

HOLIDAY **BAROMETER**

AMONG EUROPEANS, NORTH AMERICANS, ASIANS & OCEANIANS



Methodology (1/3)

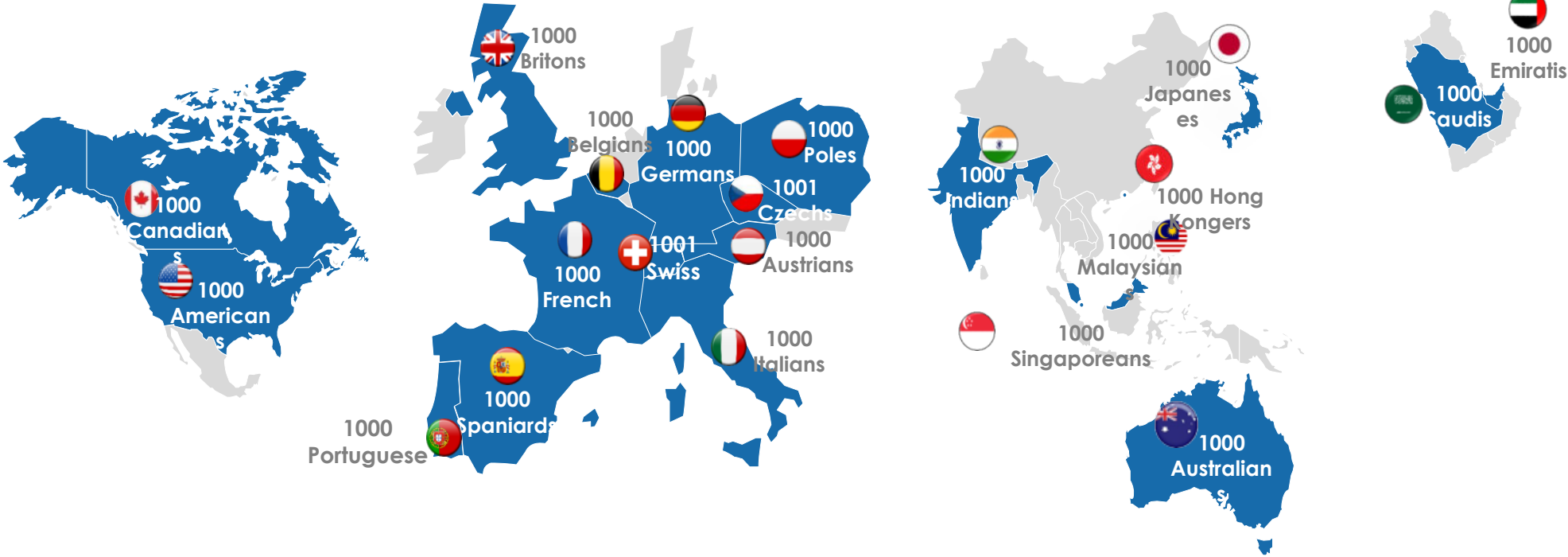
American scope

European scope

Asian/Oceanian scope

MENA scope

Scope of the survey



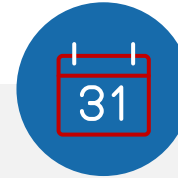
Samples & data collection

Methodology (2/3)



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 March 27th and April 22th 2023



Method of data collection

Online survey in the 21 countries

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

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

XX Significantly lower result in the country compared to EUROPE

Evolutions between 2023 and 2022 results

XX Significantly better result in 2024 compared to 2023

XX Significantly lower result in 2024 compared to 2023


How to read the results ?

2 ways



Methodology (3/3)

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 2023

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 2023.**

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 2023.**

IN A NUTSHELL

Key learnings from the 2024 Barometer

1. **Travel enthusiasm** stays very strong across zones, continuing to progress, showing a recovery from the Covid period.
2. **A desire to escape:** strong appetite for international travel - with some variations across zones.
3. **Within Europe**, a clear split between countries preferring domestic travel (mainly Southern Europe and France) vs international travel (all other countries).
4. **Concerns about safety** are very much present in travelers' minds, intensified by the geopolitical context.
5. **European destinations** remain the most popular ones, especially among European travelers where Spain, France and Italy occupy the podium in most countries.
6. **The perfect recipe for a successful vacation** is considered to be: mixing rest, social & family interactions and discovery, way above reading or sports.
7. **Inflation** is still very much a constraint; adaptations are being made to tackle it.
8. **Travel and environmental concern** don't seem contradictory: travelers are eager to adopt responsible travel practices, however not ready yet to change destinations or modes of transports only for environment.
9. **Solo travelling** is still not very common, and even less in Europe than in other zones.
10. **Workation**, blurring the borders between work and vacation, tends to stagnate in Europe, and to be less widespread in than in other zones : a slowdown of this trend among European actives.
11. **New "niche" travel trends**, such as wellbeing tours or culinary trips, appeal to small segments of the population, with specific profiles being more interested (more feminine profile for wellbeing tours, and younger profile for both).

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NEXT SUMMER'S TRAVEL PLANS

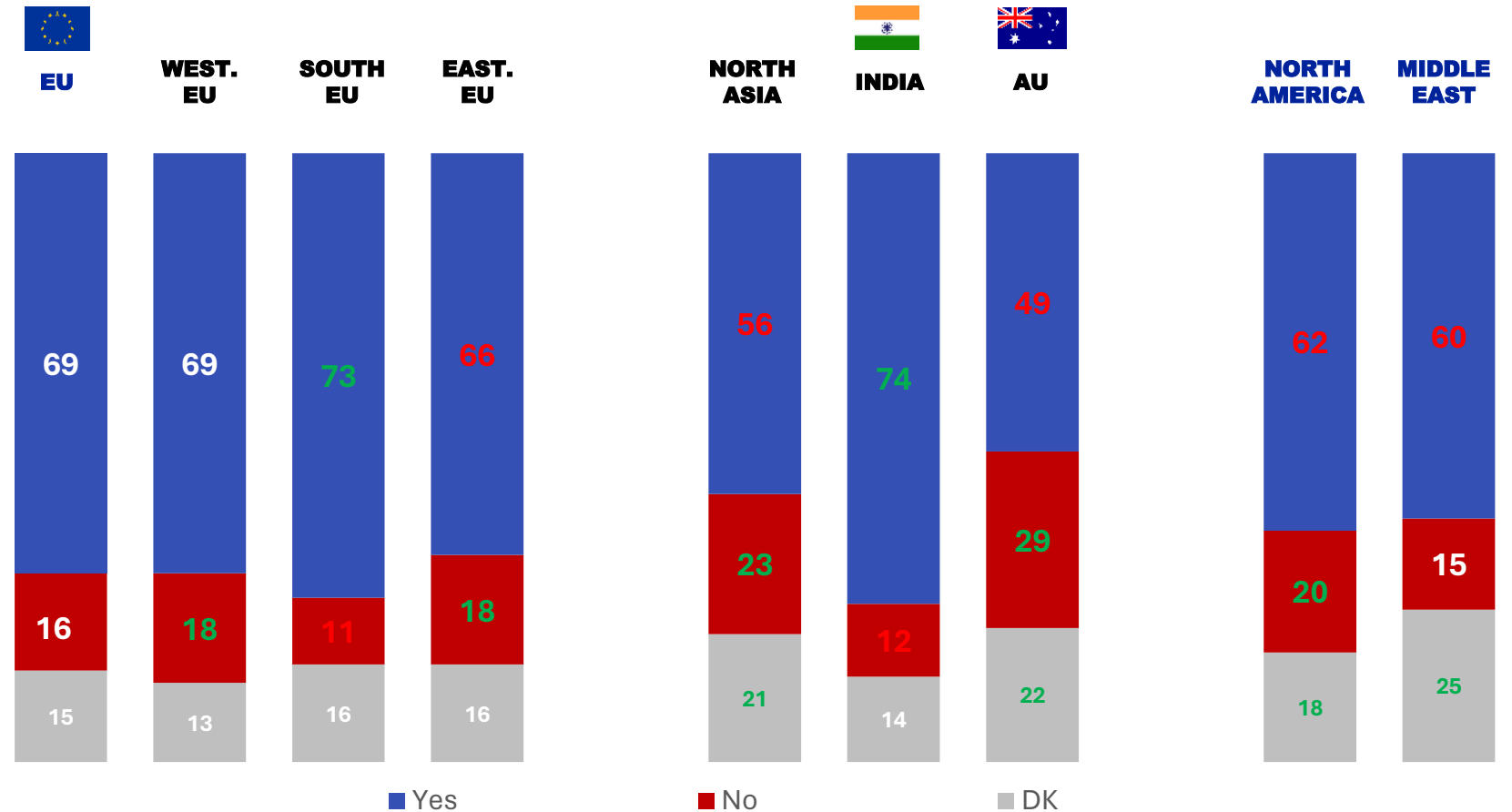


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NEXT SUMMER'S TRAVEL PLANS



1/3 Plan to take holidays during summer



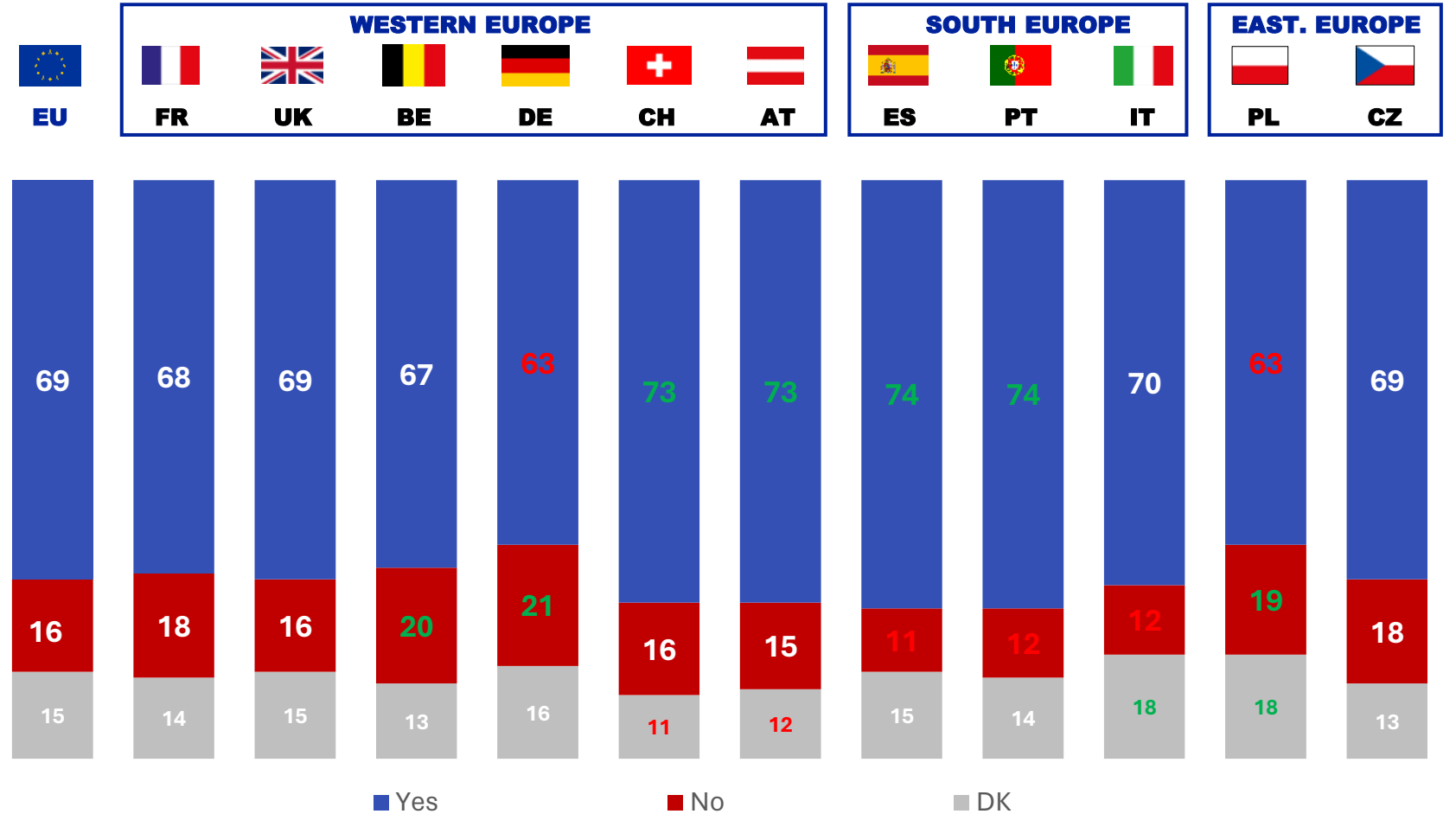
NEWQ1. Do you plan to take holidays [this summer / between June and September]? Base : All respondents

XX / XX Significantly higher or lower score vs Europe

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NEXT SUMMER'S TRAVEL PLANS

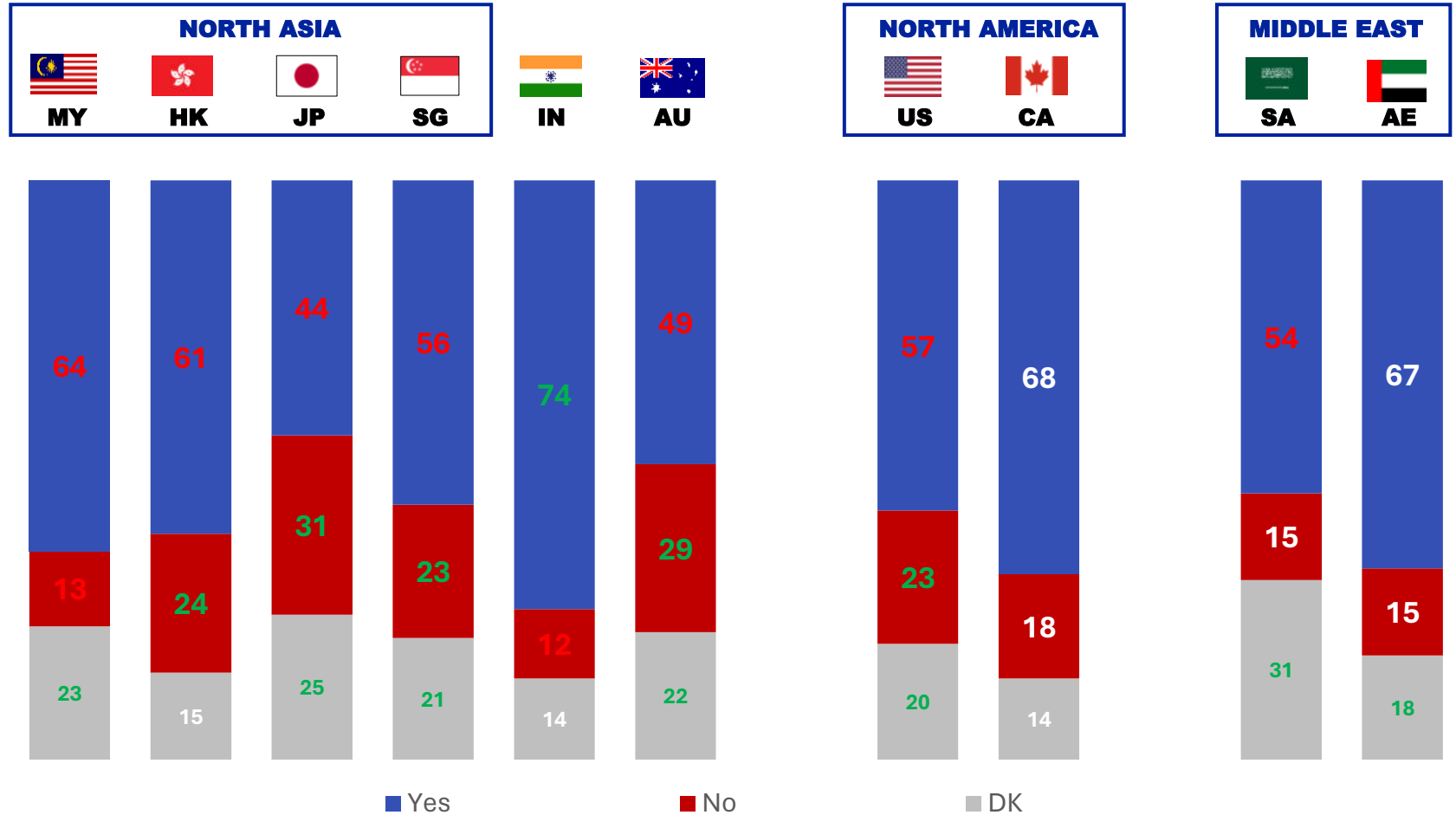
2/3 Plan to take holidays during summer



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NEXT SUMMER'S TRAVEL PLANS

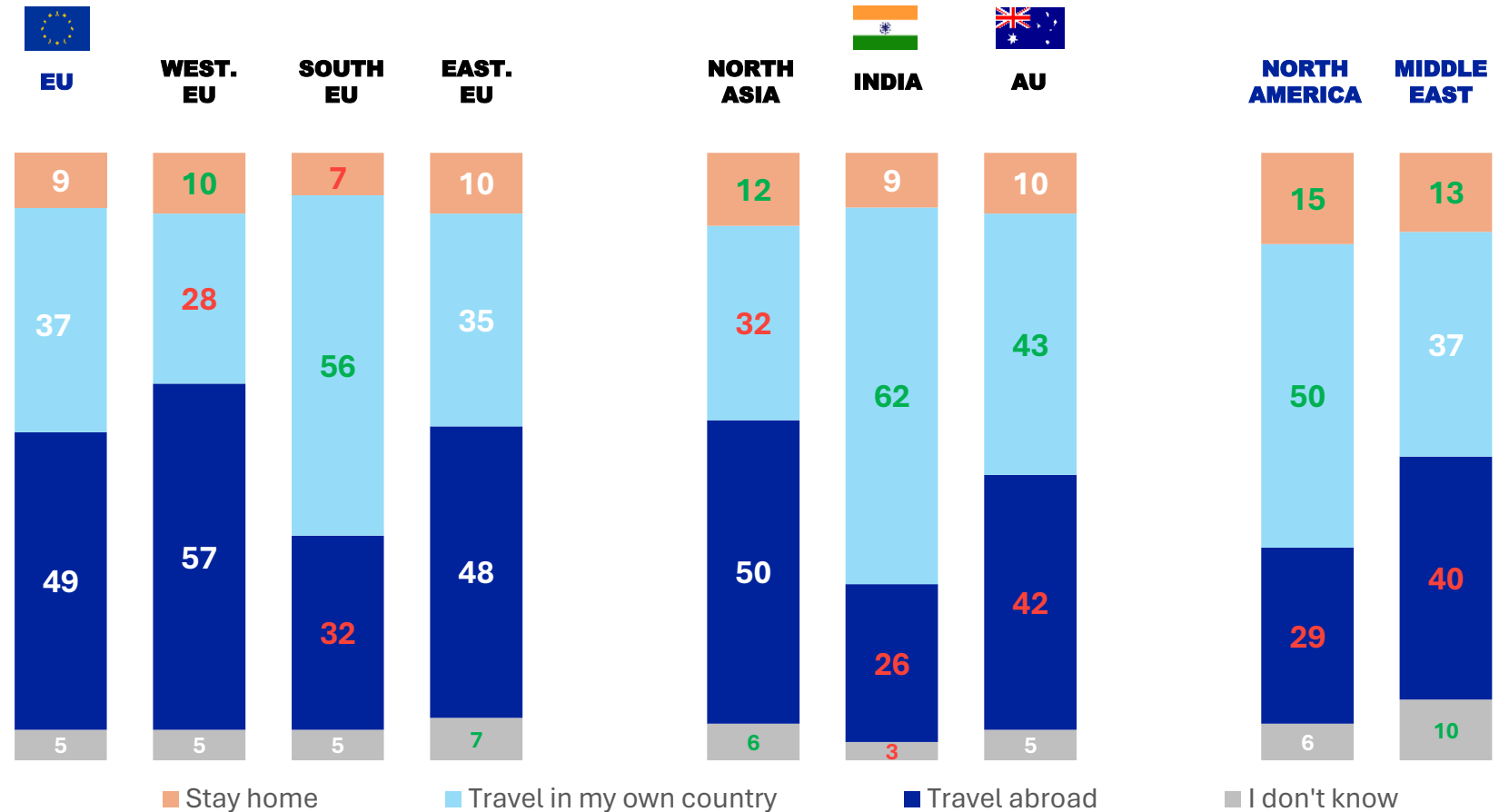
3/3 Plan to take holidays during summer



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NEXT SUMMER'S TRAVEL PLANS

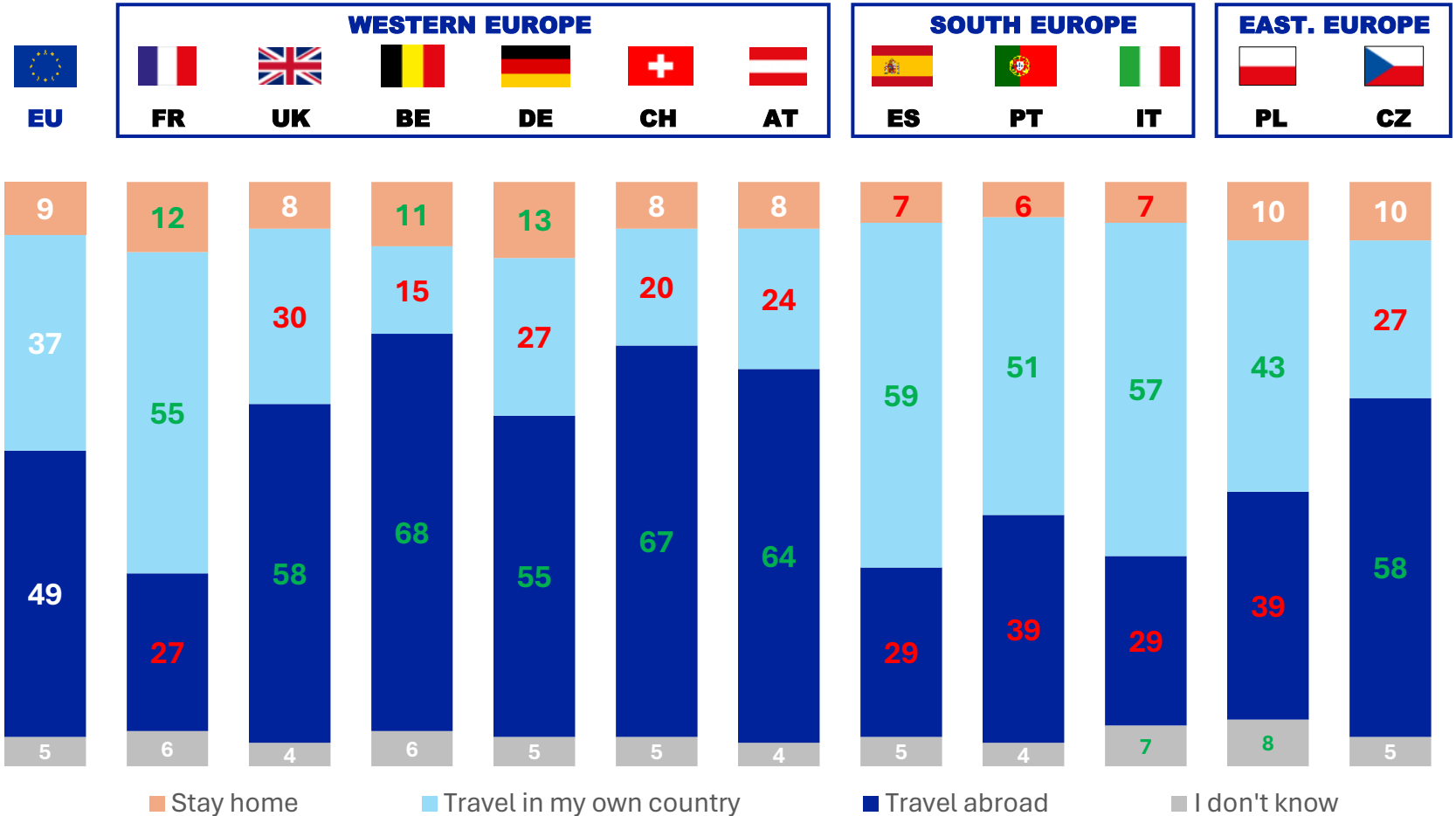
1/3 Ideal destination for summer vacation in 2024



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NEXT SUMMER'S TRAVEL PLANS

2/3 Ideal destination for summer vacation in 2024



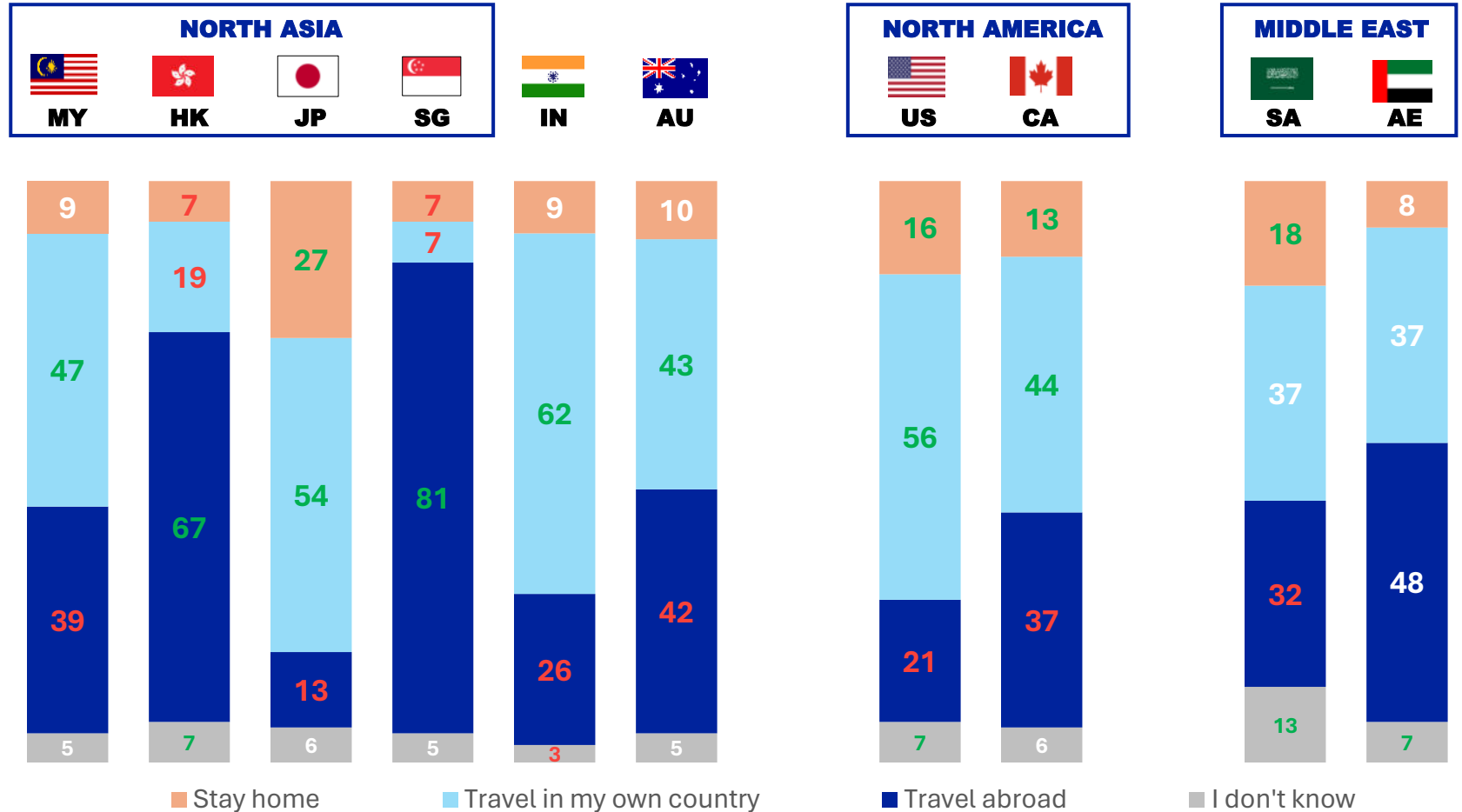
NEWQ2. When you think of the ideal [summer vacation / vacation] in 2024, where would you primarily want to go? Base : All respondents

XX/XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS




3/3 Ideal destination for summer vacation in 2024



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NEXT SUMMER'S TRAVEL PLANS

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

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Rest, have peace of mind	31	28	37	29	27	12	19	19	15
Discover new cultures, enjoy a total change of scenery	26	25	30	21	32	37	37	27	22
Come together as a family, or with friends	23	24	15	32	19	22	26	29	30
Do sports (such as hiking, climbing...)	6	6	4	8	4	4	4	5	5
Learn new things	4	4	5	2	4	8	5	5	7
Have new friendly or romantic encounters	3	3	3	3	3	5	3	4	6
Take time to read	2	2	2	1	2	3	1	1	3
Enjoy my home	2	3	1	2	5	4	1	4	8
Volunteer for a social or environmental cause/association	1	1	1	1	2	3	1	1	3
Other	2	3	2	1	2	1	3	4	1
None of these	0	1	0	0	0	1	0	1	0

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays













XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

2/6

Thinking of the ideal vacation Firstly (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Rest, have peace of mind	31	29	26	29	30	27	30	39	41	32	26	32
Discover new cultures, enjoy a total change of scenery	26	23	31	23	26	26	22	30	33	27	20	22
Come together as a family, or with friends	23	24	19	26	25	25	24	13	14	19	34	29
Do sports (such as hiking, climbing...)	6	6	6	6	4	5	7	3	4	3	6	9
Learn new things	4	6	4	4	4	5	3	6	3	7	3	0
Have new friendly or romantic encounters	3	3	3	4	3	1	3	4	1	4	4	2
Take time to read	2	3	3	2	2	4	2	1	1	3	2	1
Enjoy my home	2	3	3	1	2	2	5	1	1	1	3	2
Volunteer for a social or environmental cause/association	1	1	2	2	1	1	0	1	1	1	1	1
Other	2	1	3	2	2	4	4	2	1	2	1	2
None of these	0	1	0	1	1	0	0	0	0	1	0	0











Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays

XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

3/6 Thinking of the ideal vacation Firstly (%)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Rest, have peace of mind	23	40	23	20	12	19	18	21	17	14
Discover new cultures, enjoy a total change of scenery	30	27	29	40	37	37	30	26	21	23
Come together as a family, or with friends	23	14	14	24	22	26	27	29	24	34
Do sports (such as hiking, climbing...)	4	5	6	3	4	4	4	6	6	4
Learn new things	7	3	5	3	8	5	5	5	10	4
Have new friendly or romantic encounters	3	2	2	4	5	3	6	2	5	8
Take time to read	2	2	4	1	3	1	1	1	5	2
Enjoy my home	5	3	12	3	4	1	4	4	8	8
Volunteer for a social or environmental cause/association	2	2	1	1	3	1	1	1	3	3
Other	1	2	3	1	1	3	3	5	1	0
None of these	0	0	1	0	1	0	1	0	0	0




Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays

XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

4/6 Thinking of the ideal vacation Total – Firstly, secondly, thirdly (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Rest, have peace of mind	68	65	74	70	67	41	60	58	51
Come together as a family, or with friends	60	62	51	70	55	51	57	60	59
Discover new cultures, enjoy a total change of scenery	58	56	61	59	65	69	71	55	52
Learn new things	25	22	37	15	27	41	33	30	31
Do sports (such as hiking, climbing...)	20	20	16	29	19	18	15	22	24
Take time to read	19	21	18	12	11	9	14	15	11
Have new friendly or romantic encounters	17	18	16	18	13	29	18	16	27
Enjoy my home	15	18	11	13	24	19	14	22	32
Volunteer for a social or environmental cause/association	4	4	5	3	8	19	4	6	12
Other	6	7	6	4	5	2	7	8	1
None of these	1	1	0	0	0	1	0	1	0

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays

XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

5/6

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

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Rest, have peace of mind	68	68	64	67	64	64	63	76	81	65	65	76
Come together as a family, or with friends	60	64	53	65	64	59	68	45	50	58	71	70
Discover new cultures, enjoy a total change of scenery	58	49	67	58	59	54	49	62	68	53	58	61
Learn new things	25	28	24	22	19	22	15	39	35	38	20	10
Do sports (such as hiking, climbing...)	20	22	16	18	18	23	22	16	18	15	24	33
Take time to read	19	20	24	21	21	23	20	14	18	20	14	11
Have new friendly or romantic encounters	17	18	17	15	22	17	16	18	7	24	23	14
Enjoy my home	15	16	15	12	16	18	28	12	11	10	13	13
Volunteer for a social or environmental cause/association	4	3	6	6	4	4	3	4	5	6	5	2
Other	6	4	8	7	5	9	9	7	4	5	3	5
None of these	1	1	0	1	1	0	0	0	0	1	0	0

Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays











XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

6/6

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

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Rest, have peace of mind	62	76	65	65	41	60	53	62	52	50
Come together as a family, or with friends	64	54	37	61	51	57	59	61	55	62
Discover new cultures, enjoy a total change of scenery	65	61	58	75	69	71	57	53	49	55
Learn new things	33	22	25	26	41	33	30	30	34	28
Do sports (such as hiking, climbing...)	18	25	22	14	18	15	21	23	28	21
Take time to read	8	11	18	8	9	14	14	16	14	8
Have new friendly or romantic encounters	17	12	6	15	29	18	21	12	23	30
Enjoy my home	19	18	44	19	19	14	20	24	31	32
Volunteer for a social or environmental cause/association	8	9	5	7	19	4	7	5	12	13
Other	3	4	9	4	2	7	8	9	1	1
None of these	0	0	1	0	1	0	1	0	0	0




Q10. When you think of THE IDEAL [summer vacation / vacation] in 2024, what would you primarily want to do? Base : To those who plan to take holidays

XX / XX Significantly higher or lower score vs Europe

01

NEXT SUMMER'S TRAVEL PLANS

1/3 Travel trends Likely to try (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Travel to less touristic destinations	70	71	73	64	61	75	66	66	64
Slow tourism: take time to explore local history and culture, while supporting the environment	69	66	74	68	69	85	71	68	74
Wellbeing trips/tours	38	36	39	45	40	74	29	32	64
Culinary trips/tours	37	34	45	33	44	65	38	36	58
Solo travelling	34	34	29	40	43	63	40	39	58
Travel to a destination featured in a famous movie / television show / series	34	30	42	37	55	77	41	38	65
Travel for the purpose of doing extreme / adventure sports	23	21	27	25	33	74	25	29	60

01

NEXT SUMMER'S TRAVEL PLANS











2/3 Travel trends Likely to try (%)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Travel to less touristic destinations	70	75	66	67	65	78	74	73	73	74	77	52
Slow tourism: take time to explore local history and culture, while supporting the environment	69	76	69	69	56	67	62	66	77	78	75	61
Wellbeing trips/tours	38	38	30	28	36	42	44	35	41	40	39	50
Culinary trips/tours	37	44	29	29	31	41	32	38	47	49	43	23
Solo travelling	34	31	36	31	32	42	33	27	30	29	41	40
Travel to a destination featured in a famous movie / television show / series	34	26	39	26	30	32	24	42	46	37	41	32
Travel for the purpose of doing extreme / adventure sports	23	21	25	22	18	24	18	23	30	27	31	18

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NEXT SUMMER'S TRAVEL PLANS

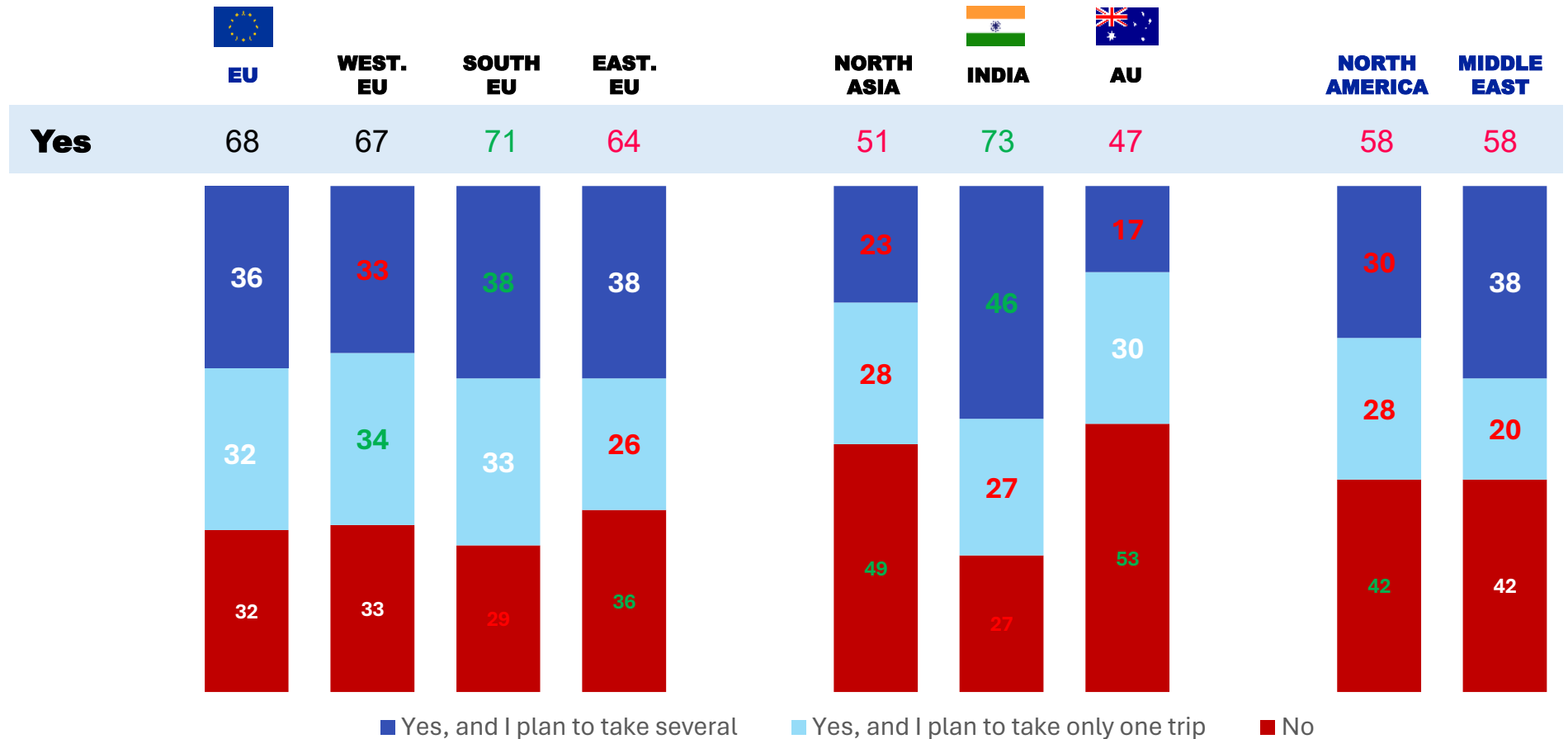
3/3 Travel trends Likely to try (%)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Travel to less touristic destinations	72	74	37	63	75	66	64	68	63	65
Slow tourism: take time to explore local history and culture, while supporting the environment	86	79	35	75	85	71	64	72	69	78
Wellbeing trips/tours	60	44	14	40	74	29	33	31	63	65
Culinary trips/tours	59	39	42	34	65	38	36	36	56	60
Solo travelling	54	42	34	41	63	40	40	38	55	61
Travel to a destination featured in a famous movie / television show / series	73	64	29	53	77	41	38	39	61	70
Travel for the purpose of doing extreme / adventure sports	55	31	14	32	74	25	31	27	56	64

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NEXT SUMMER'S TRAVEL PLANS

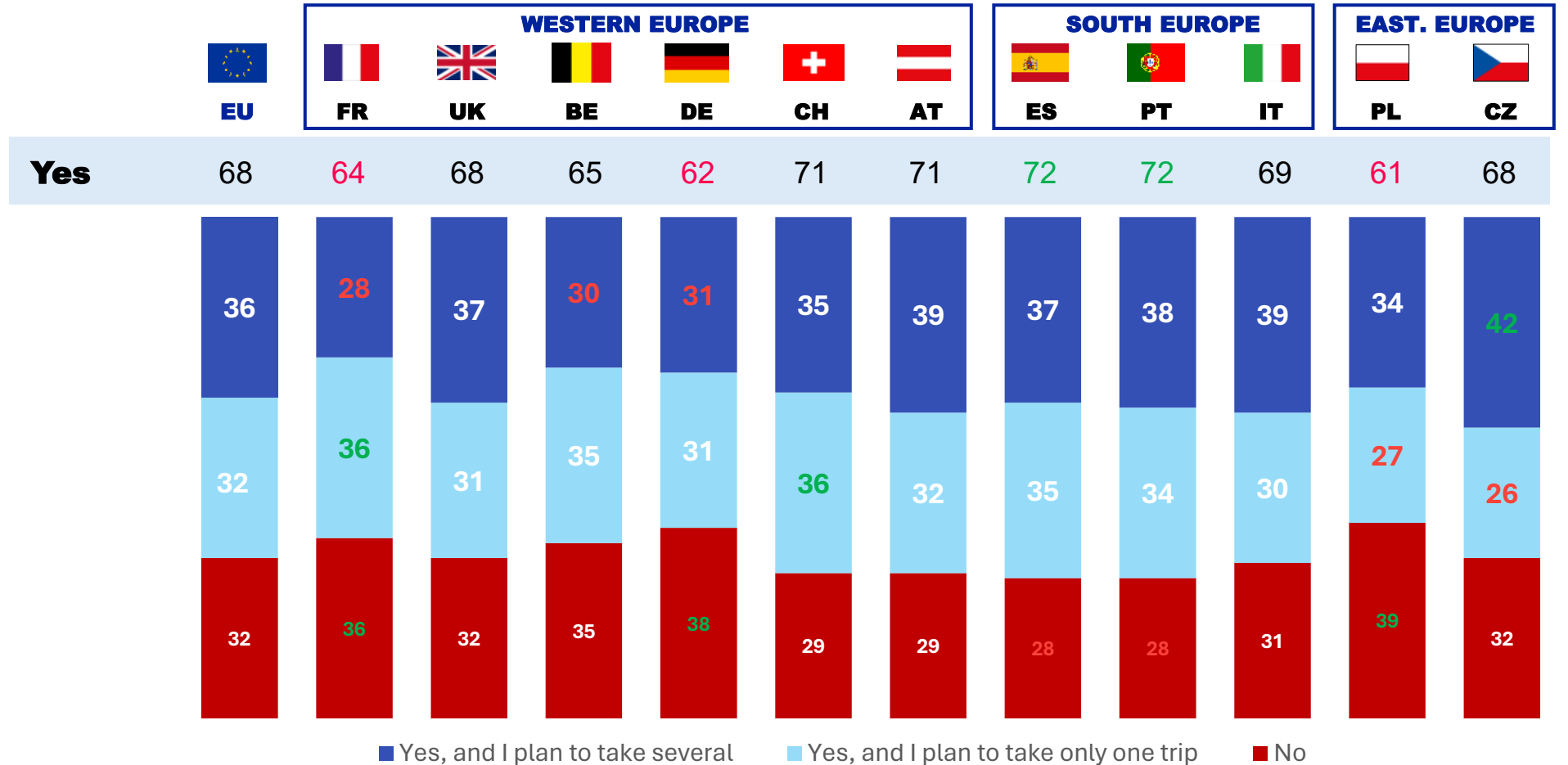
1/3 Plans to go away on holiday this year



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NEXT SUMMER'S TRAVEL PLANS

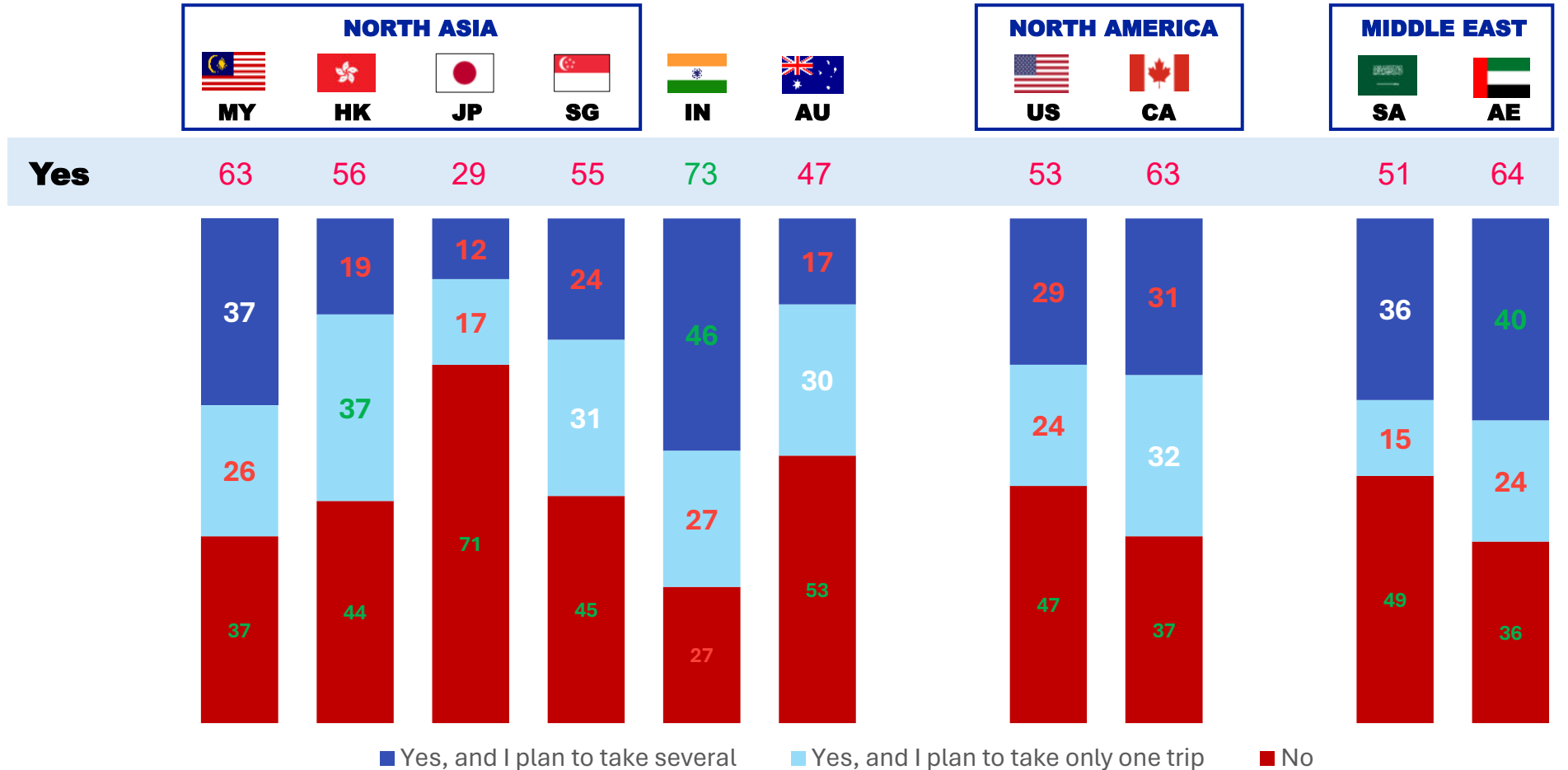
2/3 Plans to go away on holiday this year



01

NEXT SUMMER'S TRAVEL PLANS

3/3 Plans to go away on holiday this year



02




NEXT SUMMER TRAVEL PLANS DETAILS



02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Trip planning

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
More than 6 months before my trip	16 +2	18 +1	14 +6	13 +1	14	10	19 +1	15 +2	17
Between 4 and 6 months before my trip	21 -1	23 -2	20 +1	20 +1	22	21	25 +1	21 -1	22
Between 2 and 4 months before my trip	29 +2	28 +2	29 -1	29 +5	34	29	27 -4	30 =	26
Between 2 months and 15 days before my trip	20 -1	18 =	24 -2	22 =	22	28	19 +1	21 =	21
Less than 15 days before my trip	6 -1	5 -1	5 -3	8 -3	4	10	3 -2	5 -2	9
I haven't planned it yet	8 -1	8 =	8 -1	8 -4	4	2	7 +3	8 +1	5

02

NEXT SUMMER TRAVEL PLANS DETAILS





2/3 Trip planning

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
More than 6 months before my trip	16 ⁺²	15 ⁺³	26 ⁺³	20 ⁺²	17 ⁻¹	14 ⁺³	18 ⁺⁴	9 ⁺²	21 ⁺⁷	10 ⁺²	11 ⁻¹	15 ⁺²
Between 4 and 6 months before my trip	21 ⁻¹	22 ⁻³	24 ⁻³	24 ⁺³	22 ⁻²	20 =	22 ⁻¹	22 ⁺²	21 ⁺²	17 ⁻²	19 =	22 ⁺³
Between 2 and 4 months before my trip	29 ⁺²	30 ⁺⁴	31 ⁺⁶	28 ⁺¹	29 ⁺³	28 =	23 ⁻¹	31 ⁺²	24 ⁻³	32 ⁺¹	29 ⁺⁵	28 ⁺⁴
Between 2 months and 15 days before my trip	20 ⁻¹	18 ⁻³	13 ⁻³	15 ⁻³	18 ⁺¹	24 ⁺²	20 ⁻⁴	26 =	21 ⁻⁵	25 =	24 ⁺³	21 ⁻⁴
Less than 15 days before my trip	6 ⁻¹	6 =	2 ⁻¹	5 ⁻¹	7 =	7 ⁻³	7 ⁻²	6 ⁻³	4 ⁻²	6 ⁻²	9 ⁻²	7 ⁻⁵
I haven't planned it yet	8 ⁻¹	9 ⁻¹	4 ⁻²	8 ⁻²	7 ⁻¹	7 ⁻²	10 ⁺⁴	6 ⁻³	9 ⁺¹	10 ⁺¹	8 ⁻⁵	7 =

02

NEXT SUMMER TRAVEL PLANS DETAILS

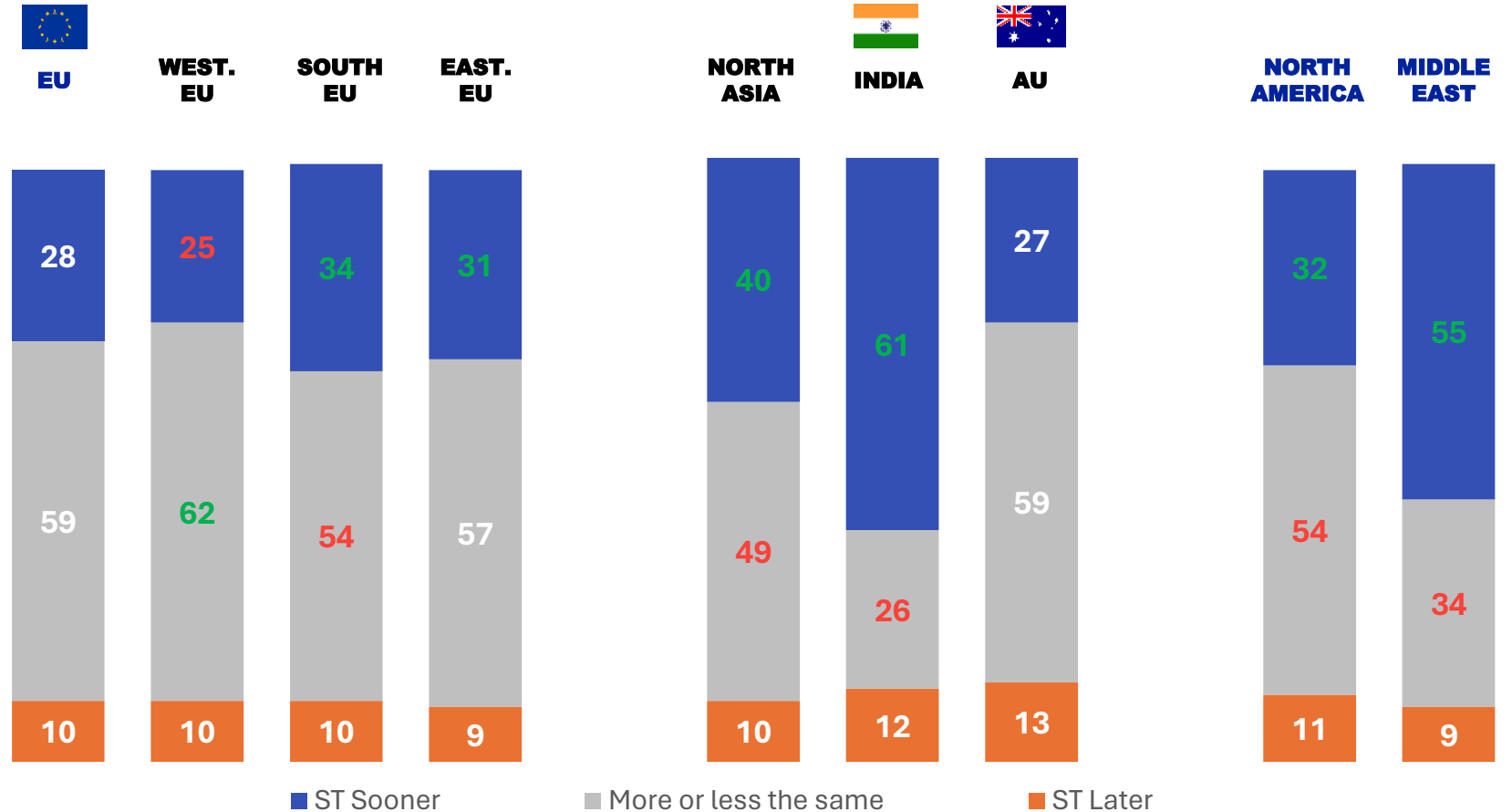
3/3 Trip planning

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
More than 6 months before my trip	20 +4	8	13	15	10	19 +1	17 +4	14 =	18	16
Between 4 and 6 months before my trip	23 +2	17	20	27	21	25 +1	19 -5	22 +2	23	21
Between 2 and 4 months before my trip	30 +2	35	35	36	29	27 -4	33 +3	28 -1	26	26
Between 2 months and 15 days before my trip	20 -2	29	21	16	28	19 +1	21 =	21 =	20	23
Less than 15 days before my trip	4 -4	6	4	2	10	3 -2	4 -2	5 -3	9	9
I haven't planned it yet	3 -2	5	7	4	2	7 +3	6 =	10 +2	4	5

02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Timing of trip's booking compared to last year



ST Sooner : %Much sooner + %Slightly sooner

ST Later : %Much later + %Slightly later

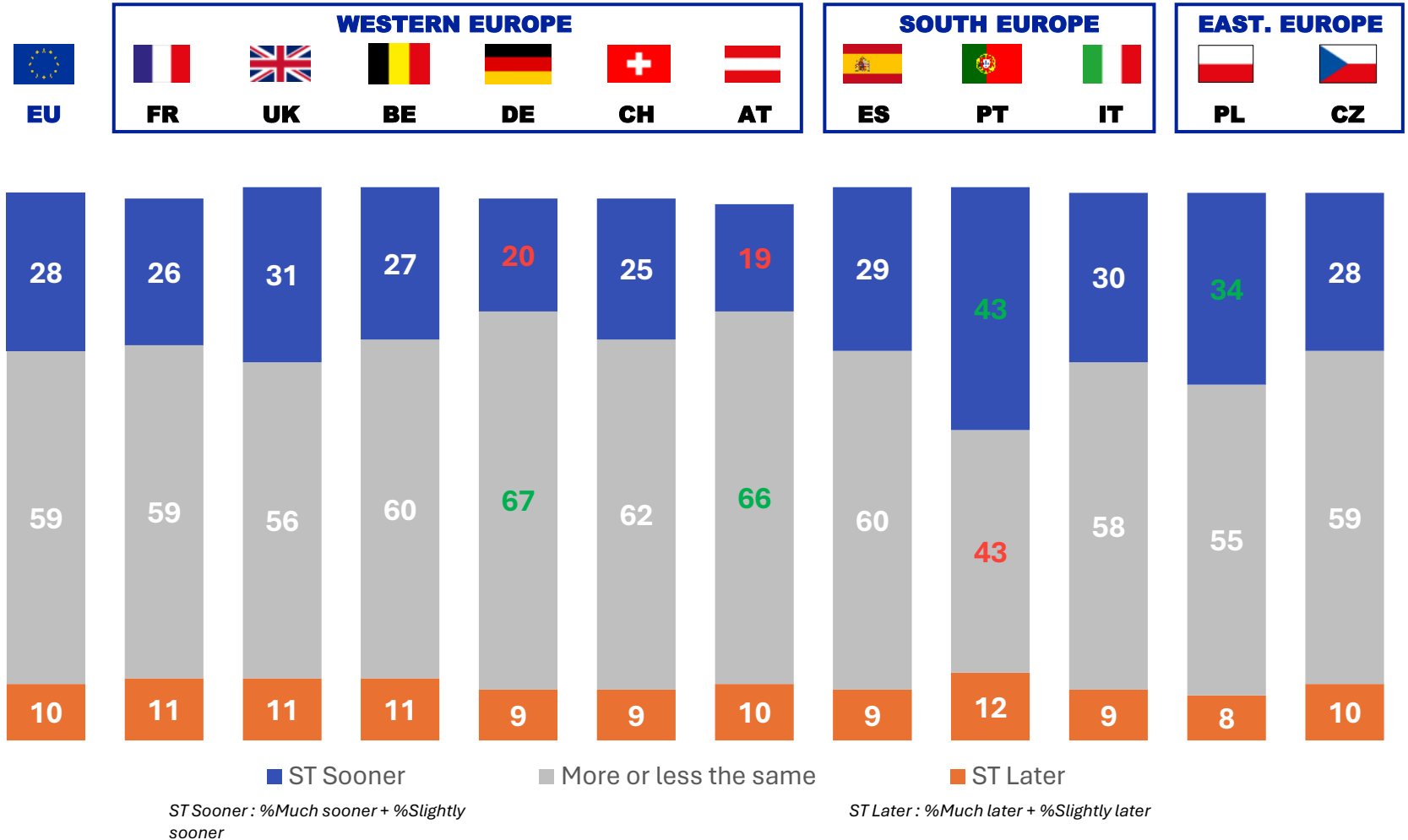
NQ2. Compared to last year, would you say that you have booked or that you plan to book your trip : Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3 Timing of trip's booking compared to last year



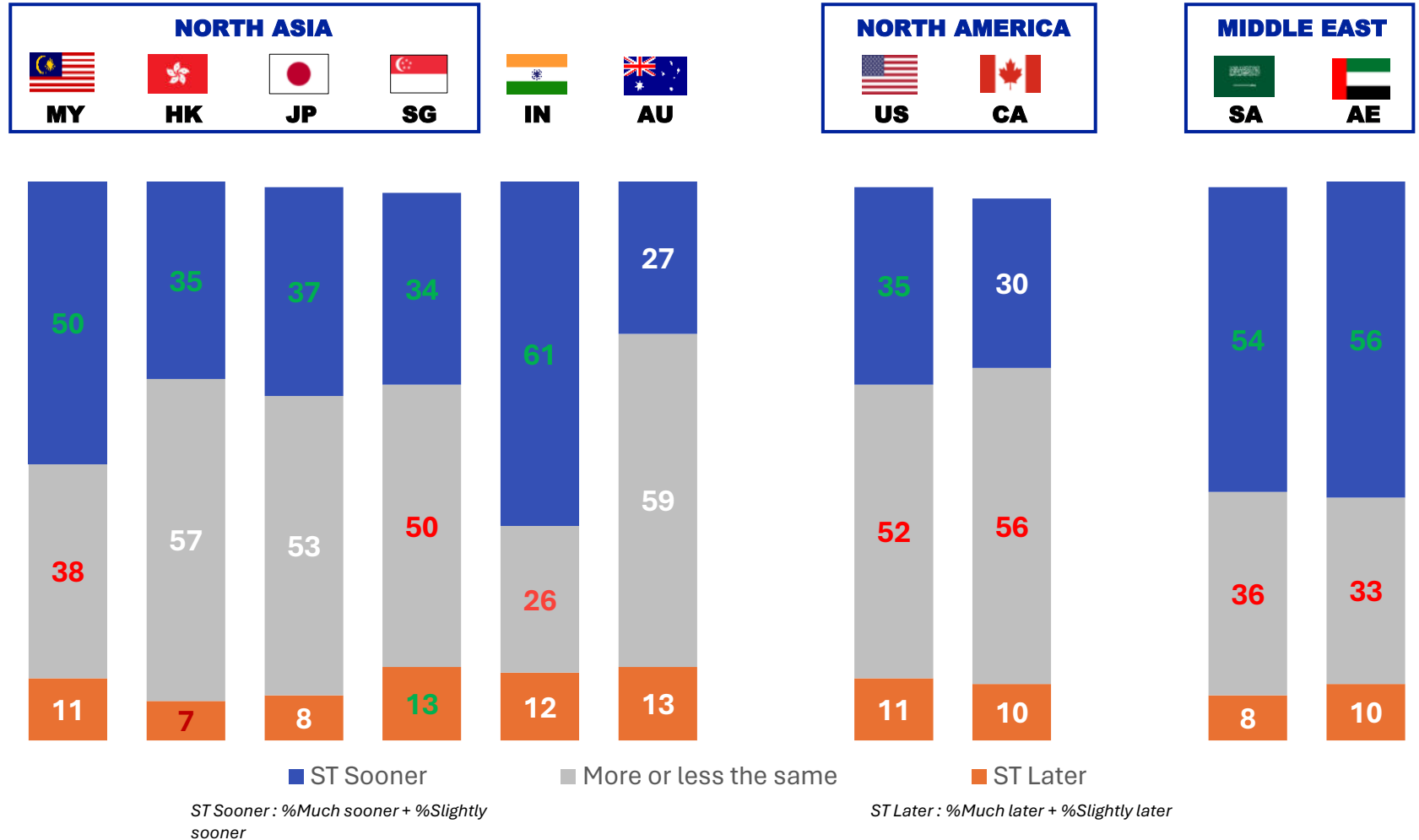
NQ2. Compared to last year, would you say that you have booked or that you plan to book your trip : Base : To those who plan to go on a trip

XX/XX Significantly higher or lower score vs Europe

02

NEXT SUMMER TRAVEL PLANS DETAILS

3/3 Timing of trip's booking compared to last year






NQ2. Compared to last year, would you say that you have booked or that you plan to book your trip : Base : To those who plan to go on a trip

XX/XX Significantly higher or lower score vs Europe

02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Reasons to book earlier than last year

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
I wanted to save money and get better deals by booking earlier	68	67	72	65	73	73	71	72	63
I was not sure of the extent of my budget	21	22	18	24	27	25	25	26	29
Geopolitical uncertainty / Safety	14	13	15	15	21	32	12	15	23
Sanitary reasons (eg rebound of COVID)	8	10	7	6	16	21	15	10	17
Other	7	9	5	4	3	1	8	4	1

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3











Reasons to book earlier than last year

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
I wanted to save money and get better deals by booking earlier	68	65	62	71	66	67	69	67	76	70	65	65
I was not sure of the extent of my budget	21	23	27	18	20	19	23	19	16	19	25	24
Geopolitical uncertainty / Safety	14	14	15	11	17	11	10	18	11	19	18	11
Sanitary reasons (eg rebound of COVID)	8	8	15	1	11	16	4	7	4	11	9	3
Other	7	8	9	9	7	9	10	6	7	2	2	7

02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Reasons to book earlier than last year

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
I wanted to save money and get better deals by booking earlier	78	64	59	80	73	71	71	72	61	65
I was not sure of the extent of my budget	29	29	30	18	25	25	25	28	28	30
Geopolitical uncertainty / Safety	24	24	12	16	32	12	18	11	27	20
Sanitary reasons (eg rebound of COVID)	18	15	23	10	21	15	11	9	18	16
Other	1	2	4	5	1	8	3	5	1	1

02

NEXT SUMMER TRAVEL PLANS DETAILS













1/3 Reasons to book later than last year

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
I was not sure of the extent of my budget	47	49	47	43	46	49	61	51	42
I wanted to take advantage of last minute deals by booking later	30	25	37	34	36	47	34	37	34
Geopolitical uncertainty / Safety	16	13	18	21	23	27	12	9	18
Sanitary reasons (eg rebound of COVID)	7	7	7	8	16	12	8	8	20
Other	16	20	10	12	11	3	7	15	2

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3 Reasons to book later than last year

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
I was not sure of the extent of my budget	47	49	57	46	46	50	42	45	50	44	50	38
I wanted to take advantage of last minute deals by booking later	30	30	27	21	25	20	28	30	35	47	36	33
Geopolitical uncertainty / Safety	16	21	11	11	12	11	12	15	19	21	23	19
Sanitary reasons (eg rebound of COVID)	7	3	0	2	15	8	16	14	1	8	11	5
Other	16	16	18	32	14	26	13	20	10	2	5	18

02

NEXT SUMMER TRAVEL PLANS DETAILS

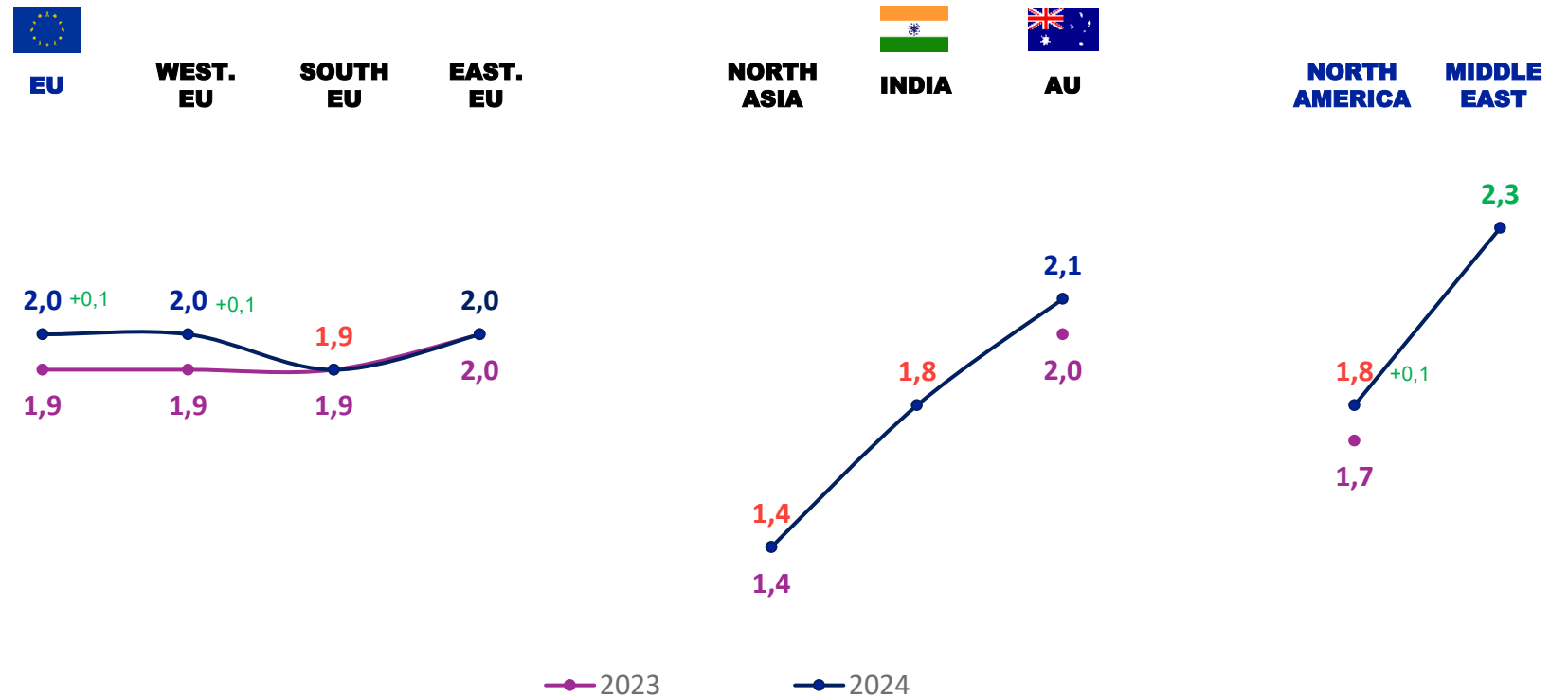
3/3 Reasons to book later than last year

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	IN	AU	US	CA	SA	AE
I was not sure of the extent of my budget	55	37	55	38	49	61	52	50	35	47
I wanted to take advantage of last minute deals by booking later	40	34	14	42	47	34	33	40	42	30
Geopolitical uncertainty / Safety	15	17	20	36	27	12	9	9	20	16
Sanitary reasons (eg rebound of COVID)	18	21	18	10	12	8	10	5	22	18
Other	7	12	21	13	3	7	20	11	1	4

02

NEXT SUMMER TRAVEL PLANS DETAILS

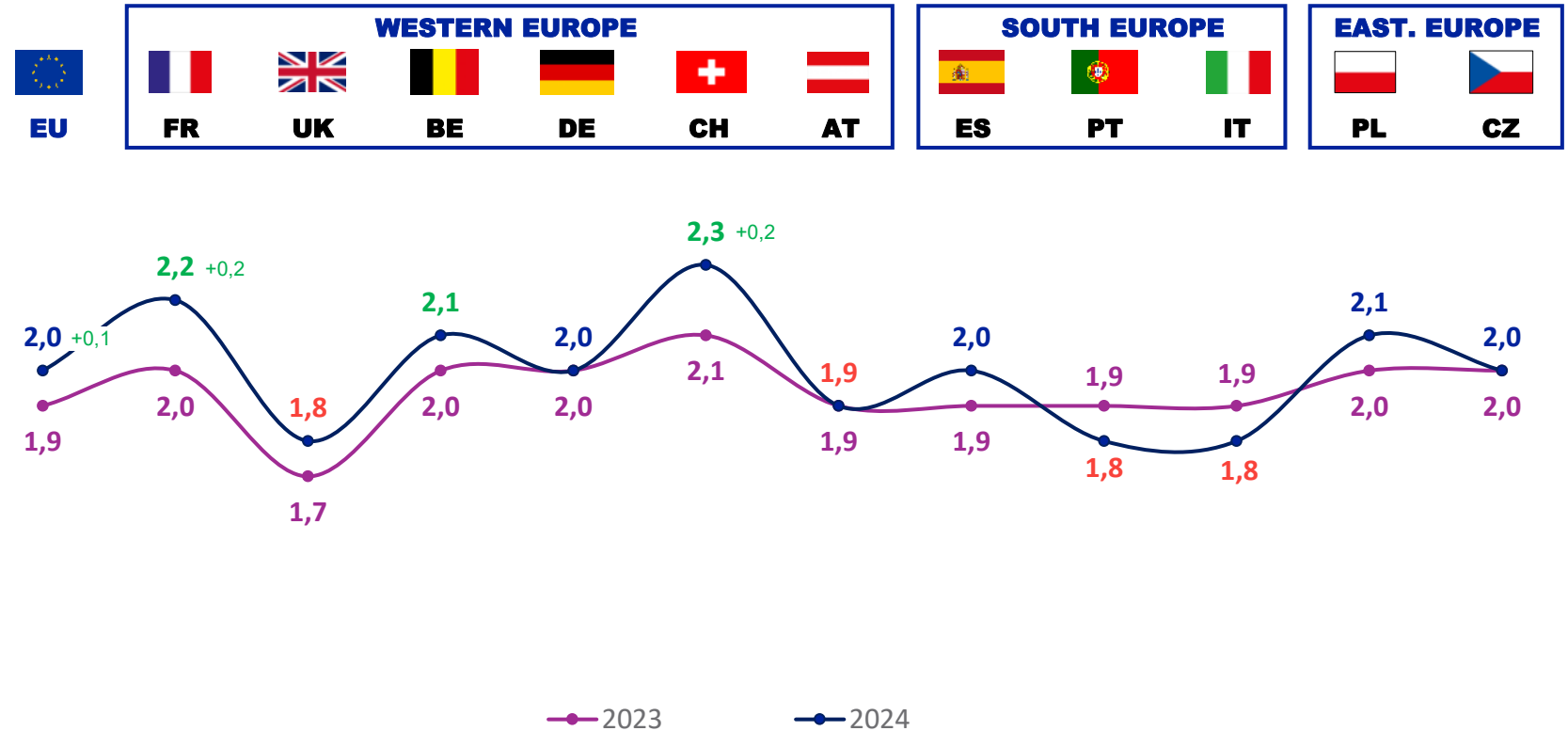
1/3 Planned trip duration Number of weeks (Mean)



02

NEXT SUMMER TRAVEL PLANS DETAILS

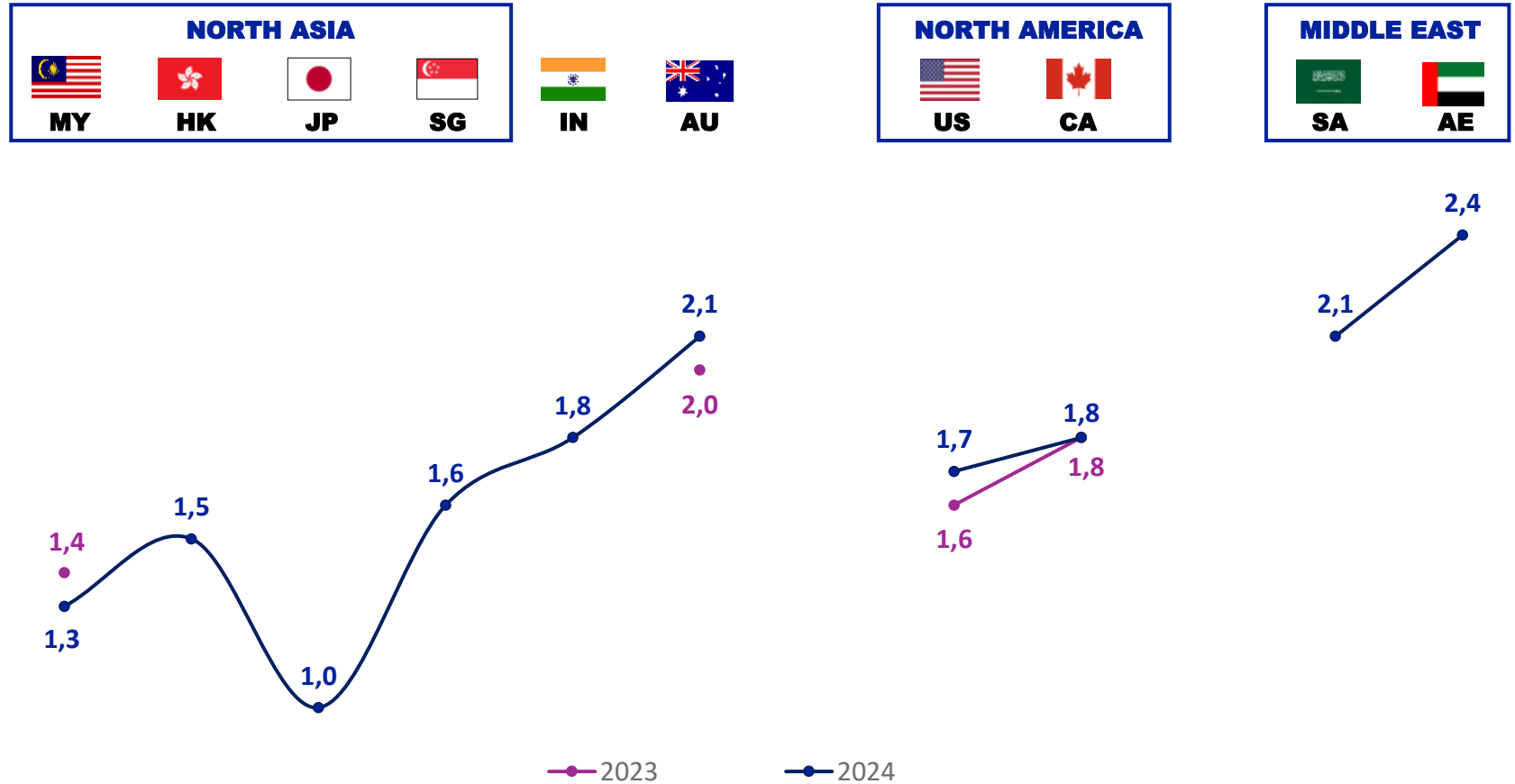
2/3 Planned trip duration Number of weeks (Mean)



02

NEXT SUMMER TRAVEL PLANS DETAILS




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



02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Partner planned for the trip

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
ST Family	83 -1	81 -2	85 =	86 =	79	84	70 -4	80 +2	80
Your partner	68 +1	65 -1	71 +3	69 =	55	57	54 -3	62 +4	54
Your children	35 +1	29 -2	39 +3	46 +4	33	41	23 -3	33 =	44
Your friends	17 -1	16 -1	18 -2	22 +1	23	33	20 =	21 -1	21
On your own	11 =	12 =	8 -1	10 =	14	17	22 +2	14 -4	16
Your parents	10 +1	10 +1	9 +1	9 =	20	28	12 +1	13 +2	17
Your siblings	7 =	8 =	7 =	6 -1	15	21	8 -2	11 =	15
Your grand children	5 =	4 -1	4 =	7 =	2	3	2 =	5 =	5
Your grand parents	1 =	1 -1	0 -1	1 =	2	5	1 =	2 +1	4
I don't know yet	2 +2	2 +2	2 +2	2 +2	2	1	2 +2	4 +4	1













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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3 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	83 -1	85 -2	82 +1	83 -1	80 =	81 +1	79 +1	87 =	87 +1	82 -2	87 =	85 +1
Your partner	68 +1	69 +2	65 -3	66 +2	64 -1	64 +4	65 +1	71 +2	70 +2	70 +3	71 +2	67 =
Your children	35 +1	33 -6	31 =	32 -1	24 -1	30 =	24 -4	42 +3	44 +3	31 -2	47 +4	45 +6
Your friends	17 -1	14 =	17 -1	16 =	16 -2	16 -3	17 -2	17 =	14 +4	23 =	18 -2	25 +1
On your own	11 =	10 +1	12 =	9 -2	14 =	16 +2	13 -2	7 -1	7 -4	9 -1	8 -2	11 +1
Your parents	10 +1	7 -2	12 +1	10 -1	9 +1	12 +2	10 +1	10 =	11 +1	8 +1	7 -3	12 +4
Your siblings	7 =	7 =	8 -2	8 +1	7 +1	8 =	7 +2	8 =	6 -2	6 =	7 =	6 =
Your grand children	5 =	6 -1	4 =	4 -3	4 +1	2 -3	3 -2	3 -1	5 -2	5 +1	7 =	7 -1
Your grand parents	1 =	1 -1	1 =	1 -1	1 -1	1 -1	1 -1	1 =	0 -1	0 -1	1 =	1 -1
I don't know yet	2 +2	3 +3	2 +2	3 +3	2 +2	1 +1	3 +3	3 +3	2 +2	2 +2	3 +3	2 +2











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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Partner planned for the trip

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
ST Family	82 +2	82	72	75	84	70 -4	77 -5	82 +7	81	79
Your partner	47 +4	64	57	56	57	54 -3	58 -1	65 +7	52	55
Your children	38 +1	36	24	30	41	23 -3	37 -1	30 +1	49	40
Your friends	26 +3	20	17	25	33	20 =	22 +1	21 -1	23	20
On your own	15 -6	12	18	11	17	22 +2	16 =	13 -6	13	18
Your parents	30 +6	14	12	17	28	12 +1	13 +1	14 +4	16	18
Your siblings	24 +3	10	5	15	21	8 -2	12 =	11 +1	14	15
Your grand children	3 =	3	2	2	3	2 =	6 =	5 +2	7	3
Your grand parents	2 -1	1	1	2	5	1 =	3 +2	2 +1	4	4
I don't know yet	1 +1	2	3	3	1	2 +2	5 +5	3 +3	1	2

02

NEXT SUMMER TRAVEL PLANS DETAILS













1/3 Planned destination for the trip

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
To the seaside	64 +4	63 +3	66 +4	64 +6	42	50	51 -1	44 +6	54
To a city	28 -2	27 -2	32 -2	23 -1	63	44	42 -1	42 -4	51
To the countryside	24 -1	27 -2	18 +2	23 =	41	42	37 +1	33 =	41
To the mountains	22 -1	20 -1	20 -3	30 -3	26	57	21 -2	28 +2	34
Other	4 +2	4 +3	3 +2	4 +1	1	1	3 +1	6 +2	0

02

NEXT SUMMER TRAVEL PLANS DETAILS











2/3 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	64 +4	62 -3	60 +3	58 +2	68 +10	65 +7	66 +5	62 +2	64 +5	72 +9	65 +4	63 +15
To a city	28 -2	18 -2	36 -3	26 +1	27 -2	31 -1	22 -3	38 -6	27 -12	30 +4	25 +3	21 -10
To the countryside	24 -1	23 -1	39 =	27 +1	22 -5	28 +1	24 -4	18 -3	23 -3	12 +1	17 -3	28 -5
To the mountains	22 -1	22 -1	18 +1	19 =	20 -1	20 =	21 +2	21 -4	14 -5	25 +4	32 -2	29 +1
Other	4 +2	3 +2	4 +3	5 +2	3 +1	3 =	5 +2	3 +1	4 +3	3 +2	4 +1	4 =

02

NEXT SUMMER TRAVEL PLANS DETAILS

3/3 Planned destination for the trip

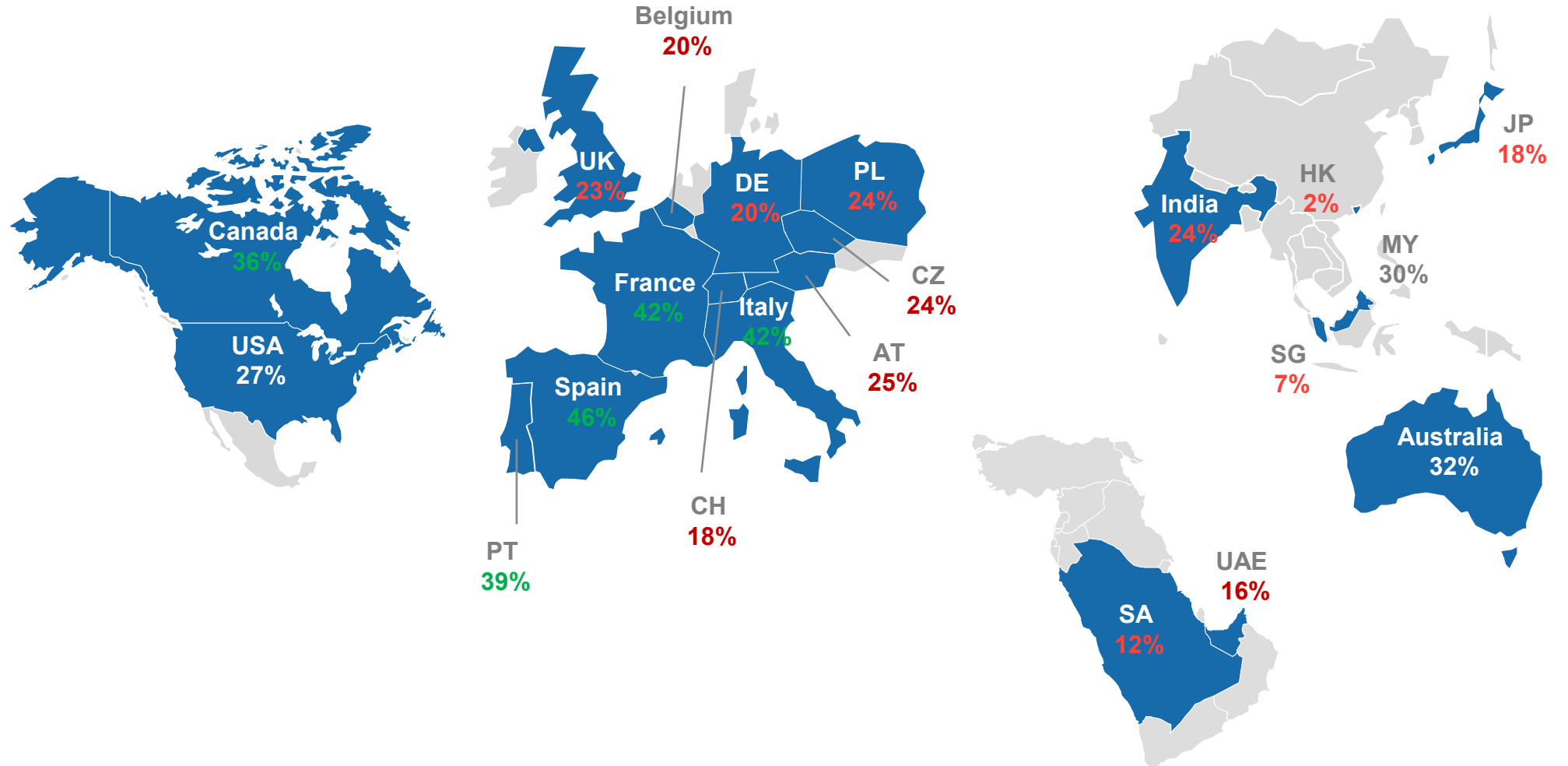
	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
To the seaside	54 =	39	39	32	50	51 -1	49 +7	40 +6	60	48
To a city	55 +2	76	50	63	44	42 -1	43 -2	42 -6	51	51
To the countryside	46 +4	30	41	47	42	37 +1	29 -2	37 +3	37	44
To the mountains	31 +3	19	27	25	57	21 -2	32 +6	24 -2	25	41
Other	1 +1	2	4	1	1	3 +1	4 +1	7 +1	0	1

02

NEXT SUMMER TRAVEL PLANS DETAILS



Holiday plans in one's own country this summer



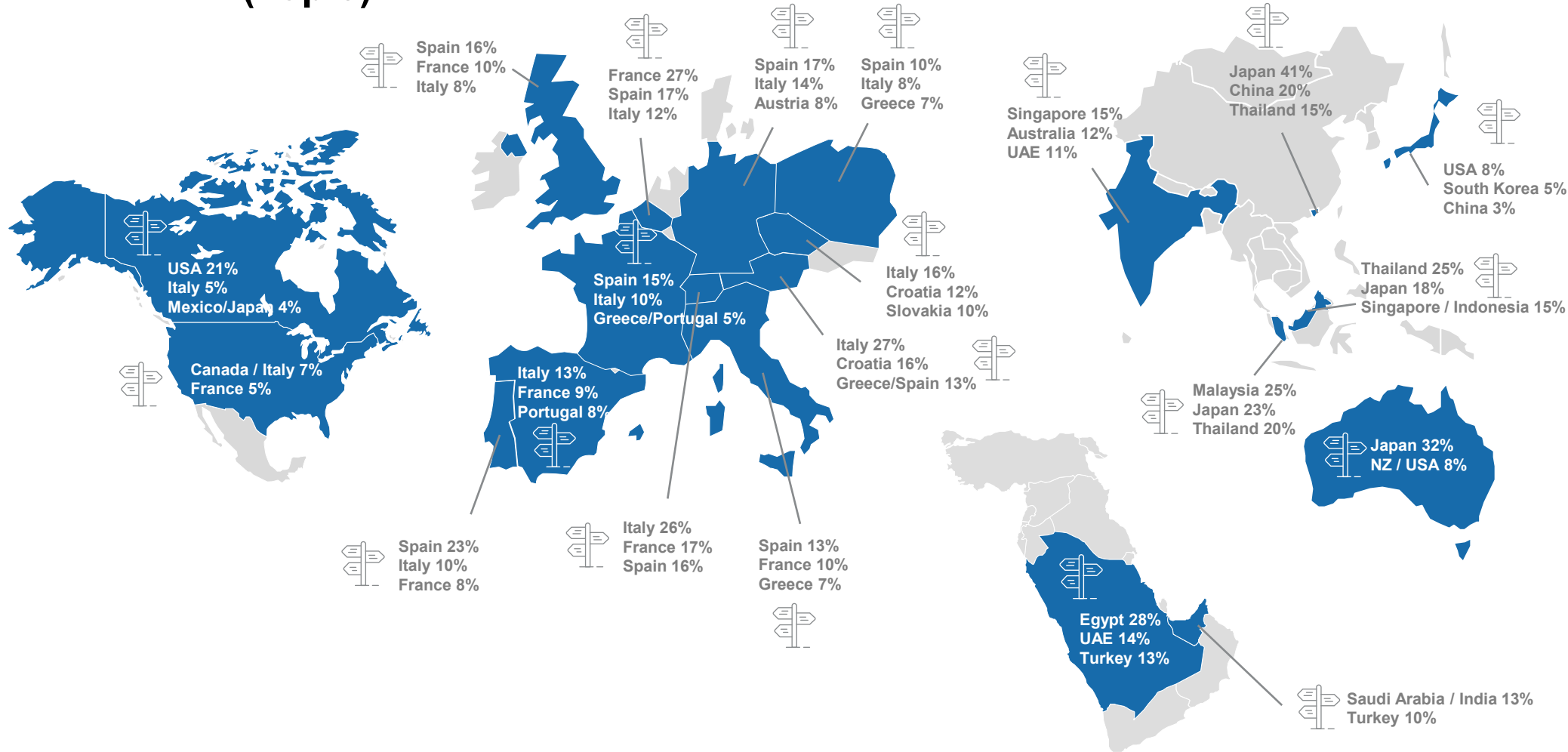
Q21. Where do you plan to go on a trip [this summer / between June and September]? Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe

02

NEXT SUMMER TRAVEL PLANS DETAILS

Foreign destinations planned this summer (Top 3)

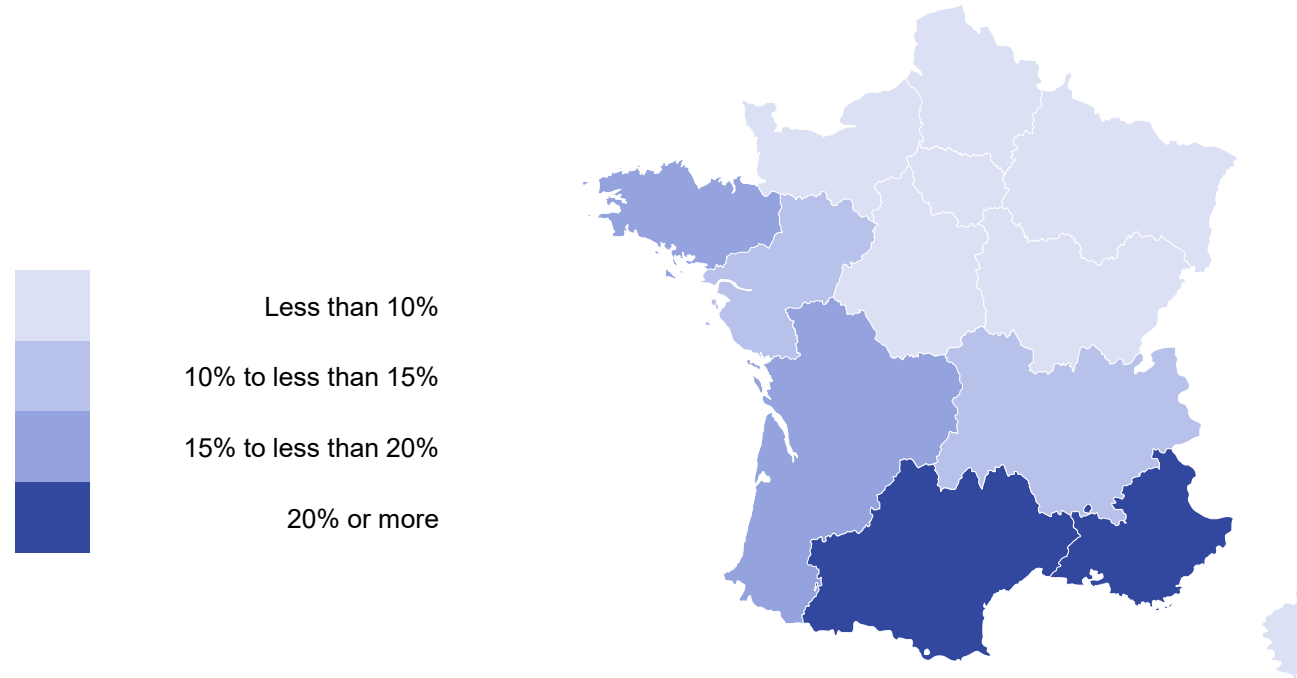


02

NEXT SUMMER TRAVEL PLANS DETAILS






Most attractive French regions



02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Motivations for the choice of destination

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
I like the weather/climate in this/these country (ies)	44 ⁺¹⁷	45 ⁺¹⁹	42 ⁺¹¹	42 ⁺¹⁷	35	45	35 ⁺¹⁰	30 ⁺¹¹	35
I have already been there and wanted to return	38 ⁺²	42 ⁺¹	26 ⁻¹	43 ⁺⁵	34	15	32 ⁺²	28 ⁺²	19
It offers activities I like	27 ⁺²	26 ⁺¹	27 ⁺¹	34 ⁺⁷	24	28	23 ⁺³	30 ⁺³	27
It is a safe destination	26 ⁺¹	25 ⁺²	29 ⁺²	30 ⁺¹	38	38	31 ⁺¹	31 ⁺⁴	32
I have friends / family to visit there	19 ⁻³	19 ⁻³	22 ⁺¹	13 ⁻¹²	19	26	29 ⁻¹	32 ⁻²	32
I have friends / family that recommended it	14 ⁺¹	14 =	15 ⁺³	13 ⁻²	19	25	19 ⁺³	17 ⁻¹	25
I found a good deal to go there	14 ⁺¹	12 ⁺¹	18 ⁺³	18 ⁺¹	33	22	21 ⁺⁴	16 ⁺³	18
It is a country with good healthcare infrastructures	7 ⁻¹	7 ⁻¹	10 ⁺¹	5 =	10	26	9 ⁻²	10 ⁺¹	17
I saw a documentary / movie / read an article / a book about this country	7 =	6 ⁻¹	9 ⁺²	7 =	16	19	6 ⁻¹	10 ⁺⁴	15
It is a country where the Covid incidence is low	2 ⁻²	2 ⁻²	3 ⁻²	2 ⁻¹	5	10	5 ⁻⁴	4 ⁻¹	9
Other	7 ⁻¹	8 =	6 ⁻¹	5 ⁻²	3	2	9 ⁻⁵	9 ⁻⁶	1

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













XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3

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)	44 ⁺¹⁷	44 ⁺²⁶	40 ⁺¹⁰	42 ⁺¹⁹	50 ⁺²¹	46 ⁺¹⁹	49 ⁺¹⁹	40 ⁺¹⁰	44 ⁺¹⁰	41 ⁺⁹	42 ⁺¹⁶	41 ⁺¹⁹
I have already been there and wanted to return	38 ⁺²	37 ⁻³	41 ⁻¹	45 ⁻¹	46 ⁺⁷	40 ⁻³	46 ⁺²	27 ⁺²	23 ⁻⁶	27 ⁻¹	32 ⁻⁵	51 ⁺¹¹
It offers activities I like	27 ⁺²	26 ⁻³	24 ⁺²	38 ⁺⁴	21 ⁻¹	21 ⁻⁴	22 ⁺⁵	26 =	26 ⁺³	29 ⁺²	24 ⁺¹	42 ⁺⁵
It is a safe destination	26 ⁺¹	20 =	31 ⁺⁷	20 ⁺¹	31 ⁺³	19 ⁻²	29 ⁺⁴	28 ⁺³	32 =	26 ⁻²	31 ⁺¹	29 ⁺²
I have friends / family to visit there	19 ⁻³	23 ⁻¹	19 ⁻⁶	14 ⁻³	14 ⁻⁵	23 ⁻¹	17 ⁺³	24 ⁺²	20 ⁻⁷	22 ⁺³	15 ⁻¹¹	12 ⁻⁹
I have friends / family that recommended it	14 ⁺¹	11 =	18 ⁺³	10 =	13 ⁻²	15 =	14 ⁻¹	14 ⁺³	17 ⁺²	13 ⁺¹	17 ⁺¹	11 ⁻²
I found a good deal to go there	14 ⁺¹	14 ⁺⁶	19 ⁺⁴	11 ⁻¹	11 ⁻¹	9 ⁺¹	8 ⁻³	19 ⁺²	19 ⁺⁴	16 ⁺³	24 ⁺⁶	13 =
It is a country with good healthcare infrastructures	7 ⁻¹	7 ⁺²	9 ⁺²	5 ⁻¹	6 ⁻⁶	10 ⁺³	5 ⁻⁴	10 ⁺²	11 ⁺³	8 ⁻²	6 ⁺¹	4 ⁻²
I saw a documentary / movie / read an article / a book about this country	7 =	6 ⁻²	8 ⁺¹	3 ⁻¹	9 ⁺¹	7 ⁻¹	5 ⁻²	8 ⁺²	8 ⁺⁴	10 ⁺¹	10 ⁺²	4 ⁻¹
It is a country where the Covid incidence is low	2 ⁻²	0 ⁻⁴	2 ⁻¹	2 ⁻¹	2 ⁻³	3 ⁻¹	1 ⁻¹	4 ⁺¹	1 ⁻²	4 ⁻²	4 ⁺¹	1 =
Other	7 ⁻¹	6 ⁻¹	9 ⁻³	11 ⁺¹	6 ⁻¹	8 ⁻²	10 ⁺²	7 ⁻²	7 =	4 ⁻¹	4 ⁻²	6 ⁻²

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











XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023



02

NEXT SUMMER TRAVEL PLANS DETAILS

3/3 Motivations for the choice of destination

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
I like the weather/climate in this/these country (ies)	35 +15	36	31	35	45	35 +10	31 +9	29 +12	32	37
I have already been there and wanted to return	22 -3	38	41	41	15	32 +2	28 +2	28 +3	20	18
It offers activities I like	23 +3	26	29	22	28	23 +3	34 +6	28 +1	33	23
It is a safe destination	38 +1	44	41	32	38	31 +1	32 +3	30 +4	33	32
I have friends / family to visit there	20 -4	15	24	19	26	29 -1	31 -3	32 -3	32	33
I have friends / family that recommended it	23 =	18	8	18	25	19 +3	16 -2	18 +1	28	23
I found a good deal to go there	37 +5	35	28	27	22	21 +4	16 =	16 +5	18	18
It is a country with good healthcare infrastructures	15 +2	11	7	5	26	9 -2	11 +4	9 -2	21	14
I saw a documentary / movie / read an article / a book about this country	24 +5	13	14	11	19	6 -1	15 +7	7 +3	16	14
It is a country where the Covid incidence is low	6 =	5	8	2	10	5 -4	4 -2	3 -1	8	9
Other	4 +1	2	1	5	2	9 -5	7 -3	11 -7	1	2

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




XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS



1/3 Modes of transportation used to go to destination

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Personal car	49 -1	47 -3	53 +3	50 -2	20	22	33 +4	48 =	26
Plane	44 +7	47 +8	41 +4	41 +9	67	63	60 +3	47 +4	65
Train	17 +1	17 +2	16 =	19 +1	30	47	13 -3	12 +5	15
Bus	9 +1	8 +1	9 +2	14 +1	19	24	11 +1	9 +3	16
Rental car through an agency	5 +1	5 +1	7 +1	3 =	11	16	14 +1	14 +4	14
Boat	5 =	5 =	5 -1	3 +1	6	12	6 +1	6 +2	7
Rental car between private individuals	3 =	3 =	4 +1	2 =	7	16	7 -2	7 +2	12
Bike	3 +1	4 +2	2 =	4 +2	3	14	3 -1	3 =	6
Camper van	3 =	3 =	2 =	3 +1	3	7	6 +2	6 +2	5
Carpooling	2 -1	2 -1	2 -2	2 +1	4	6	2 -1	6 =	8
Motorbike	2 =	2 =	2 =	2 +1	3	12	3 -1	3 =	5
Other	1 =	1 -1	1 =	1 =	1	1	2 =	1 -1	0

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3 Modes of transportation planned to go to destination

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Personal car	49 -1	62 -4	34 -2	45 -5	46 -1	40 -1	54 -2	52 +1	55 +9	52 +2	46 -5	54 +1
Plane	44 +7	25 +1	59 +5	48 +11	45 +6	57 +13	46 +8	43 +6	43 -5	38 +3	40 +9	42 +9
Train	17 +1	16 +3	21 +3	12 =	17 +2	21 +2	16 +1	18 +2	10 =	20 +3	22 +4	16 -1
Bus	9 +1	5 +1	12 +6	7 +2	7 -3	7 =	9 +1	7 -1	10 +1	9 +2	12 -1	16 +2
Rental car through an agency	5 +1	5 +2	7 +2	4 =	3 -1	6 +1	2 =	7 +2	7 +2	8 +2	5 +2	2 =
Boat	5 =	3 -1	9 +4	3 =	8 +3	5 -1	3 =	4 -1	2 =	9 +1	3 +1	4 +2
Rental car between private individuals	3 =	3 =	5 +1	3 =	3 =	3 -1	1 -1	4 +1	3 -1	5 +1	4 +2	1 =
Bike	3 +1	3 +2	4 +2	3 =	5 +2	5 +1	2 =	1 =	2 +1	4 +1	5 +3	4 =
Camper van	3 =	3 =	4 +2	2 -1	5 =	5 -1	1 -2	2 =	2 =	3 +1	4 +2	2 -1
Carpooling	2 -1	3 =	3 +1	1 -2	2 -3	2 -1	3 +1	3 -1	2 =	3 =	1 =	3 =
Motorbike	2 =	2 =	2 +1	2 =	3 +1	1 -3	2 =	1 -1	2 +1	2 =	2 +1	1 =
Other	1 =	0 -1	1 -2	1 =	1 =	2 =	1 =	0 -1	2 +2	1 =	1 =	1 +1











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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

3/3 Modes of transportation planned to go to destination

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Personal car	33 +1	8	41	9	22	33 +4	47 -2	50 +2	31	22
Plane	58 +3	78	52	75	63	60 +3	49 +5	45 +3	58	70
Train	25 +7	28	44	28	47	13 -3	11 +6	13 +5	14	16
Bus	20 +7	16	15	23	24	11 +1	8 +3	9 +3	14	17
Rental car through an agency	17 =	6	9	10	16	14 +1	17 +5	12 +3	14	14
Boat	6 +2	7	5	5	12	6 +1	8 +4	4 +1	7	7
Rental car between private individuals	11 =	4	5	6	16	7 -2	7 +1	6 +1	9	13
Bike	4 +1	2	3	2	14	3 -1	2 -1	3 +1	6	6
Camper van	5 +1	3	3	3	7	6 +2	6 +2	7 +3	7	4
Carpooling	7 =	3	1	3	6	2 -1	5 =	6 =	10	6
Motorbike	6 -1	2	3	2	12	3 -1	3 =	2 -1	4	6
Other	0 -1	1	1	1	1	2 =	1 -1	2 =	0	0

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




XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS



1/3 Reasons of choice of the main transportation mode

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
It is the most convenient way to reach my destination	57	57	54	60	57	56	58	54	45
I am used to taking this mode of transportation	34	33	33	37	32	37	30	38	36
It is more affordable for me	25	25	27	19	30	43	28	33	29
NEW It is the only possible way to reach my destination	21	23	18	17	34	35	30	24	32
It is more environmentally friendly	9	10	8	8	14	36	8	10	20

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

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3











Reasons of choice of the main transportation mode

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
It is the most convenient way to reach my destination	57	52	58	58	59	59	58	59	52	52	58	62
I am used to taking this mode of transportation	34	40	26	30	37	34	34	33	32	33	36	38
It is more affordable for me	25	30	24	24	26	24	24	24	26	31	24	15
NEW It is the only possible way to reach my destination	21	20	27	22	23	22	25	17	21	16	15	18
It is more environmentally friendly	9	9	11	8	10	12	8	9	6	9	11	6

02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Reasons of choice of the main transportation mode

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
It is the most convenient way to reach my destination	60	50	66	56	56	58	51	57	47	44
I am used to taking this mode of transportation	32	31	50	23	37	30	40	36	40	33
It is more affordable for me	36	24	36	26	43	28	37	30	28	30
NEW It is the only possible way to reach my destination	38	34	19	37	35	30	22	26	28	35
It is more environmentally friendly	19	14	8	12	36	8	12	9	22	19

02

NEXT SUMMER TRAVEL PLANS DETAILS













1/3 Type of accommodation planned

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Hotel	50 ⁺³	51 ⁺⁵	49 ⁺¹	50 ⁺²	70 ⁺⁹	64	59 ⁺⁸	53 ⁺¹	50
Rental of a house or apartment	31 ⁺¹	30 ⁻²	30 =	32 ⁺¹¹	26 ⁻⁴	29	24 ⁻¹	27 ⁺⁹	28
Friends'/family's houses or in your holiday home	17 ⁻⁴	17 ⁻⁴	18 ⁻²	15 ⁻⁸	17 ⁻⁸	32	24 =	26 ⁻³	30
A bed & breakfast	16 ⁺¹	11 ⁺¹	22 ⁻¹	23 ⁺³	19 ⁻⁴	25	14 ⁻²	14 ⁺²	20
Camping	10 =	11 ⁻¹	7 ⁺¹	11 ⁺³	10 ⁻⁵	23	10 =	19 ⁺⁴	15
Boat (e.g. cruise)	5 =	5 =	4 =	4 ⁻¹	10 ⁻¹	21	9 =	11 ⁺³	19
Go on a road trip in a camper van/caravan	5 =	6 =	4 ⁺¹	4 =	9 ⁻⁴	27	10 ⁻¹	8 =	19
NEW Do a house exchange	3	3	2	2	4	11	2	4	10

02

NEXT SUMMER TRAVEL PLANS DETAILS











2/3 Type of accommodation planned

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Hotel	50 ⁺³	31 ⁺¹	51 =	49 ⁺³	55 ⁺¹	56 ⁺⁴	63 ⁺²	57 ⁺⁶	46 ⁺³	44 ⁻²	48 =	51 ⁺²
Rental of a house or apartment	31 ⁺¹	37 ⁻³	31 ⁺¹	31 ⁻³	32 ⁺⁵	24 ⁻¹	28 ⁺⁶	30 =	30 ⁻¹	31 ⁺²	34 ⁺¹¹	31 ⁺¹⁷
Friends'/family's houses or in your holiday home	17 ⁻⁴	26 =	15 ⁻⁵	16 ⁻²	14 ⁻³	20 ⁻⁴	14 ⁻¹	19 ⁻⁵	20 ⁻⁵	16 =	18 ⁻⁶	12 ⁻⁷
A bed & breakfast	16 ⁺¹	5 =	15 ⁺¹	11 ⁺³	10 ⁻¹	12 ⁻¹	12 ⁺¹	14 ⁺³	24 ⁺³	30 ⁻¹	18 ⁺²	27 ⁻⁵
Camping	10 =	15 ⁻²	11 ⁺¹	9 ⁻²	12 ⁺¹	11 =	6 ⁻²	6 ⁺¹	7 ⁺¹	7 ⁺¹	8 ⁺²	14 =
Boat (e.g. cruise)	5 =	2 =	9 =	3 =	10 ⁺³	4 ⁻²	3 ⁻¹	4 =	3 =	6 ⁺²	5 =	3 ⁻¹
Go on a road trip in a camper van/caravan	5 =	5 =	8 ⁺²	5 =	6 =	5 ⁻³	3 =	3 ⁻¹	3 =	6 ⁺³	4 =	3 ⁻¹
NEW Do a house exchange	3	2	4	3	3	4	2	3	2	2	4	1

02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Type of accommodation planned

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Hotel	60 ⁻¹	75	84	71	64	59 ⁺⁸	58 ⁺²	50 ⁺²	49	51
Rental of a house or apartment	38 ⁺⁸	21	11	25	29	24 ⁻¹	28 ⁺⁸	25 ⁺⁸	30	27
Friends'/family's houses or in your holiday home	22 ⁻³	14	13	16	32	24 =	25 =	27 ⁻⁷	28	33
A bed & breakfast	24 ⁺¹	24	6	14	25	14 ⁻²	16 ⁺⁴	12 =	20	20
Camping	19 ⁺⁴	8	6	3	23	10 =	18 ⁺⁵	21 ⁺⁴	15	15
Boat (e.g. cruise)	13 ⁺²	9	4	9	21	9 =	14 ⁺⁴	9 ⁺²	19	18
Go on a road trip in a camper van/caravan	13 =	7	4	7	27	10 ⁻¹	8 ⁻¹	9 ⁺¹	19	19
NEW Do a house exchange	5	5	2	2	11	2	5	2	11	10

02

NEXT SUMMER TRAVEL PLANS DETAILS

1/3 Criteria of choice of accommodation

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
NEW It is my favourite mode of accommodation	38	38	36	41	34	42	28	32	35
I am used to taking this mode of accommodation	34	35	32	35	35	38	33	33	36
It is more affordable for me	32	32	37	27	35	43	42	40	33
NEW It's a reliable type of accommodation	28	29	24	30	39	36	42	35	33
For all the services and activities proposed	20	22	18	17	22	33	23	22	25
It's a safe / well-protected accommodation	19	19	20	18	37	46	31	28	30
It is more environmentally friendly	8	9	7	7	13	34	9	11	22

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/3

Criteria of choice of accommodation

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
NEW It is my favourite mode of accommodation	38	32	32	33	48	39	41	38	36	34	39	44
I am used to taking this mode of accommodation	34	39	36	37	31	32	33	33	33	30	27	43
It is more affordable for me	32	39	34	31	25	34	27	32	40	38	34	21
NEW It's a reliable type of accommodation	28	26	35	26	29	27	30	28	22	23	25	35
For all the services and activities proposed	20	16	24	26	19	23	25	23	14	17	23	12
It's a safe / well-protected accommodation	19	17	25	16	23	23	13	23	20	16	22	15
It is more environmentally friendly	8	9	10	6	10	9	7	6	7	9	9	4

02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Criteria of choice of accommodation

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
NEW It is my favourite mode of accommodation	35	40	33	28	42	28	35	30	38	33
I am used to taking this mode of accommodation	34	31	46	34	38	33	33	34	34	38
It is more affordable for me	41	27	35	37	43	42	36	44	32	34
NEW It's a reliable type of accommodation	39	35	43	40	36	42	37	33	31	35
For all the services and activities proposed	26	24	10	23	33	23	24	20	29	23
It's a safe / well-protected accommodation	40	34	33	38	46	31	29	28	28	32
It is more environmentally friendly	19	9	7	13	34	9	13	10	23	22

02

NEXT SUMMER TRAVEL PLANS DETAILS

1/6 Factors that play an 'essential' role in choosing a destination (1/2)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
My intended/possible budget	53 =	50 =	63 +6	48 -4	51 -3	55	53 +1	54 +2	58
The risk related to armed conflict in the destination zone*	49 +28	45 +27	57 +29	47 +28	59 +23	54	37 +20	39 +23	54
The weather conditions in the destination country	46 -1	47 +2	49 -2	37 -5	44 +4	61	37 +5	43 +5	56
Opportunities for leisure or cultural activities	45 =	45 -2	44 +4	45 -3	45 +1	57	51 +3	50 +3	52
The risk of a terrorist attack / The risk of an armed conflict	43 +8	39 +8	52 +9	44 +12	61 +3	57	33 +2	38 +6	57
The risk of a personal attack	42 +7	38 +7	53 +9	37 +7	60 +4	54	36 -1	39 +5	59
The quality of on-site tourist infrastructures	41 +3	38 +3	48 +4	36 -4	44 =	57	34 +4	32 =	51
Travel time to my trip destination	35 -1	33 -1	39 =	35 -3	38 +1	54	31 -3	36 +1	50
The risk of a natural disaster	34 +5	30 +5	44 +8	32 +6	56 +2	55	30 +3	33 +11	55

*Item modified. In 2023: "the war in Ukraine"




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 Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

2/6 Factors that play an 'essential' role in choosing a destination (2/2)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
The political climate in the destination country / The political and social climate in the destination country	34 +6	32 +5	41 +7	26 +5	41 +3	46	25 -3	32 +7	51
The risks of social unrest	33 +5	31 +5	39 +3	28 +7	52 +6	52	30 +5	33 +8	53
The cost of living in the destination country	33 +11	29 +9	44 +17	31 +12	39 +4	57	34 +13	30 +6	54
NEW The possibility that the destination will be overcrowded	30	28	35	28	31	45	21	27	40
Health risks (eg COVID)	26 -4	22 -3	35 -5	23 =	49 -5	56	27 -1	30 +1	57
Your ability to speak the destination country's language	25 +2	22 +2	32 +3	22 =	27 -5	43	24 -4	33 +6	40
The quality of the internet access	24 =	22 =	27 =	24 -2	43 -4	57	25 -1	30 +3	54
The ecological footprint of the trip	18 -1	16 -1	23 -1	15 -6	23 -6	47	15 -1	19 +2	43

02

NEXT SUMMER TRAVEL PLANS DETAILS

3/6 Factors that play an 'essential' role in choosing a destination (1/2)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
My intended/possible budget	53 =	59 +4	47 -3	52 +3	46 -1	48 =	47 -7	62 +4	70 -3	58 +5	54 -2	43 +4
The risk related to armed conflict in the destination zone*	49 +28	43 +29	38 +22	47 +28	45 +23	43 +25	53 +36	58 +31	61 +32	51 +23	47 +28	46 +28
The weather conditions in the destination country	46 -1	41 -6	46 +10	49 +6	48 -3	45 -4	52 +1	45 -4	58 -2	45 -7	52 +9	23 -15
Opportunities for leisure or cultural activities	45 =	44 =	51 -1	33 +2	49 +2	40 -5	52 +3	41 -4	52 +1	39 +4	53 +2	37 -2
The risk of a terrorist attack / The risk of an armed conflict	43 +8	34 +5	35 +9	39 +7	35 =	42 +5	47 +6	55 +9	57 +6	43 +4	45 +14	43 +9
The risk of a personal attack	42 +7	37 +8	36 +6	37 +8	36 +2	37 +3	42 +6	54 +7	58 +4	48 +8	37 +8	38 +6
The quality of on-site tourist infrastructures	41 +3	37 =	35 +7	43 +6	39 =	37 +1	39 -1	46 +3	53 +2	45 +2	42 =	30 -1
Travel time to my trip destination	35 -1	29 -1	34 +2	31 +1	34 -4	33 +2	35 -2	32 -2	47 +5	39 -2	45 +5	26 -2
The risk of a natural disaster	34 +5	26 +3	26 +3	32 +6	29 =	32 +8	32 +2	47 +6	47 +7	37 +7	38 +12	28 +2

*Item modified. In 2023: "the war in Ukraine"

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 Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

4/6

Factors that play an 'essential' role in choosing a destination (2/2)

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
The political climate in the destination country / The political and social climate in the destination country	34 +6	33 +6	26 +5	28 +7	39 +6	31 +5	38 +10	45 +9	43 +9	36 +4	31 +9	22 +5
The risks of social unrest	33 +5	23 +2	29 +6	27 +7	33 +2	30 =	41 +4	44 +4	39 +3	33 =	27 +8	30 +3
The cost of living in the destination country	33 +11	36 +15	28 +12	26 +11	31 +7	28 +7	25 +8	41 +16	51 +22	40 +12	39 +18	23 +11
NEW The possibility that the destination will be overcrowded	30	25	25	29	31	29	31	34	39	34	32	23
Health risks (eg COVID)	26 -4	19 =	26 +4	21 =	20 -15	24 -2	23 -10	39 -5	39 +2	26 -12	25 +4	22 -7
Your ability to speak the destination country's language	25 +2	28 +6	21 +7	22 +4	22 -2	21 -3	17 =	30 =	32 +3	33 +5	25 +3	19 -3
The quality of the internet access	24 =	18 =	26 +4	25 +1	23 -3	23 =	17 -1	25 -1	32 -1	25 -1	32 +3	17 =
The ecological footprint of the trip	18 -1	17 +3	17 +4	13 -1	18 -5	17 =	13 -1	22 =	23 -4	25 =	23 -1	8 -1













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 Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

5/6 Factors that play an 'essential' role in choosing a destination (1/2)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
My intended/possible budget	55 +1	54	53	44	55	53 +1	57 +1	52 +3	60	56
The risk related to armed conflict in the destination zone*	58 +22	63	51	62	54	37 +20	39 +21	39 +26	58	51
The weather conditions in the destination country	48 +8	47	35	41	61	37 +5	45 +5	41 +6	58	55
Opportunities for leisure or cultural activities	50 +6	44	36	45	57	51 +3	55 +7	47 +2	53	52
The risk of a terrorist attack / The risk of an armed conflict	62 +4	64	49	63	57	33 +2	38 +4	38 +8	62	54
The risk of a personal attack	61 +5	64	50	60	54	36 -1	41 +5	38 +6	61	57
The quality of on-site tourist infrastructures	43 -1	46	47	42	57	34 +4	35 +1	29 -1	55	47
Travel time to my trip destination	41 +4	42	38	32	54	31 -3	40 +1	32 =	54	46
The risk of a natural disaster	59 +5	58	45	56	55	30 +3	32 +9	33 +12	55	55

*Item modified. In 2023: "the war in Ukraine"

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 Base : To those who plan to go on a trip











XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

02

NEXT SUMMER TRAVEL PLANS DETAILS

6/6

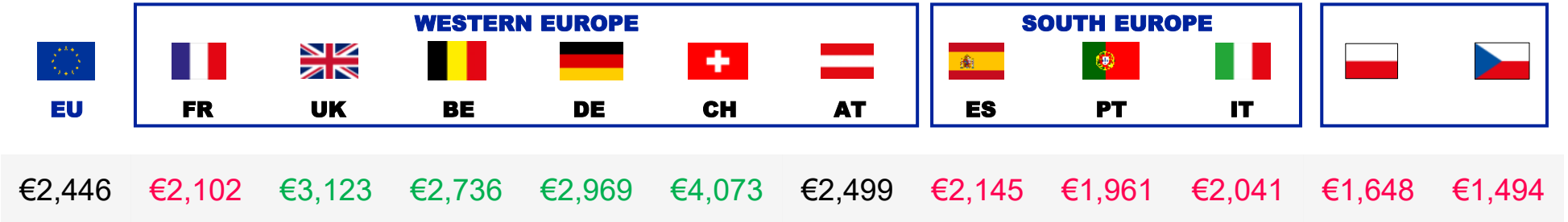
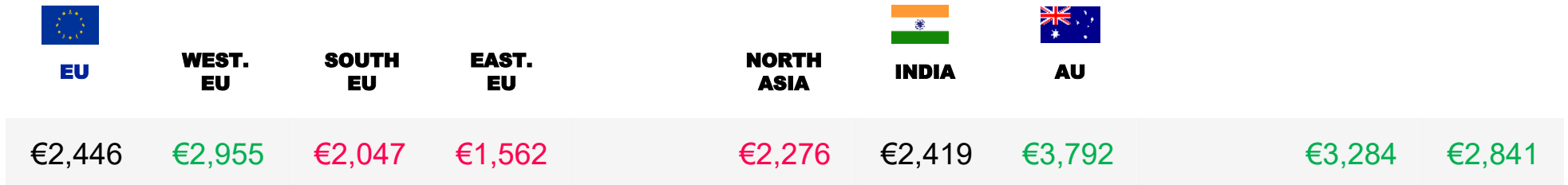
Factors that play an 'essential' role in choosing a destination (2/2)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
The political climate in the destination country / The political and social climate in the destination country	44 +6	38	42	40	46	25 -3	33 +9	31 +6	55	48
The risks of social unrest	53 +7	51	44	55	52	30 +5	37 +9	30 +7	54	52
The cost of living in the destination country	46 +11	36	43	31	57	34 +13	31 +5	29 +7	62	48
NEW The possibility that the destination will be overcrowded	39	33	23	26	45	21	31	25	43	37
Health risks (eg COVID)	56 +2	45	47	45	56	27 -1	34 +4	27 -1	56	57
Your ability to speak the destination country's language	31 -1	25	34	21	43	24 -4	38 +10	29 +4	45	37
The quality of the internet access	50 +3	42	37	39	57	25 -1	33 +3	27 +4	57	51
The ecological footprint of the trip	31 +2	20	21	16	47	15 -1	23 +6	15 -3	48	39

02

NEXT SUMMER TRAVEL PLANS DETAILS

Summer holiday budget



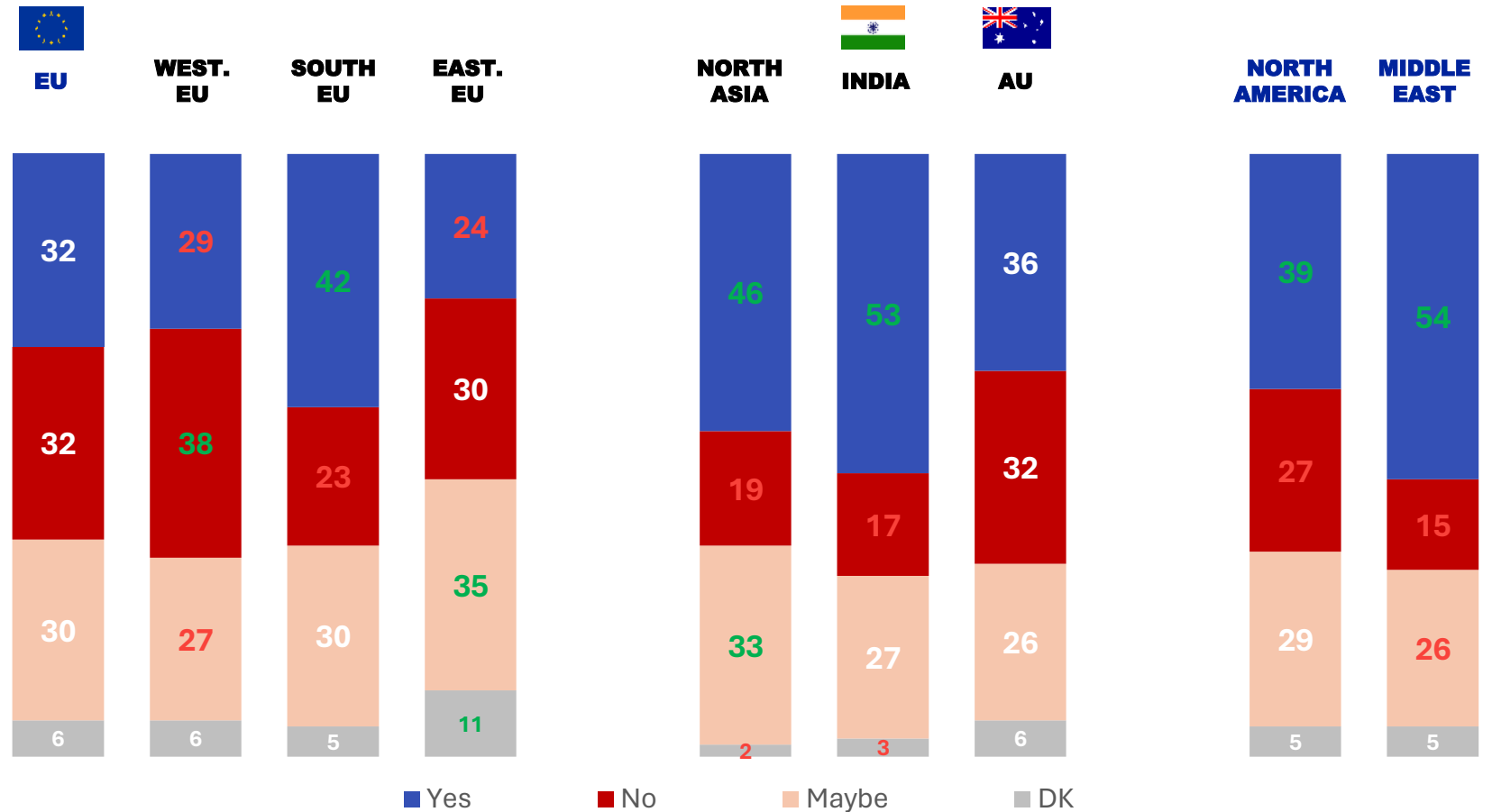
Q30. What is your full budget for your next [summer trip / trip] (when you take into account transportation, accommodations, food, leisure activities, etc.)? Base : To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe

02

NEXT SUMMER TRAVEL PLANS DETAILS

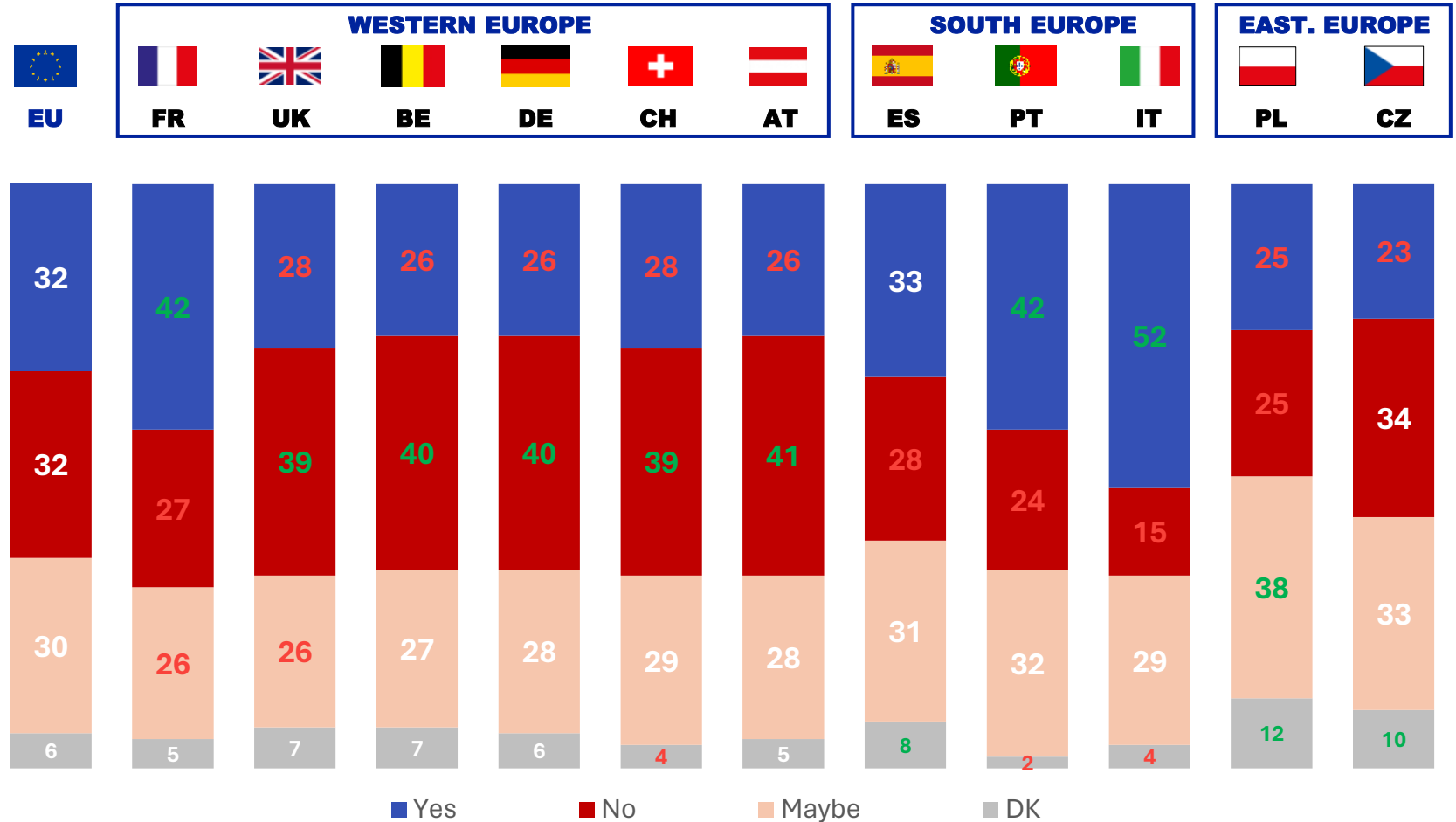
1/3 Impact of inflation / decrease of purchasing power on travel plans



02

NEXT SUMMER TRAVEL PLANS DETAILS

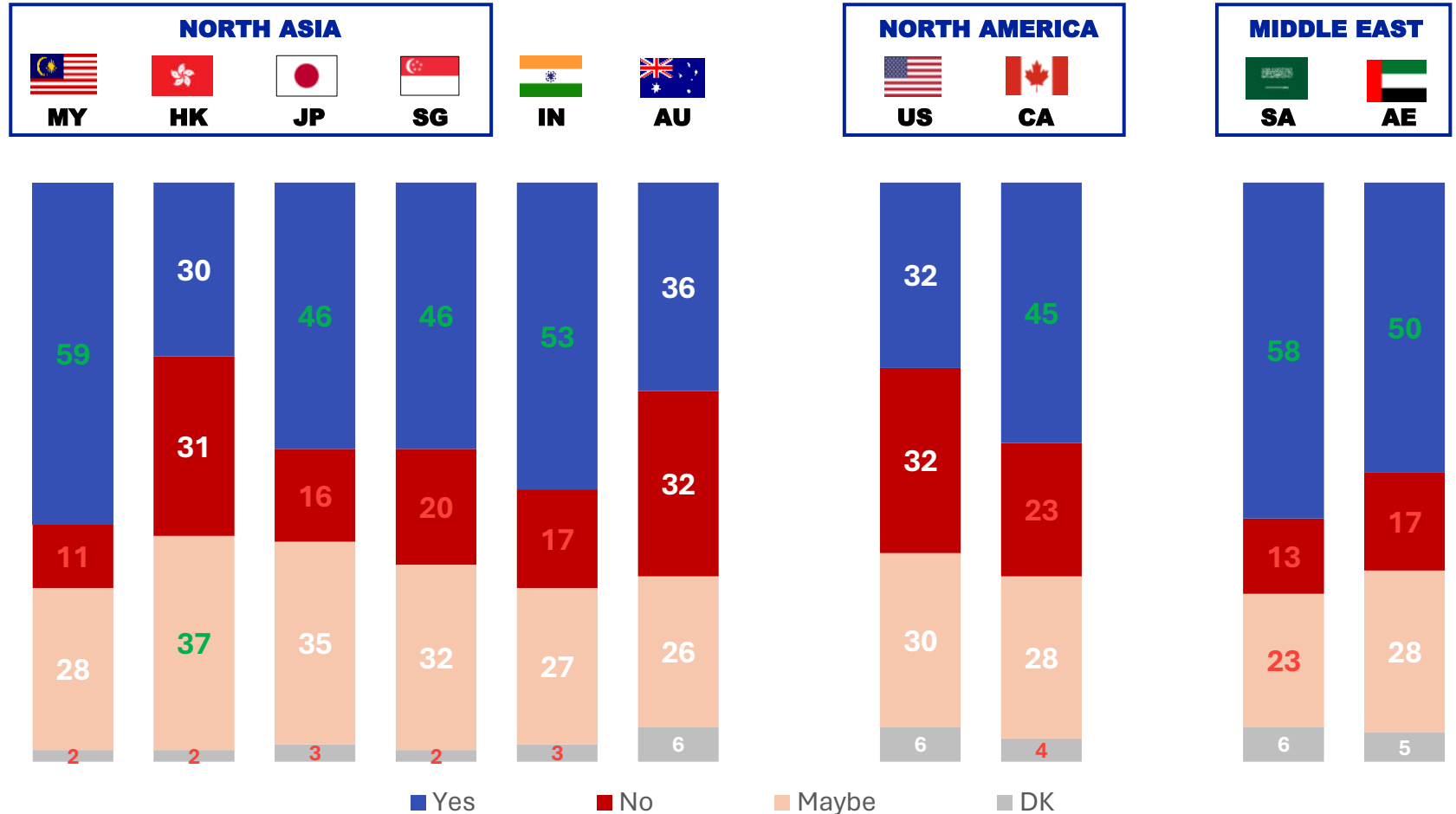
2/3 Impact of inflation / decrease of purchasing power on travel plans



02

NEXT SUMMER TRAVEL PLANS DETAILS




3/3 Impact of inflation / decrease of purchasing power on travel plans



02

NEXT SUMMER TRAVEL PLANS DETAILS


1/3 Adaptation of travel plans due to inflation context (Yes - %)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Booking cheaper mean(s) of accommodation	58	53	66	57	56	57	60	57	58
Reducing the number of destinations	53	51	56	50	45	46	42	49	53
Reducing my budget spent on food, visits and activities	52	51	54	50	47	51	53	54	50
Looking for last minute deals	48	45	50	56	43	56	52	53	56
Taking cheaper mean(s) of transportation	47	42	53	50	55	58	55	45	58
Choosing a closer destination	45	41	53	42	47	51	43	39	54
Reducing my trip duration	42	40	47	40	42	47	41	42	49

02

NEXT SUMMER TRAVEL PLANS DETAILS











2/3 Adaptation of travel plans due to inflation context (Yes - %)

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Booking cheaper mean(s) of accommodation	58	62	50	57	37	53	52	65	70	63	51	63
Reducing the number of destinations	53	61	43	56	43	52	49	55	61	53	48	53
Reducing my budget spent on food, visits and activities	52	58	50	55	47	45	46	57	53	53	53	47
Looking for last minute deals	48	43	49	43	44	40	51	55	44	52	56	55
Taking cheaper mean(s) of transportation	47	45	43	40	37	42	41	54	55	50	50	50
Choosing a closer destination	45	49	33	39	37	43	39	54	57	49	42	42
Reducing my trip duration	42	44	35	42	38	41	39	54	44	44	42	37

02

NEXT SUMMER TRAVEL PLANS DETAILS

3/3 Adaptation of travel plans due to inflation context (Yes - %)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Booking cheaper mean(s) of accommodation	57	52	52	60	57	60	57	58	58	58
Reducing the number of destinations	48	43	40	43	46	42	46	50	60	48
Reducing my budget spent on food, visits and activities	49	42	52	44	51	53	54	54	50	49
Looking for last minute deals	38	41	53	47	56	52	54	53	60	52
Taking cheaper mean(s) of transportation	56	48	57	55	58	55	43	46	62	56
Choosing a closer destination	52	47	43	43	51	43	34	42	60	49
Reducing my trip duration	45	40	43	39	47	41	42	42	52	46

03




ATTITUDES AND CONCERNS



03

ATTITUDES AND CONCERNS

1/3 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	 AU	NORTH AMERICA	MIDDLE EAST
Adopt responsible behaviors not to waste local resources	88 ⁺²	86 ⁺¹	93 ⁺¹	83 ⁺³	91 ⁻⁴	94	83 ⁺²	80 ⁻¹	90
Supporting local economy	88 ⁺¹	87 ⁺¹	92 ⁺¹	86 =	91 ⁻⁴	92	86 =	85 ⁺²	91
Trying to reduce the amount of waste in the destination country	87 ⁺¹	87 ⁺²	91 ⁺¹	82 =	91 ⁻¹	93	81 ⁻⁴	80 =	91
Avoid activities that are not socially responsible or respectful of the local culture / environment / wildlife	83 ⁺¹	82 ⁺³	88 ⁻¹	79 ⁻¹	89 ⁻⁴	93	78 ⁻¹	78 ⁺¹	91
Picking an accommodation with a green certification	75 =	72 ⁺¹	85 ⁺¹	69 ⁻³	79 ⁻⁹	93	66 ⁻²	67 ⁺¹	88
Contributing to a project in favor of the environment regeneration, or to a social cause in favor of vulnerable populations	68 ⁺⁶	64 ⁺¹⁰	81 ⁺⁵	63 ⁻²	77 ⁻⁸	91	63 ⁺⁵	62 ⁺⁷	88
Travel to a closer destination to reduce carbon footprint	67 =	62 ⁺¹	80 ⁺³	61 ⁻³	74 ⁻¹³	87	55 ⁻³	60 =	83
Switching transportation modes for a lower carbon impact	66 ⁻¹	60 =	81 ⁺¹	61 ⁻³	78 ⁻⁹	90	59 ⁻⁴	58 ⁻¹	86
Bringing goods to donate to the local population when visiting underprivileged regions	65 ⁺¹	61 ⁺³	75 =	60 ⁻⁶	66 ⁻¹⁵	90	59 ⁻⁶	59 ⁻⁵	87
Volunteer with NGOs to join community tourism projects	43 ⁻²	37 ⁻¹	54 ⁻¹	43 ⁻⁷	57 ⁻¹⁵	82	38 ⁻⁴	42 ⁺²	77













Q29. [...] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices? Base: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

2/3 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
Adopt responsible behaviors not to waste local resources	88 ⁺²	88 ⁻¹	84 ⁺²	86 ⁺³	84 ⁺¹	89 ⁺⁴	85 =	90 =	94 =	93 ⁺¹	85 ⁻¹	82 ⁺²¹
Supporting local economy	88 ⁺¹	85 ⁻¹	86 =	86 ⁺⁴	85 =	89 ⁺³	90 ⁺⁴	92 ⁺²	93 =	92 =	87 ⁺¹	84 =
Trying to reduce the amount of waste in the destination country	87 ⁺¹	86 ⁻¹	84 ⁺¹	85 ⁺¹	86 =	90 ⁺³	91 ⁺⁴	88 =	93 =	91 =	83 ⁻¹	80 ⁺¹
Avoid activities that are not socially responsible or respectful of the local culture / environment / wildlife	83 ⁺¹	82 ⁺²	81 ⁺¹	81 ⁺¹	80 ⁺⁴	83 ⁺³	84 ⁺⁵	85 ⁻²	90 ⁻¹	90 ⁺¹	81 =	76 =
Picking an accommodation with a green certification	75 =	74 ⁺¹	69 ⁺¹	69 ⁺²	73 ⁺³	74 ⁺²	70 =	84 ⁺³	85 ⁻²	86 =	75 =	63 ⁺¹
Contributing to a project in favor of the environment regeneration, or to a social cause in favor of vulnerable populations	68 ⁺⁶	66 ⁺¹²	63 ⁺⁷	56 ⁺⁷	64 ⁺¹²	71 ⁺¹⁷	63 ⁺¹⁶	77 ⁺⁵	85 ⁺⁹	81 ⁺²	73 ⁺²	54 ⁺¹¹
Travel to a closer destination to reduce carbon footprint	67 =	71 ⁺²	60 ⁺⁴	59 ⁻⁴	60 =	64 =	57 ⁺²	75 ⁺²	83 ⁺⁶	81 ⁺¹	67 =	55 ⁻²
Switching transportation modes for a lower carbon impact	66 ⁻¹	64 =	60 ⁺⁴	60 =	56 ⁻²	66 ⁺²	57 ⁻¹	80 ⁺³	79 ⁺³	82 =	68 ⁺¹	54 ⁻²
Bringing goods to donate to the local population when visiting underprivileged regions	65 ⁺¹	64 ⁻³	55 ⁺⁴	59 ⁺³	60 ⁺⁴	71 ⁺⁵	57 ⁺²	71 ⁺²	79 ⁺²	76 ⁻³	67 ⁻¹	53 ⁻³
Volunteer with NGOs to join community tourism projects	43 ⁻²	35 ⁻¹	37 ⁺³	34 ⁻¹	41 ⁻³	43 ⁻²	33 ⁻⁴	52 ⁺¹	53 ⁻⁴	57 ⁻¹	54 =	34 ⁻²











Q29. [...] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices? Base: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

3/3 Willingness to adopt sustainable travel practices Yes (whether people are already doing it or would be ready to do it) (%)

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Adopt responsible behaviors not to waste local resources	94 ⁻¹	92	89	88	94	83 ⁺²	79 ⁺¹	81 ⁻²	88	91
Supporting local economy	93 ⁻²	92	88	87	92	86 =	85 ⁺²	85 ⁺¹	92	90
Trying to reduce the amount of waste in the destination country	94 ⁺²	90	93	86	93	81 ⁻⁴	75 ⁻⁴	84 ⁺²	93	90
Avoid activities that are not socially responsible or respectful of the local culture / environment / wildlife	93 =	87	86	86	93	78 ⁻¹	76 ⁺¹	79 =	92	90
Picking an accommodation with a green certification	88 =	76	74	76	93	66 ⁻²	65 ⁺²	68 ⁻¹	89	87
Contributing to a project in favor of the environment regeneration, or to a social cause in favor of vulnerable populations	87 ⁺²	77	67	71	91	63 ⁺⁵	63 ⁺⁸	60 ⁺⁴	88	88
Travel to a closer destination to reduce carbon footprint	85 ⁻²	75	61	67	87	55 ⁻³	61 ⁺¹	60 =	86	81
Switching transportation modes for a lower carbon impact	87 =	77	74	74	90	59 ⁻⁴	56 ⁻²	60 ⁻¹	88	86
Bringing goods to donate to the local population when visiting underprivileged regions	80 ⁻¹	60	58	60	90	59 ⁻⁶	60 ⁻³	58 ⁻⁷	86	87
Volunteer with NGOs to join community tourism projects	74 ⁺²	54	44	48	82	38 ⁻⁴	48 ⁺⁸	37 ⁻³	77	78




Q29. [...] Here are some initiatives for a more sustainable way of travelling. Where do you stand regarding the following responsible practices? Base: To those who plan to go on a trip

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

1/3 Main concerns when traveling Concerned (“very concerned” or “quite concerned”) (%)

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Losing something important	54	46	69	53	76	79	57	49	68
Getting robbed	53 +7	44 +7	70 +7	54 +3	75 -9	75	48 +7	46 +11	66
Becoming sick in transit or at destination	51 +6	43 +7	68 +5	53 +2	75 -5	76	55 +9	46 +10	63
The quality of medical facilities at destination	51 +9	44 +10	68 +10	48 +3	67 -6	80	52 +10	43 +9	62
Having bad weather at destination	50 +7	44 +7	63 +9	48 =	78 -1	78	45 +7	49 +11	62
The possibility that the destination will be overcrowded	50	45	61	48	69	75	46	44	61
Fear for your physical safety	46 +8	38 +8	62 +11	47 +1	75 -5	80	43 +9	42 +13	66
Needing to cancel	45 +3	38 +3	61 +5	43 +1	67 =	70	45 +7	37 +6	60
Not being able to return home	45 +6	37 +7	62 +8	44 =	67 -12	73	47 +7	39 +7	60
Having a bad experience	44 +6	38 +7	64 +8	31 +3	71 -5	74	45 +8	44 +12	64
A natural disaster when travelling	44	35	61	43	75	77	44	38	64
Fear of a terrorist attack	43	36	58	43	66	71	37	35	
Unplanned delays	42 +4	36 +4	58 +7	38 =	71 -4	73	49 +7	45 +7	64
An epidemic outbreak when travelling	39 +1	30 +1	58 +4	38 -4	71 -12	74	44 +3	35 +3	63
My carbon footprint	37 +2	33 +3	52 +5	25 -7	43 -16	74	34 +5	32 +7	52

Q36. Are you concerned about the following when you travel? Base: All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

2/3 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
Losing something important	54	57	54	51	34	46	35	76	74	58	59	46
Getting robbed	53 +7	61 +13	45 +12	49 +6	34 +3	45 +8	29 -3	77 +5	76 +11	58 +3	62 +7	46 +11
Becoming sick in transit or at destination	51 +6	53 +12	46 +13	49 +12	34 =	39 +6	34 +5	72 +5	72 +9	61 +2	60 +4	46 +15
The quality of medical facilities at destination	51 +9	55 +11	49 +16	50 +12	33 +5	40 +7	36 +5	69 +7	74 +13	60 +7	53 +4	43 +13
Having bad weather at destination	50 +7	54 +7	48 +12	50 +10	37 +6	39 +7	35 +2	62 +9	68 +8	61 +7	54 +2	42 +7
The possibility that the destination will be overcrowded	50	57	43	48	36	50	38	66	63	54	56	41
Fear for your physical safety	46 +8	51 +14	40 +16	42 +11	31 +2	37 +10	27 +3	66 +9	71 +13	49 +5	58 +6	36 +13
Needing to cancel	45 +3	52 +10	39 +5	42 +7	32 =	37 +5	27 -3	68 +7	60 +9	55 +2	50 +4	35 +8
Not being able to return home	45 +6	52 +15	43 +14	42 +11	27 =	34 +4	26 -1	69 +5	70 +12	46 =	55 +5	33 +11
Having a bad experience	44 +6	49 +14	49 +16	43 +7	29 +2	34 +8	25 +1	70 +6	69 +12	53 +3	30 =	32 +12
A natural disaster when travelling	44	49	36	39	27	36	24	63	67	54	53	33
Fear of a terrorist attack	43	50	36	39	29	37	26	60	66	48	49	37
Unplanned delays	42 +4	45 +11	47 +10	35 +4	31 +3	31 +3	30 +6	62 +6	62 +4	50 +4	44 +2	31 +7
An epidemic outbreak when travelling	39 +1	42 +8	34 +4	32 +1	23 -2	30 +3	20 -2	64 +3	64 +10	47 -2	48 +1	29 +7
My carbon footprint	37 +2	42 +8	41 +7	33 +5	26 =	34 +12	22 =	53 +4	62 +5	42 -1	36 -1	13 -1











Q36. Are you concerned about the following when you travel? Base: All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

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

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Losing something important	87	72	58	89	79	57	46	52	61	76
Getting robbed	89 +5	66	59	87	75	48 +7	44 +10	48 +12	60	71
Becoming sick in transit or at destination	83 +3	70	61	85	76	55 +9	43 +9	49 +10	59	67
The quality of medical facilities at destination	81 +8	54	55	77	80	52 +10	39 +6	47 +11	55	69
Having bad weather at destination	83 +4	71	78	80	78	45 +7	49 +12	48 +9	58	67
The possibility that the destination will be overcrowded	75	55	77	69	75	46	44	44	58	64
Fear for your physical safety	86 +6	69	57	87	80	43 +9	42 +13	43 +14	61	72
Needing to cancel	75 +8	59	58	76	70	45 +7	33 +4	40 +7	57	63
Not being able to return home	82 +3	53	50	83	73	47 +7	37 +5	41 +9	54	66
Having a bad experience	81 +5	58	65	81	74	45 +8	44 +12	45 +12	57	71
A natural disaster when travelling	87	65	65	84	77	44	38	38	58	69
Fear of a terrorist attack	80	56	47	82	71	37	35	35		
Unplanned delays	79 +4	63	66	77	73	49 +7	45 +9	46 +7	59	69
An epidemic outbreak when travelling	85 +2	62	59	79	74	44 +3	34 +4	37 +3	59	68
My carbon footprint	64 +5	31	28	50	74	34 +5	31 +7	32 +6	47	57




Q36. Are you concerned about the following when you travel? Base: All respondents

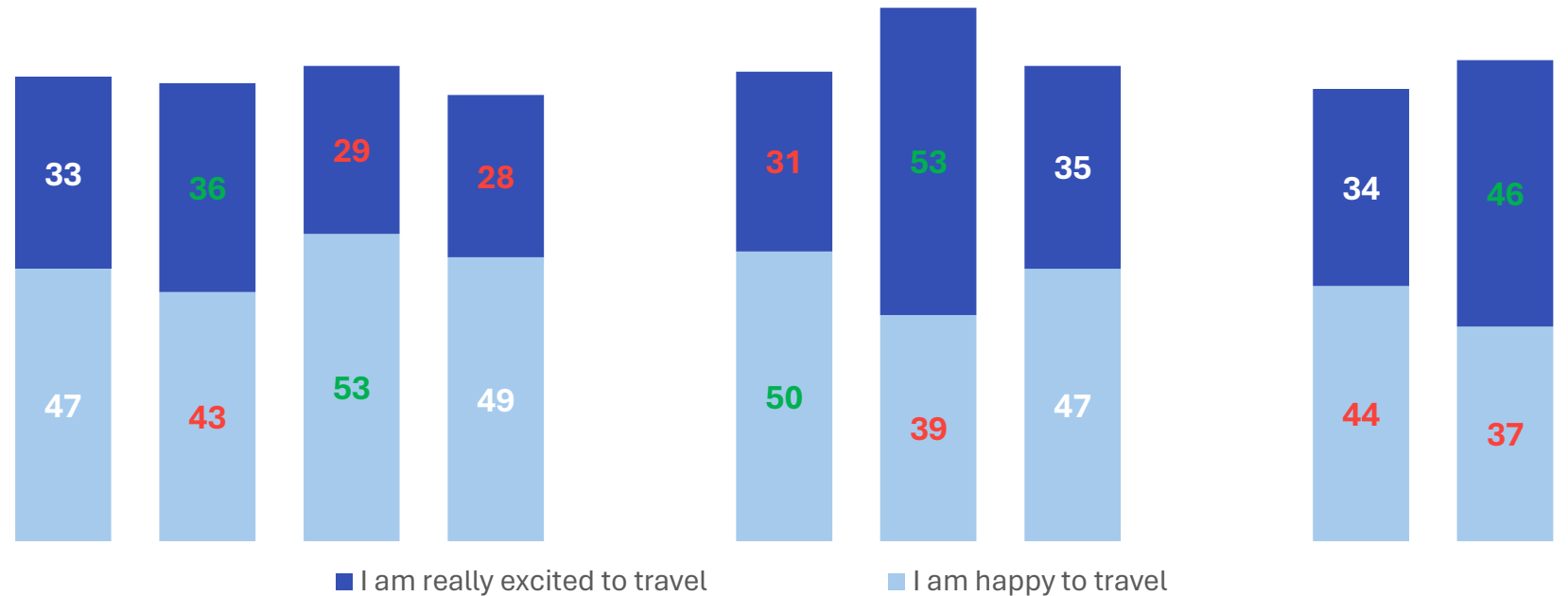
XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

1/3 Travel enthusiasm

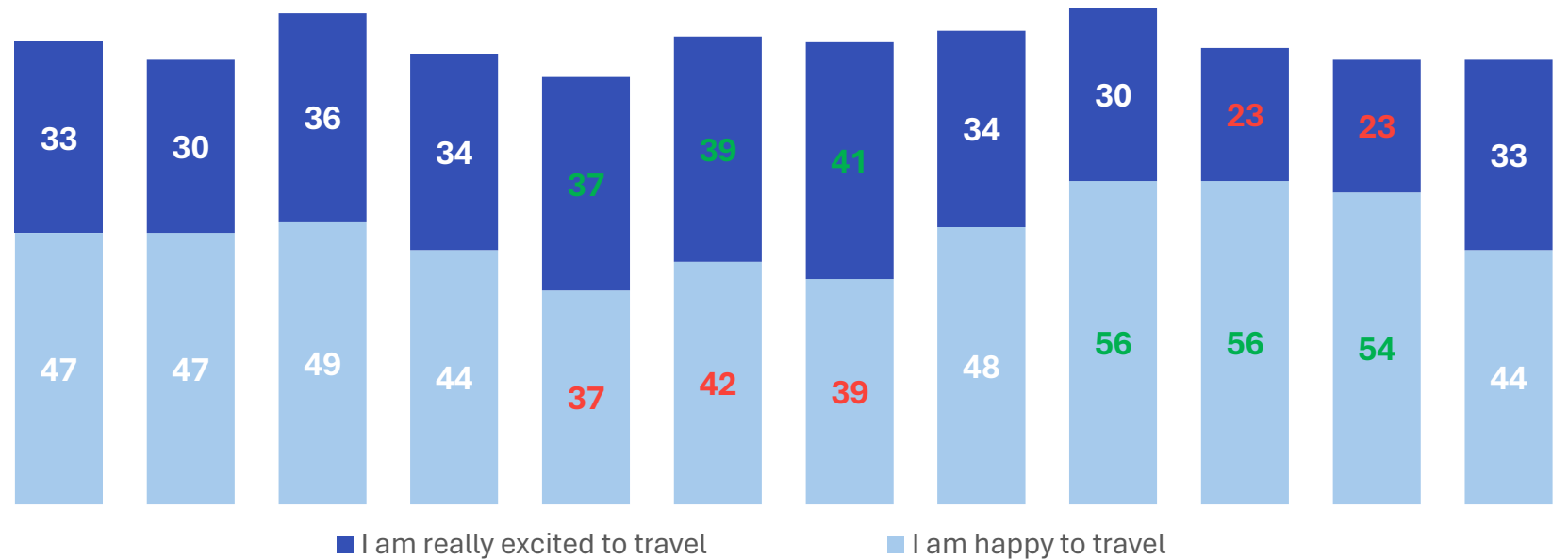
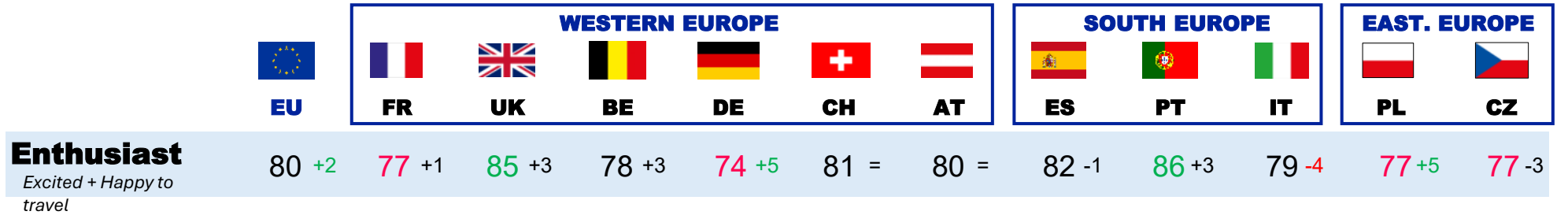
	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Enthusiast <i>Excited + Happy to travel</i>	80 +2	79 +4	82 -1	77 +3	81 +1	92	82 +8	78 +3	83



03

ATTITUDES AND CONCERNS

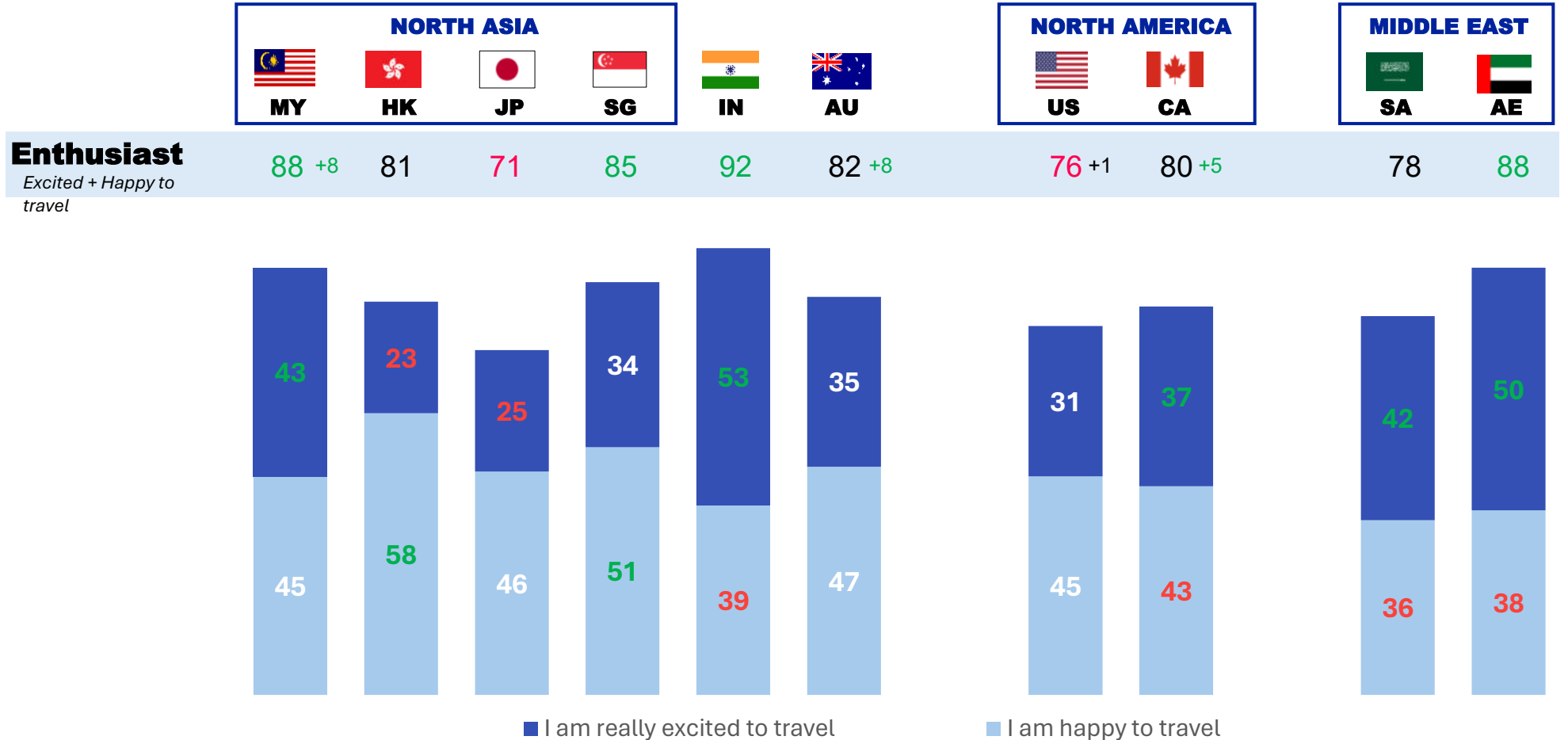
2/3 Travel enthusiasm



03

ATTITUDES AND CONCERNS

3/3 Travel enthusiasm






NQ5. How would you describe your enthusiasm and desire to travel this year? Base: All respondents

XX/XX Significantly higher or lower score vs Europe

03

ATTITUDES AND CONCERNS

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

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Inflation / high prices affecting my leisure budget	70 ⁺²	64 ⁻¹	81 ⁺⁶	69 ⁻⁴	74 ⁻⁸	76	66 ⁺²	69 ⁺⁶	75
Personal / family reasons	58 ⁺⁴	53 ⁺³	70 ⁺⁵	55 ⁺¹	66 ⁻³	79	49 ⁺³	52 ⁺¹	73
Wars, armed conflicts worldwide*	57 ⁺²⁰	50 ⁺¹⁹	69 ⁺²²	57 ⁺¹⁴	67 ⁺¹⁴	76	45 ⁺¹⁶	43 ⁺²¹	
Some places becoming too hot in the summer due to climate change	52	47	62	51	68	81	39	42	69
The rise of extreme / populist parties in democratic countries	41	38	50	37	53	69	35	37	
The ecological impact of travelling (carbon footprint)	40 ⁻⁴	37 ⁻³	51 ⁻¹	32 ⁻⁸	44 ⁻²⁴	72	27 ⁻⁵	31 =	58
Covid-19	31 ⁻³	25 ⁻⁴	42 ⁺¹	31 ⁻⁶	61 ⁻¹⁵	67	34 ⁻⁸	31 ⁻⁴	62

*Item modified. In 2023: "the war in Ukraine"

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Base: All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

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

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
Inflation / high prices affecting my leisure budget	70 +2	76 -1	54 -5	67 +9	63 +1	64 +10	66 +3	77 +4	87 +3	79 +4	74 -2	65 +5
Personal / family reasons	58 +4	60 +3	47 +2	57 +6	46 -2	53 +3	51 +2	64 +2	78 +5	68 +2	59 +2	51 +5
Wars, armed conflicts worldwide*	57 +20	58 +25	41 +18	50 +22	48 +12	57 +26	49 +18	67 +24	76 +20	61 +14	62 +15	52 +24
Some places becoming too hot in the summer due to climate change	52	54	40	50	46	47	46	59	66	62	57	46
The rise of extreme / populist parties in democratic countries	41	43	33	37	37	40	36	51	57	42	43	32
The ecological impact of travelling (carbon footprint)	40 -4	45 -4	33 +2	36 +2	36 -6	41 -1	33 -5	49 +3	59 -2	48 -7	41 -4	23 -1
Covid-19	31 -3	28 -2	27 =	26 -3	24 -7	25 -2	18 -5	41 +2	48 =	37 -6	38 -1	23 -5

*Item modified. In 2023: "the war in Ukraine"

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Base: All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

03

ATTITUDES AND CONCERNS

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

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	IN	AU	US	CA	SA	AE
Inflation / high prices affecting my leisure budget	84 +2	58	76	75	76	66 +2	65 +4	73 +9	74	75
Personal / family reasons	73 +4	53	70	66	79	49 +3	52 +1	52 +1	71	75
Wars, armed conflicts worldwide*	83 +30	57	51	76	76	45 +16	41 +20	45 +21		
Some places becoming too hot in the summer due to climate change	79	56	66	69	81	39	39	45	68	71
The rise of extreme / populist parties in democratic countries	74	42	33	63	69	35	36	40		
The ecological impact of travelling (carbon footprint)	62 -6	36	32	49	72	27 -5	28 -2	34 +2	58	59
Covid-19	78 +2	47	59	60	67	34 -8	32 -2	30 -5	63	62

*Item modified. In 2023: "the war in Ukraine"

NQ6. How do each of the following issues impact your enthusiasm and desire to travel this year? Base: All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

04

WORKATION

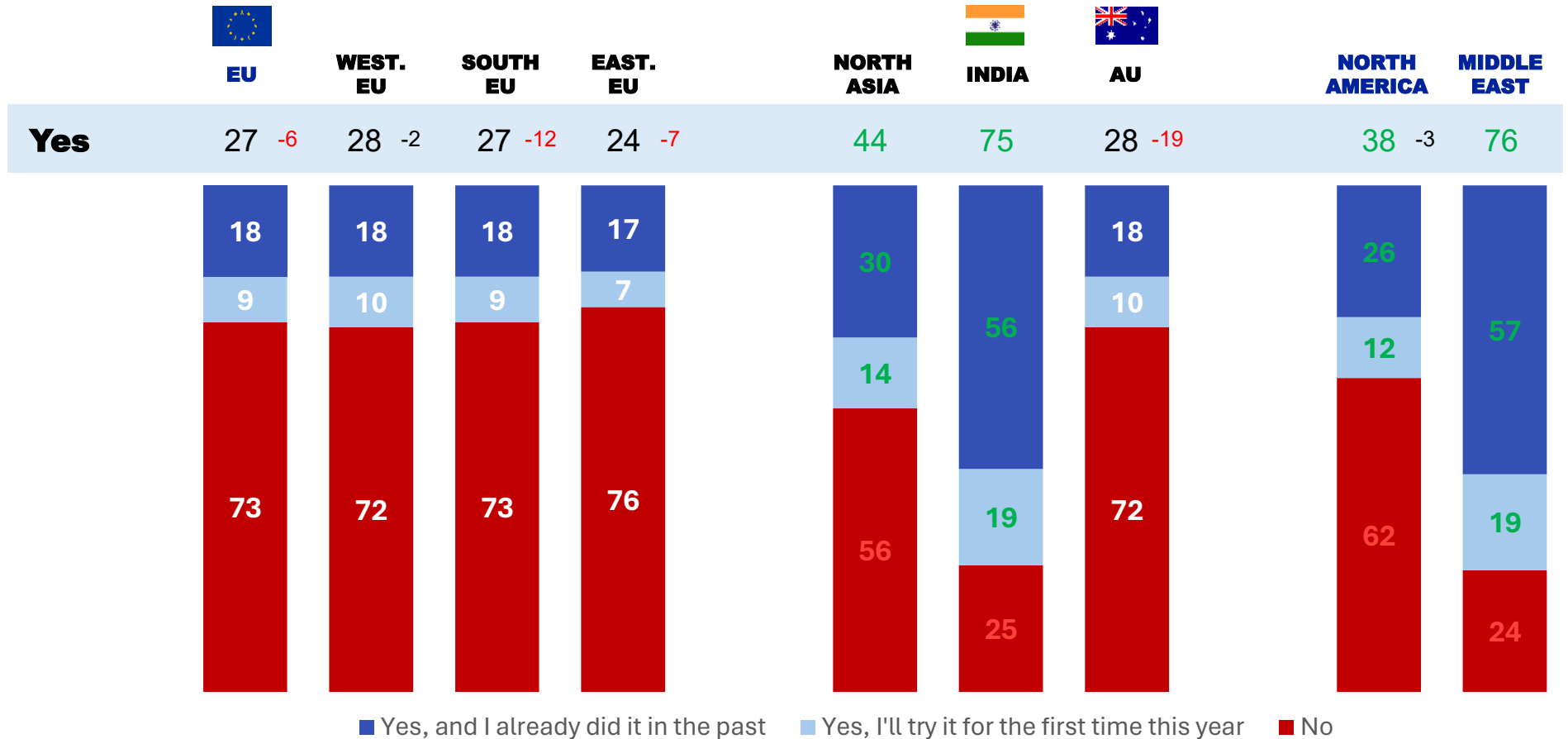


04

WORKATION

1/3 “Workation” intention among active people

Definition displayed to respondents: “Workation” is the combination of work and vacation, when people work remotely from a holiday destination.



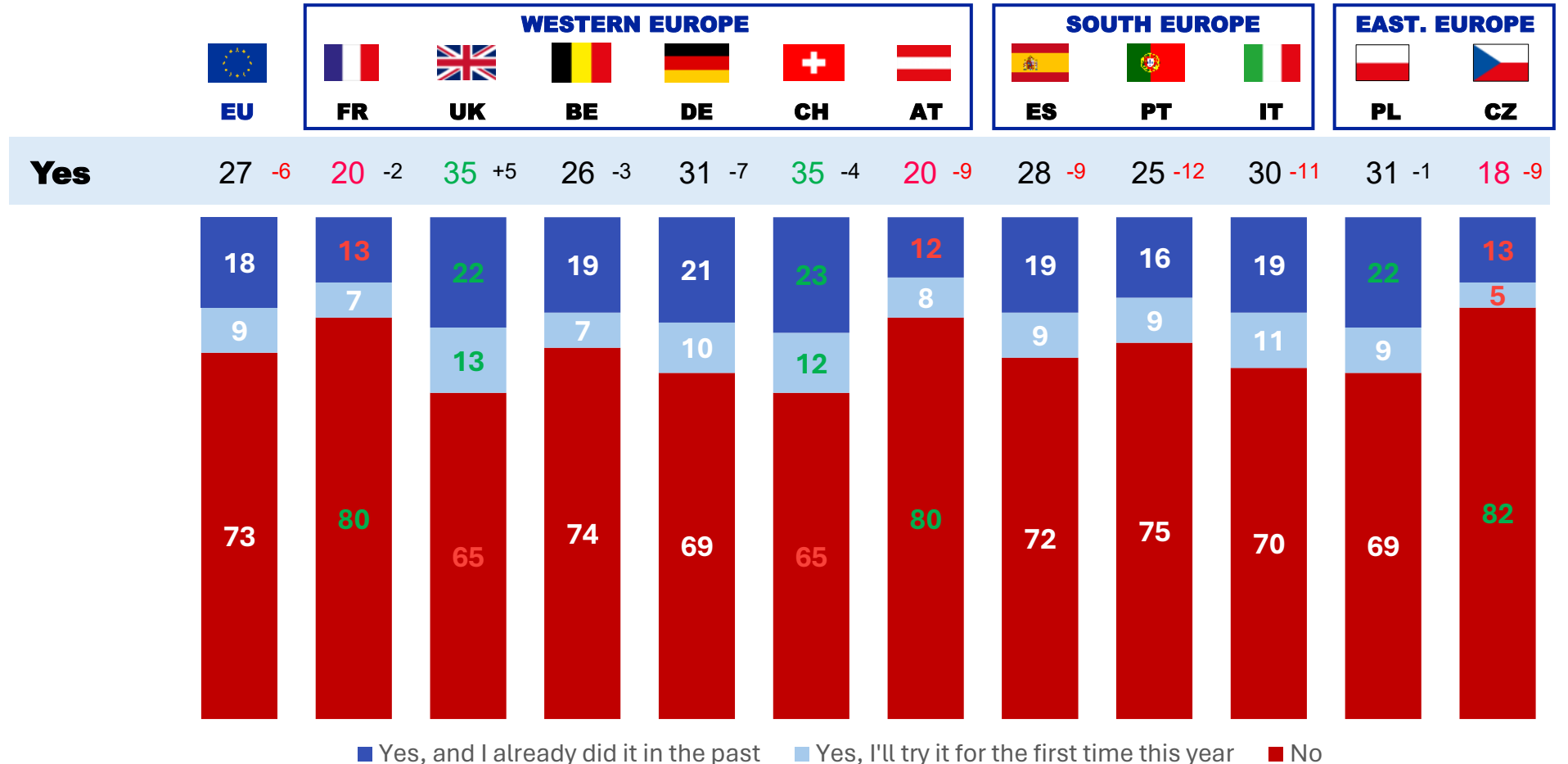
04

WORKATION

2/3

“Workation” intention among active people

Definition displayed to respondents: *“Workation” is the combination of work and vacation, when people work remotely from a holiday destination.*



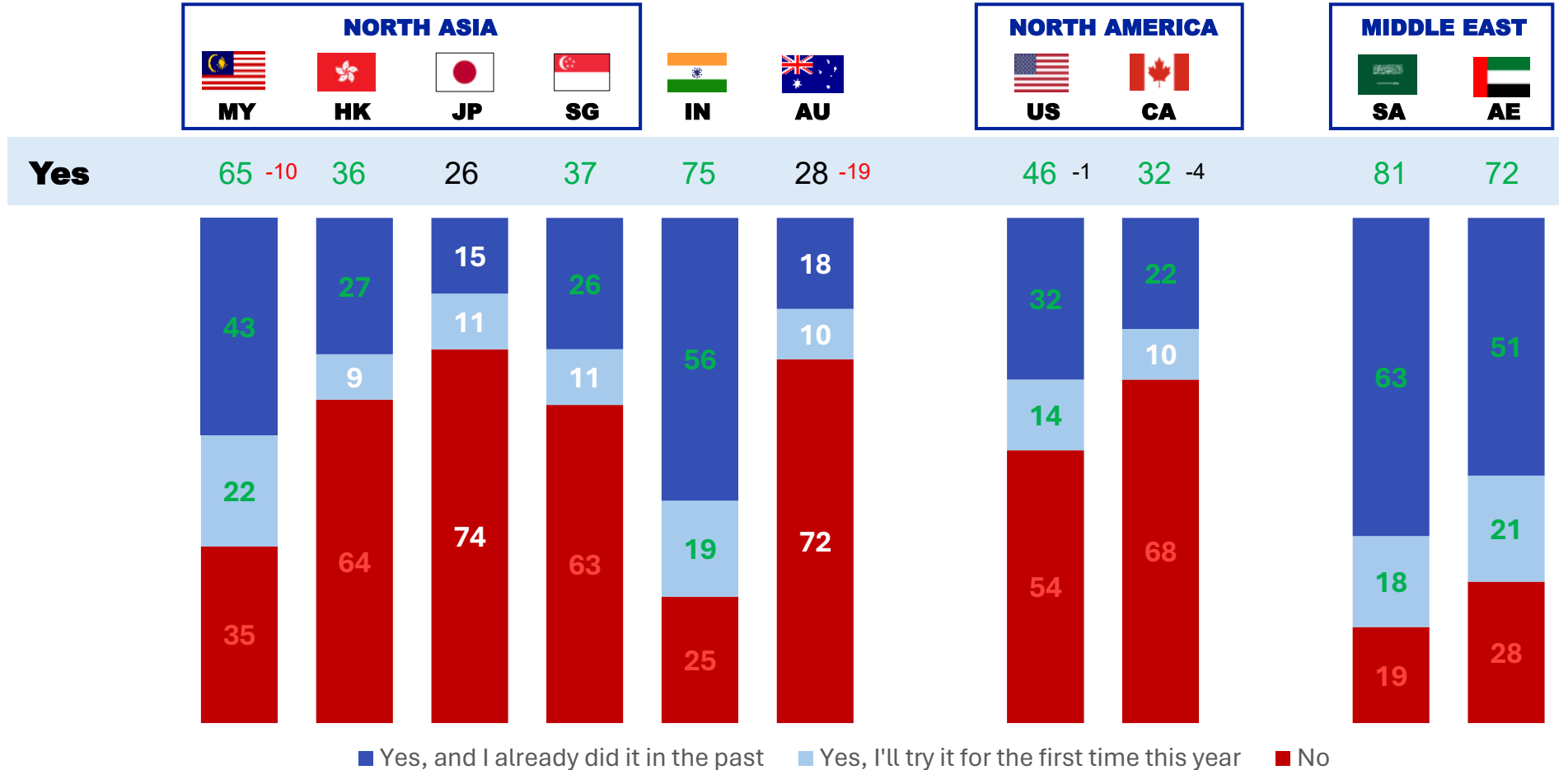
04

WORKATION

3/3

“Workation” intention among active people




Definition displayed to respondents: “Workation” is the combination of work and vacation, when people work remotely from a holiday destination.



04

WORKATION

1/3 Criteria of choice for doing workation













	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
It gives me the feeling that i have a longer vacation	48	49	44	55	57	66	43	53	57
Get out of the traditional routine of work	45	46	47	40	45	55	55	51	56
It gives me flexibility to work from where i want while enjoying time off	36	38	35	32	48	48	51	48	34
Other(s)	2	2	1	2	1	0	0	3	0

04

WORKATION

2/3

Criteria of choice for doing workation

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
It gives me the feeling that i have a longer vacation	48	43	64	44	47	48	42	43	31	57	58	49
Get out of the traditional routine of work	45	53	49	39	52	45	40	48	50	41	33	51
It gives me flexibility to work from where i want while enjoying time off	36	27	47	40	33	37	39	29	50	29	32	32
Other(s)	2	2	0	4	0	4	3	1	2	0	1	3

04

WORKATION

3/3 Criteria of choice for doing workation




	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	IN	AU	US	CA	SA	AE
It gives me the feeling that i have a longer vacation	61	60	48	50	66	43	56	48	60	54
Get out of the traditional routine of work	44	44	51	44	55	55	52	50	59	54
It gives me flexibility to work from where i want while enjoying time off	57	35	51	43	48	51	47	48	33	36
Other(s)	0	0	3	1	0	0	1	5	1	0

Low Base <40

04

WORKATION

1/3 Preferred accommodation for workation













	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
Book a hotel	31 +3	31 +2	27 =	35 +9	49 +3	41	36 -2	32 -5	32
Stay in a vacation rental (apartment/house)	27 -3	27 -4	30 -2	24 +3	22 +2	27	22 =	25 +3	26
Stay at a friend's place, at my family's or at my vacation home	22 -3	24 -1	22 +1	18 -15	17 -4	19	28 +3	27 -1	28
Stay at a bed and breakfast	18 +3	16 +3	19 +1	22 +5	12 =	13	13 -1	14 +4	14
Other	2 =	2 =	2 =	1 -2	0 -1	0	1 =	2 -1	0

04

WORKATION

2/3











Preferred accommodation for workation

	 EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		 FR	 UK	 BE	 DE	 CH	 AT	 ES	 PT	 IT	 PL	 CZ
Book a hotel	31 +3	23 +3	39 +2	29 +4	29 +1	34 -3	30 =	28 -4	26 -3	25 +2	32 +7	39 +7
Stay in a vacation rental (apartment/house)	27 -3	36 -6	21 -1	30 +1	28 -3	28 +2	21 -4	30 +1	29 -2	31 -3	25 +3	22 +8
Stay at a friend's place, at my family's or at my vacation home	22 -3	25 -4	18 -5	24 -1	32 +7	19 -6	28 +3	22 -1	26 -1	19 =	20 -14	16 -16
Stay at a bed and breakfast	18 +3	13 +7	22 +7	17 -2	8 -8	16 +6	18 +3	19 +5	16 +3	23 +1	23 +7	22 +3
Other	2 =	3 =	0 -3	0 -2	3 +3	3 +1	3 -2	1 -1	3 +3	2 =	0 -3	1 -2

04

WORKATION




3/3 Preferred accommodation for workation

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
Book a hotel	46 =	55	41	53	41	36 -2	38 -5	25 -4	30	33
Stay in a vacation rental (apartment/house)	23 +3	15	30	22	27	22 =	26 +3	25 +3	30	23
Stay at a friend's place, at my family's or at my vacation home	18 -3	18	14	14	19	28 +3	21 -3	32 -1	25	31
Stay at a bed and breakfast	13 +1	12	15	11	13	13 -1	14 +6	14 +2	15	13
Other	0 -1	0	0	0	0	1 =	1 -1	4 =	0	0

04

WORKATION

1/3 Envisaged place for workation

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
In my own country	39 ⁻⁴	32 ⁻⁶	52 ⁺⁴	36 ⁻¹⁴	38 ⁻¹²	46	44 ⁻³	48 ⁻⁶	36
Abroad	36 ⁺⁶	40 ⁺⁷	25 ⁺²	45 ⁺¹³	31 ⁺¹⁵	26	27 ⁺⁵	22 =	36
Both	20 ⁻⁴	22 ⁻⁴	20 ⁻⁶	11 ⁻²	27 ⁻⁵	27	22 ⁻⁵	28 ⁺⁸	25
I don't know yet	5 ⁺²	6 ⁺³	3 =	8 ⁺³	4 ⁺²	1	7 ⁺³	2 ⁻²	3

04

WORKATION

2/3











Envisaged place for workation

	EU	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE	
		FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ
In my own country	39 ⁻⁴	44 ⁻⁷	33 ⁻⁴	25 ⁻⁵	32 ⁻²	32 ⁺⁹	26 ⁺²	57 ⁺⁶	55 ⁺¹²	45 ⁻²	39 ⁻¹³	32 ⁻⁵
Abroad	36 ⁺⁶	23 ⁺⁵	42 ⁺⁴	47 ⁺¹	35 ⁺¹	41 ⁻¹⁰	48 ⁻⁴	23 ⁺¹	22 ⁻⁵	29 ⁺⁷	43 ⁺¹⁴	48 ⁼
Both	20 ⁻⁴	20 ⁻⁶	22 ⁻²	23 ⁺⁴	28 ⁻¹	21 ⁻²	21 ⁺³	17 ⁻⁷	20 ⁻⁷	24 ⁻⁴	10 ⁻³	12 ⁻¹
I don't know yet	5 ⁺²	13 ⁺⁸	3 ⁺²	5 ⁼	5 ⁺²	6 ⁺³	5 ⁻¹	3 ⁼	3 ⁼	2 ⁻¹	8 ⁺²	8 ⁺⁶

04

WORKATION

3/3 Envisaged place for workation




	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	 MY	 HK	 JP	 SG	 IN	 AU	 US	 CA	 SA	 AE
In my own country	44 -6	34	56	26	46	44 -3	44 -11	52 =	39	34
Abroad	23 +7	38	19	44	26	27 +5	17 +3	27 -4	33	38
Both	32 =	21	22	24	27	22 -5	36 +11	19 +5	26	25
I don't know yet	1 -1	7	3	6	1	7 +3	3 -3	2 -1	2	3

04

WORKATION

1/3

Workation plans in relation to holiday plans

	 EU	WEST. EU	SOUTH EU	EAST. EU	NORTH ASIA	 INDIA	 AU	NORTH AMERICA	MIDDLE EAST
You will stay longer at your holiday location to work from there after the end of your holiday	35 -3	37 -1	36 -4	31 =	40 +3	48	33 -4	42 +8	42
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	32 -9	31 -11	36 -5	30 -6	46 -7	48	50 +14	36 -5	43
You will change or postpone your initial plans of holidays: instead of taking holidays, you will work from a holiday location	31 +2	33 +1	29 +3	30 +7	36 +12	40	26 -8	31 +2	39
I don't know yet	14 +3	13 +2	13 +5	18 -2	6 -1	3	14 +3	15 +2	5

04

WORKATION

2/3

Workation plans in relation to holiday plans

	WESTERN EUROPE						SOUTH EUROPE			EAST. EUROPE		
EU	FR	UK	BE	DE	CH	AT	ES	PT	IT	PL	CZ	
You will stay longer at your holiday location to work from there after the end of your holiday	35 -3	36 +4	33 -9	36 =	40 +1	35 -4	41 -2	35 -4	36 +4	35 -6	36 +4	25 -1
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	32 -9	23 -18	47 +5	32 -5	33 -10	24 -15	25 -13	38 -1	38 -4	31 -11	29 -6	32 -4
You will change or postpone your initial plans of holidays: instead of taking holidays, you will work from a holiday location	31 +2	38 +7	35 +6	38 +6	27 -8	34 -1	28 +9	33 +4	19 +1	34 +8	27 +6	34 +4
I don't know yet	14 +3	10 =	10 -2	11 =	14 +5	18 +6	12 -1	9 =	18 +4	12 +6	17 -4	20 +5

04

WORKATION

3/3 Workation plans in relation to holiday plans

	NORTH ASIA						NORTH AMERICA		MIDDLE EAST	
	MY	HK	JP	SG	IN	AU	US	CA	SA	AE
You will stay longer at your holiday location to work from there after the end of your holiday	43 +6	32	36	41	48	33 -4	39 +6	46 +11	44	40
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	50 -3	40	55	42	48	50 +14	37 -6	35 -4	44	42
You will change or postpone your initial plans of holidays: instead of taking holidays, you will work from a holiday location	37 +13	35	38	32	40	26 -8	36 +8	26 -3	41	38
I don't know yet	4 -3	7	4	9	3	14 +3	12 +1	17 +3	3	6

05

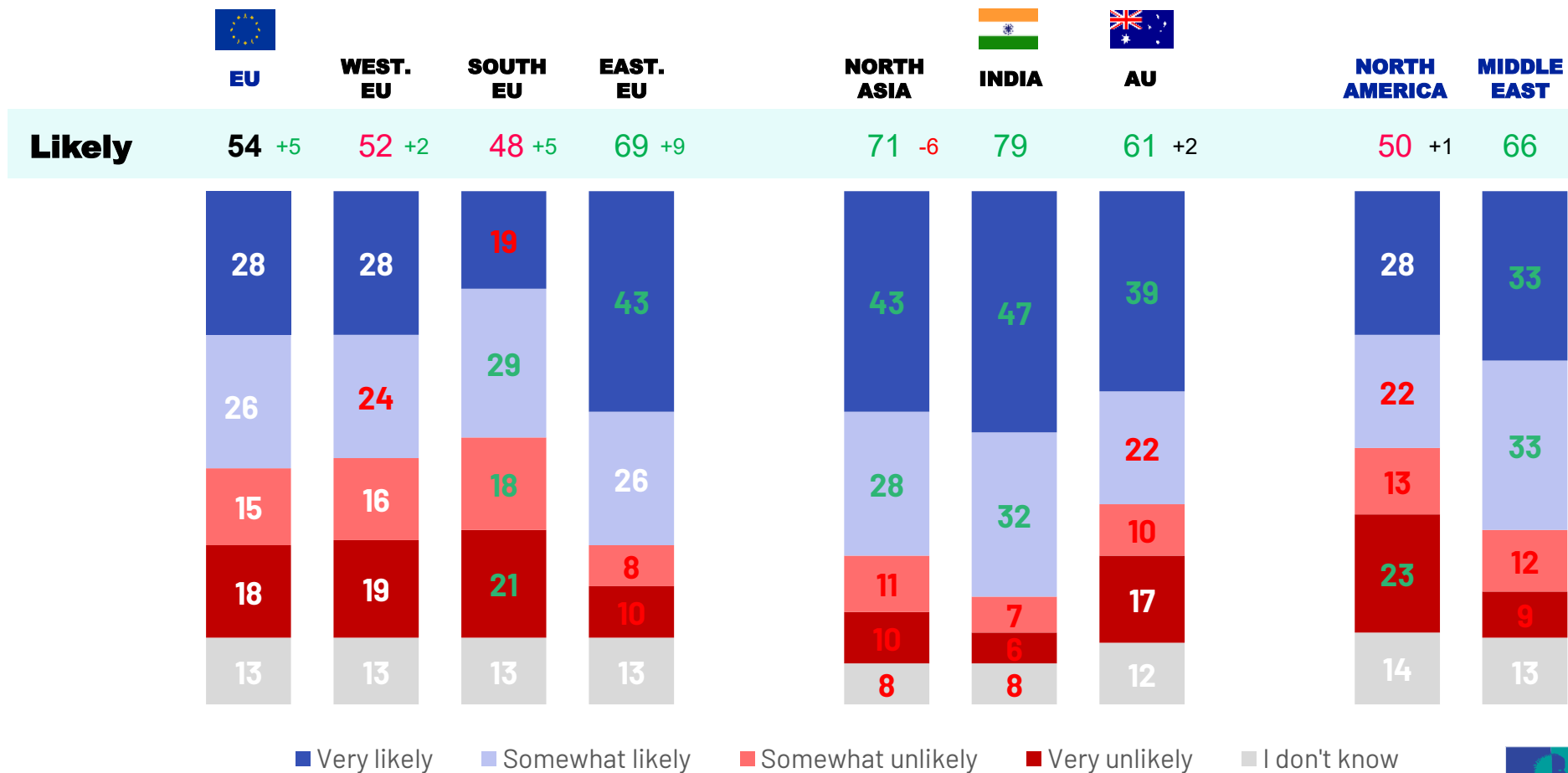
TRAVEL
INSURANCE



05

TRAVEL INSURANCE

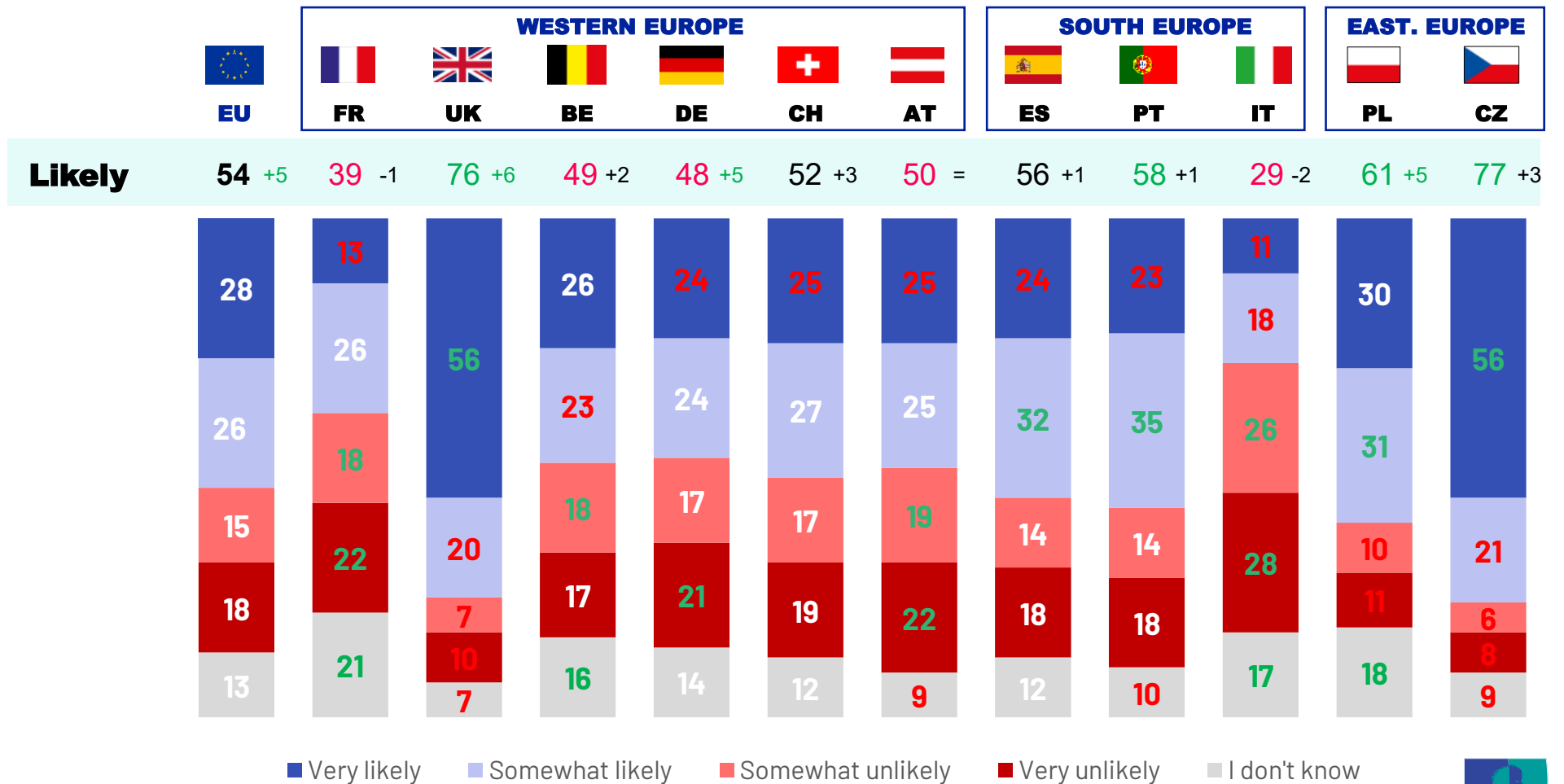
1/3 Purchase intent of travel insurance for next trip



05

TRAVEL INSURANCE

2/3 Purchase intent of travel insurance for next trip



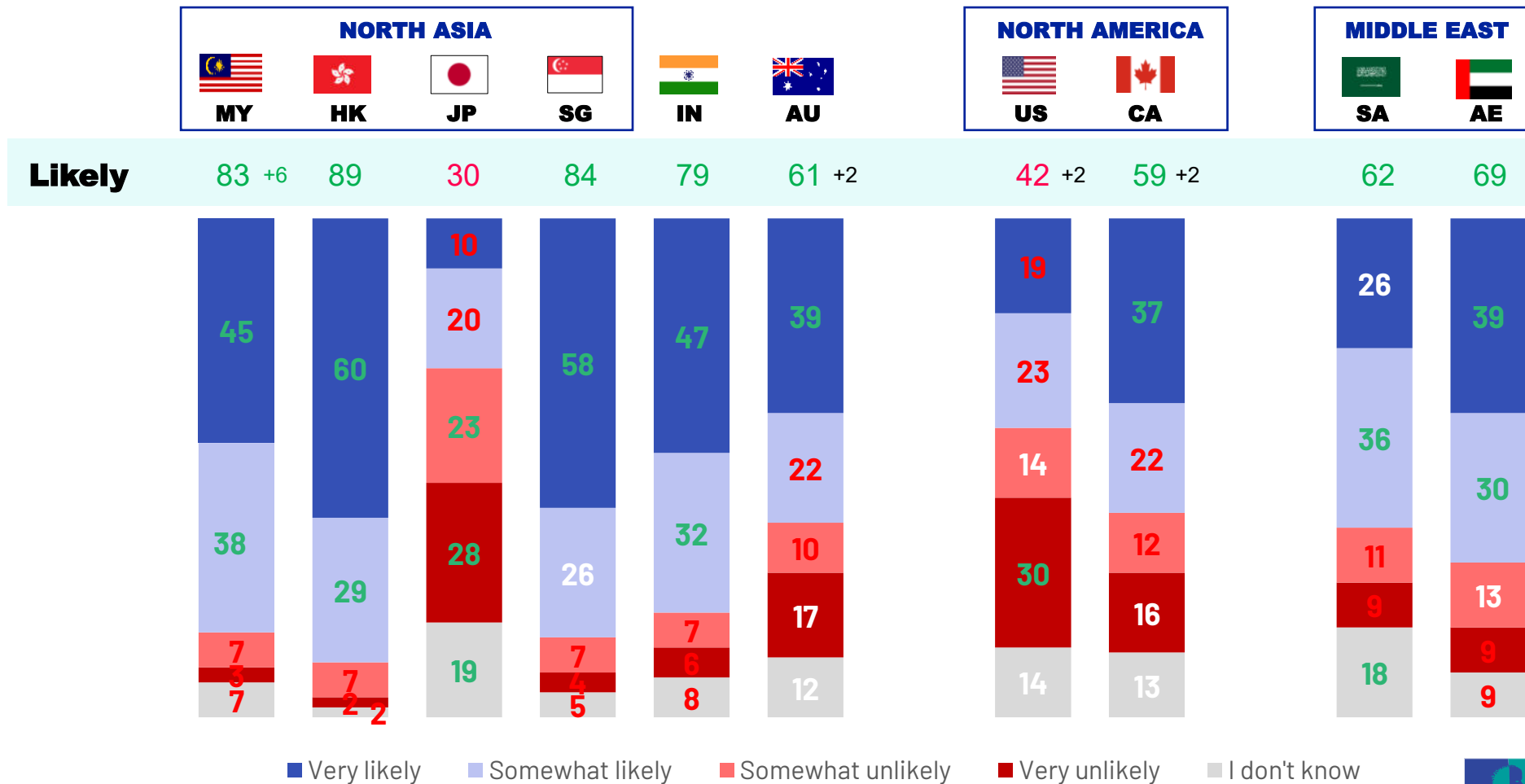
109
Q45. For your next trips, how likely are you to purchase a travel insurance? Base : All respondents

XX / XX Significantly higher or lower score vs Europe
+X / -X Significantly evolution vs 2023

05

TRAVEL INSURANCE

3/3 Purchase intent of travel insurance for next trip



APPENDICES





Our commitments

- PROFESSIONAL CODES, QUALITY CERTIFICATION CONSERVATION AND DATA PROTECTION

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

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



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

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

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



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

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

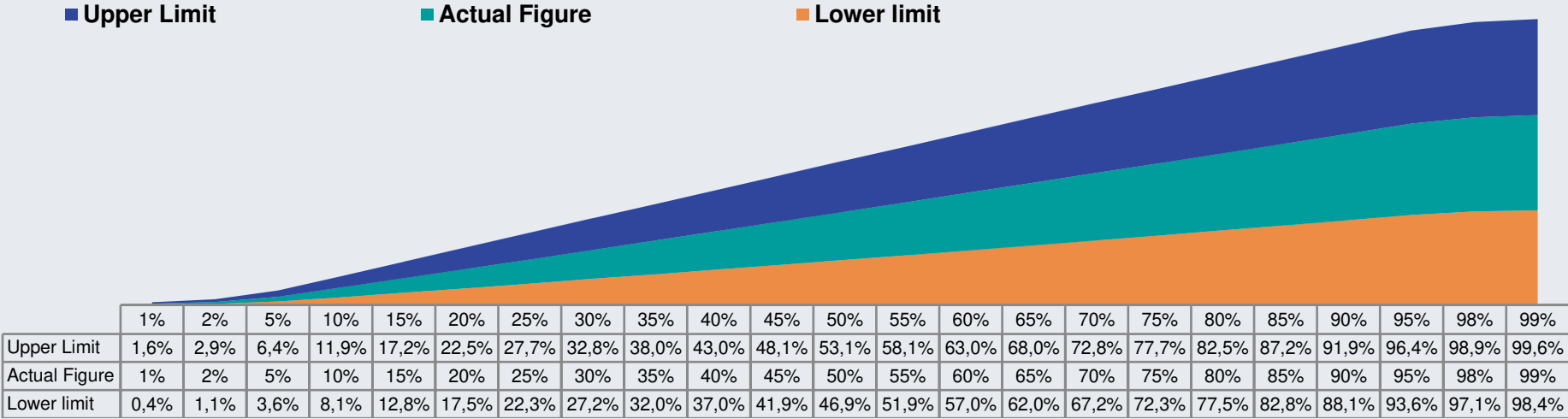
- 12 months following the end date of an Ad Hoc study.
- 36 months following the end date of each wave of a recurring study.

Reliability of results

- In this instance, with regard to this study:**

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

- The proportions observed are between:**



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 or random method (Kish method, other random method), etc.
- When appropriate, a reasoned draw to over-represent targets with systematically lower-than-average participation rates
- **Sample representativeness** : criteria and sources : sex, age, socio-economic category of the individual / head of the family, the regions, the market size (INSEE data)

DATA COLLECTION

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

DATA PROCESSING

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

RELIABILITY OF RESULTS:

Self completion online surveys

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

UPSTREAM OF THE DATA COLLECTION

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

DURING THE DATA COLLECTION

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

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

DOWNSTREAM OF THE DATA COLLECTION

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

Survey overview

Organization (CAWI survey - Online panel)

ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

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

ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

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

ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

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

ABOUT IPSOS

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

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

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

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

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

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

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

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

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