiasm Impacting at least somewhat (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Inflation / high prices affecting my leisure budget	73 +3	78 +4	58 +3	65 +3	67 +2	69 +4	73 +6	79 +3	90 +5	80 +3	72 =	72 +5
Wars, armed conflicts worldwide	65 +8	63 +5	46 +5	61 +9	60 +8	65 +13	63 +9	71 +4	82 +5	74 +11	65 +4	70 +15
Personal / family reasons	58 +4	55 +3	43 -2	52 +5	49 +4	50 +1	55 +9	66 +2	77 +3	69 +3	59 +1	58 +10
Some places becoming too hot in the summer due to climate change	54 +2	52 -3	41 =	51 +1	47 -2	48 =	50 +3	64 +3	67 +4	63 +2	55 -3	52 +2
My available time to take vacations	51 +3	47 +1	40 +1	42 +3	47 +4	49 +5	49 +4	60 +3	66 +2	59 +3	53 +2	52 +7
Health concerns (e.g epidemic outbreak)	49 =	47 -4	29 -7	43 +1	37 +1	42 -1	47 +8	64 -1	72 -1	58 +2	53 =	47 +8
Bureaucratic hassles (Dealing with visas, customs, other travel documentation...)	47 +2	39 -4	36 =	40 +1	43 +6	42 +1	49 +9	51 -3	63 -2	57 +4	48 -3	49 +7
The rise of extreme / populist parties in democratic countries	46 +2	40 -5	34 +1	40 +2	44 +3	44 +3	49 +9	54 +1	62 -1	54 +3	42 -2	40 +8
Professional workload **	45 =	35 -2	38 -2	39 +1	37 =	43 +3	35 -4	58 -1	68 +8	55 +6	52 -2	42 -8
The ecological impact of travelling (carbon footprint)	37 -1	35 -4	25 -6	33 +1	33 =	37 +3	38 +6	44 -6	58 =	48 -1	32 -9	26 +4

** Asked to Active people only











Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

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

02

3/4 Issues impacting travel enthusiasm Impacting at least somewhat (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Inflation / high prices affecting my leisure budget	81 =	63 +5	79 +6	75 -2	77 +3	74 -4	63 -2	72 +4	72 +2	80 +4
Wars, armed conflicts worldwide *	80 =	68 +9	62 +14	81 +5	70 +8	75 +1	57 +10	59 +12		
Personal / family reasons	71 -3	57 +8	65 +3	67 -2	64 +2	72 -3	49 +2	54 +4	67 -3	73 -2
Some places becoming too hot in the summer due to climate change	72 +2	56 +1	67 +4	68 -1	65 +3	76 -3	41 =	43 +7	70 +6	74 +4
My available time to take vacations	71 -1	59 +9	57 +3	67 -3	69 -1	73 -3	47 =	53 +2	65 -1	72 -1
Health concerns (e.g epidemic outbreak)	79 -1	55 +3	61 +1	71 -4	67 +5	73 -3	40 -2	38 +2	66 -3	73 +2
Bureaucratic hassles (Dealing with visas, customs, other travel documentation...)	71 -2	51 -1	44 =	62 -1	63 +3	72 -1	43 +1	42 +4	67 +2	75 +1
The rise of extreme / populist parties in democratic countries *	69 -1	47 +5	39 +7	63 -1	51 +1	72 +3	43 +4	44 +7		
Professional workload **	68 -1	54 +2	53 +2	58 =	55 -3	75 +2	45 +2	50 +6	66 =	71 =
The ecological impact of travelling (carbon footprint)	58 -1	39 +6	31 +1	39 -4	38 +3	68 -3	26 -2	29 +5	56 -1	65 +1

* Not asked in Saudi Arabia and the UAE

** Asked to Active people only

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

+X / -X Significant evolution vs 2025

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

02



4/4 Issues impacting travel enthusiasm Impacting at least somewhat (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Inflation / high prices affecting my leisure budget	62 -1	74 +6	79	74	74
Wars, armed conflicts worldwide	48 +6	55 +5	70	68	71
Personal / family reasons	51 +1	50 +3	68	59	59
Some places becoming too hot in the summer due to climate change	42 =	42 =	59	59	63
My available time to take vacations	47 +2	46 =	62	61	61
Health concerns (e.g epidemic outbreak)	38 -3	41 -3	69	64	71
Bureaucratic hassles (Dealing with visas, customs, other travel documentation...)	40 +3	42 =	61	59	62
The rise of extreme / populist parties in democratic countries	39 +2	48 +1	53	56	58
Professional workload **	45 +1	42 =	59	59	60
The ecological impact of travelling (carbon footprint)	32 +1	28 -2	46	53	59

** Asked to Active people only

02

1/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

			WEST. EU		SOUTH EU		EAST. EU		NORTH ASIA				OCEANIA		MIDDLE EAST		NORTH AMERICA		SOUTH AMERICA	
Getting robbed	52	-2	42	-2	71	-1	55	=	71	-2	75	=	40	-10	69	=	37	-9	80	
Becoming sick in transit or at destination	51	-3	41	-3	69	-2	53	-4	71	-4	76	=	44	-9	65	-1	39	-9	73	
Losing something important	51	-2	43	-2	69	+1	51	-2	72	-3	76	-1	46	-9	69	+1	40	-9	75	
Being a victim of a travel scam at your destination	50	-2	40	-3	68	-3	50	=	70	-2	75	-2	38	-11	69	+1	37	-7	78	
Having bad weather at destination	49	-2	41	-4	64	-2	48	-1	74	-2	75	-4	41	-4	64	+2	44	-5	65	
The quality of medical facilities at destination	49	-2	40	-3	68	-3	48	=	63	-2	75	-3	38	-10	64	+1	36	-10	75	
The possibility that the destination will be overcrowded	49	-3	43	-3	61	-3	50	-1	66	-2	71	-5	37	-6	59	-3	38	-4	62	
Not being able to return home	47	=	37	-1	63	-1	49	+2	65	-1	73	=	42	-5	62	+1	35	-8	73	
Fear for your physical safety *	46	-2	37	-2	63	=	48	-2	70	-3	79	-1	35	-9	62	+3	35	-8	74	
Needing to cancel before your trip	46	-3	37	-3	63	-2	45	-5	64	-3	71	-1	40	-6	61	+1	34	-8	64	

* Not asked in the UAE

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

XX / XX Significantly higher or lower score vs Europe

+X / -X Significant evolution vs 2025

02

2/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	EU				INDIA				OCEANIA		MIDDLE EAST		NORTH AMERICA		SOUTH AMERICA				
	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA	NORTH AMERICA	SOUTH AMERICA	NORTH AMERICA	SOUTH AMERICA	NORTH AMERICA	SOUTH AMERICA			
Fear of a terrorist attack *	46	-1	37	-2	62	+1	48	+2	65	=	75	+2	37	=	34	-4	64		
A natural disaster when travelling (flood, heat wave, wild fire, storm)	46	-2	36	-2	66	-1	46	-2	71	-3	78	-1	40	-5	65	-1	36	-7	72
Having a bad experience	43	-2	36	-3	65	-1	30	-1	67	-2	73	=	36	-9	66	+4	36	-8	70
Unplanned delays	43	-1	35	-2	61	=	41	+1	69	-1	72	=	42	-3	65	+2	40	-4	64
An epidemic outbreak when travelling	40	-2	31	-2	59	-4	38	-2	68	-4	74	-1	36	-8	65	-2	32	-8	70
My carbon footprint	32	-3	27	-3	48	-5	22	-3	40	-1	71	=	25	-4	55	=	26	-4	54
Language barriers and communications difficulties	32	-4	25	-3	44	-5	37	-3	53	-1	67	-1	27	-5	54	-3	27	-7	53
Infrastructure not accessible to people with physical disabilities	29	-2	23	-2	41	-4	26	=	41	-1	67	-2	23	-3	56	-2	22	-6	55
Being discriminated because of your sexual orientation **	21	-2	17	-2	29	-4	20	=	33	=	66	+2	19	-2			17	-7	36













* Not asked in Saudi Arabia and the UAE

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

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













02

3/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

		WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
	EU											
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Getting robbed	52 -2	60 -2	36 -10	52 =	31 =	39 -1	33 -2	74 -4	78 -4	61 +4	61 -1	49 =
Becoming sick in transit or at destination	51 -3	51 -3	37 -9	52 -2	31 -3	37 -1	39 +2	72 -1	75 -1	61 -2	58 -3	49 -3
Losing something important	51 -2	54 -4	42 -11	52 +2	31 -1	41 +1	35 -1	73 +1	77 =	58 +4	55 -4	48 +1
Being a victim of a travel scam at your destination	50 -2	54 -5	34 -9	55 +2	30 +1	37 -3	32 -1	69 -4	77 -3	57 -2	60 -3	40 +2
Having bad weather at destination	49 -2	57 +1	40 -7	52 +1	31 -5	33 -7	35 -3	59 -4	71 -2	62 -1	52 =	43 -3
The quality of medical facilities at destination	49 -2	49 -3	35 -12	52 +3	31 =	38 -1	37 -1	71 -1	75 -3	60 -2	49 -1	46 +1
The possibility that the destination will be overcrowded	49 -3	58 -1	35 -10	51 +3	35 -5	43 -2	37 -5	63 -4	67 -1	53 -3	55 =	45 -3
Not being able to return home	47 =	48 -3	36 -6	44 +1	27 +2	36 +2	33 +2	70 -1	74 -2	47 +1	57 =	40 +3
Fear for your physical safety	46 -2	50 -3	31 -11	44 +1	27 -4	35 =	34 +4	66 -2	75 +2	50 +1	56 -3	40 -1
Needing to cancel before your trip	46 -3	50 -5	33 -6	50 +5	27 -5	33 -5	32 -1	67 -3	67 -1	55 -1	51 -6	40 -3











02

4/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Fear of a terrorist attack	46 -1	49 -4	34 -8	42 =	27 -3	37 +2	32 -2	65 +1	70 +1	50 =	53 =	43 +3
A natural disaster when travelling (flood, heat wave, wild fire, storm)	46 -2	48 -3	31 -10	45 +1	25 -2	35 =	31 +2	69 +2	75 =	55 -3	52 -5	39 =
Having a bad experience	43 -2	47 -3	39 -9	47 +4	25 -5	32 =	29 -2	68 -5	73 +1	55 +1	29 =	32 -1
Unplanned delays	43 -1	43 -3	41 -4	39 -1	28 -1	31 -2	30 +1	62 -2	68 +1	53 +2	45 =	38 +2
An epidemic outbreak when travelling	40 -2	42 -1	29 -8	37 =	20 -2	29 -4	27 +2	63 -4	69 -2	46 -5	43 -5	33 +1
My carbon footprint	32 -3	34 -4	27 -9	29 -3	21 -4	26 -2	24 +4	46 -9	59 -3	38 -6	27 -6	17 +1
Language barriers and communications difficulties	32 -4	34 -4	23 -9	29 -1	19 -4	21 -4	23 +2	44 -6	46 -6	42 -2	41 -2	33 -4
Infrastructure not accessible to people with physical disabilities	29 -2	25 -3	22 -5	26 =	20 -2	19 -7	27 +5	44 -2	46 -7	34 -3	30 -2	22 +2
Being discriminated because of your sexual orientation	21 -2	21 -3	16 -5	21 -2	11 -2	15 -3	17 +3	34 -4	28 -5	25 -4	23 -5	16 +3

02

5/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Getting robbed	84 -3	65 -5	58 =	78 -5	69 +3	75 =	42 -9	38 -12	64 +2	73 -3
Becoming sick in transit or at destination	83 -2	61 -12	59 -3	79 -6	74 +3	76 =	45 -9	43 -8	59 -2	70 -1
Losing something important	85 -3	67 -5	55 =	82 -5	73 +1	76 -1	47 -8	45 -11	63 +2	75 =
Being a victim of a travel scam at your destination	84 -3	62 -6	55 +1	78 -4	69 +1	75 -2	41 -8	35 -15	63 +2	74 -1
Having bad weather at destination	80 -3	67 -4	73 -1	76 -4	73 +2	75 -4	42 -6	41 -1	57 +1	71 +2
The quality of medical facilities at destination	73 -6	55 -2	54 +1	67 -8	65 +2	75 -3	42 -6	34 -15	57 +2	70 -1
The possibility that the destination will be overcrowded	74 =	53 -2	74 +1	65 -6	64 =	71 -5	38 -7	35 -5	56 -2	63 -4
Not being able to return home	83 -3	56 -1	50 +3	78 -5	56 +1	73 =	43 -4	41 -7	55 =	69 +2
Fear for your physical safety *	83 -3	67 -4	55 -1	75 -8	68 =	79 -1	39 -6	31 -11	62 +3	
Needing to cancel before your trip	74 -4	58 -4	57 +1	68 -9	61 =	71 -1	40 -7	40 -5	54 =	68 +2











* Not asked in the UAE

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

02

6/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Fear of a terrorist attack *	81 -3	60 -3	48 +3	74 -5	61 +6	75 +2	39 -1	34 -1		
A natural disaster when travelling (flood, heat wave, wild fire, storm)	83 -5	62 -10	62 +1	80 -3	68 +2	78 -1	40 -7	39 -4	58 =	72 -2
Having a bad experience	76 -5	58 -1	61 +2	73 -7	69 +1	73 =	38 -8	34 -9	60 +2	72 +5
Unplanned delays	77 -3	62 -4	66 +4	73 -6	67 +3	72 =	43 -3	41 -3	60 +3	70 +2
An epidemic outbreak when travelling	83 -2	61 -11	55 +1	75 -7	67 =	74 -1	37 -9	34 -8	59 -4	71 +1
My carbon footprint	61 -3	30 +2	28 +1	40 -5	38 =	71 =	27 -2	23 -7	49 -1	61 =
Language barriers and communications difficulties	58 -8	42 -5	51 +4	52 -3	61 +4	67 -1	32 -2	22 -8	51 -2	58 -3
Infrastructure not accessible to people with physical disabilities	64 -4	33 +7	29 -2	45 -4	35 -2	67 -2	26 -4	21 -2	50 -2	61 -3
Being discriminated because of your sexual orientation **		26 +4	24 -2	44 -5	37 +2	66 +2	22 -2	16 -2		

* Not asked in Saudi Arabia and the UAE

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

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






02

7/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Getting robbed	34 -8	40 -10	79	79	81
Becoming sick in transit or at destination	38 -5	41 -11	73	74	71
Losing something important	40 -8	40 -11	77	74	75
Being a victim of a travel scam at your destination	36 -6	38 -8	79	77	78
Having bad weather at destination	44 -5	44 -6	56	72	67
The quality of medical facilities at destination	35 -8	37 -12	77	72	77
The possibility that the destination will be overcrowded	40 -2	37 -6	52	68	66
Not being able to return home	33 -7	36 -10	72	71	76
Fear for your physical safety	33 -8	36 -9	70	75	76
Needing to cancel before your trip	34 -4	35 -12	68	62	63

02

8/8 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	NORTH AMERICA		SOUTH AMERICA		
	 US	 CA	 AR	 BR	 MX
Fear of a terrorist attack	35 -3	33 -6	59	61	71
A natural disaster when travelling (flood, heat wave, wild fire, storm)	35 -6	36 -9	69	74	73
Having a bad experience	37 -6	35 -9	68	71	71
Unplanned delays	40 -3	39 -6	61	67	63
An epidemic outbreak when travelling	33 -7	30 -9	65	71	73
My carbon footprint	26 -5	25 -4	41	57	62
Language barriers and communications difficulties	27 -9	26 -7	44	60	54
Infrastructure not accessible to people with physical disabilities	25 -6	19 -7	48	60	59
Being discriminated because of your sexual orientation	19 -6	15 -9	25	40	42

03

**The rise of AI in leisure travel :
a clear divide in global
adoption**

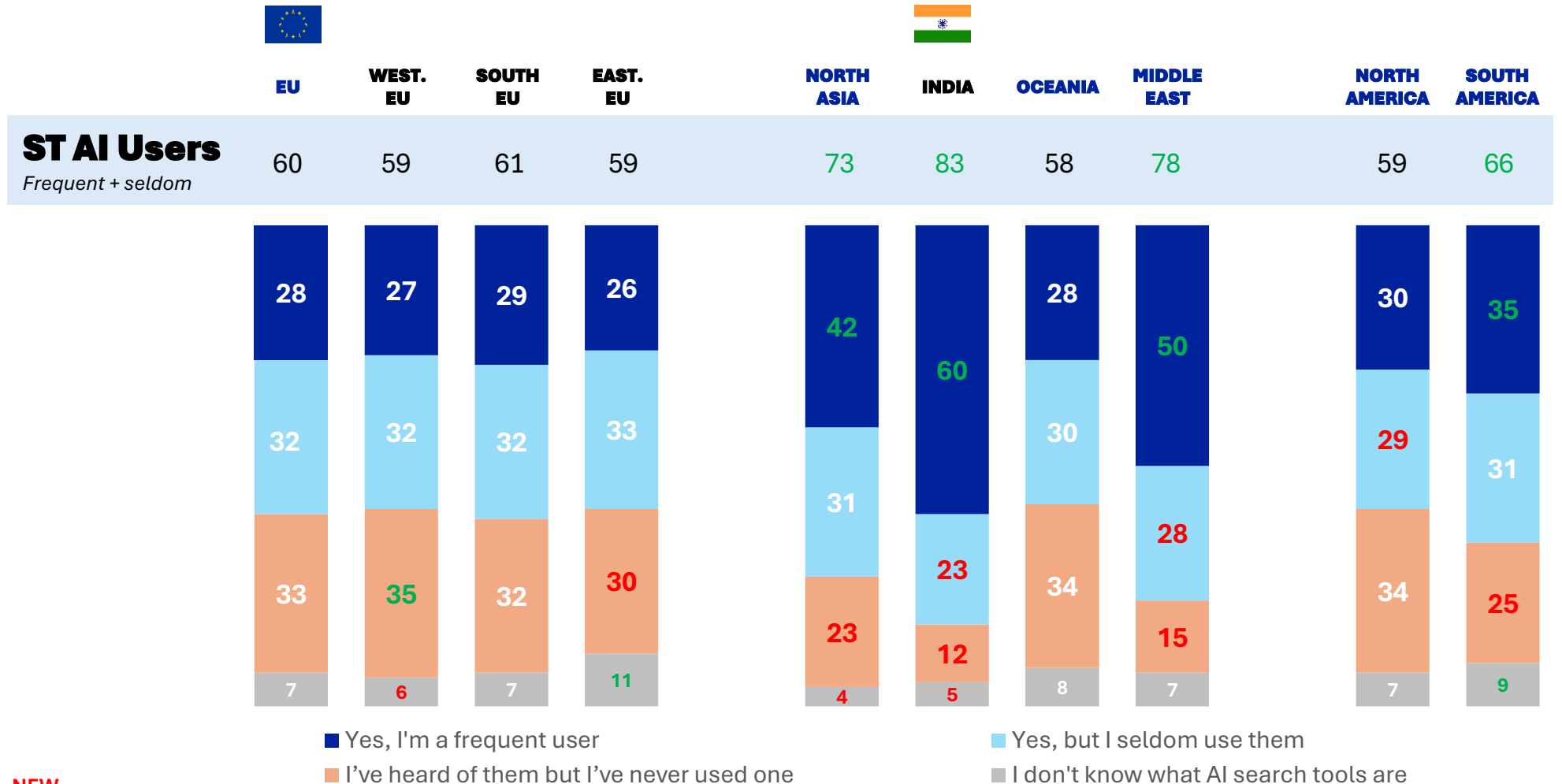
**This growth reveals a world at two
distinct speeds: while early-
adopting regions like India, MENA
and Asia enthusiastically embrace
AI, their counterparts in Europe,
North America, and Oceania
remain significantly more
reluctant.**



03

The global adoption of AI varies significantly across regions, with populations in North Asia, the Middle East, and especially India being much more frequent users compared to those in Europe, the Americas, and Oceania.

1/4 AI tools usage (%)



NEW

Q26Q12. Do you use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc)? Basis: To all

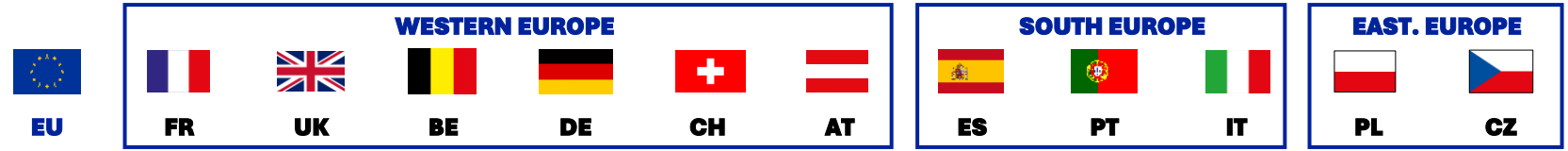
XX / XX Significantly higher or lower score vs Europe

03

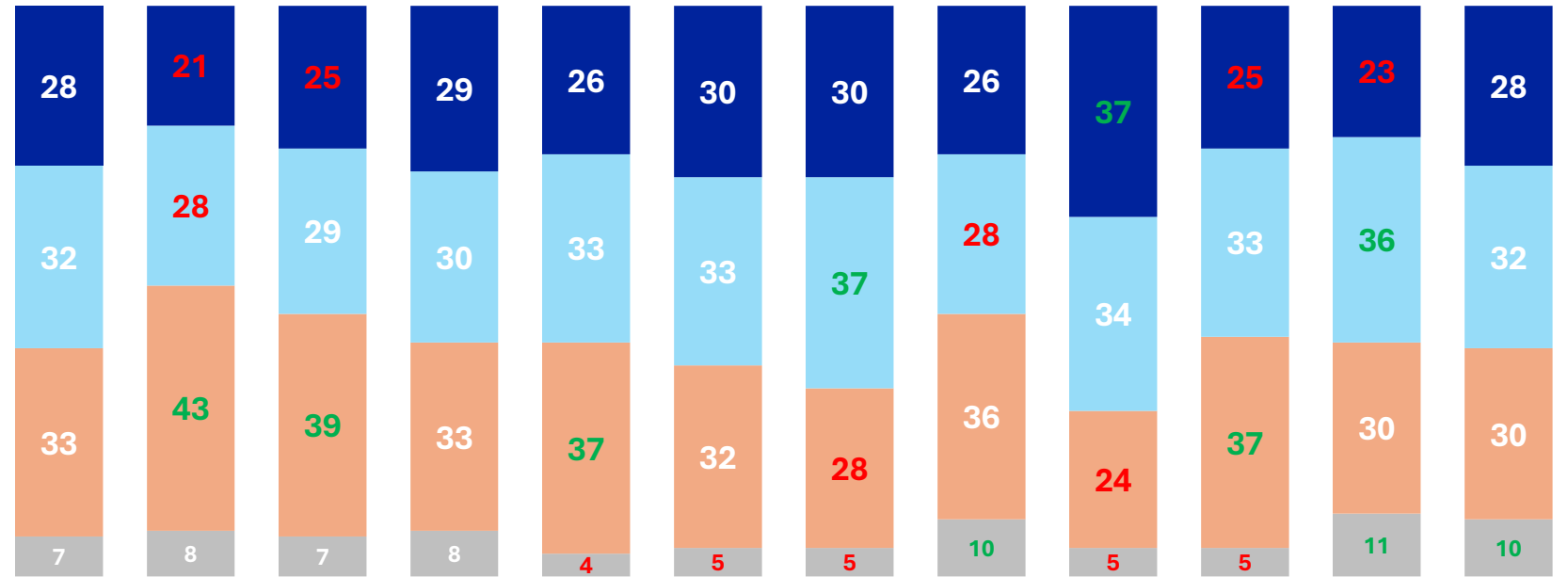
2/4 AI tools usage (%)

In 2026, 6 Europeans out of 10 declare using at least seldom AI tools:

- The French, British, and Spanish are the populations who report using it the least, while the Portuguese and Austrians report using it the most.



ST AI Users <i>Frequent + seldom</i>	EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
	60	49	54	59	59	63	67	54	71	58	59	60



■ Yes, I'm a frequent user
■ Yes, but I seldom use them
■ I've heard of them but I've never used one
■ I don't know what AI search tools are

NEW

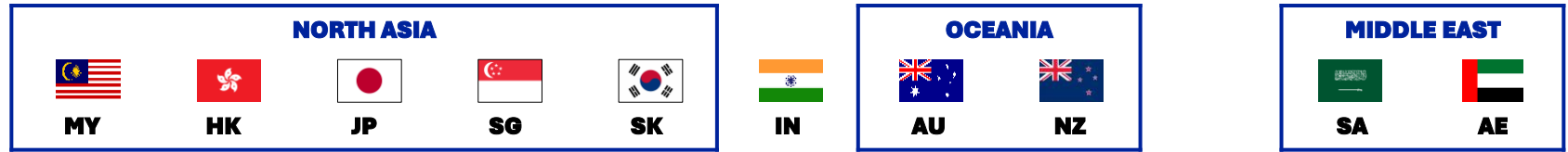
Q26Q12. Do you use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe



03

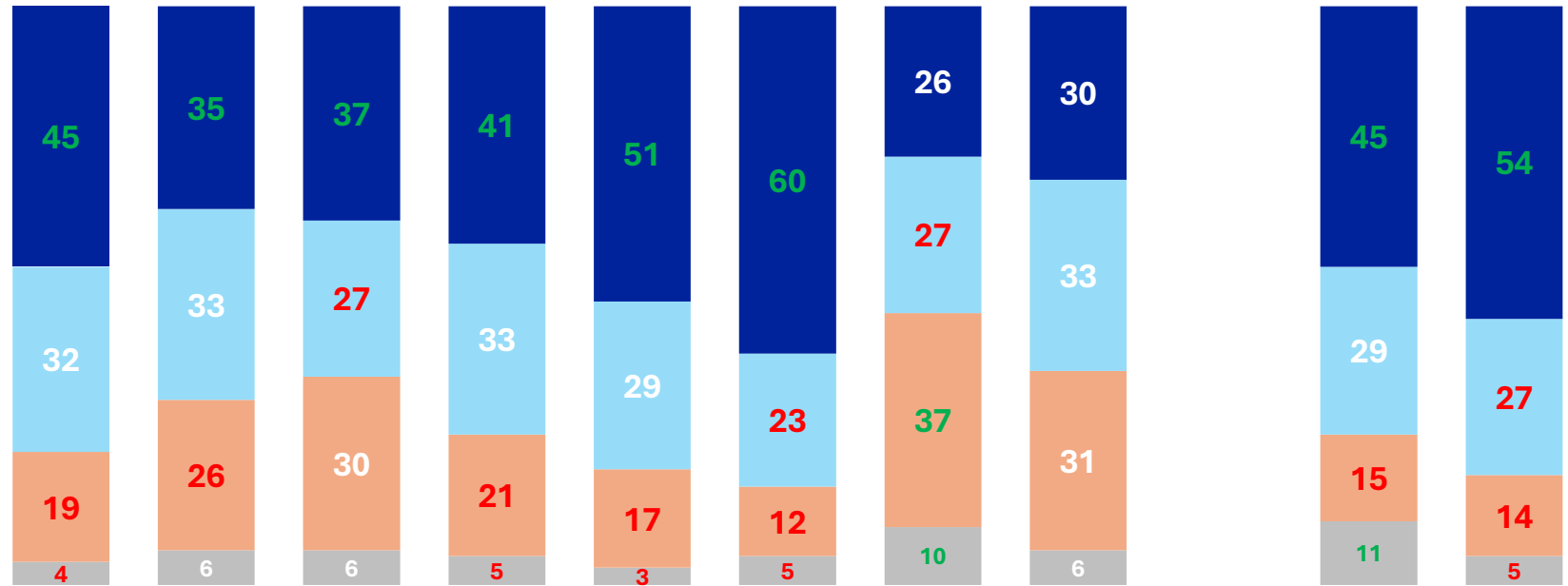
3/4 AI tools usage (%)



ST AI Users

Frequent + seldom

Country	ST AI Users (%)
MY	77
HK	68
JP	64
SG	74
SK	80
IN	83
AU	53
NZ	63
SA	74
AE	81



- Yes, I'm a frequent user
- Yes, but I seldom use them
- I've heard of them but I've never used one
- I don't know what AI search tools are

NEW

Q26Q12. Do you use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe



03

4/4 AI tools usage (%)



ST AI Users
Frequent + seldom

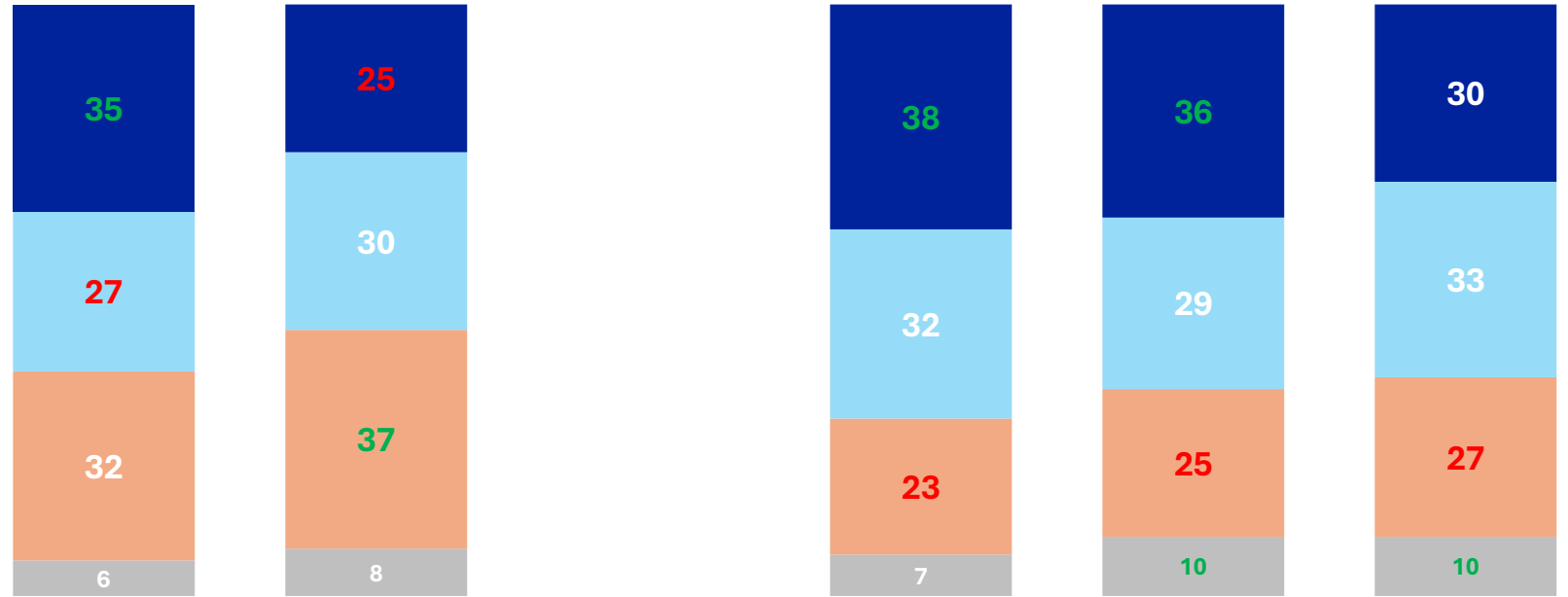
62

55

70

65

63



■ Yes, I'm a frequent user
■ I've heard of them but I've never used one

■ Yes, but I seldom use them
■ I don't know what AI search tools are

NEW



Q26Q12. Do you use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe

03

Information search dominates global AI usage, with solving complex questions ranking as a distant second, and leisure travel preparation placing third in most regions.

1/4 AI tools uses (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Information search (news, research, quick explanations)	72	71	72	74	77	72	71	62	76	70
Solving technical or complex questions (Finances, admin, practical advice)	49	50	45	51	49	58	47	46	44	40
Preparing my leisure trips and/or during my leisure trips	29	28	32	27	43	54	29	39	32	25
Household tasks / home management (shopping, organization, recipes, smart home)	25	24	24	27	29	50	26	35	31	30
Entertainment (music, movies, recommendations, games)	22	21	22	23	28	50	20	34	28	32
Other	3	4	3	4	2	1	6	1	5	3

NEW

Q26Q13. What do you primarily use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc) for? Please think about your use of Artificial Intelligence in your personal life, not your professional life. Basis: To those who use AI

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

While the use of AI for preparing leisure trips is relatively consistent across Europe, individuals in Switzerland and Italy report the highest usage for this purpose.

2/4 AI tools uses (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Information search (news, research, quick explanations)	72	70	69	74	76	69	67	66	77	73	72	76
Solving technical or complex questions (Finances, admin, practical advice)	49	55	48	49	51	51	47	46	49	40	45	58
Preparing my leisure trips and/or during my leisure trips	29	31	27	27	25	34	25	31	32	33	27	26
Household tasks / home management (shopping, organization, recipes, smart home)	25	20	26	24	22	23	27	29	25	18	25	29
Entertainment (music, movies, recommendations, games)	22	22	21	20	23	19	24	28	20	20	23	23
Other	3	4	6	2	3	5	4	3	2	2	3	4

NEW

Q26Q13. What do you primarily use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc) for? Please think about your use of Artificial Intelligence in your personal life, not your professional life. Basis: To those who use AI

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

3/4 AI tools uses (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
Information search (news, research, quick explanations)	78	71	80	79	79	72	71	71	59	64
Solving technical or complex questions (Finances, admin, practical advice)	57	49	41	49	47	58	45	48	41	50
Preparing my leisure trips and/or during my leisure trips	52	53	23	48	37	54	30	28	36	41
Household tasks / home management (shopping, organization, recipes, smart home)	36	28	26	26	27	50	26	26	32	38
Entertainment (music, movies, recommendations, games)	32	31	31	21	25	50	22	18	31	37
Other	1	1	3	2	1	1	6	6	1	0

NEW

Q26Q13. What do you primarily use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc) for? Please think about your use of Artificial Intelligence in your personal life, not your professional life. Basis: To those who use AI

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

4/4 AI tools uses (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Information search (news, research, quick explanations)	79	73	70	73	66
Solving technical or complex questions (Finances, admin, practical advice)	45	44	48	39	32
Preparing my leisure trips and/or during my leisure trips	35	28	22	30	24
Household tasks / home management (shopping, organization, recipes, smart home)	34	27	30	27	32
Entertainment (music, movies, recommendations, games)	32	24	24	36	38
Other	5	6	4	3	1

NEW

Q26Q13. What do you primarily use Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot etc) for? Please think about your use of Artificial Intelligence in your personal life, not your professional life. Basis: To those who use AI

Top answers per country: #1 #2 #3

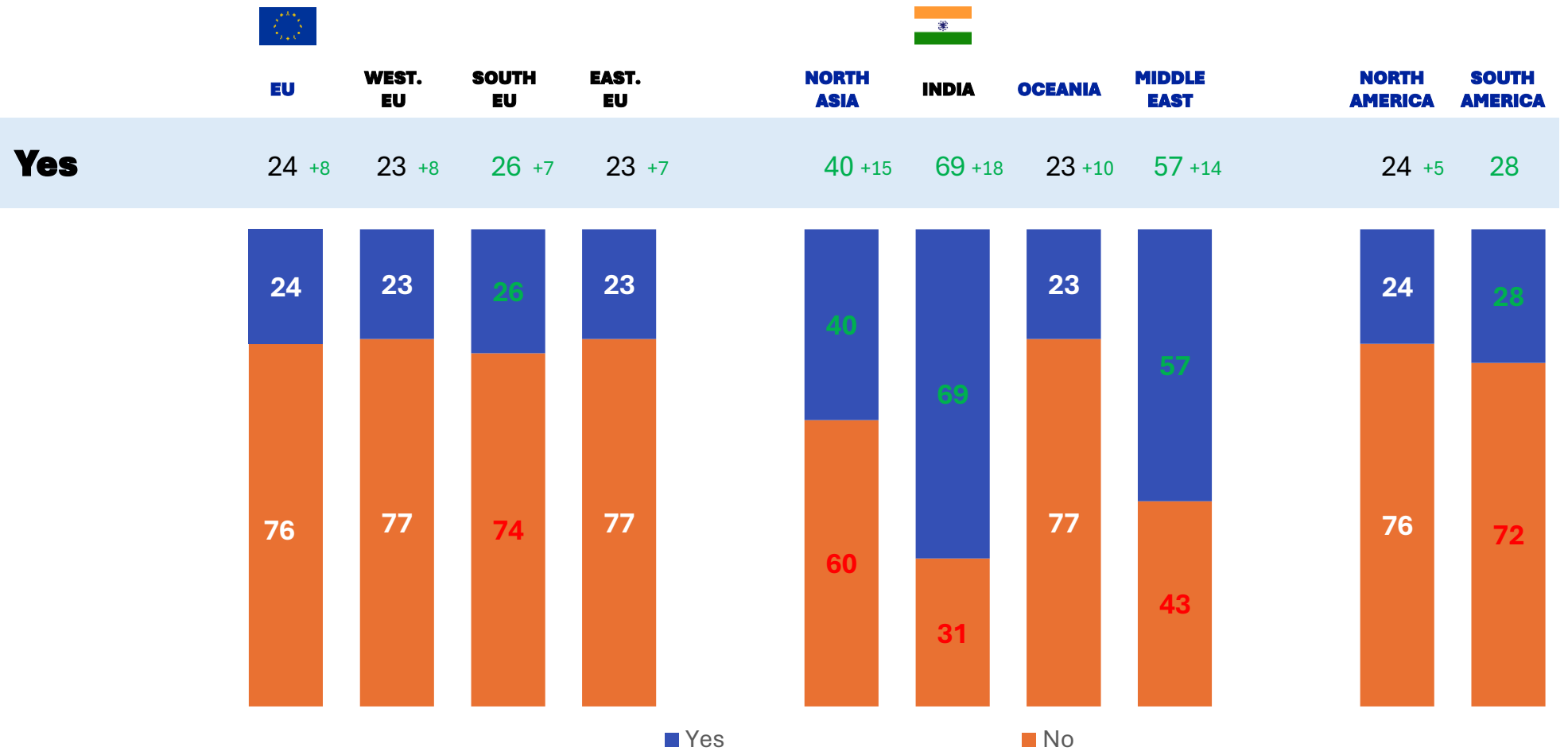
XX / XX Significantly higher or lower score vs Europe

03

1/4 Past use of Artificial Intelligence for holiday planning or booking (%)

AI adoption for holiday planning grew everywhere between 2025 and 2026 : the sharpest increases were in leading regions (North Asia, the Middle East and India) further solidifying their advance compared to Europe, Oceania and America.

Indeed, while a clear majority of citizens in India and the Middle East used AI for travel planning in 2026, the adoption rate was dramatically lower in Europe, North America, and Oceania, at only about a quarter.



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

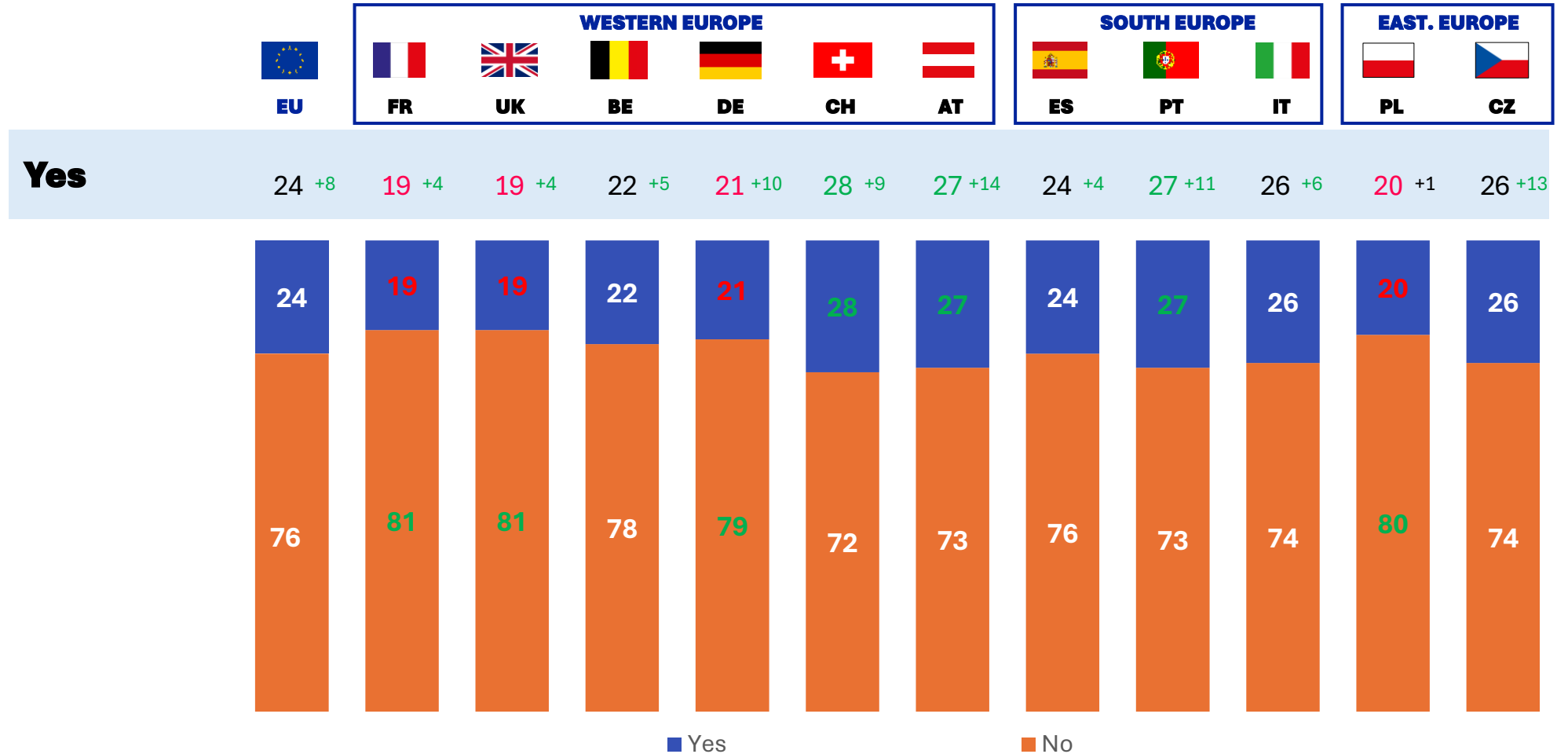
XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

03

While only a quarter of Europeans have used AI to prepare a trip, the French, British, Germans, and Polish are the most hesitant.

2/4

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

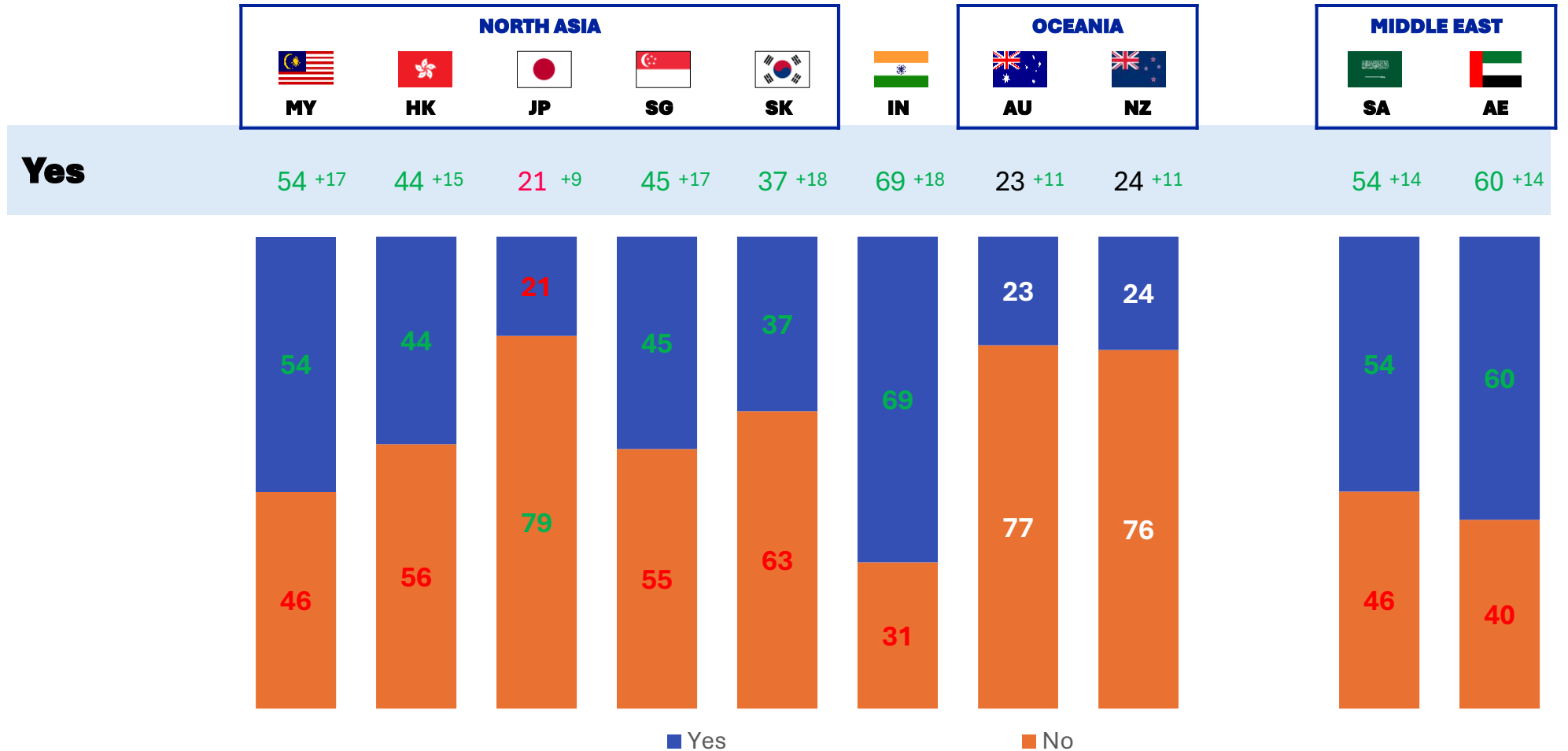


03

In stark contrast to the rest of North Asia, Japan's AI adoption rate for trip planning remains exceptionally low (21%), despite having grown by 9pts. Meanwhile, other countries in the region show significantly higher usage, with scores ranging from 37% (South Korea) to 54% (Malaysia).

Adoption is also high in the Middle East, where more than half of respondents report using AI for leisure trip preparation, while India emerges as the clear leader with an adoption rate of nearly seven in ten.

3/4 Past use of Artificial Intelligence for holiday planning or booking (%)

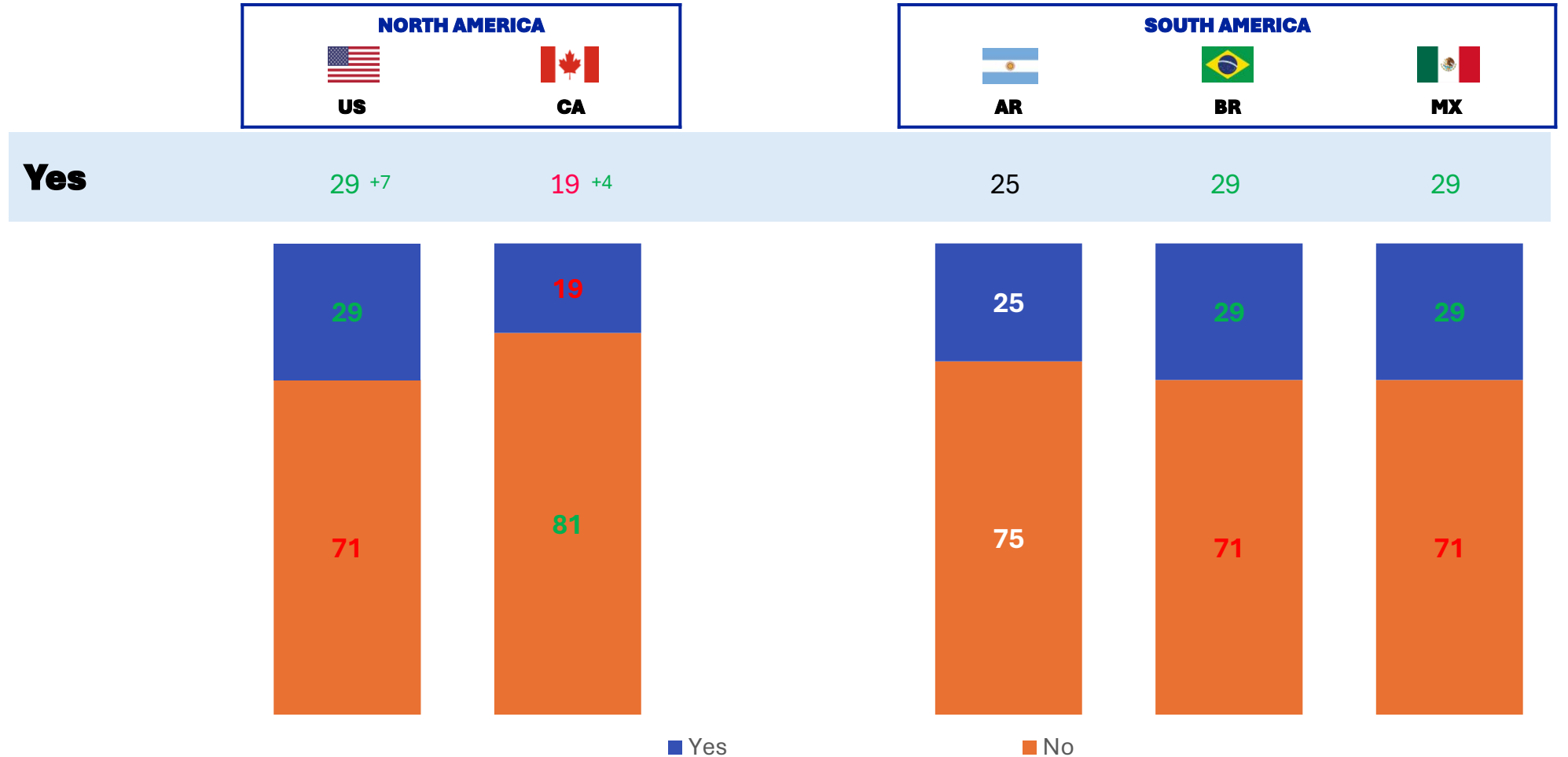


03

Canada's AI adoption for travel planning is among the lowest in the survey, lagging 10 points behind the USA.

In Latin America, adoption rates are consistent across the three countries surveyed, ranging from 25% to 29%.



4/4 Past use of Artificial Intelligence for holiday planning or booking (%)



03

The main barrier to using AI search tools for holiday planning is a preference for human interaction, although in some regions (Oceania and North America), a lack of trust in the accuracy and reliability of information is also a prominent issue.

1/4 Reasons for not using AI to prepare a trip or during holidays (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
I prefer interacting with humans rather than automated systems	36	35	35	41	27	40	36	31	35	34
I don't use AI tools at all / It wouldn't naturally occur to me to use them	29	32	28	20	29	24	38	26	36	26
I lack trust in the accuracy and reliability of the information provided by AI tools	26	26	25	28	25	19	36	19	32	19
I am concerned about privacy and how my data might be used	18	19	17	15	22	28	26	24	26	18
I fear that using AI might lead to 'bad deals' or non-optimal offers	15	15	16	15	15	19	17	19	14	9
I generally feel uncomfortable using AI technology	14	16	11	11	11	13	21	15	21	9
I find AI tools too complex to understand and use	6	6	6	6	13	8	7	8	6	11
Other	10	10	9	10	6	4	10	4	12	10
ST Practical & cognitive barriers	68	69	67	64	66	69	71	67	71	68
ST Trust or ethical concerns	43	43	43	45	47	50	51	49	47	36

NEW

Q26Q15. What are the main reasons you have not used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to prepare or during your holidays? Basis: To those who have never used AI to prepare a trip

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

2/4 Reasons for not using AI to prepare a trip or during holidays (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I prefer interacting with humans rather than automated systems	36	35	31	31	36	39	40	30	38	37	35	47
I don't use AI tools at all / It wouldn't naturally occur to me to use them	29	39	43	30	29	28	23	32	23	28	22	18
I lack trust in the accuracy and reliability of the information provided by AI tools	26	24	31	25	26	26	24	25	25	24	32	25
I am concerned about privacy and how my data might be used	18	21	21	17	18	19	18	17	21	13	15	16
I fear that using AI might lead to 'bad deals' or non-optimal offers	15	15	16	16	13	16	13	11	18	18	17	14
I generally feel uncomfortable using AI technology	14	14	20	13	20	15	16	13	10	10	13	10
I find AI tools too complex to understand and use	6	7	6	6	6	5	6	9	5	5	6	6
Other	10	9	8	12	13	13	8	6	12	9	7	13
ST Practical & cognitive barriers	68	72	73	65	68	67	70	71	63	67	63	65
ST Trust or ethical concerns	43	43	47	42	42	42	41	40	46	44	49	41

NEW

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

Q26Q15. What are the main reasons you have not used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to prepare or during your holidays? Basis: To those who have never used AI to prepare a trip

03

3/4 Reasons for not using AI to prepare a trip or during holidays (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK	IN	AU	NZ	SA	AE
I prefer interacting with humans rather than automated systems	40	34	13	33	22	40	36	35	28	36
I don't use AI tools at all / It wouldn't naturally occur to me to use them	25	27	37	28	22	24	42	35	27	24
I lack trust in the accuracy and reliability of the information provided by AI tools	28	26	24	30	21	19	32	41	17	21
I am concerned about privacy and how my data might be used	29	25	12	26	22	28	25	27	20	27
I fear that using AI might lead to 'bad deals' or non-optimal offers	25	13	7	20	13	19	16	19	19	19
I generally feel uncomfortable using AI technology	16	12	9	13	10	13	22	20	15	14
I find AI tools too complex to understand and use	12	15	16	10	11	8	8	7	6	10
Other	4	3	7	9	6	4	9	12	4	5
ST Practical & cognitive barriers	74	71	67	64	58	69	75	68	67	68
ST Trust or ethical concerns	56	49	38	53	48	50	48	55	46	53

NEW

Q26Q15. What are the main reasons you have not used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to prepare or during your holidays? Basis: To those who have never used AI to prepare a trip

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

4/4 Reasons for not using AI to prepare a trip or during holidays (%)



	US	CA	AR	BR	MX
I prefer interacting with humans rather than automated systems	34	36	36	34	30
I don't use AI tools at all / It wouldn't naturally occur to me to use them	35	36	29	20	30
I lack trust in the accuracy and reliability of the information provided by AI tools	32	31	18	19	19
I am concerned about privacy and how my data might be used	27	26	16	16	21
I fear that using AI might lead to 'bad deals' or non-optimal offers	13	15	9	11	9
I generally feel uncomfortable using AI technology	20	21	7	12	9
I find AI tools too complex to understand and use	7	5	11	8	14
Other	12	12	10	14	7
ST Practical & cognitive barriers	70	72	71	62	71
ST Trust or ethical concerns	48	47	34	36	38

NEW

Q26Q15. What are the main reasons you have not used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to prepare or during your holidays? Basis: To those who have never used AI to prepare a trip



Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

The use of AI in leisure trip planning is extensive and broadly distributed across the entire process, with a slight preference shown for itinerary and activity planning over booking accommodation and transportation.

1/4 Trip planning – AI tools uses Yes, at least once (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Planning your itinerary – Finding suggestions for routes, places to visit, or things to do	89	88	91	91	95	93	91	91	91	92
Activities & attractions – Discovering experiences and attractions at your destination	88	88	89	86	91	95	90	92	92	90
Choosing a destination – Getting ideas, information on security, weather, vaccinations, currency exchange etc, or recommendations for where to go	87	86	89	85	90	98	84	96	87	91
Accommodation – Searching for options, reviews, or opinions on where to stay	74	71	79	76	81	92	73	91	78	86
Transportation – Comparing flights, car rentals, or other transport options for your trip	73	71	77	74	84	91	75	92	79	82













NEW

Q26Q16. Below are some common steps of trip preparation. For each one, please indicate if you have used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

2/4 Trip planning – AI tools uses Yes, at least once (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Planning your itinerary – Finding suggestions for routes, places to visit, or things to do	89	88	91	85	88	88	87	92	96	87	89	93
Activities & attractions – Discovering experiences and attractions at your destination	88	86	92	87	89	87	90	90	94	84	84	88
Choosing a destination – Getting ideas, information on security, weather, vaccinations, currency exchange etc, or recommendations for where to go	87	83	86	85	87	85	88	93	87	88	84	86
Accommodation – Searching for options, reviews, or opinions on where to stay	74	71	81	66	70	60	83	79	76	82	80	73
Transportation – Comparing flights, car rentals, or other transport options for your trip	73	70	74	71	68	63	80	77	77	78	78	71











NEW

Q26Q16. Below are some common steps of trip preparation. For each one, please indicate if you have used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

3/4 Trip planning – AI tools uses Yes, at least once (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Planning your itinerary – Finding suggestions for routes, places to visit, or things to do	96	94	99	96	91	93	91	92	90	92
Activities & attractions – Discovering experiences and attractions at your destination	93	90	78	94	92	95	88	91	92	92
Choosing a destination – Getting ideas, information on security, weather, vaccinations, currency exchange etc, or recommendations for where to go	96	88	90	85	92	98	88	80	97	96
Accommodation – Searching for options, reviews, or opinions on where to stay	90	77	76	76	84	92	79	68	91	91
Transportation – Comparing flights, car rentals, or other transport options for your trip	89	85	72	79	86	91	81	69	93	92

NEW

Q26Q16. Below are some common steps of trip preparation. For each one, please indicate if you have used Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

4/4 Trip planning – AI tools uses Yes, at least once (%)

NORTH AMERICA	
 US	 CA

SOUTH AMERICA		
 AR	 BR	 MX



	US	CA	AR	BR	MX
Planning your itinerary – Finding suggestions for routes, places to visit, or things to do	92	90	92	92	92
Activities & attractions – Discovering experiences and attractions at your destination	94	88	91	91	88
Choosing a destination – Getting ideas, information on security, weather, vaccinations, currency exchange etc, or recommendations for where to go	94	76	92	88	94
Accommodation – Searching for options, reviews, or opinions on where to stay	84	67	85	84	91
Transportation – Comparing flights, car rentals, or other transport options for your trip	86	68	76	84	86

03

When it comes to steps during the trip, the favoured applications are quite similar to the preparation of the trip:

- **Discovering activities and updating itineraries are the two applications individuals favor globally.**
- **Improving communication and getting assistance rank lower in Europe, but are quite important in India and the Middle East.**

1/4 On-trip management – AI tools uses Yes, at least once (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Activities & attractions – Discovering things to do on-site	84	82	85	86	87	89	84	88	86	86
Updating your itinerary – Adjusting plans or finding new places to visit	79	78	83	77	87	95	73	92	79	85
Transportation – Finding local transport options or comparing	73	68	79	77	83	88	72	89	75	82
Communication – Translating information or helping communicate in another language	73	71	76	77	78	92	63	91	69	83
Accommodation – Looking up reviews or alternative lodging	68	66	71	69	78	90	69	86	76	81
Assistance – Getting help or guidance in case of issues during the trip	66	64	72	65	76	92	63	93	70	83













NEW

Q26Q17. Now, regarding actions done during your trip. Below are some common steps. For each one, please indicate if you have used Artificial Intelligence search tools (such as Chat GPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

2/4 On-trip management – AI tools uses Yes, at least once (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Activities & attractions – Discovering things to do on-site	84	85	81	79	87	78	85	84	90	83	82	88
Updating your itinerary – Adjusting plans or finding new places to visit	79	77	77	78	76	75	84	84	83	82	82	73
Transportation – Finding local transport options or comparing	73	68	72	67	67	62	74	77	79	81	78	75
Communication – Translating information or helping communicate in another language	73	63	71	69	71	67	81	76	72	78	76	77
Accommodation – Looking up reviews or alternative lodging	68	63	73	64	66	57	73	75	70	67	73	65
Assistance – Getting help or guidance in case of issues during the trip	66	56	60	64	60	62	75	76	67	74	71	60











NEW

Q26Q17. Now, regarding actions done during your trip. Below are some common steps. For each one, please indicate if you have used Artificial Intelligence search tools (such as Chat GPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

3/4 On-trip management – AI tools uses Yes, at least once (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Activities & attractions – Discovering things to do on-site	92	85	79	88	86	89	87	81	86	88
Updating your itinerary – Adjusting plans or finding new places to visit	91	84	87	88	87	95	79	68	92	92
Transportation – Finding local transport options or comparing	86	84	79	77	85	88	80	64	90	88
Communication – Translating information or helping communicate in another language	87	77	63	71	83	92	69	58	92	91
Accommodation – Looking up reviews or alternative lodging	82	80	69	73	81	90	80	59	86	87
Assistance – Getting help or guidance in case of issues during the trip	89	72	57	72	80	92	72	53	93	92

NEW

Q26Q17. Now, regarding actions done during your trip. Below are some common steps. For each one, please indicate if you have used Artificial Intelligence search tools (such as Chat GPT, Gemini, Copilot) for. Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

4/4 On-trip management – AI tools uses Yes, at least once (%)



Activities & attractions
– Discovering things to do
on-site

90

80

83

88

88

Updating your itinerary
– Adjusting plans or finding
new places to visit

85

70

80

86

89

Transportation – Finding
local transport options or
comparing

83

62

77

83

86

Communication –
Translating information or
helping communicate in
another language

77

55

80

84

85

Accommodation –
Looking up reviews or
alternative lodging

83

66

73

83

87

Assistance – Getting help
or guidance in case of
issues during the trip

82

51

81



80

86

03

Immediate access to information and 'all-in-one' functionality stand out as the top perceived benefits of generative AI, with one in five respondents citing each as the **FIRST** benefit

1/8 Benefits of AI tools for trip planning or managing Firstly (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Quick access to information	20	21	16	21	24	19	17	18	24	19
An "all-in-one" platform that consolidates insights from multiple sources	19	19	19	20	18	22	22	16	17	19
Personalized itinerary / planning for my trip	15	14	17	14	18	12	17	11	16	9
Better deals and competitive prices	15	14	18	14	11	13	15	17	12	20
Recommendations on new activities	10	10	10	6	7	10	6	11	9	9
Real-time assistance available throughout my trip	10	10	9	13	11	11	9	14	9	10
Recommendations on new destinations	9	9	10	10	10	12	12	12	11	12
Other	0	0	0	0	0	0	0	0	0	0
None	1	1	0	1	0	0	1	0	1	1
I don't know	1	2	1	1	1	1	1	1	1	1

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

2/8 Benefits of AI tools for trip planning or managing Firstly (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Quick access to information	20	21	24	22	22	21	17	17	18	13	17	24
An "all-in-one" platform that consolidates insights from multiple sources	19	15	18	19	21	18	20	20	17	20	18	21
Personalized itinerary / planning for my trip	15	19	16	19	9	15	10	15	18	18	19	9
Better deals and competitive prices	15	19	14	11	10	15	16	20	18	16	18	11
Recommendations on new activities	10	9	11	6	13	11	13	7	12	11	4	8
Real-time assistance available throughout my trip	10	6	5	11	13	7	16	9	7	10	12	13
Recommendations on new destinations	9	9	10	9	9	9	8	10	9	10	9	11
Other	0	0	0	0	0	1	0	0	0	0	0	1
None	1	1	0	0	1	1	0	1	0	0	2	0
I don't know	1	1	2	3	2	2	0	1	1	2	1	2

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

3/8 Benefits of AI tools for trip planning or managing Firstly (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Quick access to information	19	22	27	23	33	19	19	15	20	17
An "all-in-one" platform that consolidates insights from multiple sources	22	19	12	26	6	22	19	25	13	19
Personalized itinerary / planning for my trip	13	20	30	18	16	12	14	21	10	11
Better deals and competitive prices	13	11	5	12	13	13	18	12	16	17
Recommendations on new activities	8	6	4	7	6	10	6	5	12	11
Real-time assistance available throughout my trip	13	13	7	6	12	11	11	7	14	13
Recommendations on new destinations	11	9	13	7	12	12	10	13	13	11
Other	0	0	1	0	0	0	1	1	1	0
None	0	0	1	0	1	0	1	1	0	0
I don't know	1	0	0	1	1	1	1	0	1	1

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

4/8 Benefits of AI tools for trip planning or managing Firstly (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Quick access to information	25	22	23	17	18
An "all-in-one" platform that consolidates insights from multiple sources	15	20	25	15	18
Personalized itinerary / planning for my trip	13	21	8	10	8
Better deals and competitive prices	13	11	18	18	23
Recommendations on new activities	10	8	4	13	9
Real-time assistance available throughout my trip	12	4	12	11	7
Recommendations on new destinations	10	11	7	14	14
Other	0	0	1	0	0
None	2	1	1	1	1
I don't know	0	2	1	1	2

NEW



Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

XX / XX Significantly higher or lower score vs Europe

03

5/8

Benefits of AI tools for trip planning or managing Total – Firstly, secondly, thirdly (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Quick access to information	52	53	50	54	57	46	51	49	56	48
An "all-in-one" platform that consolidates insights from multiple sources	48	47	49	51	46	55	50	43	46	46
Personalized itinerary / planning for my trip	43	44	47	36	50	38	47	35	45	34
Better deals and competitive prices	42	39	46	44	37	42	41	45	40	52
Real-time assistance available throughout my trip	37	36	36	41	37	41	33	44	33	43
Recommendations on new activities	34	38	32	28	31	33	35	37	35	32
Recommendations on new destinations	33	33	32	36	37	39	34	38	33	35
Other	1	1	0	1	0	0	1	0	0	1
None	1	1	0	1	0	0	1	0	1	1
I don't know	1	2	1	1	1	1	1	1	1	1

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

6/8 Benefits of AI tools for trip planning or managing Total – Firstly, secondly, thirdly (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Quick access to information	52	53	57	54	54	53	47	47	54	49	50	57
An "all-in-one" platform that consolidates insights from multiple sources	48	44	45	49	47	44	54	49	46	52	46	55
Personalized itinerary / planning for my trip	43	49	46	54	35	43	36	47	50	46	41	33
Better deals and competitive prices	42	50	34	35	35	34	44	49	48	40	54	35
Real-time assistance available throughout my trip	37	31	29	33	38	36	46	35	31	41	41	42
Recommendations on new activities	34	37	41	29	49	38	35	33	30	34	22	34
Recommendations on new destinations	33	29	35	29	32	38	33	31	35	29	36	36
Other	1	0	1	0	1	1	1	0	0	0	1	1
None	1	1	0	0	1	1	0	1	0	0	2	0
I don't know	1	1	2	3	2	2	0	1	1	2	1	2

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

7/8 Benefits of AI tools for trip planning or managing Total – Firstly, secondly, thirdly (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
Quick access to information	53	55	66	58	61	46	53	49	52	47
An "all-in-one" platform that consolidates insights from multiple sources	54	45	31	60	26	55	47	52	37	49
Personalized itinerary / planning for my trip	37	58	69	52	47	38	44	51	33	37
Better deals and competitive prices	41	36	22	32	47	42	43	38	46	44
Real-time assistance available throughout my trip	43	43	32	28	37	41	34	32	43	45
Recommendations on new activities	32	29	27	33	31	33	34	36	38	37
Recommendations on new destinations	36	31	43	34	44	39	33	36	41	35
Other	0	0	2	0	0	0	2	1	1	0
None	0	0	1	0	1	0	1	1	0	0
I don't know	1	0	0	1	1	1	1	0	1	1

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

8/8

Benefits of AI tools for trip planning or managing Total – Firstly, secondly, thirdly (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Quick access to information	56	58	50	49	45
An "all-in-one" platform that consolidates insights from multiple sources	45	48	48	45	45
Personalized itinerary / planning for my trip	42	48	37	36	31
Better deals and competitive prices	40	39	56	48	52
Real-time assistance available throughout my trip	36	29	41	46	41
Recommendations on new activities	38	31	24	33	38
Recommendations on new destinations	35	31	33	35	36
Other	0	0	2	0	1
None	2	1	1	1	1
I don't know	0	2	1	1	2

NEW

Q26Q18. What are the top 3 benefits you would expect from using Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) for planning or during your leisure trips? Basis: To those who use AI to prepare their trip(s).

Top answers per country: #1 #2 #3

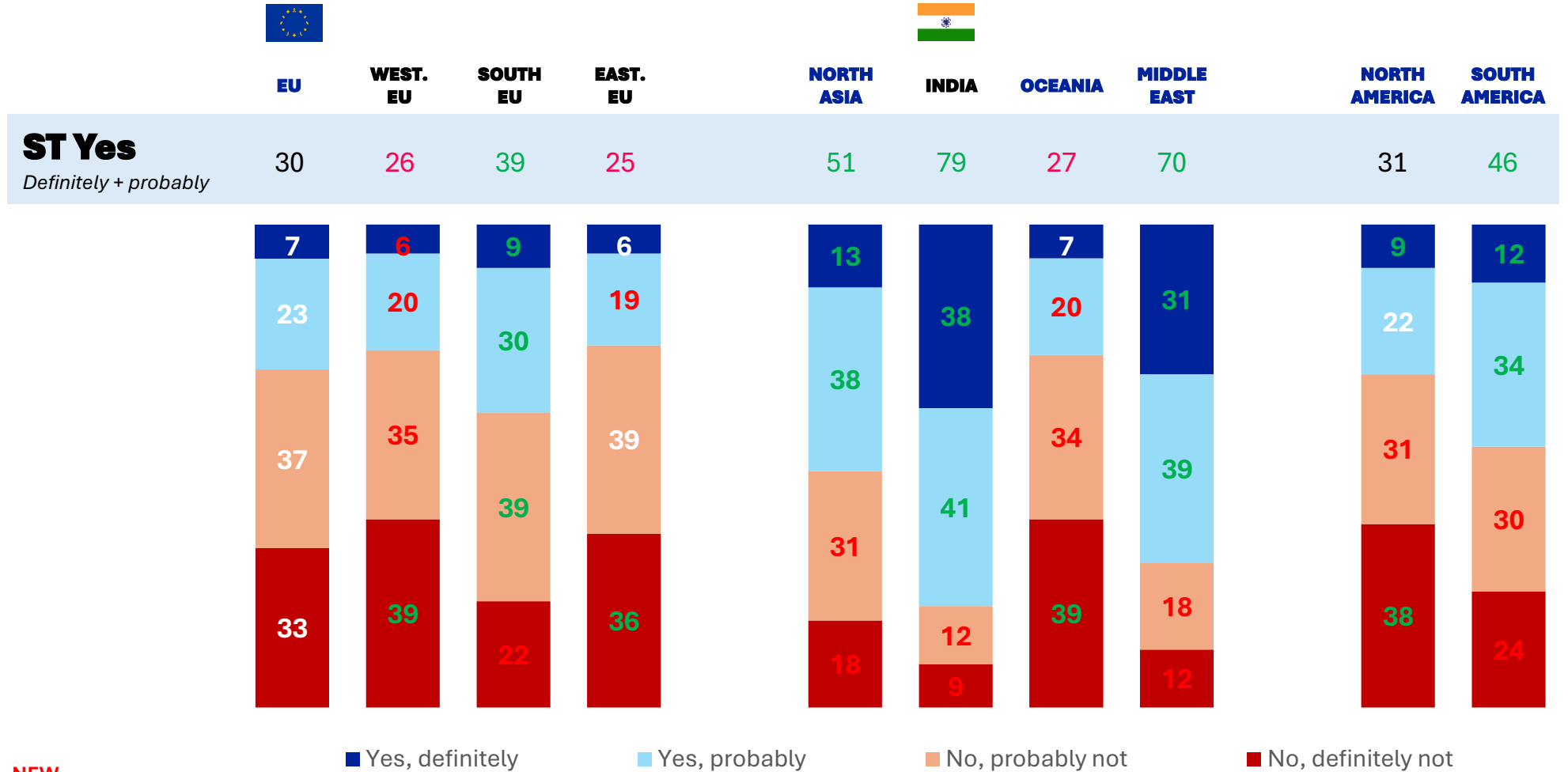
XX / XX Significantly higher or lower score vs Europe

03

There is a strong appetite to rely exclusively on AI tools to plan leisure trips in India (79% would consider this) and the Middle East (70%). In other parts of the world, people are less keen. Interest is lowest in Eastern Europe (25%), Western Europe (26%) and Oceania (27%).

1/4

Consideration of relying exclusively on AI tools to plan a trip (%)



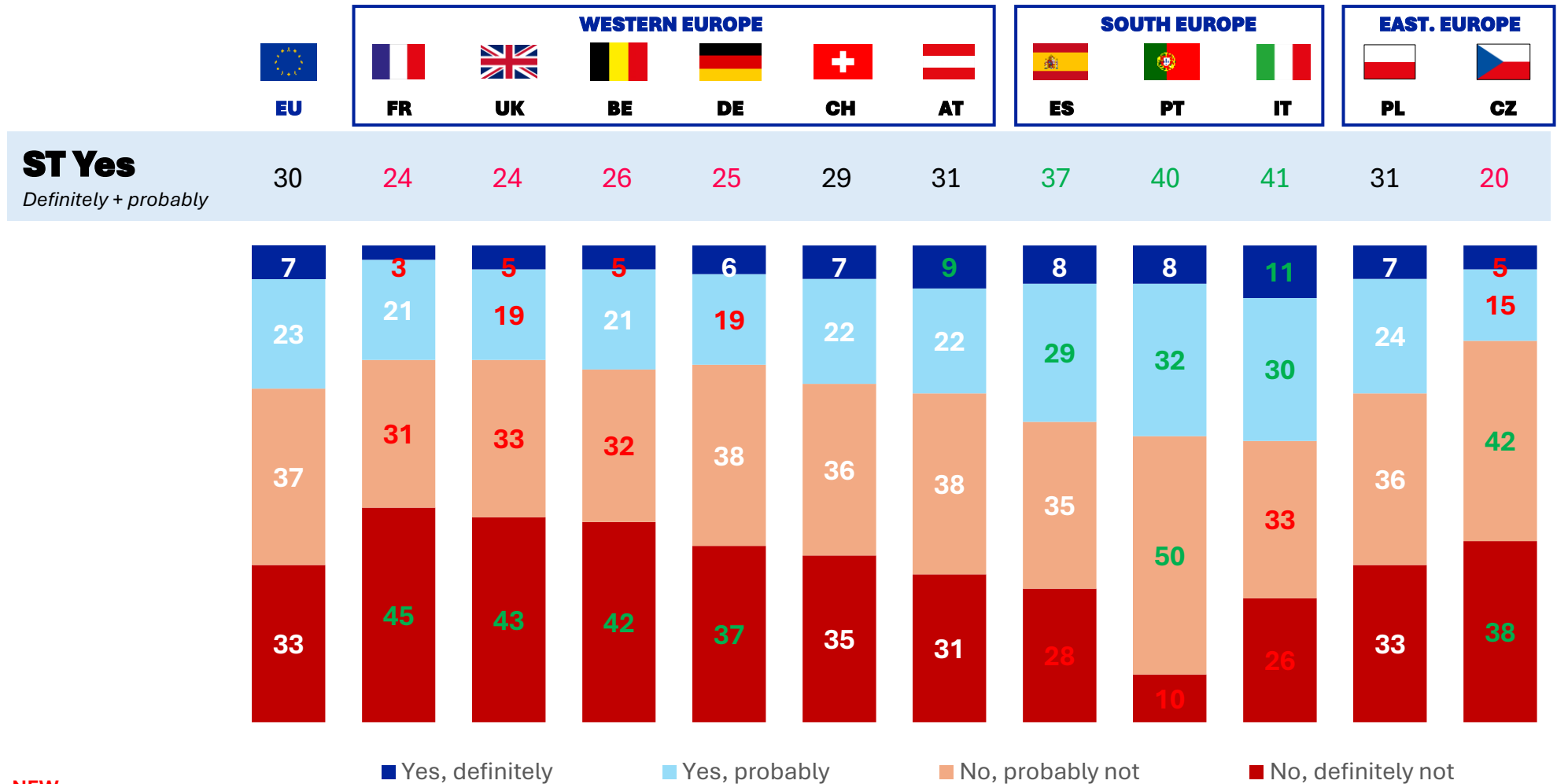
NEW

Q26Q19. Would you consider relying mainly on Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to plan your next leisure trip, without consulting additional resources (by additional resources we mean: relatives or friends, internet, social media etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe

03

2/4 Consideration of relying exclusively on AI tools to plan a trip (%)



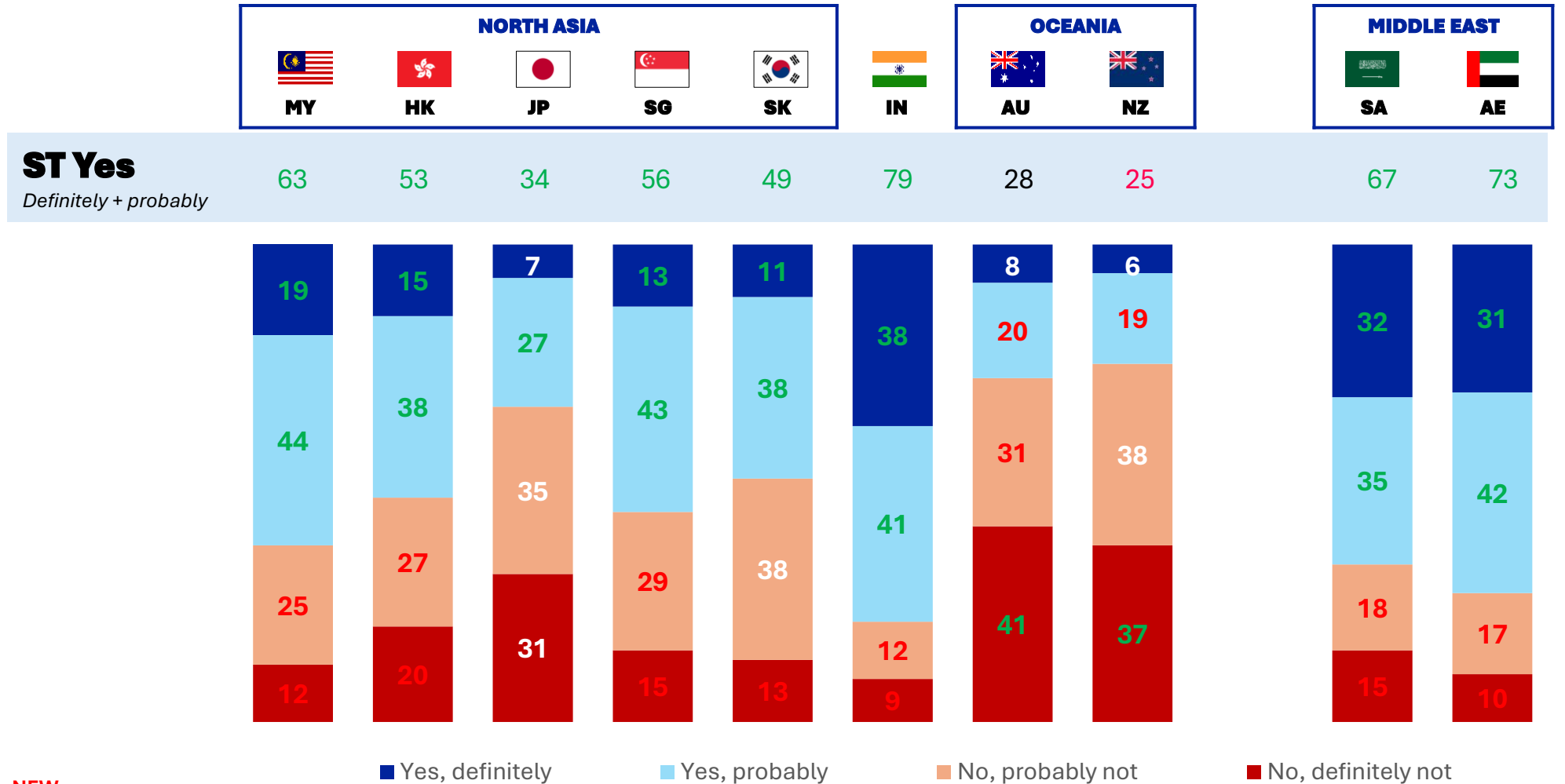
NEW

Q26Q19. Would you consider relying mainly on Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to plan your next leisure trip, without consulting additional resources (by additional resources we mean: relatives or friends, internet, social media etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe

03

3/4 Consideration of relying exclusively on AI tools to plan a trip (%)



NEW

Q26Q19. Would you consider relying mainly on Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to plan your next leisure trip, without consulting additional resources (by additional resources we mean: relatives or friends, internet, social media etc)? Basis: To all

XX / XX Significantly higher or lower score vs Europe

03

4/4 Consideration of relying exclusively on AI tools to plan a trip (%)



ST Yes

Definitely + probably

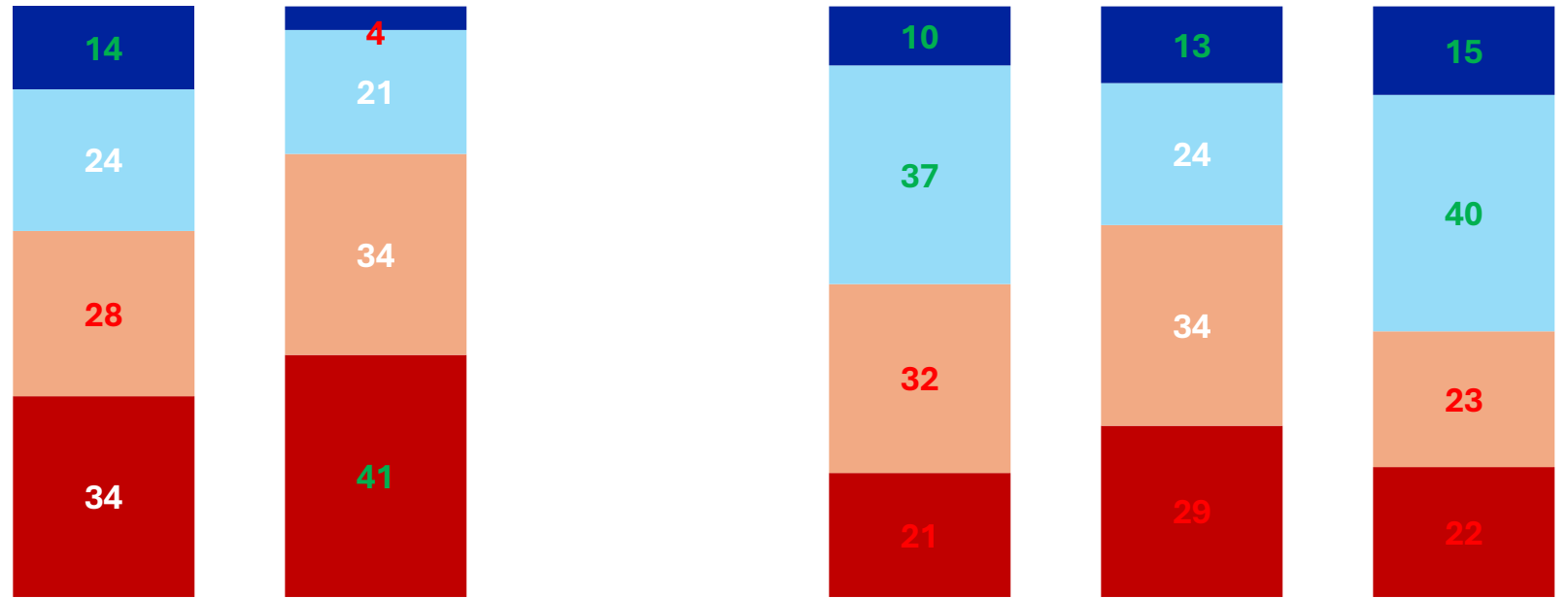
38

25

47

37

55



■ Yes, definitely

■ Yes, probably

■ No, probably not

■ No, definitely not

NEW

Q26Q19. Would you consider relying mainly on Artificial Intelligence search tools (such as ChatGPT, Gemini, Copilot) to plan your next leisure trip, without consulting additional resources (by additional resources we mean: relatives or friends, internet, social media etc)? Basis: To all

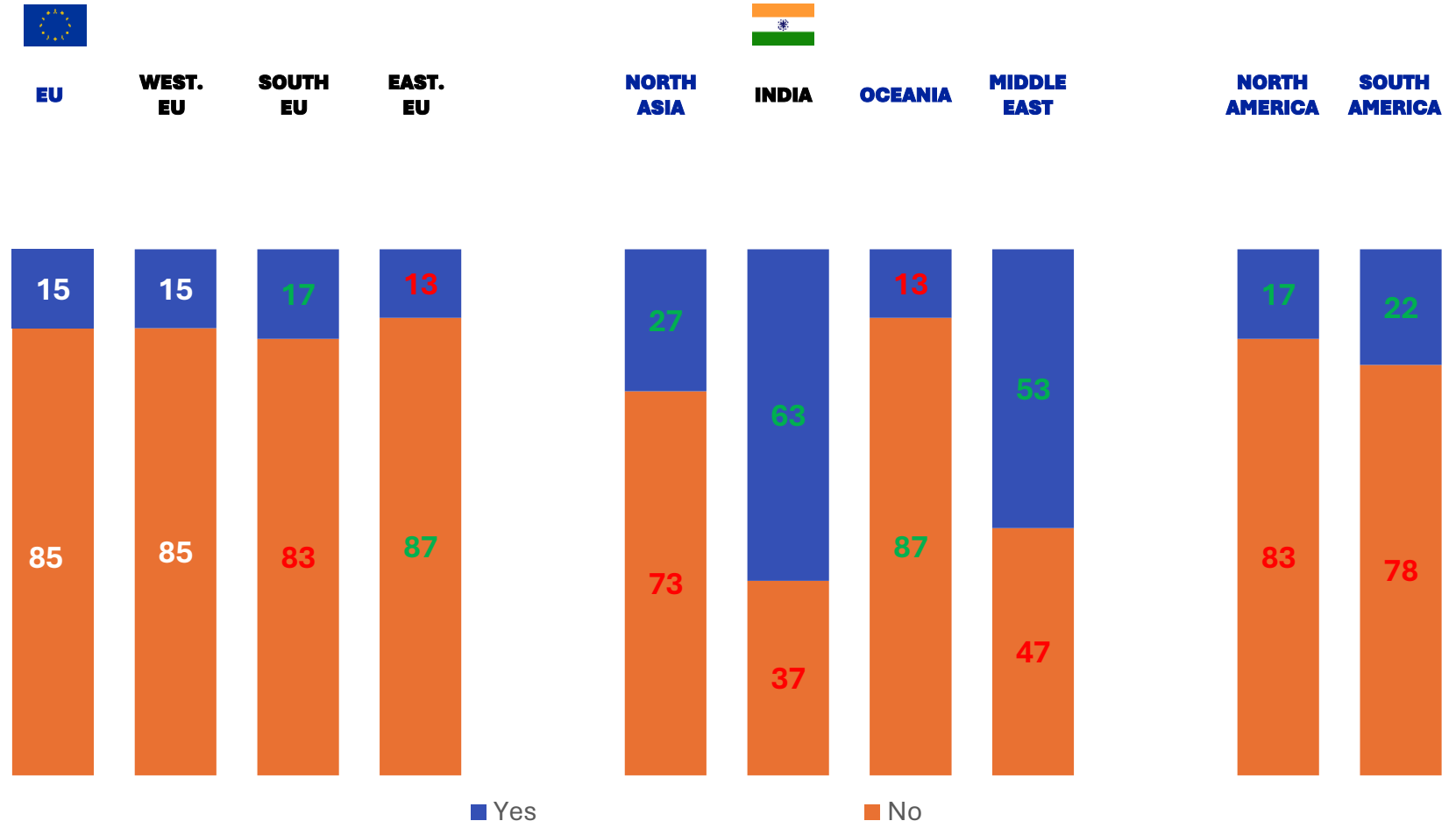
XX / XX Significantly higher or lower score vs Europe

03

Using AI specifically to book some specific parts of one's trip reaches lower levels than preparing one's leisure trip through AI across the world.

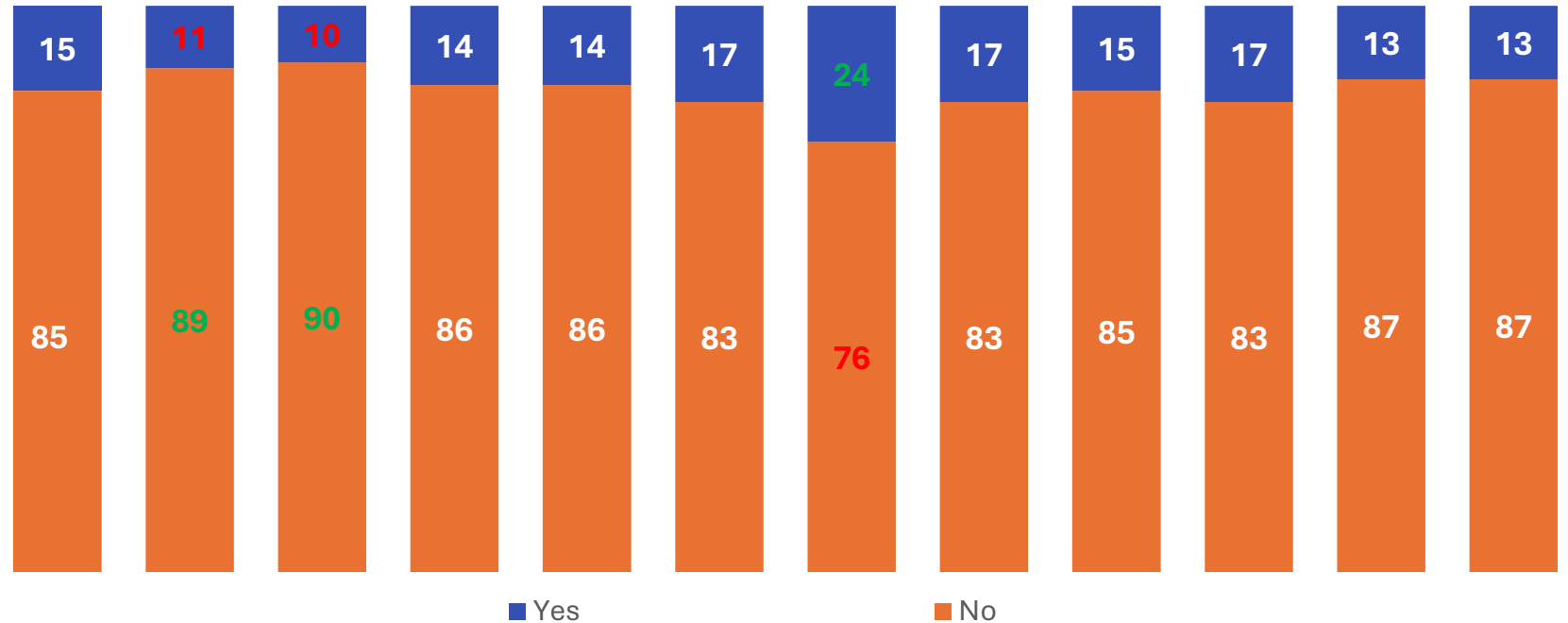
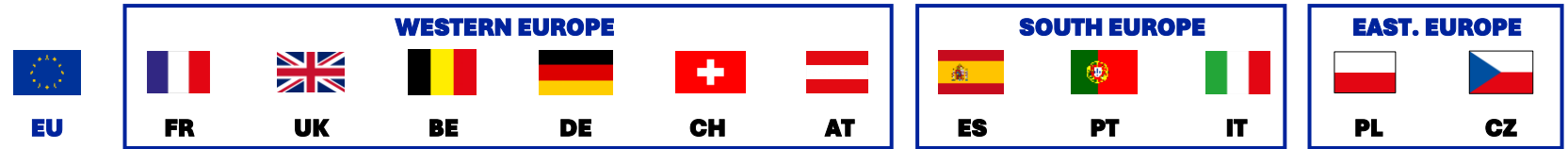
However, a sharp divide is once again evident between early-adopting regions like India and the Middle East, and their European and North American counterparts.

1/4 Past use of Artificial Intelligence for holiday booking (%)



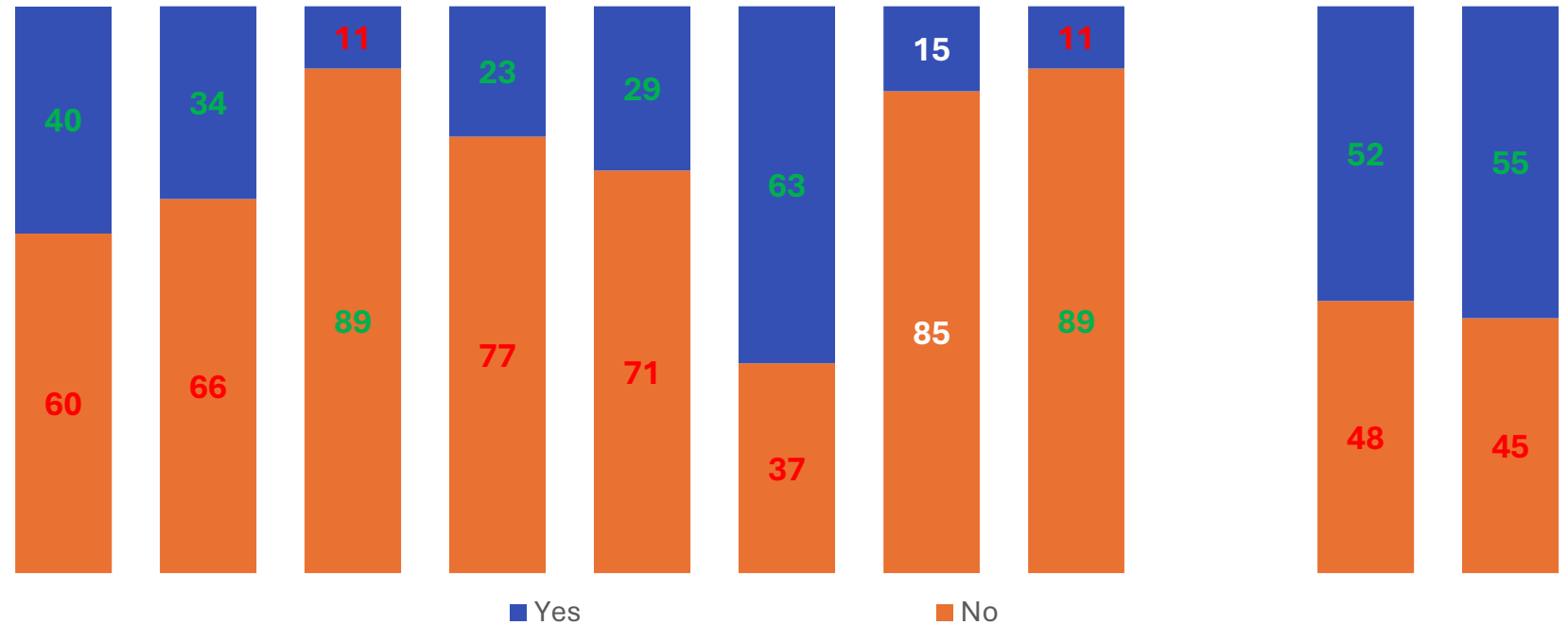
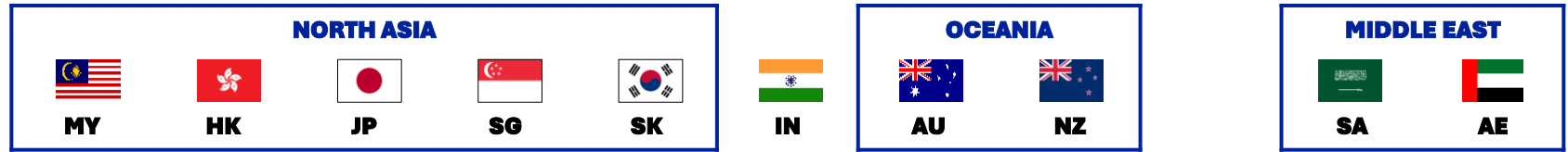
03

2/4 Past use of Artificial Intelligence for holiday booking (%)



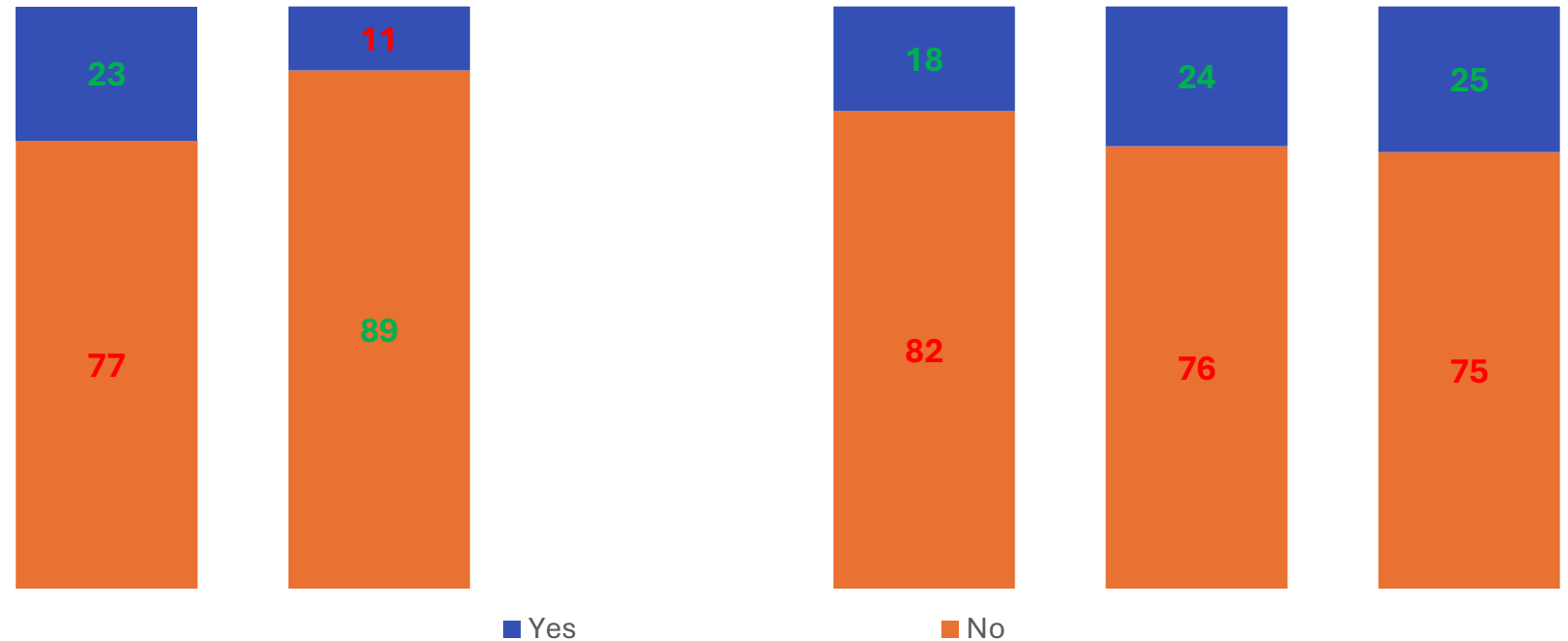
03

3/4 Past use of Artificial Intelligence for holiday booking (%)



03

4/4 Past use of Artificial Intelligence for holiday booking (%)

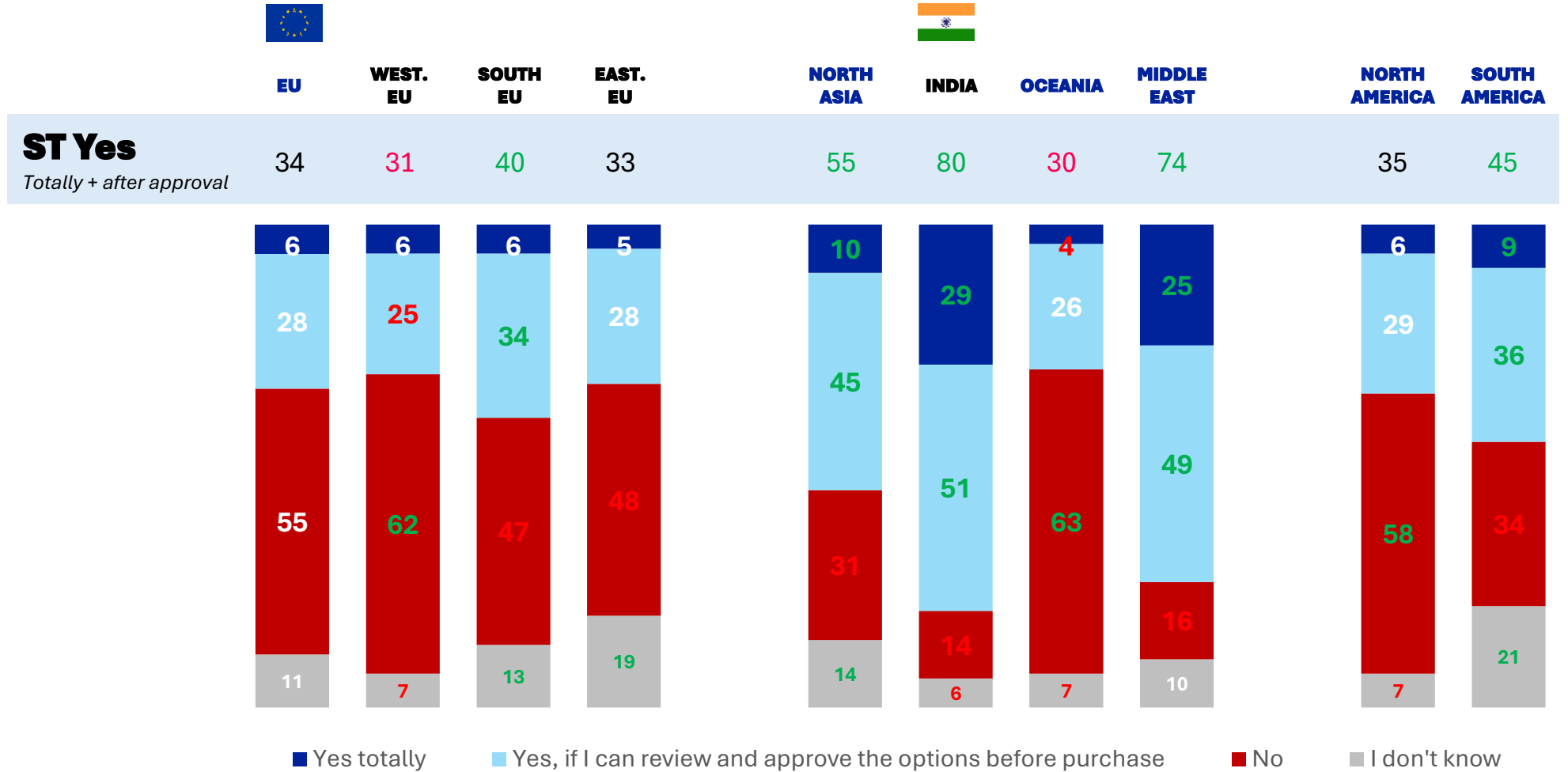


03

There is an enthusiasm for delegating booking trips to AI, although people are reluctant to give up all oversight. Only in India (29%) and MENA (25%) would a significant proportion be comfortable to totally rely on AI to book trips. People are much more reluctant in Europe (6%), North America (6%) and Oceania (4%).

1/4

Consideration of relying exclusively on AI tools to plan a trip (%)



NEW

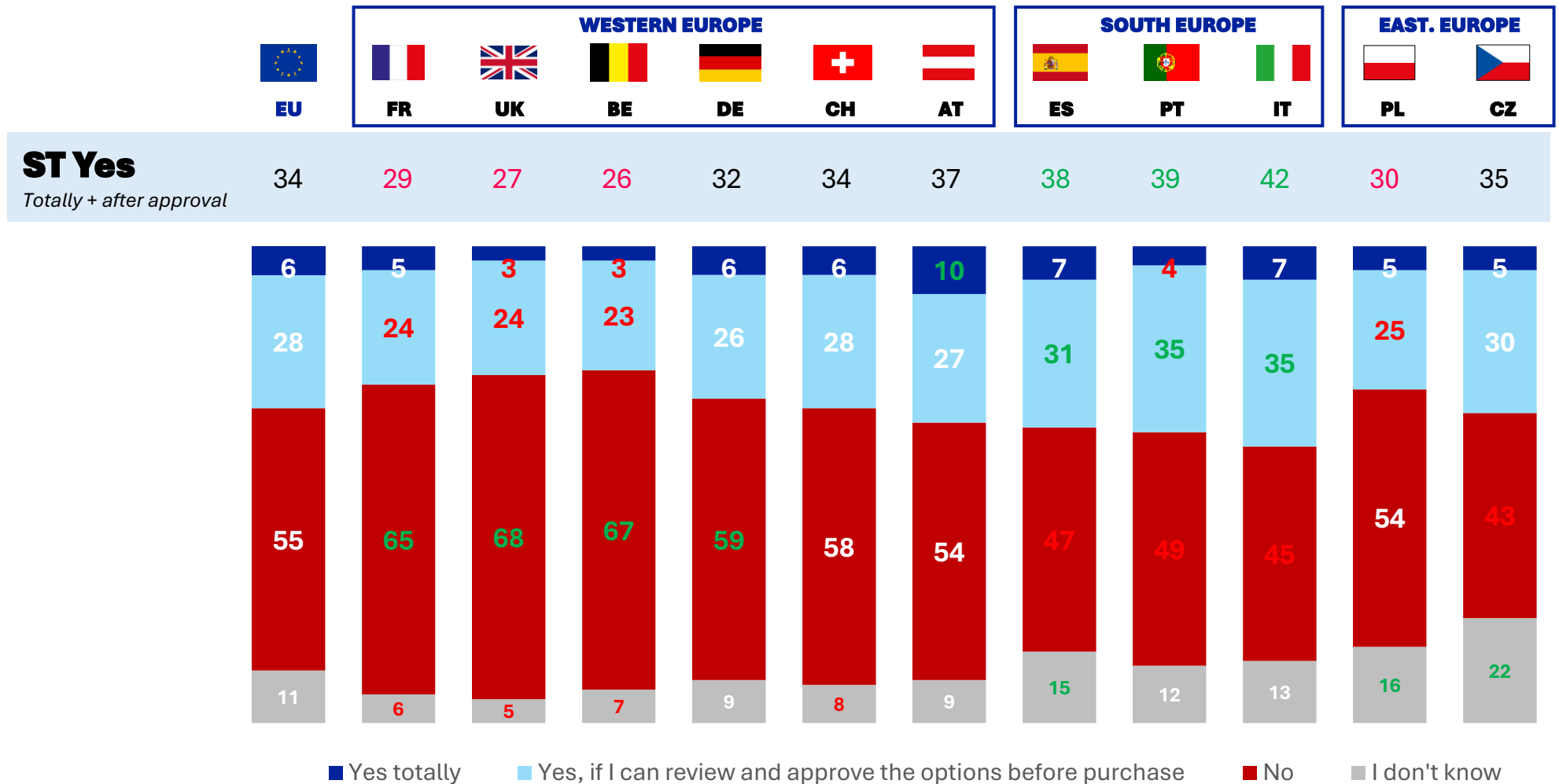
Q26Q21. Would you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To all

XX / XX Significantly higher or lower score vs Europe



03

2/4 Consideration of relying exclusively on AI tools to plan a trip (%)



ST Yes

Totally + after approval

34 29 27 26 32 34 37 38 39 42 30 35

■ Yes totally ■ Yes, if I can review and approve the options before purchase ■ No ■ I don't know

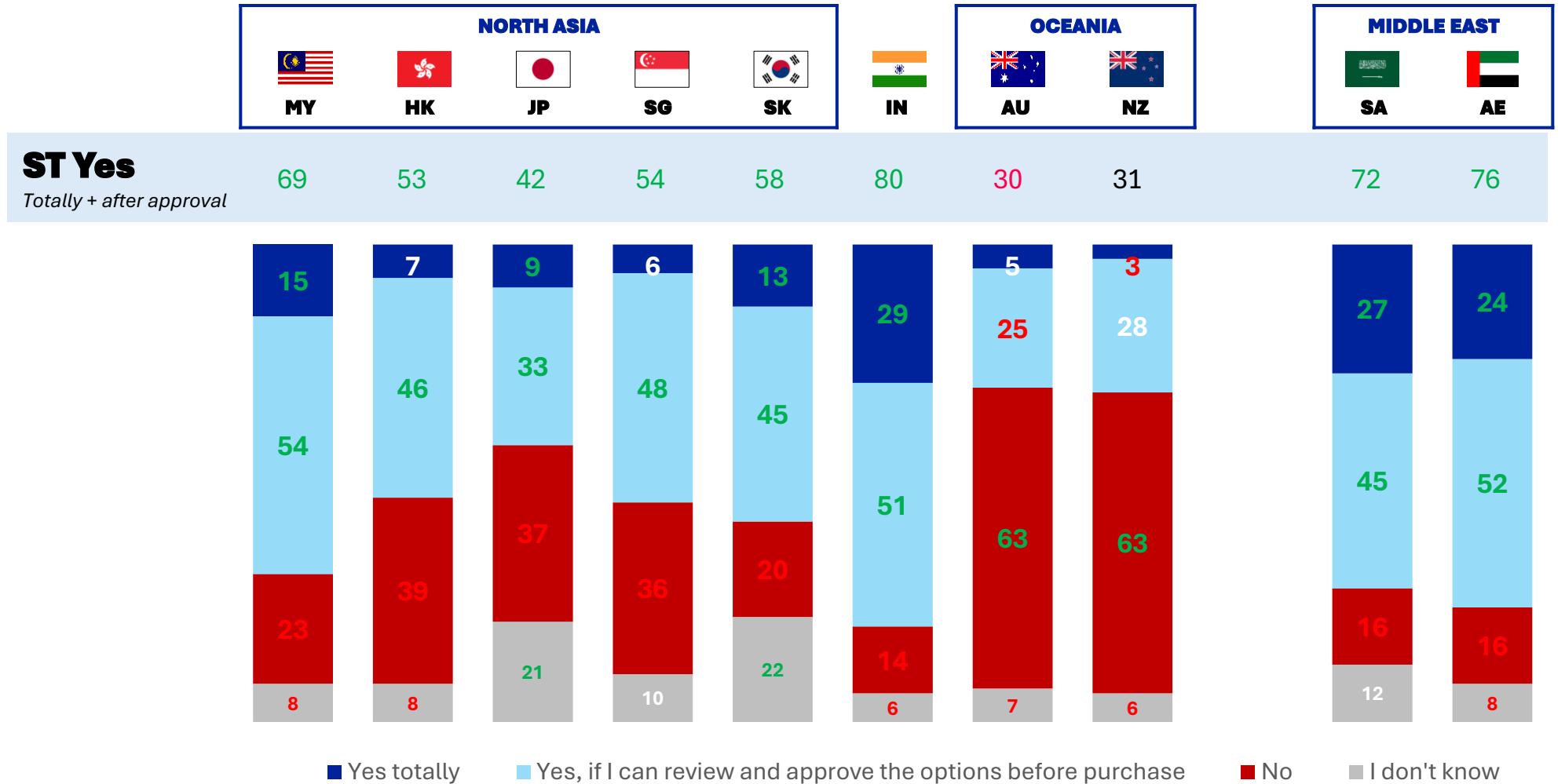
NEW

Q26Q21. Would you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To all

XX / XX Significantly higher or lower score vs Europe

03

3/4 Consideration of relying exclusively on AI tools to plan a trip (%)



ST Yes

Totally + after approval

69 53 42 54 58 80 30 31 72 76

03

4/4 Consideration of relying exclusively on AI tools to plan a trip (%)



ST Yes

Totally + after approval

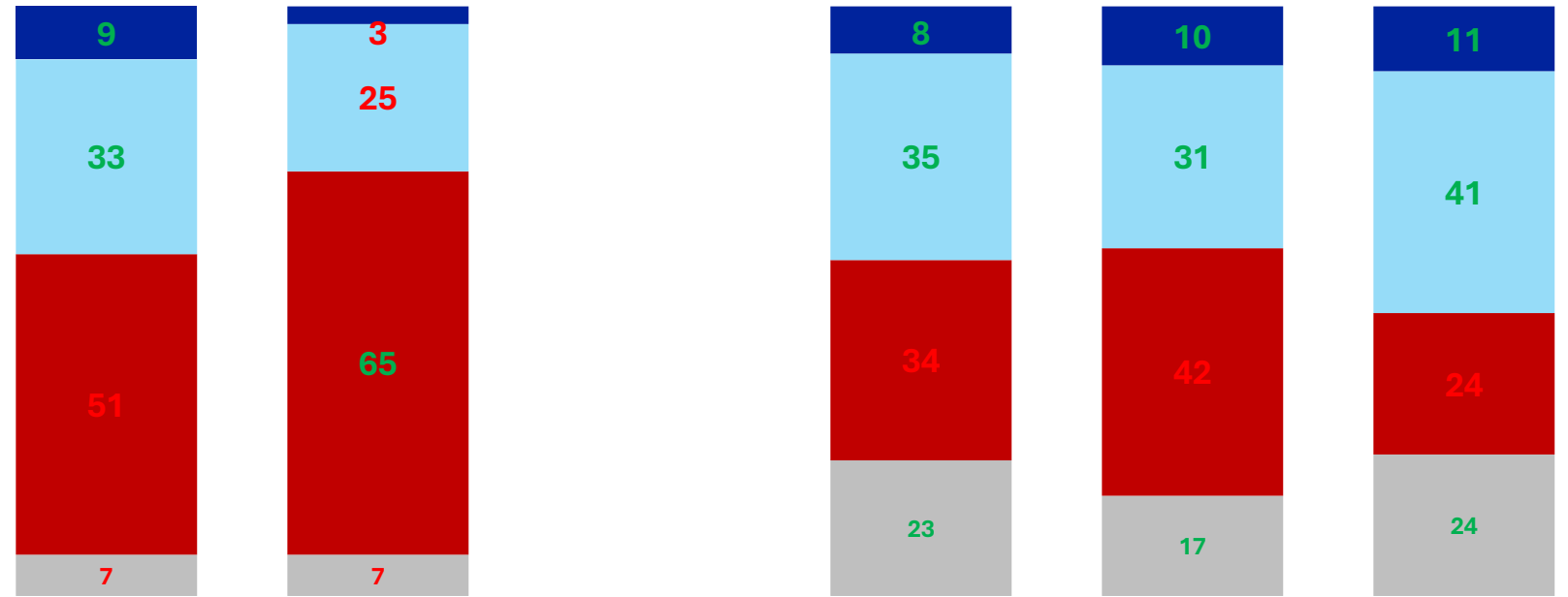
42

28

43

41

52



■ Yes totally

■ Yes, if I can review and approve the options before purchase

■ No

■ I don't know

NEW

Q26Q21. Would you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To all

XX / XX Significantly higher or lower score vs Europe



03

A preference for personal control of the decisions and enjoyment of the planning process are top reasons cited by those uncomfortable with delegating travel bookings to AI.

Furthermore, a lack of trust in AI for payments and data is a major barrier, cited by one-third in Europe - a figure that climbs to over 40% in North America and nearly 50% in Oceania.



1/4 Barriers to delegating trip booking to AI (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
I prefer to make travel decisions myself	48	52	42	44	39	34	53	33	50	32
I enjoy planning my own trips	40	44	35	35	30	32	47	29	40	27
I don't trust AI with payment or personal data	33	35	31	33	31	33	47	29	43	23
I worry about mistakes or incorrect bookings	32	34	30	30	37	28	43	22	40	26
I want to compare options personally	32	32	31	30	28	23	39	22	34	24
I'm concerned about privacy and data security	23	26	21	18	27	22	35	20	36	20
I'm not familiar enough with AI tools	20	19	21	18	28	19	25	17	26	22
I need human assistance for complex trips	15	14	16	14	15	28	17	19	18	16
Other	2	2	1	2	1	3	5	1	4	2
ST Prefer deciding themselves of with human assistance	77	80	74	73	68	70	78	67	78	66
ST Trust & risk concerns	64	65	65	62	70	67	75	60	72	62

NEW

Q26Q22. Why wouldn't you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To those who are not comfortable delegating their entire leisure travel booking to an AI search tool or AI Agent.

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

2/4 Barriers to delegating trip booking to AI (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
I prefer to make travel decisions myself	48	52	54	49	54	50	52	41	47	37	42	46
I enjoy planning my own trips	40	45	45	41	44	48	42	33	41	32	32	38
I don't trust AI with payment or personal data	33	34	44	33	34	35	29	33	33	25	38	28
I worry about mistakes or incorrect bookings	32	30	41	31	38	36	30	26	37	25	29	31
I want to compare options personally	32	29	40	30	33	32	29	29	30	35	29	30
I'm concerned about privacy and data security	23	27	31	23	25	24	23	23	27	13	19	18
I'm not familiar enough with AI tools	20	21	25	17	20	17	16	22	22	19	22	14
I need human assistance for complex trips	15	13	17	10	15	17	14	15	17	16	15	13
Other	2	2	3	3	3	1	1	1	1	1	1	3
ST Prefer deciding themselves of with human assistance	77	79	81	76	82	82	81	71	74	76	73	75
ST Trust & risk concerns	64	65	74	63	66	65	58	68	69	57	67	58

NEW











Q26Q22. Why wouldn't you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To those who are not comfortable delegating their entire leisure travel booking to an AI search tool or AI Agent.

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

3/4 Barriers to delegating trip booking to AI (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
I prefer to make travel decisions myself	45	35	40	47	28	34	52	55	27	39
I enjoy planning my own trips	37	33	30	33	20	32	44	51	23	35
I don't trust AI with payment or personal data	42	32	21	36	28	33	45	50	26	33
I worry about mistakes or incorrect bookings	38	47	34	43	22	28	39	47	17	28
I want to compare options personally	34	29	23	32	22	23	37	41	18	26
I'm concerned about privacy and data security	34	32	18	36	19	22	33	36	13	28
I'm not familiar enough with AI tools	29	33	28	23	31	19	24	26	15	19
I need human assistance for complex trips	31	14	6	18	15	28	17	17	14	24
Other	1	1	2	1	1	3	5	5	2	0
ST Prefer deciding themselves of with human assistance	77	69	65	74	59	70	76	80	64	71
ST Trust & risk concerns	76	71	65	73	67	67	74	76	55	67

NEW

Q26Q22. Why wouldn't you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To those who are not comfortable delegating their entire leisure travel booking to an AI search tool or AI Agent.

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

03

4/4 Barriers to delegating trip booking to AI (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
I prefer to make travel decisions myself	51	49	36	31	29
I enjoy planning my own trips	37	43	31	30	20
I don't trust AI with payment or personal data	42	44	22	25	22
I worry about mistakes or incorrect bookings	40	40	28	27	23
I want to compare options personally	34	33	30	20	23
I'm concerned about privacy and data security	36	36	18	20	22
I'm not familiar enough with AI tools	28	25	22	22	23
I need human assistance for complex trips	17	20	17	15	15
Other	3	5	1	2	2
ST Prefer deciding themselves of with human assistance	77	79	71	64	62
ST Trust & risk concerns	74	72	60	63	63

NEW

Q26Q22. Why wouldn't you feel comfortable delegating your entire leisure travel booking to an AI search tool or AI Agent? Basis: To those who are not comfortable delegating their entire leisure travel booking to an AI search tool or AI Agent.

Top answers per country: #1 #2 #3

XX / XX Significantly higher or lower score vs Europe

04

**Budgets,
accommodation
choices, transport
options, preferred
settings... everything
you need to know
about travelers'
intentions across our
26 countries**



04

1/2 Summer holiday budget (Average sum spent, converted to euro)



Once again, the holiday budget remains a protected priority, highlighting its importance for populations.

In Europe, the average summer holiday budget for 2026 stands at €2,089, remaining highly stable compared to 2025 (an increase of €9).

As observed in previous editions of the Holiday Barometer, this budget shows significant variations by region:

- Within Europe, budgets are highest in Western Europe (€2,491), compared to Southern Europe (€1,775) and Eastern Europe (€1,412).
- Budgets are higher still in Oceania (€2,900), North America (€2,600), and the MENA region (€2,602).

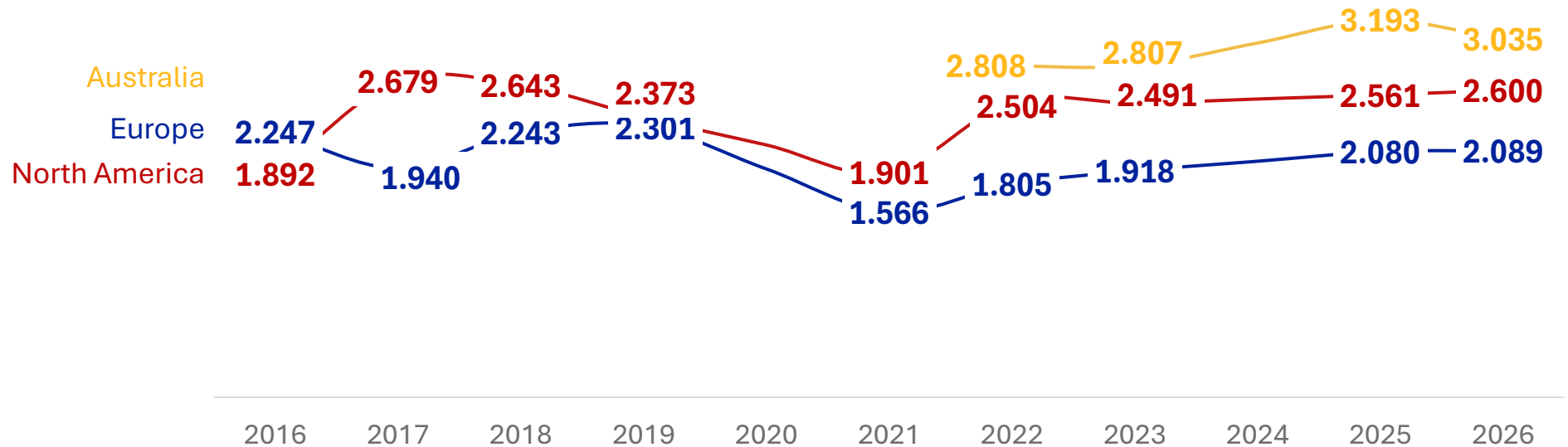
04

Average budgets in Europe and North America are holding steady this year. In contrast, Australia's budget shows a slight decrease, although it remains at a historically high level.

While the average European holiday budget has seen consistent, albeit moderate, growth since 2022, it has still not returned to its pre-COVID level.

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

Average summer holiday budget for 2026 (€)

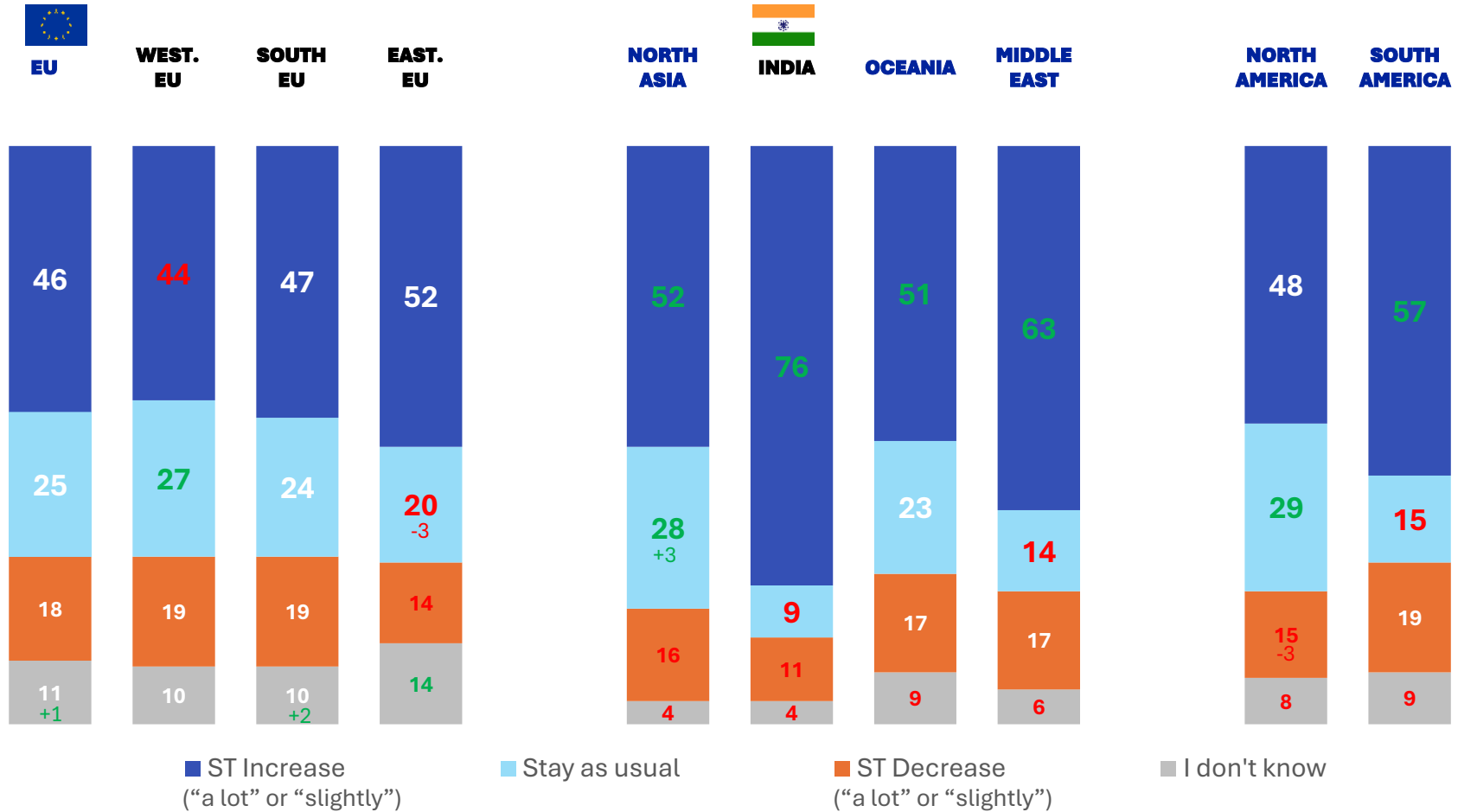


04

Despite the cost of living remaining a top global concern, almost half of European travelers plan to increase their holiday budget compared to last year.

This trend is even more pronounced in other regions, with the proportion rising to nearly two in three in the Middle East and over three-quarters in India.

1/4 Expected change in holiday budget compared to last year (%)

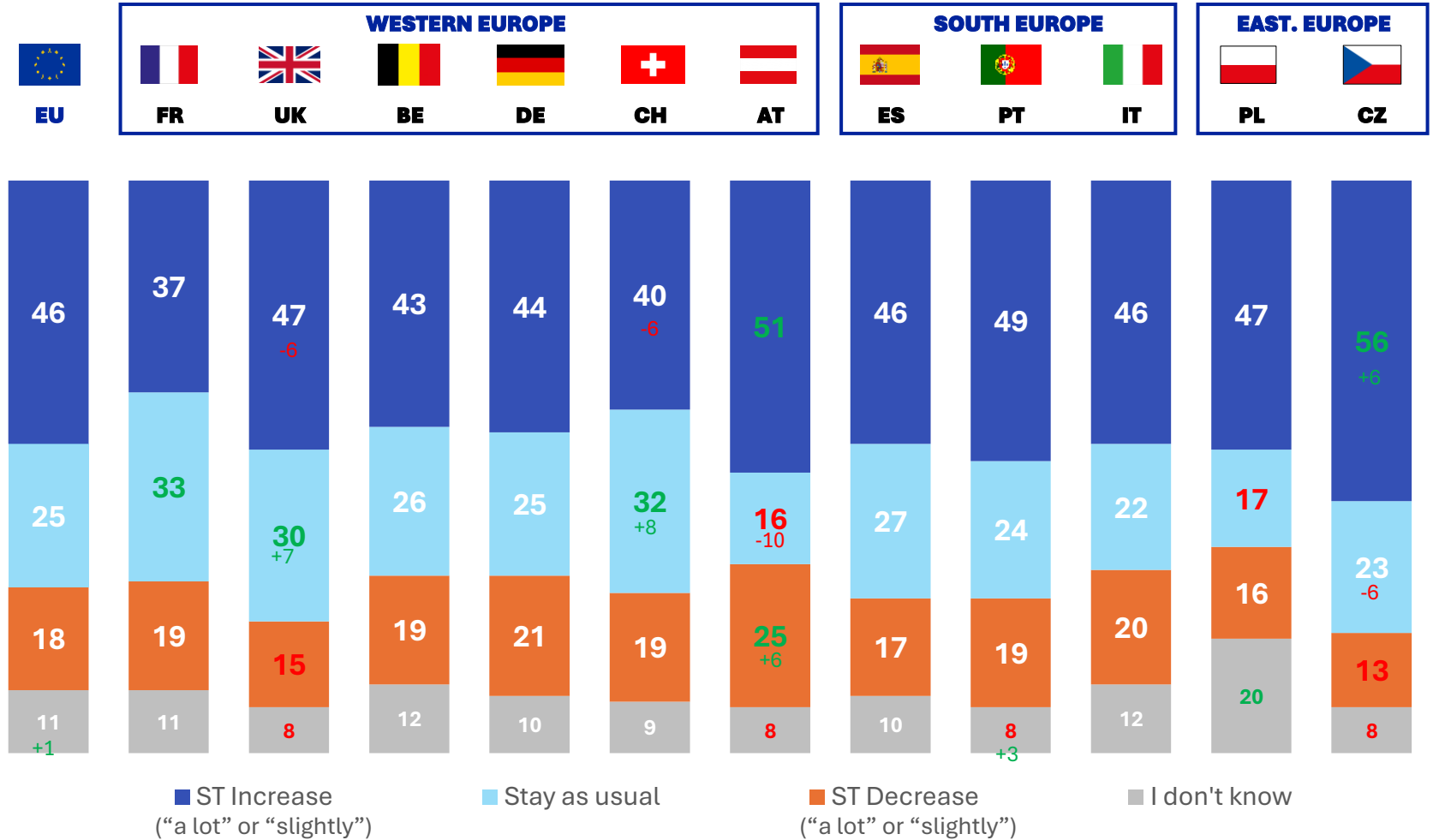


Q32. How might your budget for your next [summer trip / trip between June and September] change compared to what you spent last year? Will it... Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

2/4 Expected change in holiday budget compared to last year (%)

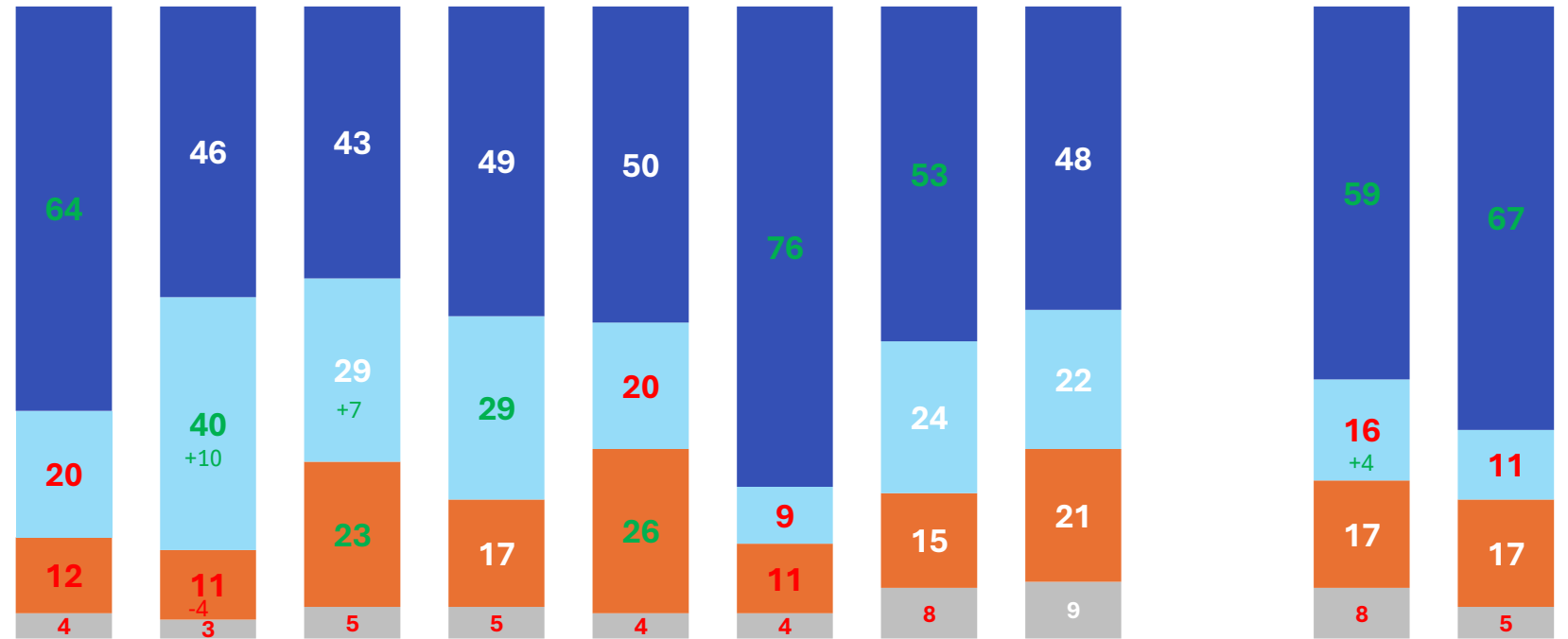
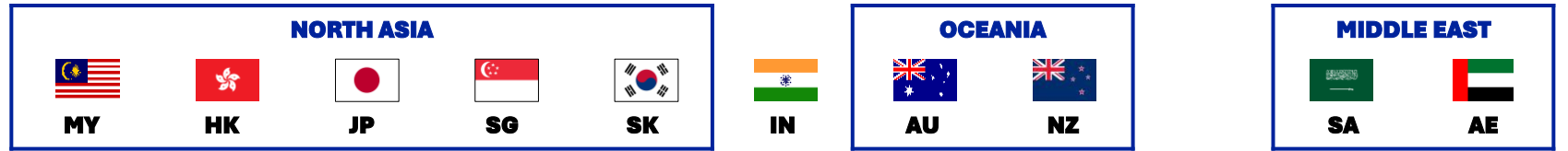


Q32. How might your budget for your next [summer trip / trip between June and September] change compared to what you spent last year? Will it... Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

3/4 Expected change in holiday budget compared to last year (%)

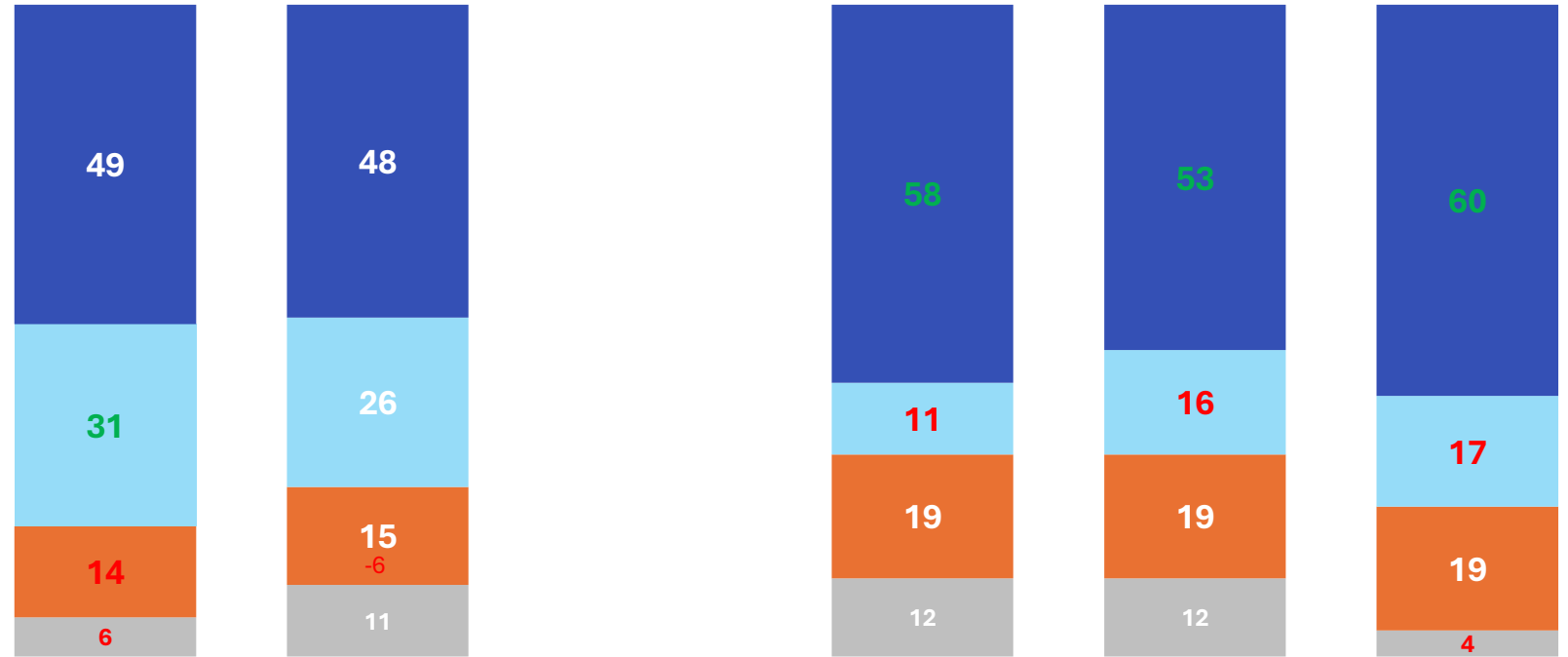


■ ST Increase ("a lot" or "slightly") ■ Stay as usual ■ ST Decrease ("a lot" or "slightly") ■ I don't know

04

4/4

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



■ ST Increase ("a lot" or "slightly")

■ Stay as usual

■ ST Decrease ("a lot" or "slightly")

■ I don't know

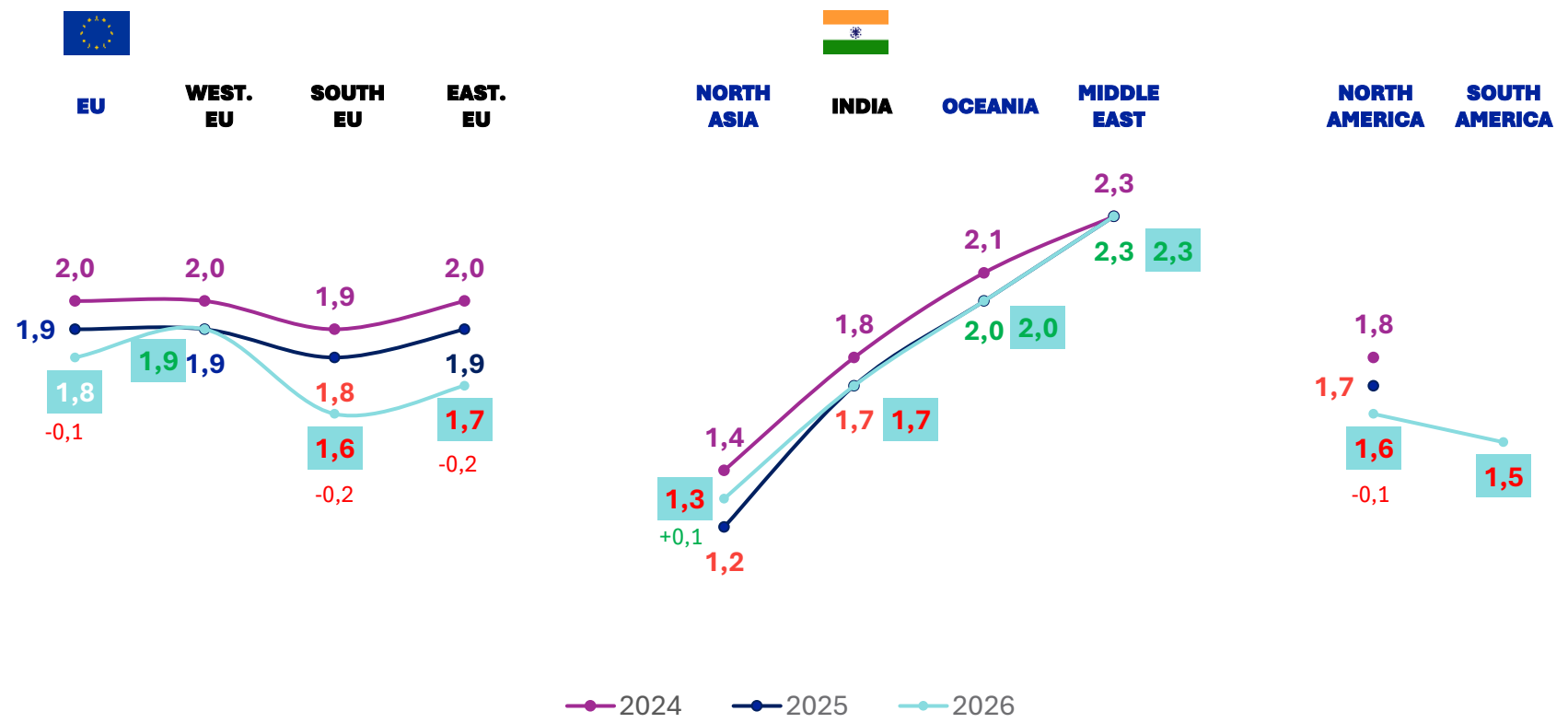


04

The average duration of summer trips (June-September) remains consistent with previous years: 1.8 weeks in Europe (stable overall, though decreasing slightly in the South and East), 2 weeks in Oceania, and 2.3 weeks in the MENA region.

In contrast, North Asians, Indians, and North Americans typically take shorter trips.

1/4 Planned trip duration Number of weeks (Mean)

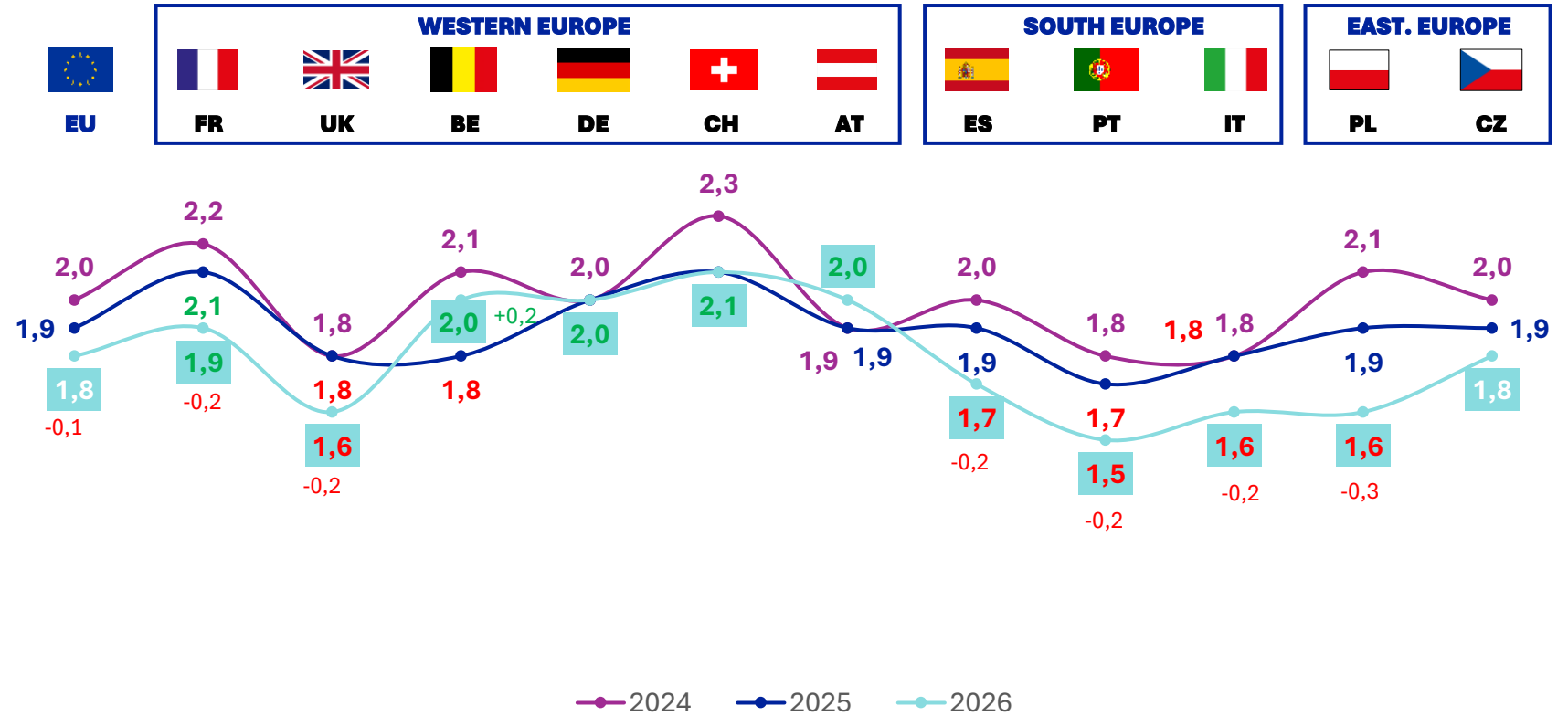


Q18. In total, how long will you be away on a trip [this summer / between June and September]? Basis: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

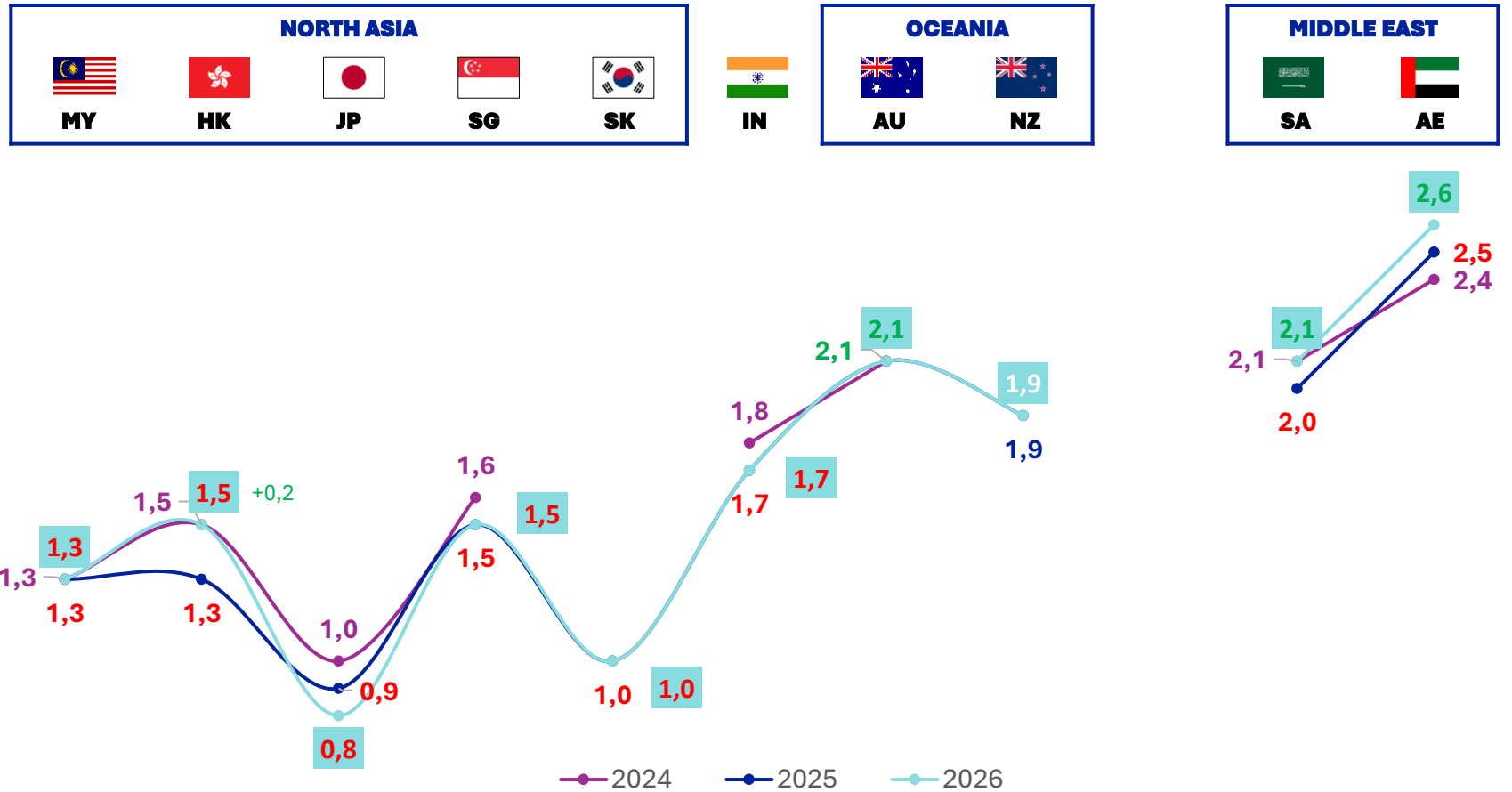
04

2/4 Planned trip duration Number of weeks (Mean)



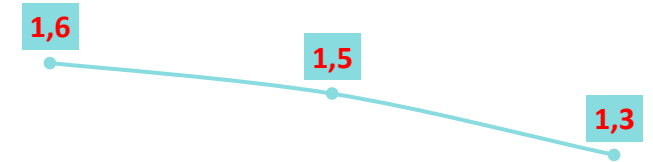
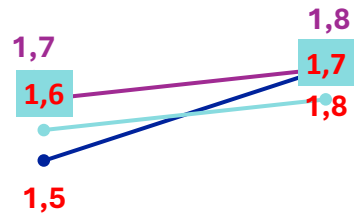
04

3/4 Planned trip duration Number of weeks (Mean)



04

4/4 Planned trip duration Number of weeks (Mean)





—●— 2024 —●— 2025 —●— 2026

04

Early planning remains the norm, with the vast majority of travelers organizing their trips at least two months in advance.

1/4 Trip planning (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
More than 6 months before my trip	15 =	18 =	13 =	12 =	12 =	10 -2	23 =	12 -4	15 -4	21
Between 4 and 6 months before my trip	21 -1	23 -2	19 -2	17 -2	20 -2	18 -3	26 =	20 -1	26 +2	20
Between 2 and 4 months before my trip	28 -2	28 +1	31 -2	26 -4	34 =	29 +2	25 -2	26 =	29 +1	25
Between 2 months and 15 days before my trip	21 +1	17 -1	23 +3	27 +4	23 +1	30 +2	16 +2	27 +6	19 +2	19
Less than 15 days before my trip	6 +2	6 +3	6 +2	7 =	6 +1	9 =	4 +1	10 +2	4 =	7
I haven't planned it yet	9 =	8 -1	8 -1	11 +2	5 =	4 +1	6 -1	5 -3	7 -1	8

04











Across Europe, around one out of five travelers from the UK, Belgium, Germany and Portugal plan their trips more than six months in advance.

2/4 Trip planning (%)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
More than 6 months before my trip	15 =	17 +4	24 =	21 =	22 +5	13 -2	15 -2	10 =	18 -3	9 =	11 -1	13 +1
Between 4 and 6 months before my trip	21 -1	23 -2	27 -1	23 +2	23 +1	23 -3	19 -5	16 -4	22 =	20 +1	16 -4	18 =
Between 2 and 4 months before my trip	28 -2	26 -2	27 +2	25 -1	25 -8	31 +4	30 +3	31 -2	28 -1	34 -3	27 -3	24 -6
Between 2 months and 15 days before my trip	21 +1	17 =	14 =	17 -1	16 -2	19 -3	20 =	28 +4	20 +3	23 +2	27 +4	26 +2
Less than 15 days before my trip	6 +2	6 +2	2 =	5 =	6 +4	7 +3	7 +2	7 +3	3 -1	6 +2	7 +1	8 +1
I haven't planned it yet	9 =	11 -2	6 -1	9 =	8 =	7 +1	9 +2	8 -1	9 +2	8 -2	12 +3	11 +2






04

3/4 Trip planning (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
More than 6 months before my trip	17 -2	8 +2	15 +4	18 -1	4 +2	10 -2	24 +4	22 -4	12 -3	13 -5
Between 4 and 6 months before my trip	21 -2	14 -8	26 +5	29 +1	14 -1	18 -3	22 -1	30 =	19 -3	20 +1
Between 2 and 4 months before my trip	30 +1	39 +4	32 -7	32 -1	32 -5	29 +2	23 -7	27 +4	26 +4	27 -2
Between 2 months and 15 days before my trip	17 =	29 +1	19 -1	14 +1	35 +4	30 +2	20 +4	12 -1	27 +4	27 +8
Less than 15 days before my trip	8 +3	8 +2	3 +1	2 -1	9 +1	9 =	4 =	4 +2	10 +2	10 +1
I haven't planned it yet	7 =	2 -1	5 -2	5 +1	6 -1	4 +1	7 =	5 -1	6 -4	3 -3

04

4/4 Trip planning (%)



	NORTH AMERICA		SOUTH AMERICA		
	 US	 CA	 AR	 BR	 MX
More than 6 months before my trip	14 ⁻⁶	15 ⁻³	17	27	18
Between 4 and 6 months before my trip	25 ⁺³	26 =	21	19	20
Between 2 and 4 months before my trip	29 ⁺²	30 =	25	22	27
Between 2 months and 15 days before my trip	21 ⁺²	16 ⁺¹	23	16	21
Less than 15 days before my trip	5 ⁺¹	5 ⁺²	7	4	9
I haven't planned it yet	6 ⁻²	8 =	7	12	5

04

Online channels remain the most popular ways of booking one's trip across the world.













This is particularly the case in North Asia, India, and Oceania, where travelers also strongly favor hotel and airline mobile apps - applications that are used far less by their European counterparts.

1/4 Means used to plan for the trip (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
Online travel agency (e.g., Expedia, Booking.com)	35 -1	35 -2	36 -1	34 =	46 +1	54 +4	38 -4	37 +5	34 =	24
Directly through the airline or hotel website	28 =	30 -2	30 +3	17 -3	32 =	31 =	47 -1	29 +3	41 +4	25
Travel agency (in-person or via phone)	17 -2	16 -1	19 -3	19 -3	18 -3	25 -1	15 -4	20 +1	12 -2	21
Mobile app (e.g., airline or hotel app)	15 -1	16 -1	17 =	12 -2	34 -2	46 -1	22 -3	32 -3	23 -1	20
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	11 -1	11 -2	14 =	6 =	18 -2	26 +1	13 -1	23 +3	12 +1	10
Tour operator	10 -2	9 -2	6 -2	19 -1	7 -2	10 -5	3 -2	12 -4	3 -1	8
Other	10 +2	10 +2	8 +2	13 +2	2 =	2 =	6 +2	3 +2	9 +1	9
I never travel	9 =	8 =	7 -1	13 +2	11 +1	4 -1	6 +1	5 -3	10 =	16

04

2/4 Means used to plan for the trip (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Online travel agency (e.g., Expedia, Booking.com)	35 -1	30 -2	37 -6	29 =	39 -2	37 +2	39 -2	37 -4	34 =	38 +4	34 -1	33 +1
Directly through the airline or hotel website	28 =	30 -3	39 =	30 =	23 +2	34 -2	25 -5	31 +3	24 +2	37 +6	20 -2	14 -4
Travel agency (in-person or via phone)	17 -2	12 -2	12 -6	21 +3	15 +1	14 -2	22 +1	19 -2	20 -3	18 -4	24 -2	14 -3
Mobile app (e.g., airline or hotel app)	15 -1	14 -1	19 -3	11 -1	15 +1	19 =	17 -1	17 +1	17 =	17 -1	12 -5	13 +1
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	11 -1	12 -3	12 -3	11 +1	9 -1	13 -3	10 +1	15 -2	13 +1	13 -1	7 -1	5 +1
Tour operator	10 -2	5 -1	11 -2	9 =	10 -2	9 -1	12 -3	5 -1	7 -5	6 -2	10 -1	28 -1
Other	10 +2	16 +4	5 +1	10 =	11 +2	11 +4	8 +1	6 +1	10 +4	7 =	11 -1	16 +5
I never travel	9 =	11 +2	7 +1	10 -1	11 -1	6 +1	6 =	8 +1	7 -2	6 =	15 +5	10 -2

04

3/4 Means used to plan for the trip (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
Online travel agency (e.g., Expedia, Booking.com)	50 +3	59 +4	38 -5	50 +1	31 +1	54 +4	39 -2	37 -5	35 +6	39 +4
Directly through the airline or hotel website	37 +3	34 +2	21 -1	48 =	21 -2	31 =	43 -2	51 =	22 +3	35 +3
Travel agency (in-person or via phone)	23 -2	23 -3	15 -3	13 -5	15 -1	25 -1	17 -2	14 -5	16 -1	23 +1
Mobile app (e.g., airline or hotel app)	45 -1	39 =	16 -5	34 -1	38 -1	46 -1	21 =	23 -7	30 -4	34 -1
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	16 -4	26 -1	5 -2	22 -2	20 -1	26 +1	14 +1	11 -5	21 +3	25 +3
Tour operator	8 -4	11 =	2 -1	7 -4	9 -1	10 -5	4 -2	3 -1	14 -3	10 -6
Other	1 -1	1 =	4 +1	2 =	3 =	2 =	5 +1	7 +3	5 +3	1 =
I never travel	6 -1	4 -1	27 +7	3 -1	17 +2	4 -1	8 +2	5 =	9 -3	2 -2

04

4/4 Means used to plan for the trip (%)

NORTH AMERICA	
US	CA
	

SOUTH AMERICA		
AR	BR	MX
		

	US	CA	AR	BR	MX
Online travel agency (e.g., Expedia, Booking.com)	36 +3	32 -3	24	24	23
Directly through the airline or hotel website	42 +6	40 +2	29	23	23
Travel agency (in-person or via phone)	13 +1	12 -4	23	19	21
Mobile app (e.g., airline or hotel app)	28 +1	19 -3	19	19	22
Travel aggregators websites - Skyscanner, Kayak, GoogleFlights	12 +2	12 =	11	8	11
Tour operator	3 -1	4 =	10	7	7
Other	7 -2	10 +2	8	11	7
I never travel	9 -4	11 +3	13	19	16

04



The seaside remains by far the most popular holiday environment for European travelers, a highly stable trend that confirms the enduring appeal of coastal scenery.

City trips rank a distant second for Europeans (27%), followed closely by the mountains and countryside, which both stand at 20%.

Outside of Europe, however, city trips are significantly more popular and continue to grow in appeal: they rank first in North Asia, Oceania, and the MENA region, and are nearly neck and neck with the seaside in North America and India.

India stands out as the only country where the mountains are the preferred destination (50%).

1/8 Planned destination for the trip (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
To the seaside	62 -1	64 =	59 -2	58 -4	40 -10	47 -4	42 -3	48 -1	44 -1	55 x
To a city	27 -1	26 =	32 -1	22 -1	64 +4	45 +4	53 +4	53 +2	43 +1	39 x
To the mountains	20 -2	19 -2	18 -2	28 -2	24 -4	50 -8	18 -5	29 -4	24 -3	17 x
To the countryside	20 -3	23 -3	13 -4	21 -2	31 -8	45 -1	29 -6	36 -3	28 -5	16 x
Other	4 +1	4 +1	4 +2	4 =	1 +1	1 =	5 +2	1 =	6 +1	2 x

04

2/8 Planned destination for the trip (%)











	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
To the seaside	62 -1	67 +2	58 -3	64 +2	68 +3	67 +2	63 -4	55 -2	58 -1	64 -2	61 -3	55 -5
To a city	27 -1	18 -4	34 -6	29 +5	25 +3	26 =	25 +1	40 -2	28 -2	29 =	21 -4	23 +1
To the mountains	20 -2	23 =	13 -4	20 -6	18 -2	19 -2	19 +2	19 -3	13 -1	21 -4	30 -4	25 -1
To the countryside	20 -3	23 -2	32 -5	22 -2	19 -2	19 -1	21 -5	13 -4	18 -6	8 -3	13 -4	27 -2
Other	4 +1	4 +2	4 =	5 +1	3 =	4 =	3 =	2 +1	5 +3	4 +2	3 -1	5 +1

The seaside is the undisputed top choice for Europeans in every country, with Germans, French, and Swiss showing the highest preference for this destination.

Despite this universal preference, notable national specificities emerge for other destinations: the Spanish show the greatest interest in city trips (40% vs. the 27% European average), the Polish are most likely to head for the mountains (30% vs. 20%), and the British most strongly favor the countryside (32% vs. 20%).

04

3/8 Planned destination for the trip (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
To the seaside	50 -6	32 -12	31 -10	27 -10	58 -7	47 -4	42 -6	41 -1	51 =	45 -3
To a city	57 +2	75 =	54 -1	70 +2	58 +14	45 +4	52 +4	53 +2	57 +5	49 -1
To the mountains	30 -4	20 -4	24 -5	27 -2	19 -6	50 -8	18 -8	18 -2	23 -4	36 -1
To the countryside	42 -10	25 -7	29 -9	39 -8	17 -8	45 -1	33 -5	25 -7	30 -7	42 +2
Other	0 =	1 +1	5 +4	1 =	0 =	1 =	5 +2	4 +1	1 =	1 +1

04

4/8 Planned destination for the trip (%)



	US	CA	AR	BR	MX
To the seaside	48 +2	39 -5	42	59	63
To a city	43 =	43 +1	40	44	33
To the mountains	26 -4	22 -3	30	11	10
To the countryside	23 -7	33 -3	13	21	14
Other	4 -1	7 +2	2	2	1



04

Across geographies, holidays are above all a time for family reunions. However, some local particularities are noted:

- an attraction for “solo” travel in Oceania
- about 1 in 5 travelers in North Asia and the Middle East (and nearly a third in India) travel with their parents



1/4 Partner planned for the trip (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
ST Family	80 ⁻¹	79 =	83 =	80 ⁻⁴	78 ⁺³	81 ⁺¹	73 ⁺¹	80 ⁺³	79 ⁺¹	77
Your partner	67 ⁺²	65 ⁺¹	71 ⁺⁵	65 ⁻²	57 ⁺²	58 ⁺⁷	60 ⁺²	58 ⁺⁹	64 ⁺⁶	55
Your children	34 ⁺¹	31 ⁺¹	36 ⁺¹	40 ⁻¹	36 ⁺³	44 ⁺⁴	30 ⁺³	46 ⁺⁷	34 ⁺³	42
Your friends	17 =	16 ⁺¹	16 ⁻¹	21 ⁻¹	20 ⁻¹	33 =	11 ⁻²	19 ⁺¹	17 ⁻³	10
On your own	10 ⁻¹	13 =	6 ⁻³	10 =	12 ⁻³	11 ⁻⁵	18 ⁻²	11 ⁻⁵	13 ⁻¹	10
Your parents	9 =	10 ⁺¹	8 ⁻¹	9 =	17 =	29 ⁺²	8 ⁻¹	19 ⁺¹	11 ⁻²	11
Your siblings	6 =	6 =	6 ⁻¹	6 ⁺¹	13 ⁺¹	19 =	7 =	14 =	10 ⁻¹	8
Your grand children	2 ⁻²	2 ⁻²	2 ⁻²	4 ⁻³	1 ⁻¹	1 ⁻³	1 ⁻¹	1 ⁻³	3 ⁻²	1
Your grand parents	1 =	1 =	0 =	1 =	0 ⁻¹	2 ⁻²	0 ⁻¹	1 ⁻⁴	1 =	1
I don't know yet	3 =	3 =	4 =	4 =	4 =	2 =	4 =	2 ⁻²	4 =	8













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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

The proportion of solo travelers in Germany, Switzerland and Austria is higher than the European average.

2/4 Partner planned for the trip (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
ST Family	80 -1	83 +2	83 +2	79 =	74 -4	76 +1	78 +1	84 -1	83 -1	83 +3	81 -3	79 -4
Your partner	67 +2	68 +4	68 +1	63 =	61 -5	63 +4	63 -2	71 +2	70 +5	73 +8	65 -3	65 -1
Your children	34 +1	36 =	33 -2	35 +4	26 +4	28 +2	27 =	38 +2	38 =	34 +4	38 -2	41 -2
Your friends	17 =	12 -2	13 -2	18 +4	19 +4	18 +4	17 -4	13 -4	14 =	20 =	17 -3	24 =
On your own	10 -1	11 +1	10 -4	11 =	16 +3	15 -4	13 +1	5 -2	8 -2	6 -3	9 +2	10 -2
Your parents	9 =	9 =	12 +2	11 +1	8 +1	10 +1	10 +1	8 -2	9 =	6 -2	9 +2	9 -3
Your siblings	6 =	7 -1	8 -1	5 -2	5 +1	7 =	6 +1	7 =	5 -1	6 -2	8 +3	5 =
Your grand children	2 -2	3 -1	2 -2	3 -1	1 -3	2 -1	1 -2	2 -2	4 -1	1 -2	3 -3	6 -1
Your grand parents	1 =	1 +1	0 -1	1 =	1 -1	1 =	1 =	0 -1	0 =	0 -1	0 -1	1 =
I don't know yet	3 =	4 =	3 =	3 =	3 =	2 -2	3 -1	5 +1	3 =	2 -1	5 +1	4 +1

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

Australia and New Zealand show the highest proportion of solo travellers.

3/4 Partner planned for the trip (%)



	MY	HK	JP	SG	SK	IN	AU	NZ	SA	AE
ST Family	81 +1	81 +5	69 -3	77 +2	74 +4	81 +1	71 +2	75 =	80 +4	81 +3
Your partner	54 +2	64 +2	53 -2	55 =	56 +6	58 +7	57 +2	62 +1	59 +12	58 +7
Your children	42 +2	43 +9	27 -1	30 -2	32 +1	44 +4	31 +3	30 +3	45 +7	48 +8
Your friends	18 -4	24 +3	21 +1	18 -4	19 =	33 =	11 -2	11 -3	20 +4	18 -1
On your own	17 =	8 -3	13 -3	12 =	12 -4	11 -5	18 -4	18 +1	9 -5	13 -4
Your parents	23 -3	16 +4	14 =	18 +2	14 =	29 +2	7 =	8 -2	18 =	19 =
Your siblings	20 =	9 =	6 +1	15 +4	10 -2	19 =	6 -1	7 -1	15 =	13 =
Your grand children	1 -1	1 -1	4 +1	1 -1	1 -1	1 -3	0 -2	1 -1	1 -4	0 -3
Your grand parents	1 =	0 -1	0 -1	0 -1	0 -1	2 -2	0 -1	1 =	1 -3	1 -4
I don't know yet	3 =	5 +1	7 +2	3 -1	4 -3	2 =	5 +1	4 =	2 -3	1 -2

04

4/4 Partner planned for the trip (%)





	US	CA	AR	BR	MX
ST Family	82 +6	76 -4	71	74	86
Your partner	66 +11	62 =	53	52	59
Your children	40 +7	27 -2	35	37	54
Your friends	15 -7	20 +1	12	12	6
On your own	12 -3	14 =	13	12	7
Your parents	11 -3	12 =	7	10	16
Your siblings	11 -1	9 =	6	8	10
Your grand children	4 -2	1 -4	0	1	2
Your grand parents	1 =	0 -1	1	1	1
I don't know yet	4 -1	4 +1	10	9	6

04

Globally, the plane is once again the leading mode of transport to reach a destination, though in Europe it runs neck and neck with the personal car.

Notably, a slight decrease is seen across all transport modes in Europe this year, suggesting that Europeans are combining them less frequently.

1/4 Modes of transportation used to go to destination (%)













												
	EU	WEST. EU	SOUTH EU	EAST. EU		NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST		NORTH AMERICA	SOUTH AMERICA
Plane	47 -3	49 -1	48 -2	42 -6		71 +1	63 +1	64 -1	57 -3		53 +1	54 x
Personal car	46 -2	45 -1	47 -2	50 -4		22 -4	23 =	29 -3	25 +1		47 =	20 x
Train	19 -3	19 -3	17 -5	22 -2		34 -1	48 -7	22 -4	21 +3		13 -2	7 x
Bus	10 -2	9 -2	10 =	15 -2		23 =	31 -1	17 -3	17 +1		9 -2	36 x
Rental car through an agency	5 -1	6 =	6 -1	3 =		17 =	25 =	19 =	18 +1		18 +1	12 x
Boat	5 -1	6 -1	5 -1	3 =		7 -1	12 -2	7 -1	8 -1		7 -1	4 x
Rental car between private individuals	3 -1	3 -1	3 -1	1 -1		10 =	21 =	8 -4	15 +1		6 -1	8 x
Camper van	3 =	3 -1	2 -1	3 =		3 -1	8 -2	5 =	7 =		4 -1	1 x
Carpooling	2 -1	2 -1	2 -1	1 -1		4 -1	7 -2	3 =	7 -2		4 -2	4 x
Bike	2 -1	3 =	1 -2	3 =		3 -1	18 +5	3 -3	8 -1		4 -2	2 x
Motorbike	1 -1	2 =	2 =	1 =		3 -1	17 +3	3 =	7 =		2 -1	3 x
Other	2 +1	2 +1	2 +1	1 =		0 -1	0 =	3 +1	1 +1		2 =	1 x

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

2/4 Modes of transportation planned to go to destination (%)








	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Plane	47 ⁻³	33 ⁻¹	61 ⁻⁵	50 ⁻¹	43 ⁻³	56 ⁺¹	50 =	46 ⁻³	52 ⁻³	45 ⁻¹	39 ⁻⁸	44 ⁻⁵
Personal car	46 ⁻²	58 ⁻²	35 ⁺²	42 ⁻²	51 ⁺³	39 =	46 ⁻⁸	50 ⁺¹	45 ⁻¹	46 ⁻⁵	48 ⁻³	53 ⁻³
Train	19 ⁻³	19 ⁻⁵	22 ⁻⁷	14 ⁻¹	16 ⁻³	22 ⁻¹	20 ⁻¹	20 ⁻⁴	11 ⁻⁵	20 ⁻⁵	25 =	20 ⁻²
Bus	10 ⁻²	5 ⁻²	12 ⁻³	10 ⁺¹	8 ⁻¹	9 ⁻³	11 ⁻¹	10 ⁻¹	11 ⁻¹	8 =	11 ⁻⁴	18 ⁻¹
Rental car through an agency	5 ⁻¹	5 =	8 ⁻³	6 ⁺¹	4 ⁻²	7 =	4 ⁻²	6 ⁻²	7 ⁻¹	5 ⁻²	3 =	2 =
Boat	5 ⁻¹	4 ⁻²	8 ⁻³	4 ⁺¹	6 ⁺¹	7 =	5 ⁻²	3 ⁻²	2 ⁻¹	10 ⁺¹	2 ⁻¹	4 ⁺¹
Rental car between private individuals	3 ⁻¹	2 ⁻¹	4 =	2 =	1 ⁻³	3 ⁻²	4 =	2 ⁻²	4 ⁻¹	3 ⁻²	2 ⁻¹	1 =
Camper van	3 =	3 ⁺¹	3 ⁻¹	2 ⁻¹	4 =	2 ⁻⁴	5 ⁺¹	1 ⁻²	3 ⁺¹	2 ⁻¹	3 =	4 ⁺¹
Carpooling	2 ⁻¹	3 =	1 ⁻¹	2 =	2 =	2 ⁻²	3 =	2 ⁻¹	2 =	3 =	1 =	2 ⁻¹
Bike	2 ⁻¹	2 =	2 ⁻¹	3 =	4 =	4 =	4 ⁺¹	1 ⁻²	1 ⁻¹	1 ⁻¹	4 =	2 ⁻¹
Motorbike	1 ⁻¹	1 =	1 ⁻¹	1 ⁻¹	1 =	2 =	3 =	2 =	1 ⁻¹	1 ⁻¹	1 =	2 ⁺¹
Other	2 ⁺¹	1 =	3 ⁺¹	2 ⁺¹	2 ⁺¹	1 =	1 =	1 =	3 ⁺²	2 ⁺¹	1 =	1 =

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

3/4 Modes of transportation planned to go to destination (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Plane	64 =	85 =	53 -7	78 -4	66 +13	63 +1	70 +4	59 -6	51 -2	63 -3
Personal car	33 -2	9 -2	36 -5	11 =	28 -10	23 =	26 -4	32 -3	29 +5	22 -2
Train	34 -3	32 =	51 +3	37 =	22 -4	48 -7	22 -5	22 -2	18 +5	23 =
Bus	24 -3	20 =	22 +4	30 +2	21 -1	31 -1	16 -2	18 -4	14 +1	19 =
Rental car through an agency	27 -1	14 +6	10 -1	16 +1	15 -4	25 =	16 -2	21 =	20 +4	16 -1
Boat	7 -1	10 +1	8 -1	7 -3	4 -1	12 -2	7 =	6 -3	8 =	8 -3
Rental car between private individuals	16 +1	8 +2	6 =	9 -3	9 +1	21 =	8 -2	9 -5	16 +2	14 =
Camper van	4 -2	3 -1	2 -1	3 -1	3 =	8 -2	4 -1	5 -1	7 +1	8 =
Carpooling	6 -2	6 =	4 =	3 =	2 +1	7 -2	2 -1	3 +1	9 -1	5 -3
Bike	4 -1	4 +1	4 -2	3 -1	2 -1	18 +5	2 -4	3 -3	7 -1	9 -1
Motorbike	6 -2	3 +1	3 -1	2 -1	1 =	17 +3	4 +1	2 -1	7 =	8 =
Other	0 -1	0 -1	1 =	1 -1	0 -1	0 =	3 =	3 +2	1 +1	0 =

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

4/4 Modes of transportation planned to go to destination (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
Plane	54	51	60	46	55
Personal car	46	48	25	21	15
Train	13	14	11	6	5
Bus	8	10	35	32	40
Rental car through an agency	21	15	9	17	10
Boat	8	6	6	3	4
Rental car between private individuals	8	4	5	12	6
Camper van	4	4	1	1	1
Carpooling	3	4	3	5	5
Bike	4	3	2	4	1
Motorbike	3	1	3	3	2
Other	1	2	1	2	1

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

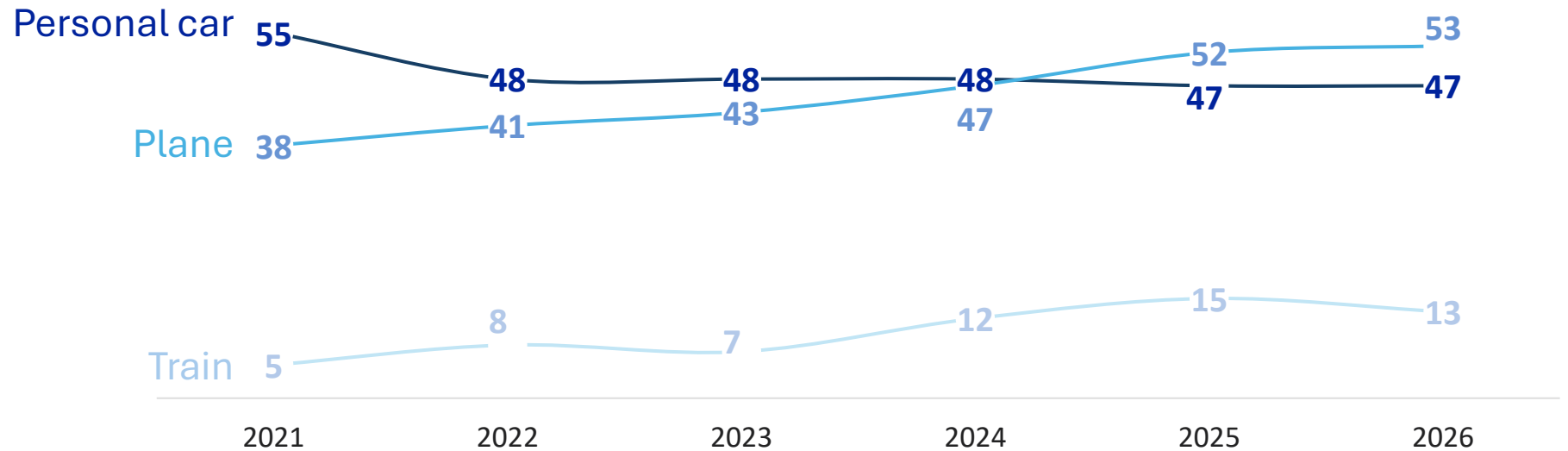
XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04

5/4 Modes of transportation planned to go to destination – North America (%)

Over the past five years in North America, the plane has overtaken the car as the preferred mode of transport, gaining 15 points while personal car use has dropped by 8 points - a level that has remained stable since 2022.

Notably, despite rising gas prices, personal car usage has not declined, remaining stable compared to last year.



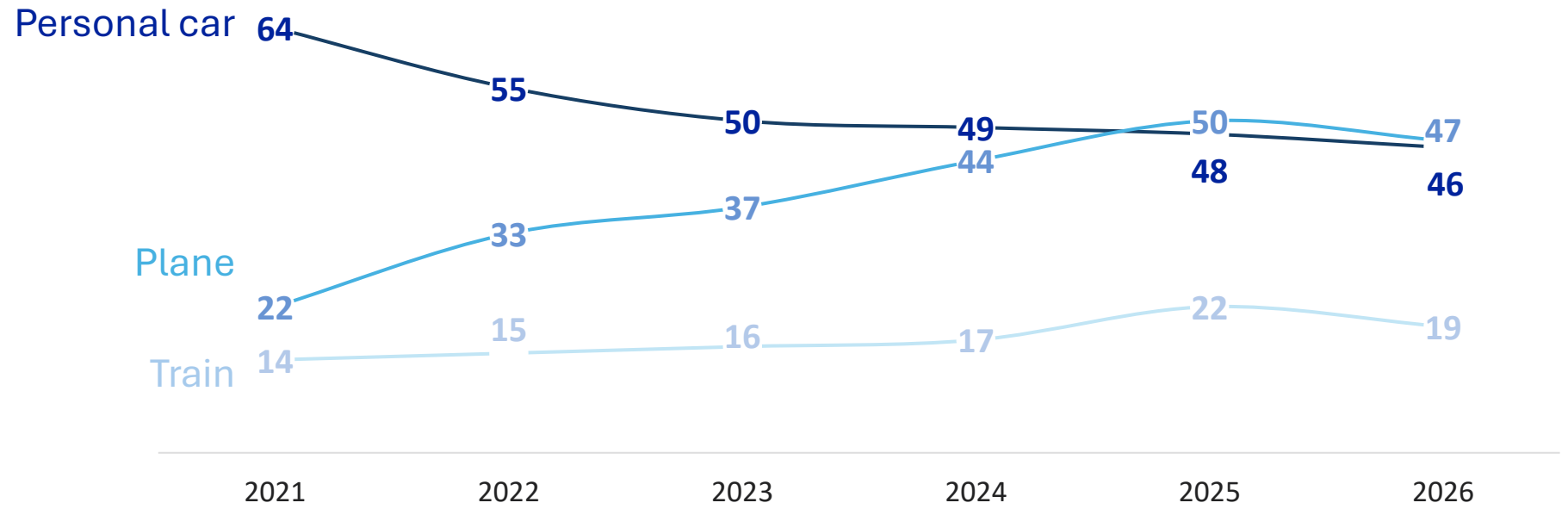


04

While all transportation modes in Europe show a slight decrease, a stark divergence is evident: the plane's usage remains at a historically high level, whereas the personal car has fallen to its lowest point.



5/4 Modes of transportation planned to go to destination – Europe (%)

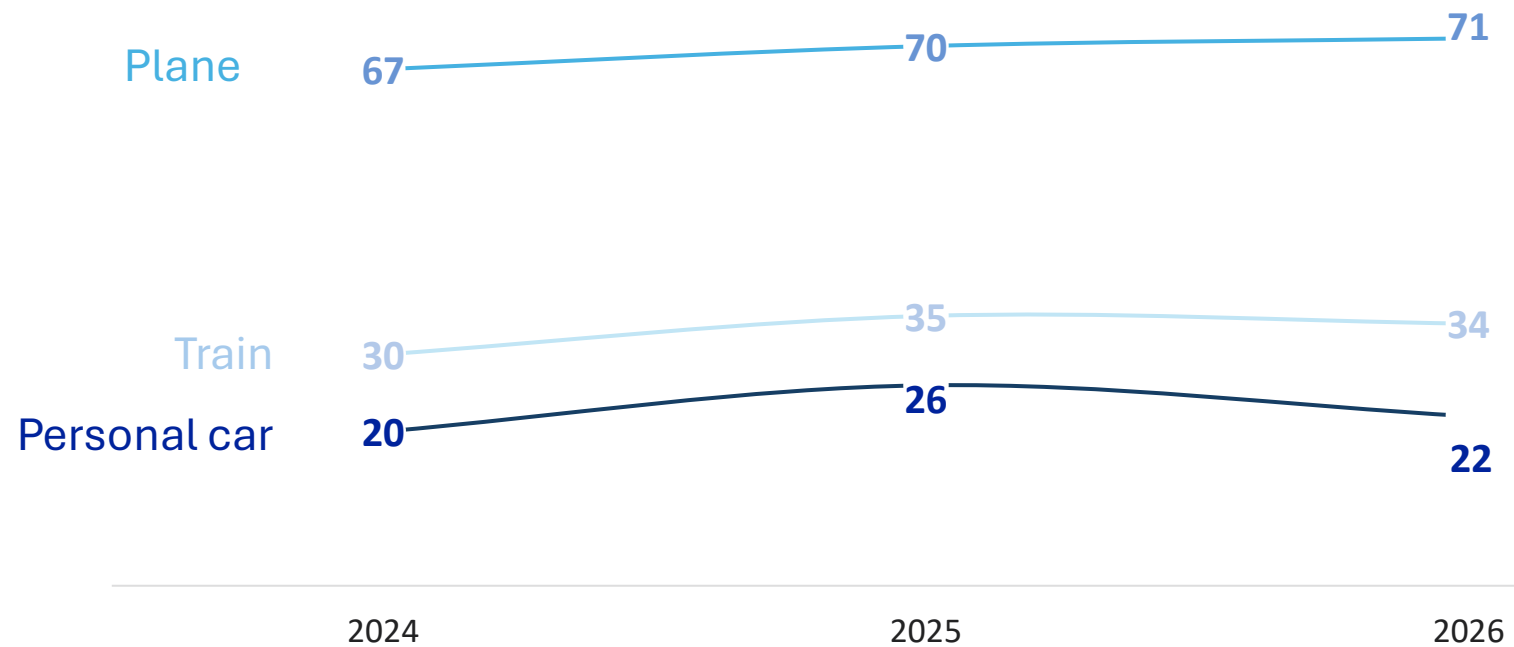


Q23. What kind of transportation will you [use this summer / use] to go to your holiday destination?

XX / XX Significantly higher or lower score vs Europe
+X / -X Significant evolution vs 2025

04



5/4 Modes of transportation planned to go to destination – North Asia (%)



04

A clear hierarchy defines transport choice globally: convenience is the undisputed top factor, while environmental impact ranks last - a logical consequence of the plane's popularity - and is even a diminishing concern in Europe and North Asia

1/4 Reasons of choice of the main transportation mode (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA
It is the most convenient way to reach my destination	55 ⁻²	56 ⁻²	54 ⁺²	56 ⁻⁴	57 ⁻⁴	53 ⁻⁵	59 ⁺¹	44 ⁺¹	59 =	47 ^x
I am used to taking this mode of transportation	38 =	38 =	34 ⁻²	44 ⁺³	39 ⁻²	41 ⁻⁴	34 ⁺²	35 =	38 ⁺²	37 ^x
It is more affordable for me	26 ⁻²	27 ⁻³	28 ⁻²	23 ⁺¹	27 ⁻⁵	41 ⁻⁹	29 ⁻⁵	30 ⁻²	35 ⁻⁴	32 ^x
It is the only possible way to reach my destination	21 ⁻¹	24 ⁻¹	19 ⁻¹	17 ⁻³	34 =	39 ⁺¹	34 ⁻¹	31 ⁻⁴	23 ⁻³	20 ^x
It is more environmentally friendly	8 ⁻²	9 ⁻²	7 ⁻¹	7 ⁻¹	14 ⁻⁴	36 ⁻²	10 =	21 ⁻¹	11 ⁻²	8 ^x
Other	2 ⁺¹	2 =	1 =	2 ⁺¹	0 ⁻¹	0 ⁻¹	3 ⁺¹	1 ⁺¹	2 =	2 ^x
None of these	2 ⁺¹	2 =	2 ⁺¹	2 ⁺¹	1 =	1 =	1 ⁻¹	1 =	2 ⁺¹	2 ^x

04

2/4 Reasons of choice of the main transportation mode (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
It is the most convenient way to reach my destination	55 ⁻²	52 ⁻²	60 ⁻⁵	55 ⁺²	62 =	58 ⁺⁶	51 ⁻¹⁰	57 ⁺³	56 ⁺⁴	49 ⁻²	58 ⁻¹	54 ⁻⁷
I am used to taking this mode of transportation	38 =	47 ⁺⁴	33 ⁻¹	35 ⁺¹	40 ⁺¹	38 ⁻¹	38 =	34 ⁻⁶	33 ⁺²	34 ⁻⁴	38 ⁺²	49 ⁺³
It is more affordable for me	26 ⁻²	33 ⁻¹	23 ⁻⁹	26 =	28 =	25 ⁻³	25 ⁻⁴	27 ⁺²	27 ⁻⁶	31 =	27 =	19 ⁺¹
It is the only possible way to reach my destination	21 ⁻¹	22 =	32 ⁺¹	19 ⁻²	20 ⁻²	22 ⁻³	25 ⁻¹	16 ⁻⁴	21 =	19 =	16 ⁻³	18 ⁻²
It is more environmentally friendly	8 ⁻²	9 ⁻³	7 ⁻⁴	10 ⁻¹	10 ⁻³	11 =	9 ⁻²	5 ⁻⁵	6 ⁻¹	8 ⁺¹	9 =	6 ⁻¹
Other	2 ⁺¹	2 ⁺¹	2 ⁺¹	3 =	3 ⁺¹	3 ⁺¹	2 =	2 ⁺¹	2 ⁺¹	1 =	1 =	3 ⁺¹
None of these	2 ⁺¹	1 =	2 =	3 ⁺¹	1 =	2 =	1 ⁻¹	2 =	2 ⁺¹	2 ⁺¹	2 ⁺¹	2 =

04

3/4 Reasons of choice of the main transportation mode (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	MY	HK	JP	SG	SK		AU	NZ	SA	AE
It is the most convenient way to reach my destination	56 -7	58 =	59 -1	56 -3	58 -4	53 -5	58 =	60 +2	43 +1	44 =
I am used to taking this mode of transportation	41 -1	35 -4	49 =	34 =	43 -2	41 -4	34 -1	35 +6	36 =	33 -1
It is more affordable for me	38 -10	24 -2	28 -5	30 -4	11 -5	41 -9	27 -10	30 -2	31 -1	29 -2
It is the only possible way to reach my destination	38 -1	33 -2	22 -3	46 +2	25 +3	39 +1	32 -1	37 =	26 -7	37 =
It is more environmentally friendly	24 -7	14 -2	5 -4	12 -6	8 -3	36 -2	12 +1	8 =	20 +3	22 -3
Other	0 =	1 +1	0 =	0 -1	0 -1	0 -1	3 +2	2 =	1 +1	1 +1
None of these	1 +1	1 =	2 -1	1 =	2 =	1 =	1 -1	1 =	1 -1	1 =

04

4/4 Reasons of choice of the main transportation mode (%)





	US	CA	AR	BR	MX
It is the most convenient way to reach my destination	63 +7	56 -5	52	41	48
I am used to taking this mode of transportation	40 +1	36 +3	36	39	36
It is more affordable for me	36 -7	33 -2	29	39	28
It is the only possible way to reach my destination	19 -4	27 -1	21	16	23
It is more environmentally friendly	14 -1	8 -3	7	9	9
Other	2 =	2 +1	3	1	1
None of these	1 =	2 +1	2	2	1

04

Hotels and resorts remain the top accommodation choice for European travelers (53%), with holiday rentals ranking second, holding steady at 30%.













In stark contrast to Europeans (17%), travelers in other regions are significantly more likely to stay with friends or family, with this practice being particularly prevalent in India (30%), North America (26%), and the MENA region (26%).

1/4 Type of accommodation planned (%)

												
	EU	WEST. EU	SOUTH EU	EAST. EU		NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST		NORTH AMERICA	SOUTH AMERICA
Hotels	42 -4	43 -5	42 -2	38 -4		69 -1	58 -4	49 -2	46 +1		49 -1	37
Rental of a house or apartment	30 =	30 -2	28 -1	31 +2		25 =	32 +1	24 -4	25 +1		26 +2	29
Friends'/family's houses or in your holiday home	17 -1	16 -2	17 -2	16 -2		15 =	30 -3	31 +1	26 =		26 -3	26
All-inclusive resorts	17 -2	16 -3	16 -2	19 -3		16 -4	30 -1	14 -2	25 =		14 -3	21
A bed & breakfast	16 -2	11 -2	21 -3	23 =		23 -2	29 -1	15 -2	22 =		13 -1	15
Camping at a campsite	9 -1	10 -1	5 -3	9 -1		8 -3	22 -2	9 -2	14 -1		16 -3	7
Boat (e.g. cruise)	4 -2	5 -1	4 -1	3 -2		7 -3	20 -3	7 -2	14 -3		10 -1	5
Roadtrip in a camper van/caravan	4 -1	5 =	4 +1	4 =		7 -2	21 -6	8 -1	16 -1		7 -2	5
Do a house exchange	2 -1	3 -1	3 =	2 =		4 -1	12 -2	3 -1	10 =		2 -2	3
Other	2 =	3 =	2 =	2 =		1 =	1 +1	2 =	0 =		3 =	2
ST Hotel or resort	53 -4	53 -5	54 -1	52 -5		76 -2	72 -1	57 -2	59 =		57 -1	52











04

2/4 Type of accommodation planned (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Hotels	42 -4	33 -1	47 -5	38 -9	42 -3	47 -5	47 -10	48 +1	38 =	41 -4	42 -4	35 -3
Rental of a house or apartment	30 =	38 -4	26 -5	33 +2	32 -3	28 +3	24 -4	28 -1	25 -5	31 +4	30 +2	31 +2
Friends'/family's houses or in your holiday home	17 -1	22 -5	13 -2	14 +1	13 -1	20 -1	14 =	19 +1	22 -1	12 -4	16 -4	16 +1
All-inclusive resorts	17 -2	9 -1	18 -4	18 +4	16 -5	16 -2	17 -11	19 -2	18 =	13 -3	16 -1	22 -5
A bed & breakfast	16 -2	5 -1	13 -3	13 +1	9 -3	13 -1	13 -4	12 -2	22 -4	28 -4	18 =	28 =
Camping at a campsite	9 -1	14 -1	9 -1	10 =	10 +2	8 -2	10 -2	5 -4	6 -1	4 -3	7 -1	11 -1
Boat (e.g. cruise)	4 -2	3 =	7 -4	4 =	6 =	4 -2	6 -1	3 -2	3 =	5 -2	3 -1	3 -3
Roadtrip in a camper van/caravan	4 -1	4 +1	5 -2	5 =	5 -1	5 -2	5 -2	3 -1	4 +2	4 =	4 =	4 +1
Do a house exchange	2 -1	2 -2	2 =	2 =	3 +1	3 -2	3 -3	3 =	2 -1	3 +1	2 =	1 =
Other	2 =	4 +1	3 =	2 -1	3 =	3 -1	1 =	2 =	2 +1	2 +1	2 =	2 +1
ST Hotel or resort	53 -4	39 -1	59 -6	51 -6	53 -6	57 -3	59 -13	61 =	51 -1	50 -4	53 -5	51 -6

04

3/4 Type of accommodation planned (%)

	NORTH ASIA					IN	OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Hotels	56 -1	76 =	82 -2	69 +1	68 -2	58 -4	52 -1	46 -4	45 +3	46 -2
Rental of a house or apartment	41 -3	24 +1	6 -3	25 -2	14 +1	32 +1	25 -1	24 -6	23 -2	27 +3
Friends'/family's houses or in your holiday home	21 -2	15 +1	11 +1	14 -1	10 +1	30 -3	26 +1	36 =	23 =	29 =
All-inclusive resorts	27 -5	14 -4	8 -4	19 -5	8 -1	30 -1	17 -2	10 -3	24 -3	27 +3
A bed & breakfast	25 =	19 -7	5 -5	18 -3	41 +6	29 -1	16 -3	14 =	21 =	24 =
Camping at a campsite	16 -4	5 -3	6 -4	4 -4	8 =	22 -2	8 -4	9 -2	13 -1	14 -2
Boat (e.g. cruise)	12 -3	7 -2	4 -4	9 -1	3 -1	20 -3	8 -3	6 -1	13 -3	16 -1
Roadtrip in a camper van/caravan	12 -5	4 -4	4 -2	7 -3	4 =	21 -6	8 -1	8 -1	16 +1	16 -2
Do a house exchange	5 -2	4 =	3 +1	4 -1	4 -2	12 -2	4 =	3 =	10 +1	9 -1
Other	0 =	1 =	2 +1	2 +2	1 =	1 +1	2 =	2 =	0 =	0 =
ST Hotel or resort	68 -4	81 -2	86 -2	77 -1	72 -2	72 -1	62 =	53 -4	58 =	60 =

04

4/4 Type of accommodation planned (%)

NORTH AMERICA	
 US	 CA

SOUTH AMERICA		
 AR	 BR	 MX



Hotels	51 -1	46 -1	41	34	38
Rental of a house or apartment	27 +3	26 +2	36	24	27
Friends'/family's houses or in your holiday home	25 =	27 -5	23	26	28
All-inclusive resorts	14 -4	14 -2	23	15	26
A bed & breakfast	14 -2	12 -1	8	30	7
Camping at a campsite	15 -3	16 -4	9	7	6
Boat (e.g. cruise)	13 +1	7 -3	5	4	6
Roadtrip in a camper van/caravan	9 -1	5 -3	4	5	7
Do a house exchange	3 -1	1 -3	3	3	4
Other	3 =	3 =	2	3	2
ST Hotel or resort	60 -1	55 -1	57	42	58

04

Habit and affordability remain the undisputed top criteria for accommodation choice, underscoring the deep-seated stability of traveler motivations.

1/4

Criteria of choice of accommodation (%)

												
	EU	WEST. EU	SOUTH EU	EAST. EU		NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST		NORTH AMERICA	SOUTH AMERICA
It is my favourite mode of accommodation	38 =	39 +1	36 +1	42 -2		35 =	41 =	32 -1	34 +2		33 =	30
I am used to taking this mode of accommodation	36 +1	36 +1	35 +1	37 =		35 -5	39 -1	38 -2	32 =		35 -2	30
It is more affordable for me	34 -1	36 +1	35 -3	29 =		33 -3	44 -2	41 -3	32 -2		40 -3	35
It's a reliable type of accommodation (e.g. no risk of being scammed)*	24 -2	26 =	21 -3	23 -3		40 +1	40 -2	34 -3	31 =		35 +2	23
It's a safe / well-protected accommodation	23 -1	23 -2	23 -1	22 =		43 -2	44 -6	34 =	33 -1		36 +1	29
For all the services and activities proposed	19 -1	21 -1	18 =	17 +2		22 -1	36 -1	22 -1	25 -1		22 -3	23
It is more environmentally friendly	8 =	8 =	7 -1	8 -1		13 -3	34 -1	11 +2	24 +2		10 -4	9
Other	2 =	3 +1	1 =	2 +1		1 +1	0 =	3 -1	1 +1		2 =	1
None of these	2 =	2 =	2 =	3 +1		1 -1	2 +1	2 +1	1 -1		2 =	2











04

2/4 Criteria of choice of accommodation (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
It is my favourite mode of accommodation	38 =	35 =	35 -4	35 +5	48 +3	42 +3	38 -5	36 +1	36 +2	35 =	38 -3	46 -2
I am used to taking this mode of accommodation	36 +1	43 +1	42 +2	34 -2	34 +5	35 +3	30 =	33 -2	38 =	33 +5	32 +3	41 -4
It is more affordable for me	34 -1	46 +5	38 -3	31 -1	32 -1	35 +1	32 +1	31 -2	37 -5	36 -2	36 -3	22 +3
It's a reliable type of accommodation (e.g. no risk of being scammed)*	24 -2	23 =	31 -4	28 +5	27 +3	25 +1	25 -4	22 -4	23 -2	18 -4	20 -2	26 -3
It's a safe / well-protected accommodation	23 -1	19 -2	28 -3	20 -3	24 -3	24 +1	24 -3	23 -3	25 -1	20 =	26 +1	19 -1
For all the services and activities proposed	19 -1	21 +1	22 -3	23 +1	19 -2	19 -3	20 -5	21 -2	17 +4	16 -2	20 +2	14 +2
It is more environmentally friendly	8 =	7 -1	10 =	6 =	8 =	9 -1	9 +1	6 -3	4 -2	9 =	10 -1	5 -1
Other	2 =	1 =	3 +1	4 +1	3 =	3 +1	2 =	1 =	2 +1	1 =	1 =	2 +1
None of these	2 =	1 -1	2 +1	2 =	2 +1	1 -1	1 -1	2 =	2 =	1 =	3 +1	2 =

04

3/4 Criteria of choice of accommodation (%)

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
It is my favourite mode of accommodation	36 =	41 -1	30 +4	29 -6	38 +5	41 =	35 -1	29 =	35 +3	33 +1
I am used to taking this mode of accommodation	34 -4	28 -12	36 -6	36 -1	44 +1	39 -1	37 -1	39 -3	31 +1	33 -1
It is more affordable for me	45 -4	28 -5	37 +3	33 -4	21 -4	44 -2	36 -7	46 +1	30 -3	34 -1
It's a reliable type of accommodation (e.g. no risk of being scammed)*	40 -3	41 +4	37 +3	42 -1	38 +4	40 -2	35 -1	32 -6	27 -1	34 =
It's a safe / well-protected accommodation	46 -5	40 -3	39 -3	46 -5	41 +3	44 -6	37 +3	31 -3	31 -1	36 =
For all the services and activities proposed	28 -5	27 -2	9 -8	27 +1	11 +1	36 -1	23 -1	20 -2	24 -1	26 =
It is more environmentally friendly	23 -5	10 =	4 -4	15 -2	8 -3	34 -1	14 +3	8 =	22 +2	25 +2
Other	0 =	1 +1	1 =	2 +2	0 =	0 =	2 -1	5 =	1 +1	0 =
None of these	1 =	1 =	2 -1	1 -1	2 -1	2 +1	1 =	2 +1	1 -1	1 =

04

4/4 Criteria of choice of accommodation (%)

	NORTH AMERICA		SOUTH AMERICA		
	US	CA	AR	BR	MX
It is my favourite mode of accommodation	35 +3	31 -2	36	26	30
I am used to taking this mode of accommodation	39 +4	32 -6	33	30	28
It is more affordable for me	38 -5	41 -3	32	40	32
It's a reliable type of accommodation (e.g. no risk of being scammed)*	37 +2	32 =	22	23	24
It's a safe / well-protected accommodation	39 +1	33 +2	27	31	30
For all the services and activities proposed	25 +1	20 -6	23	17	28
It is more environmentally friendly	11 -5	10 -2	6	11	11
Other	2 -1	3 +2	2	1	0
None of these	2 =	2 -1	2	2	1

APPENDICES





Travel trends





1/8 Willingness to adopt sustainable travel practices

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

											
	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA	
Supporting local economy	82 ⁻²	80 ⁻³	87 ⁻²	79 ⁻⁵	83 ⁻²	91 ⁻¹	84 ⁻³	87 =	80 ⁻³	89	
Adopt responsible behaviors not to waste local resources	82 =	80 ⁺¹	87 ⁻¹	78 =	84 ⁺¹	90 ⁺¹	80 =	86 ⁺¹	76 ⁺²	88	
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	77 ⁻³	76 ⁻³	84 ⁻²	72 ⁻³	83 ⁻¹	90 =	78 ⁻³	86 ⁺²	74 ⁻³	83	
Travel during off-peak seasons	75 ⁻¹	73 ⁻¹	81 ⁻²	69 ⁻³	77 ⁻²	91 ⁺²	69 ⁻⁵	83 =	68 ⁻³	83	
Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	71 ⁻²	68 ⁻¹	79 ⁻³	69 ⁻²	79 ⁻¹	89 ⁻¹	69 ⁻⁴	84 ⁻¹	62 ⁻³	84	
Picking an accommodation with a green certification	69 =	67 =	77 ⁻²	61 ⁻¹	71 =	87 ⁺²	66 ⁺¹	83 ⁺²	64 ⁻¹	83	
Travel to a closer destination to reduce carbon footprint	63 =	59 =	72 ⁻³	57 ⁻¹	67 ⁻¹	83 ⁺¹	56 ⁺¹	78 ⁺²	59 ⁻³	76	

2/8 Willingness to adopt sustainable travel practices

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

											
	EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	INDIA	OCEANIA	MIDDLE EAST	NORTH AMERICA	SOUTH AMERICA	
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	62 -3	59 -2	73 -4	57 -2	70 -3	88 -1	61 -6	81 -1	59 -4	79 x	
Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	61 -3	58 -1	71 -5	55 -7	67 -3	87 +2	55 -3	83 +1	55 -3	79 x	
Limit high carbon impact transportations (e.g. max number of flights/year)	61 -3	59 -2	73 -3	52 -5	62 -5	87 +1	53 -3	81 +1	56 -2	76 x	
Bringing goods to donate to the local population when visiting underprivileged regions	60 +1	56 +1	68 -2	57 =	59 +2	87 +2	60 +1	82 +1	61 -1	77 x	
Select your company airline or travel provider based on their climate commitments	57 -1	53 =	70 -1	49 -5	65 -4	82 =	55 -1	80 -1	54 -1	75 x	
Use carbon offset programs to compensate for the emissions from your flights and other travel activities	56 -1	52 -1	68 -3	48 -4	63 -2	84 +1	49 -3	78 =	51 -2	74 x	
Volunteer with NGOs to join community tourism initiatives	38 -5	33 -5	48 -10	36 -2	50 -5	80 =	39 +1	75 +1	39 -1	66 x	

3/8 Willingness to adopt sustainable travel practices

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

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Supporting local economy	82 -2	80 -1	80 -3	76 -4	79 =	86 +2	82 -6	86 =	88 -3	87 -1	80 -5	78 -5
Adopt responsible behaviors not to waste local resources	82 =	84 =	77 +2	78 -1	78 +2	84 +3	81 -2	85 =	91 +1	87 -2	78 =	77 =
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	77 -3	75 -2	75 -2	72 -5	73 -2	82 +1	80 -4	79 -2	86 -1	86 -2	75 -2	69 -4
Travel during off-peak seasons	75 -1	72 -3	67 -6	72 +2	71 -1	80 +3	78 =	78 -1	82 -2	83 -2	71 -3	67 -2
Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	71 -2	66 -5	69 -3	68 =	62 -2	73 =	70 =	76 -5	78 -2	82 -2	71 -3	67 -1
Picking an accommodation with a green certification	69 =	68 -1	66 -1	64 -1	62 =	72 +4	68 =	74 -2	78 -4	80 +2	66 =	56 -2
Travel to a closer destination to reduce carbon footprint	63 =	67 +1	58 -2	61 +1	52 -3	61 +3	57 +1	67 -5	73 -3	76 =	58 -4	55 +1

4/8 Willingness to adopt sustainable travel practices











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

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	62 -3	60 -5	61 -4	58 -4	52 -2	63 -1	60 +2	68 -8	70 -6	79 -1	60 -4	53 -1
Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	61 -3	55 -2	55 -6	59 +2	54 =	61 +1	66 +4	73 -2	69 -9	72 -3	57 -9	52 -6
Limit high carbon impact transportations (e.g. max number of flights/year)	61 -3	57 -6	56 -4	58 -3	53 -4	64 +1	63 +3	69 -3	70 -4	78 -2	58 -5	47 -4
Bringing goods to donate to the local population when visiting underprivileged regions	60 +1	59 =	52 +1	55 +2	47 -1	63 +1	60 +6	62 -3	70 -4	73 +1	58 -3	55 +2
Select your company airline or travel provider based on their climate commitments	57 -1	50 -4	52 -7	53 +4	47 -1	57 =	56 +5	67 =	75 -1	69 -2	50 -9	47 -1
Use carbon offset programs to compensate for the emissions from your flights and other travel activities	56 -1	50 -2	52 -3	46 =	50 =	56 =	58 +2	65 -1	68 -6	71 -2	51 -6	45 -2
Volunteer with NGOs to join community tourism initiatives	38 -5	28 -11	32 -5	29 -3	31 -5	38 -6	41 +3	46 -5	48 -17	50 -10	41 -3	31 -1

5/8

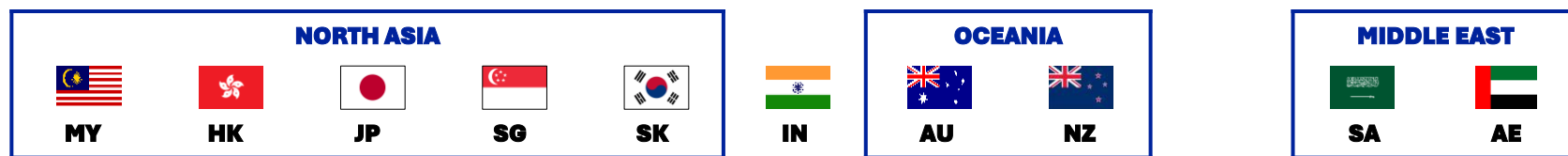
Willingness to adopt sustainable travel practices

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

	NORTH ASIA						OCEANIA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 SK	 IN	 AU	 NZ	 SA	 AE
Supporting local economy	91 -4	87 -1	77 -2	83 -2	76 -4	91 -1	82 -2	86 -5	85 +3	89 -2
Adopt responsible behaviors not to waste local resources	90 -1	88 +1	77 +4	84 =	83 +2	90 +1	76 -1	83 +1	84 +2	88 -1
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	90 +2	86 =	75 -1	80 -5	85 -1	90 =	75 -1	82 -3	83 +2	89 +2
Travel during off-peak seasons	88 -2	80 =	62 -3	81 -2	73 -4	91 +2	67 -5	72 -4	79 -1	88 +3
Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	87 -1	83 -1	68 -2	81 -1	75 -2	89 -1	66 -4	73 -2	81 =	87 -2
Picking an accommodation with a green certification	84 -1	71 +1	57 +1	72 -1	73 -1	87 +2	63 +1	69 +1	79 +1	86 +3
Travel to a closer destination to reduce carbon footprint	82 =	68 -2	50 -1	66 -1	70 -1	83 +1	56 +1	55 =	75 +1	81 +3

6/8 Willingness to adopt sustainable travel practices






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



	MY	HK	JP	SG	SK	IN	AU	NZ	SA	AE
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	82 -2	70 -2	60 -4	68 -5	71 -2	88 -1	58 -6	65 -4	79 +1	83 -4
Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	80 -3	67 -2	53 -2	64 -6	73 -1	87 +2	54 -3	57 -3	81 +1	85 =
Limit high carbon impact transportations (e.g. max number of flights/year)	78 -4	61 =	42 -7	66 -3	65 -6	87 +1	52 -3	54 -2	78 =	85 +2
Bringing goods to donate to the local population when visiting underprivileged regions	78 -3	60 +12	39 -2	60 -3	56 +2	87 +2	57 =	63 +2	79 +3	85 -1
Select your company airline or travel provider based on their climate commitments	77 -4	65 -3	51 -4	63 -3	68 -4	82 =	51 -3	58 =	76 -2	85 +2
Use carbon offset programs to compensate for the emissions from your flights and other travel activities	78 -1	66 +2	44 -5	62 -4	66 -4	84 +1	48 -4	51 -2	74 -2	83 +4
Volunteer with NGOs to join community tourism initiatives	68 -5	49 -6	27 -13	48 -4	56 +2	80 =	38 +1	41 +2	70 -1	80 +1

7/8 Willingness to adopt sustainable travel practices

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

	NORTH AMERICA				SOUTH AMERICA		
	 US		 CA		 AR	 BR	 MX
Supporting local economy	78	-3	82	-2	89	85	92
Adopt responsible behaviors not to waste local resources	72	+3	79	+1	87	87	90
Avoid activities that are not socially responsible or respectful of the local culture/ environment/ the wildlife	71	-4	76	-3	82	83	84
Travel during off-peak seasons	68	-1	68	-6	82	79	90
Opt for buses, trains, or other forms of on-site public transport instead of cars or taxis	60	-3	65	-3	84	79	89
Picking an accommodation with a green certification	61	-1	66	-3	80	80	90
Travel to a closer destination to reduce carbon footprint	58	-3	61	-1	70	74	85

8/8

Willingness to adopt sustainable travel practices

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

NORTH AMERICA



US **CA**

SOUTH AMERICA



AR **BR** **MX**

Practice	US	Evolution	CA	Evolution	AR	BR	MX
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	56	-6	62	-2	77	76	85
Choose travel agencies, booking platforms or tour organisers specialised in sustainable travels	55	-2	56	-3	76	77	83
Limit high carbon impact transportations (e.g. max number of flights/year)	54	-2	57	-2	70	76	82
Bringing goods to donate to the local population when visiting underprivileged regions	58	-2	64	+1	73	76	82
Select your company airline or travel provider based on their climate commitments	52	=	55	-2	71	74	81
Use carbon offset programs to compensate for the emissions from your flights and other travel activities	50	-2	51	-3	70	73	79
Volunteer with NGOs to join community tourism initiatives	43	+1	35	-3	57	65	75



Our commitments

- PROFESSIONAL CODES, QUALITY CERTIFICATION CONSERVATION AND DATA PROTECTION

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

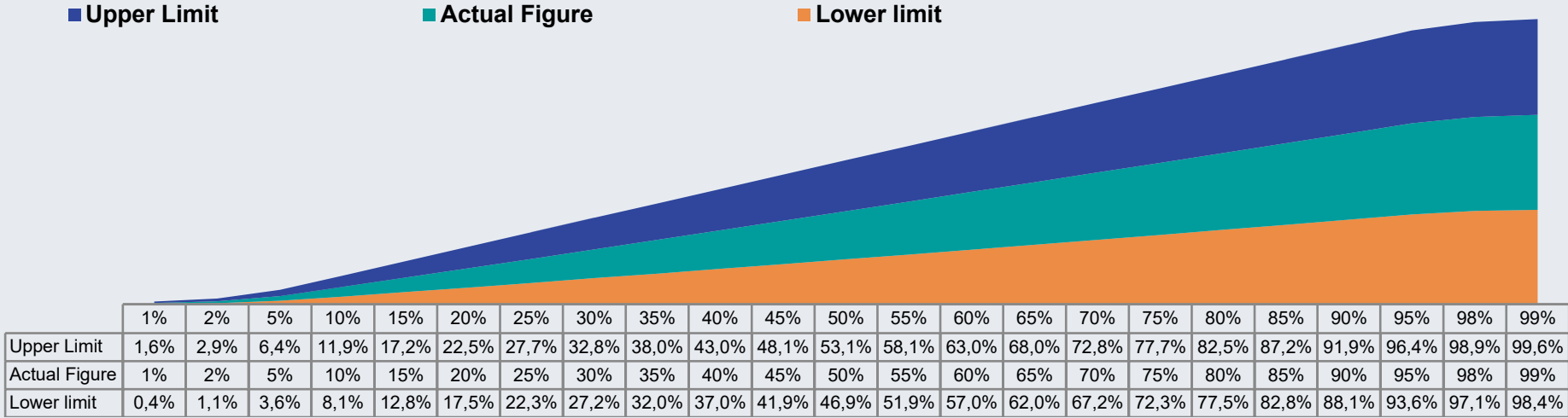
- 12 months following the end date of an Ad Hoc study.
- 36 months following the end date of each wave of a recurring study.

Reliability of results

- In this instance, with regard to this study:

- Confidence interval: 95%
- Size of sample : 1000 by country

- The proportions observed are between:



STUDY OVERVIEW

ONLINE STUDY WITH IIS

Survey overview

CAWI survey – Online panel

SAMPLE

- **Target** : : Man/woman aged 18 years and over
- **Selection of the respondent** : participant selection using a quota
- **Sample representativeness** : criteria and sources : sex, age, socio-economic category of the individual, the regions

DATA COLLECTION

- **Fieldwork dates** : February 27th to April 7th
- **Sample achieved** : 26000 interviews
- **Data collection** : on line with IIS Panel
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)**
- **Checking of IP and consistency of demographic data.**
- Data will be kept on a protected network for 3 years

DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, sex, age, socio-economic category of the individual / head of the family, the regions, the market size

RELIABILITY OF RESULTS:

Self completion online surveys

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

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

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

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

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

Survey overview

Organization (CAWI survey - Online panel)

ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

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

ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

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

ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

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

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