Holiday Barometer among Europeans, North Americans, Asians & Oceanians

IPSOS/EUROP ASSISTANCE SURVEY

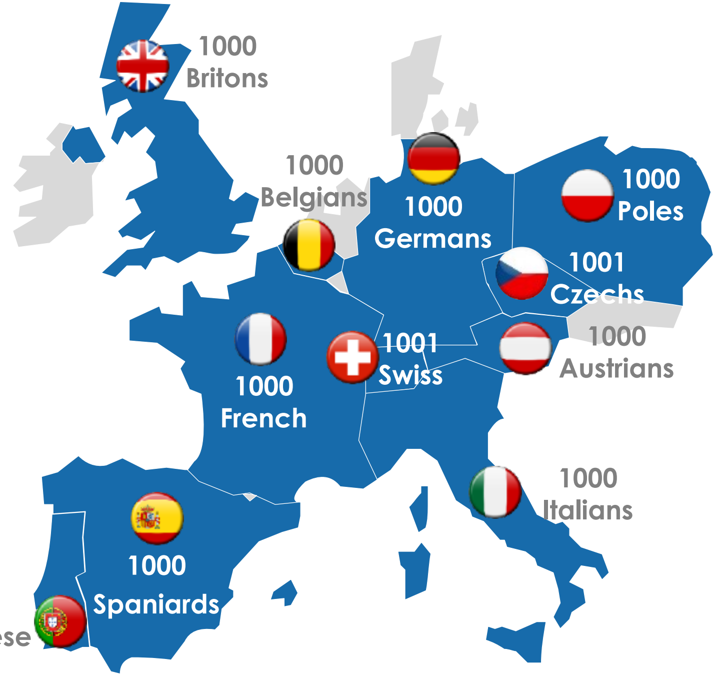
21TH EDITION

SCOPE OF THE SURVEY

15 COUNTRIES
15,000 INTERVIEWS

American scope

European scope



Asian/Oceanian scope

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GAME CHANGERS

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METHODOLOGY

Samples

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

Timeline

The field studies were carried out between April 26th and May 16th 2022

Method of data collection

Online survey in the 15 countries

CONTENT

1.

CURRENT STATE OF MIND & CONCERNS

> Travel enthusiasm

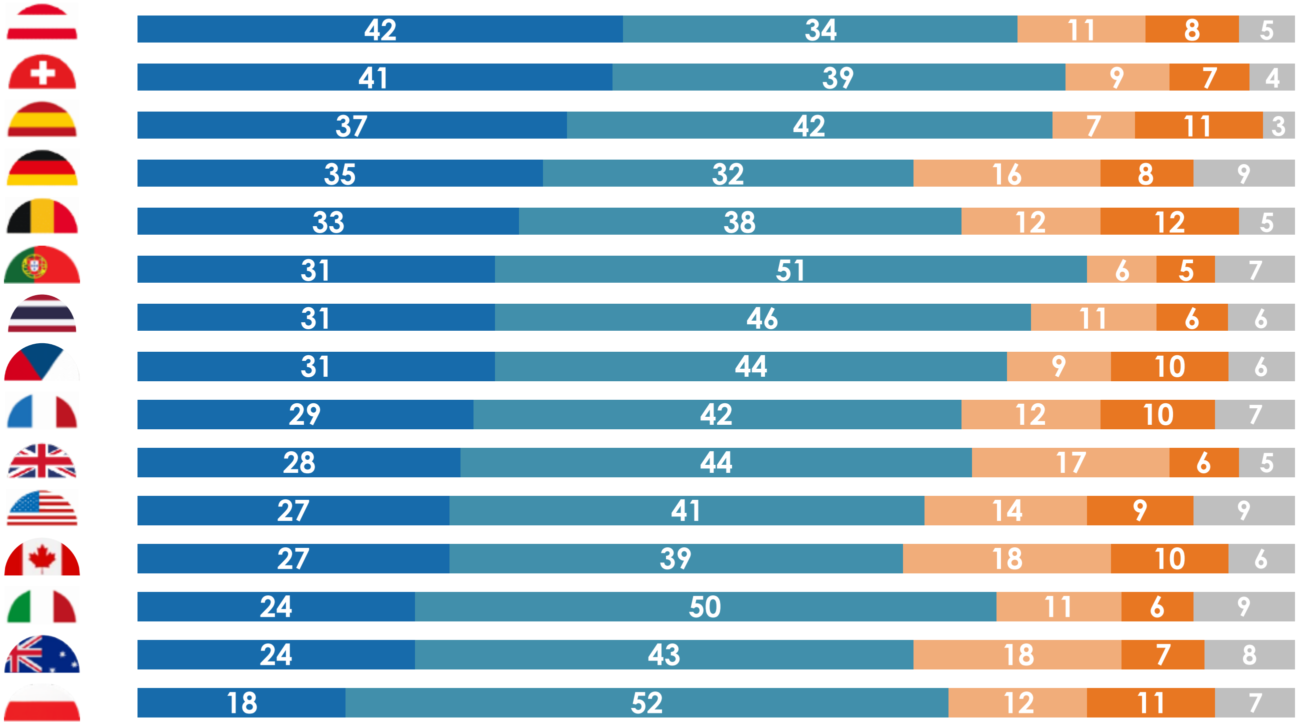
> Main concerns regarding the global situation

> Main concerns when travelling

> Conditions to fulfill to travel

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

TRAVEL ENTHUSIASM (%)



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

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

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

ISSUES IMPACT - AT LEAST SOMEWHAT (%)

	Very much	Somewhat	A little	Not at all	EUROPE				
Inflation / Prices increase	30	39	21	10	69	62	70	63	77
Personal / family reasons	21	34	25	20	55	49	55	54	58
Covid-19	17	36	28	19	53	46	60	60	81
Situation in Ukraine	15	31	28	26	46	27	33	34	53

How do each of the following issues impact your enthusiasm and desire to travel this year?

Very much **Somewhat** **A little** **Not at all**

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

MAIN CONCERNS (%)

	Very concerned	Quite concerned	Not very concerned	Not concerned at all	EUROPE				
Family and friends' health	17	37	33	13	54 -17	46 -12	55	57	63 -13
Economic situation	17	33	34	16	50 -3	43 -3	48	52	73 -13
Overall health	13	32	40	15	45 -12	41 -6	45	48	57 -8
Travel plans	9	29	43	19	38 -14	36 -7	40	45	56 -14
Mental health	11	26	38	25	37 -10	33 -9	39	42	53 -10
Leisure plans	8	29	44	19	37 -17	34 -8	38	43	55
Job / graduation	9	20	33	38	29 -9	26 -7	27	28	53 -13

Are you concerned about the following regarding COVID-19?

Very concerned Quite concerned Not very concerned Not concerned at all

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

ACTIONS CONSIDERED WHEN TRAVELLING (%)

	Yes, certainly	Yes, probably	No, probably not	No, surely not	Don't know	EUROPE							
Avoid travelling to certain countries	26	37	17	11	9	63	-13	64	-7	67	72	77	-10
Avoid crowded places	18	36	26	14	6	54	-18	53	-16	62	58	81	-8
Favor close destinations	18	36	24	13	9	54	-14	52	-10	57	61	77	-11
Avoid going on a cruise	28	23	22	16	11	51	-15	57	-10	61	62	62	-18
Avoid flying and going to airports	17	21	29	24	9	38	-18	39	-11	35	34	53	-21
Avoid taking the train and going to train stations	12	21	35	24	8	33	-18	38	-12	34	31	58	-21
Avoid staying at a hotel / resort	9	18	35	29	9	27	-13	27	-5	24	24	46	-23

At a personal level, when travelling, do you intend to:

Yes, certainly **Yes, probably** **No, probably not** **No, surely not** Don't know

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

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

	Very concerned	Quite concerned	Not very concerned	Not concerned at all	EUROPE							
Being quarantined abroad	19	29	30	22	48	-15	37	-8	47	53	75	-6
Becoming sick in transit or at destination	16	32	38	14	48	-12	40	-4	47	55	72	-9
An epidemic outbreak when travelling	15	33	35	17	48	-16	41	-7	47	57	80	-10
Running out of money	18	28	36	18	46	-1	37	-1	39	42	73	-7
Needing to cancel	13	33	38	16	46	-13	36	-6	43	51	65	-8
Getting robbed/losing something important	15	30	39	16	45	-1	37	+3	36	40	74	-3
Not to be able to do the usual activities due to Covid	12	33	38	17	45	-20	40	-11	44	50	75	-9

Are you concerned about the following for your next trip?

Very concerned **Quite concerned** **Not very concerned** **Not concerned at all**

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

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

	Very concerned	Quite concerned	Not very concerned	Not concerned at all	EUROPE							
Not being able to return home	17	27	35	21	44	-14	35	-6	42	52	73	-9
The quality of medical facilities at destination	12	31	39	18	43	-12	33	-7	39	46	67	-12
Having bad weather at destination	11	32	42	15	43	-2	38	-1	40	42	75	=
Having a bad experience	11	29	41	19	40	-9	35	-4	36	42	65	-5
Closed restaurants, bars or hotels due to Covid	11	28	42	19	39	-25	35	-15	38	42	65	-9
Unplanned delays	8	31	45	16	39	-10	37	-6	41	47	67	-8
Fear for your physical safety	11	27	42	20	38	-8	33	-4	33	38	77	-6

Are you concerned about the following for your next trip?

Very concerned Quite concerned Not very concerned Not concerned at all

2.

2022 SUMMER HOLIDAY PLANS

> Summer holiday plans

> Budget

> Summer trip duration

SUMMER PLANS ARE INCREASING COMPARED TO 2021

SUMMER HOLIDAY PLANS

EUROPE

71%

(+14 versus 2021)

USA

60%

(+10 vs 2021)

CANADA

61%

THAILAND

69%

(+25 vs 2021)

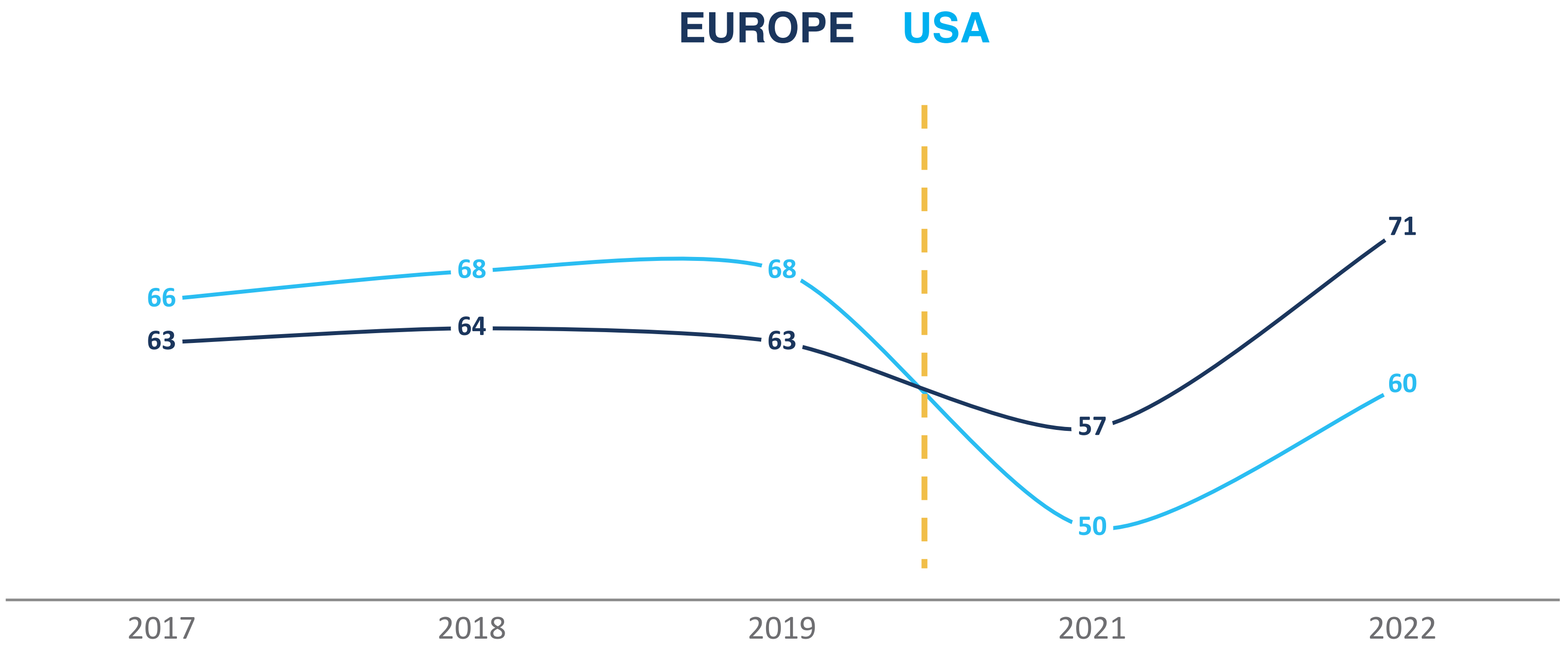
AUSTRALIA

52%

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

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

EVOLUTION OF HOLIDAY PLANS (%)



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

AMONG EUROPEANS, THE SITUATION IS UNIFORMLY POSITIVE

SUMMER HOLIDAY PLANS

AUSTRIA	BELGIUM	CZECH REP	FRANCE	GERMANY
75% *+14pts vs 2021*	71% *+18pts*	73% *+8pts*	74% *+7pts*	61% *+19pts*

ITALY	POLAND	PORTUGAL	SPAIN	SWITZERLAND
76% *+9pts*	75% *+9pts*	79% *+17pts*	78% *+20pts*	75% *+12pts*

UNITED KINGDOM
68% *+18pts*

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

MAIN REASONS NOT TO TRAVEL IN 2022 (%)

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

And why are you not going on a trip this summer?
(Question asked to those who are not going to travel)

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THE GLOBAL HOLIDAY BUDGET INCREASES STRONGLY VS 2021

SUMMER HOLIDAY BUDGET

EUROPE

€ 1,805

+14% vs 2021

USA

$2 758

+19%

€2 620

CANADA

$3 225

€2 391

THAILAND

฿62 800

+18%

€1 725

AUSTRALIA

$3 788

€2 808

Exchange rate applied

1 GBP = €1.18 1 CHF = €0.95 1 PLN = €0.22 1 CZK = €0,041 1 USD = €0.95 1 CAD =0,74 1 AUD=0,74 1 THB = €0,027

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

SUMMER HOLIDAY BUDGET

AUSTRIA	BELGIUM	CZECH REP	FRANCE	GERMANY
€2 162	€2 289	Kč 28 421	€1 806	€2 128
+4%	*+15%*	*+6%*	*+11%*	*+15%*
		€1 153		

ITALY	POLAND	PORTUGAL	SPAIN	SWITZERLAND
€1 740	Zł 4 499	€1 543	€1 503	CHF 2 912
+10%	*+14%*	*+15%*	*+20%*	*+7%*
	€969			€2 776

UNITED KINGDOM
£1 833
+19%
€2 165

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Exchange rate applied

1 GBP = €1.18 1 CHF = €0.95 1 PLN = €0.22 1 CZK = €0,041 1 USD = €0.95 1 CAD =0,74 1 AUD=0,74 1 THB = €0,027

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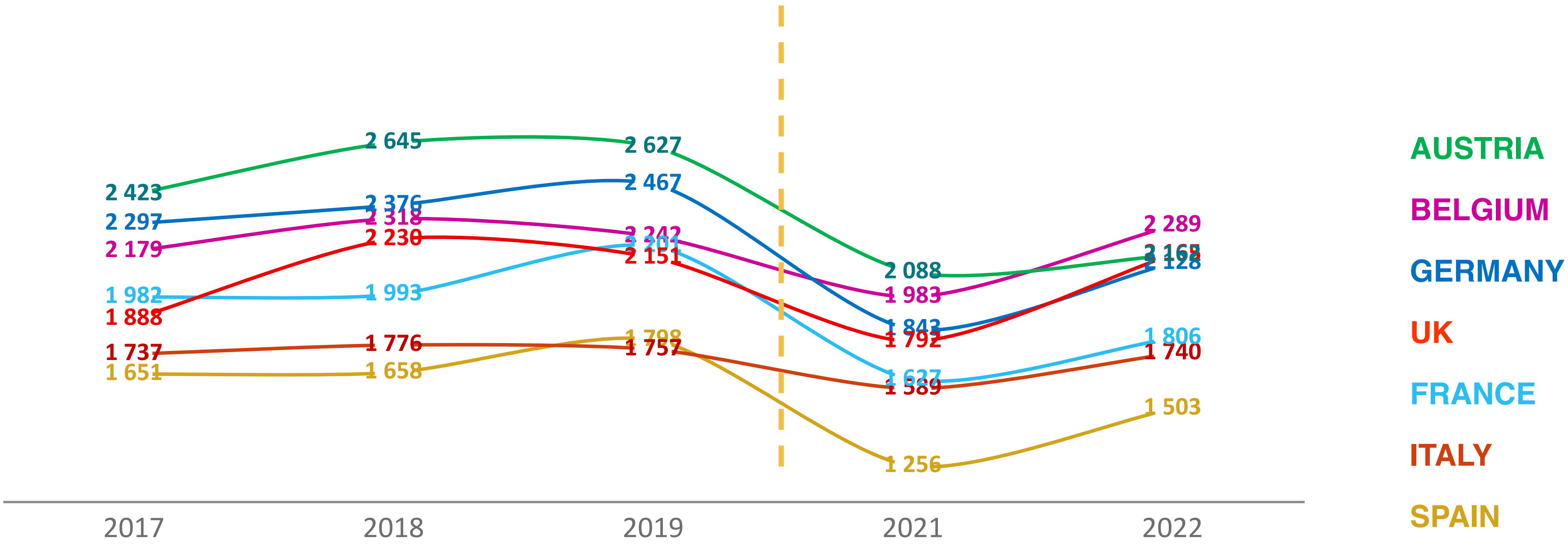
HOWEVER, SPENDING LEVELS REMAIN GLOBALLY BELOW 2019 LEVELS

SUMMER HOLIDAY BUDGET BY EUROPEAN COUNTRY (€)

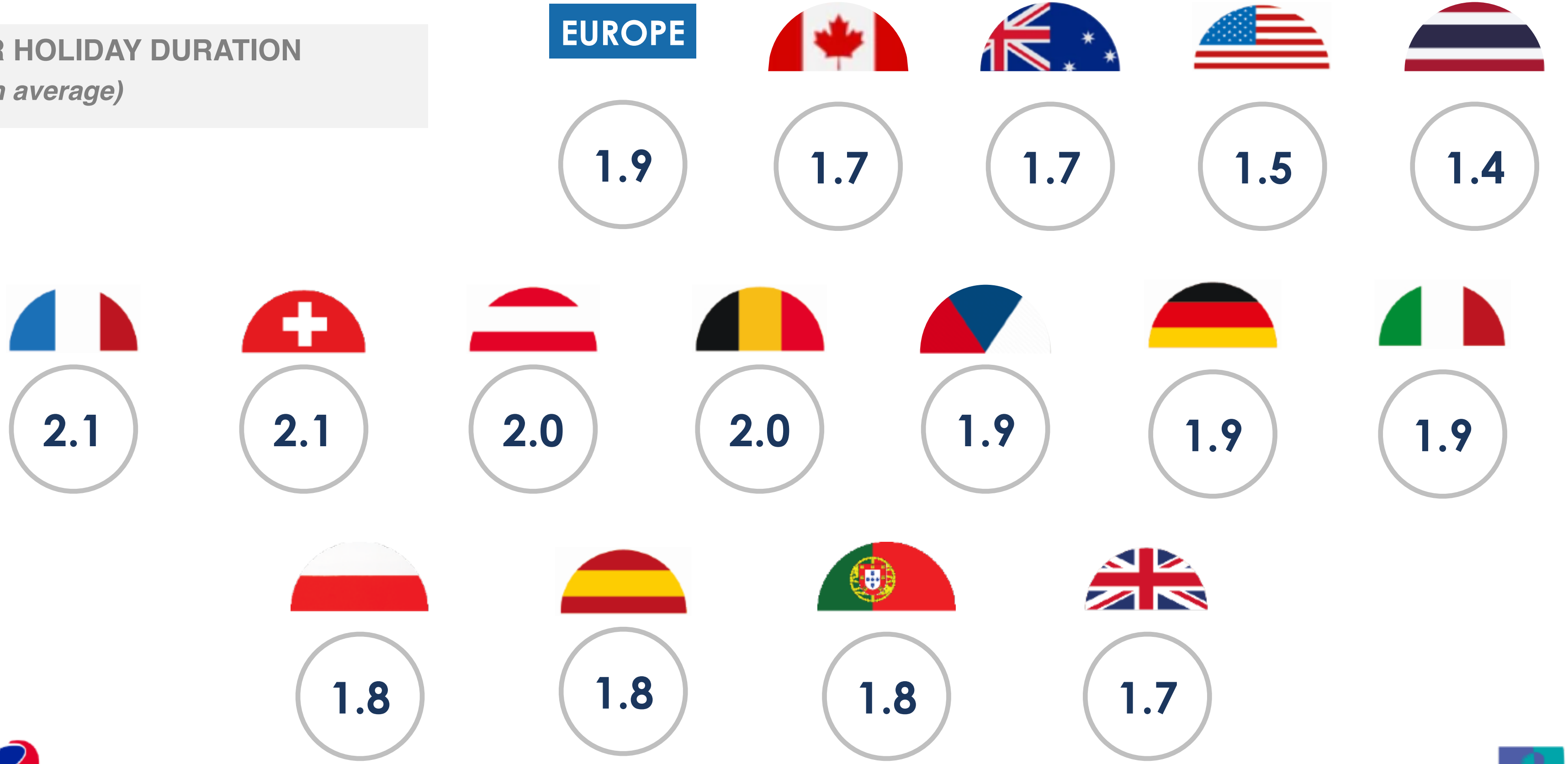


What is your full budget for your next summer trip (when you take into account transportation, accommodations, food, leisure activities, etc.)?

Base: Those who intend to go on holidays

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

SUMMER HOLIDAY DURATION
(weeks on average)



In total, how long will you be away on a trip this summer?

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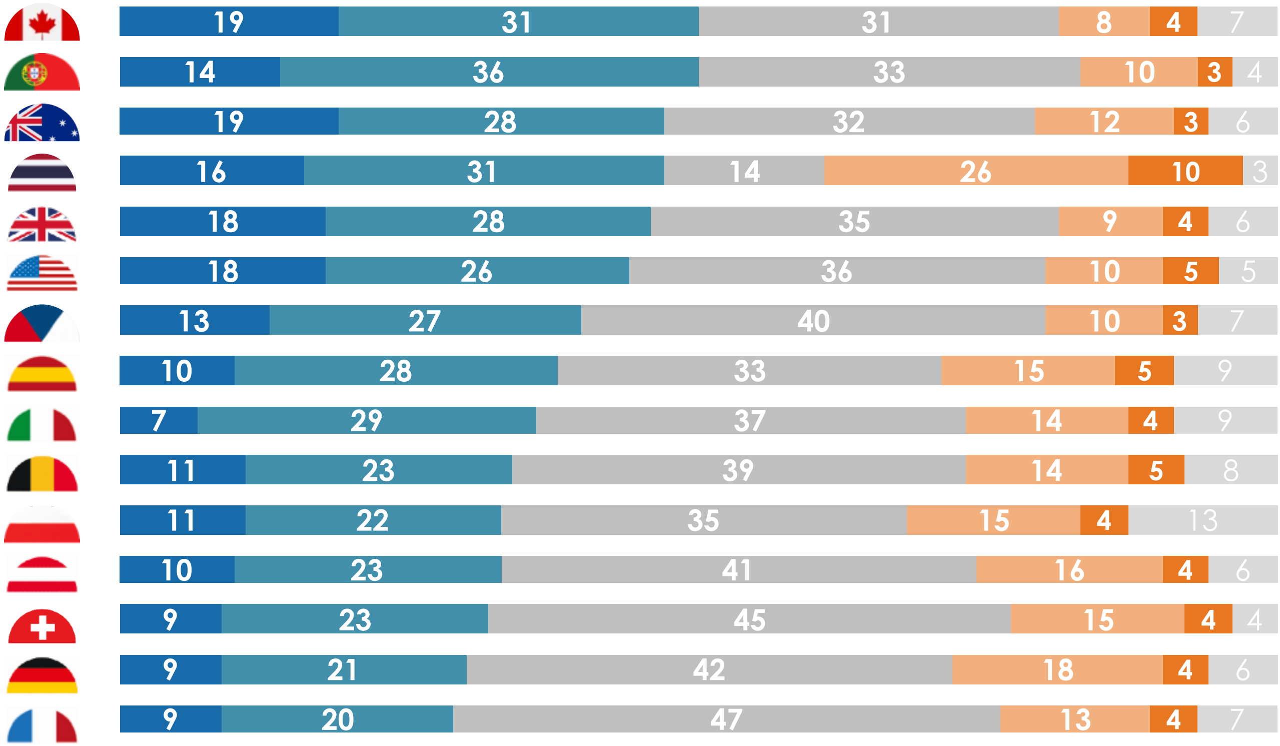
HOLIDAYMAKERS FROM CANADA AND PORTUGAL CONSIDER THE MOST THAT THEIR HOLIDAY DURATION WILL INCREASE THIS YEAR

EVOLUTION OF SUMMER HOLIDAY DURATION (%)



Increase	Decrease
50	12
50	13
47	15
47	36
46	13
44	15
40	13
38	20
36	18
34	19
33	19
33	20
32	19
30	22
29	17

How might the duration of your summer trip change compared to its usual duration? Will it

Increase a lot **Increase slightly** **Stay as usual** **Decrease slightly** **Decrease a lot** DK

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3. FAVORITE DESTINATIONS

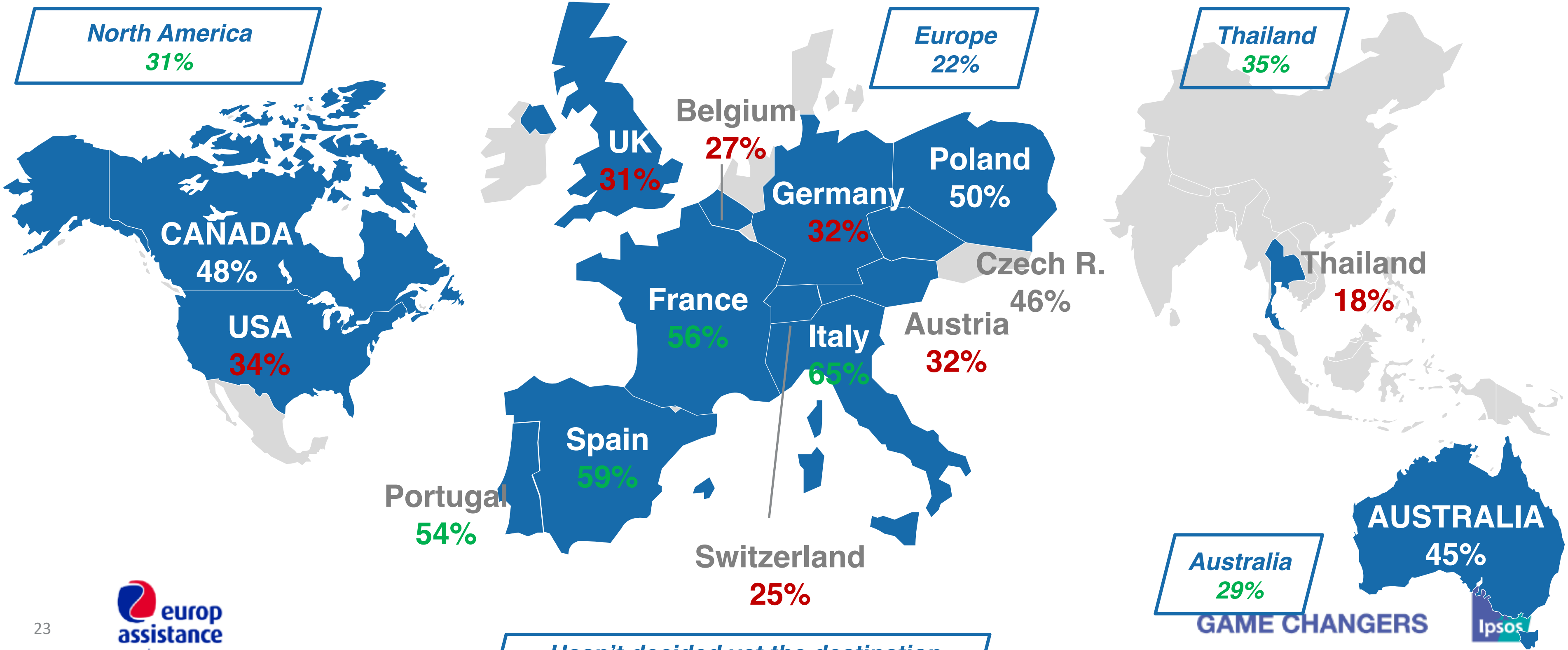
> Summer destinations (country)

> Summer destinations (type of location)

> Choice criteria for destination

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

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



Hasn't decided yet the destination

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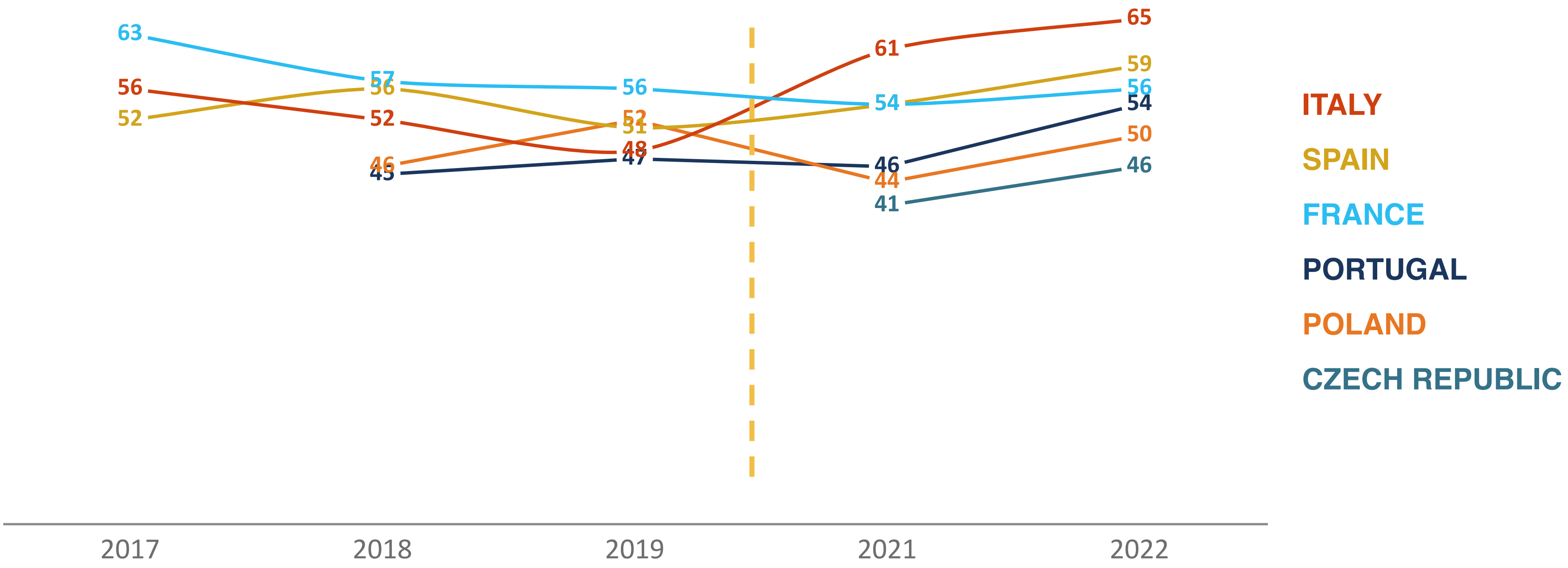
EUROPEAN HOLIDAYMAKERS ARE STILL MORE LIKELY TO STAY IN THEIR OWN COUNTRY THAN THEY WERE IN 2019

HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)



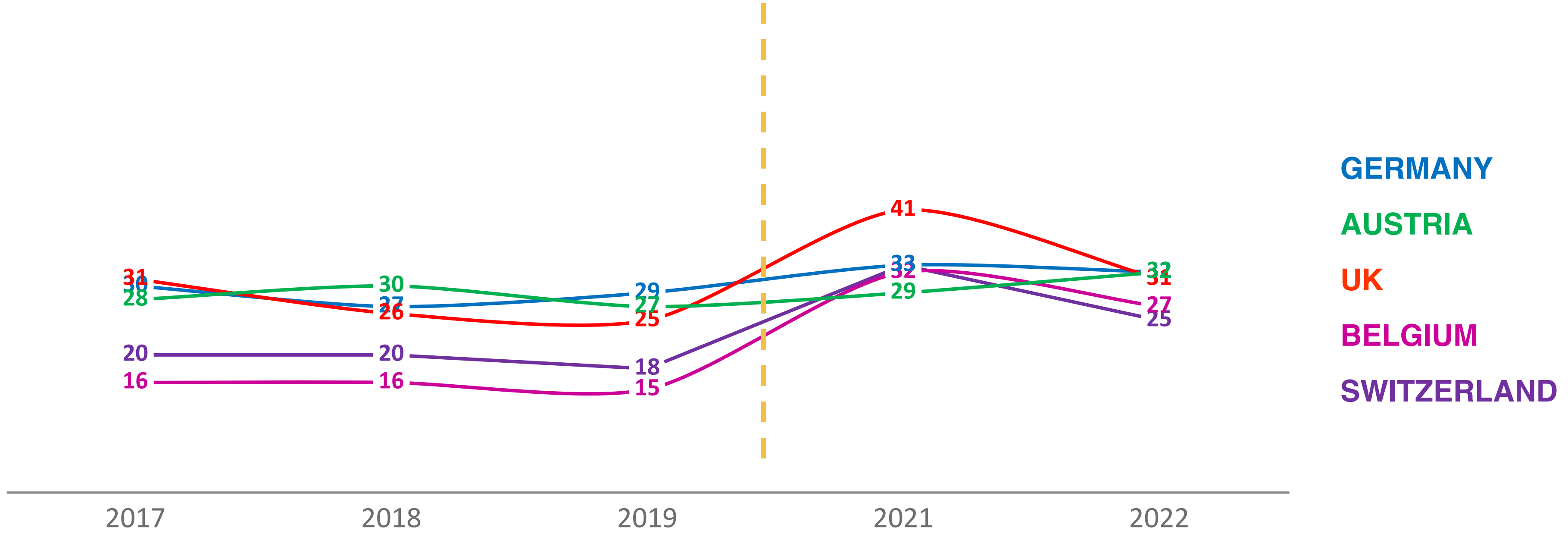
Where do you plan to go on a trip this summer?

Base: Those who intend to go on holidays

GAME CHANGERS

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

HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)



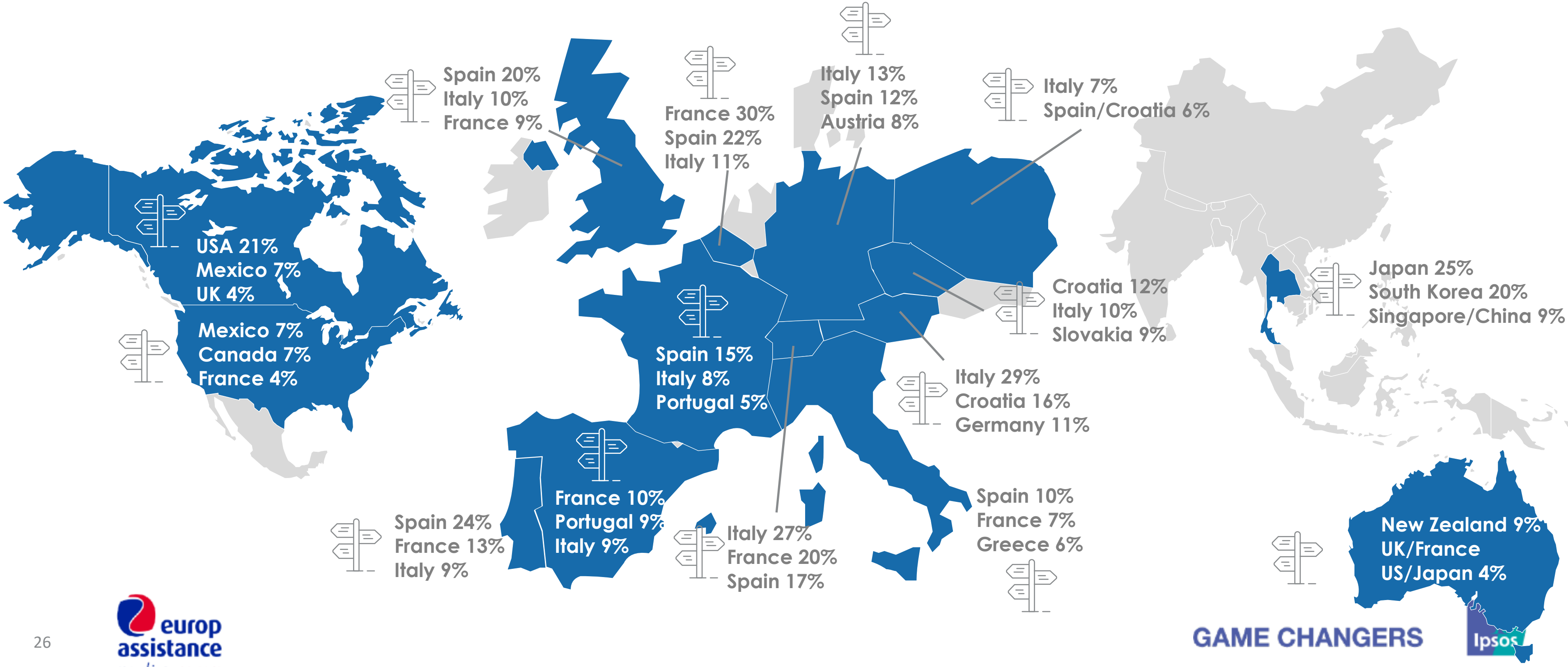
Where do you plan to go on a trip this summer?

Base: Those who intend to go on holidays

GAME CHANGERS

WHEN CHOOSING TO TRAVEL ABROAD, HOLIDAYMAKERS MOSTLY CHOOSE NEIGHBORING COUNTRIES

FOREIGN DESTINATIONS PLANNED THIS SUMMER



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

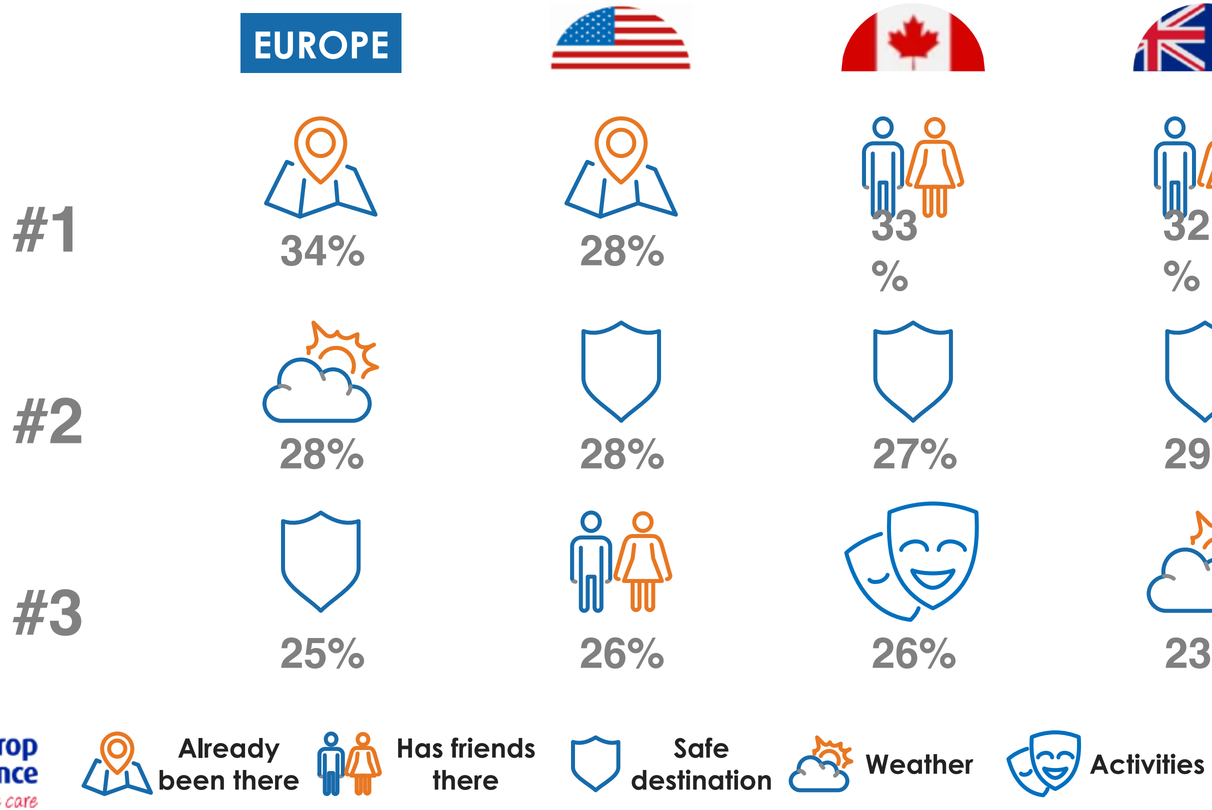
SUMMER HOLIDAY PREFERENCES (%)

	EUROPE				
	60 +2	42	35	42	58
	26 +5	44 +9	38	40	37 +8
	23 -3	28	37	33	38
	21 -3	26	26	19	44
	20 +2	19	22	29	24

Seaside Countryside Mountains City Tour

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

MOTIVATIONS FOR THE CHOICE OF DESTINATION



GAME CHANGERS

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

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

RANK 2022

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

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

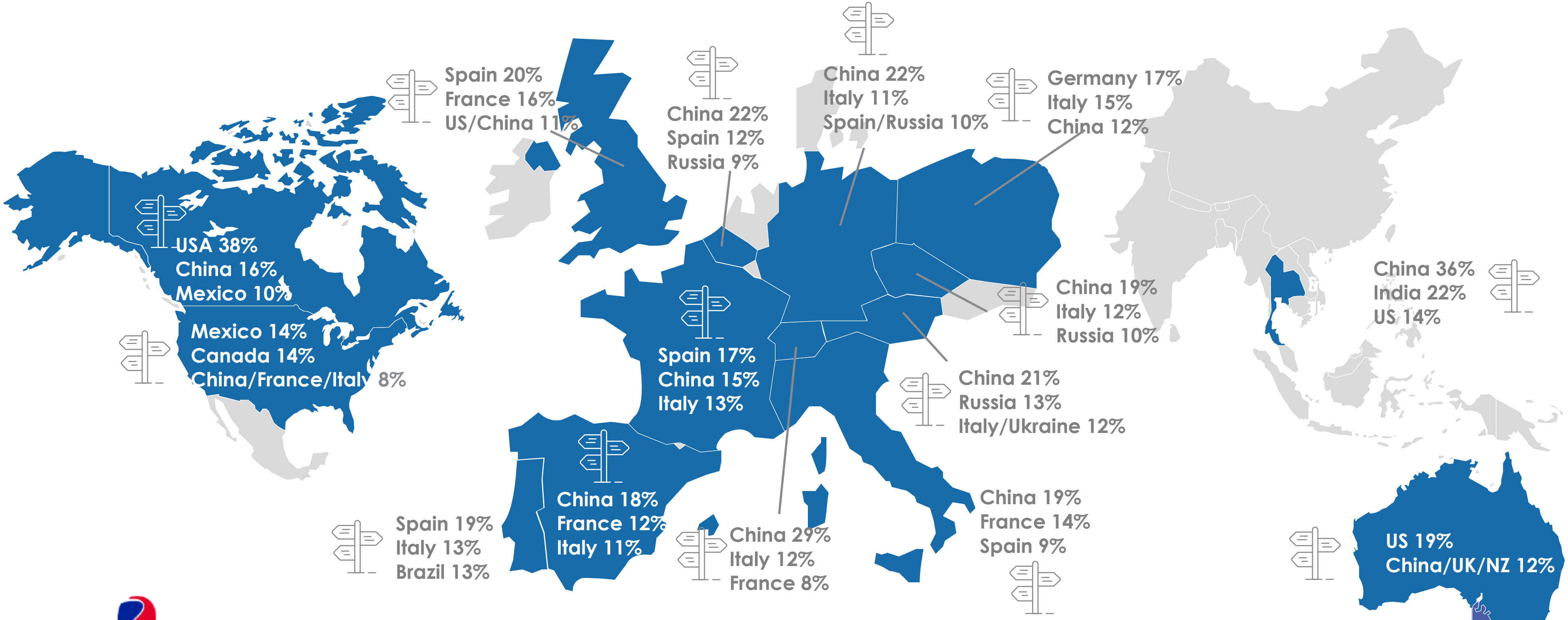
FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION 2/2

RANK 2022

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

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

FOREIGN DESTINATIONS AVOIDED THIS SUMMER



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

GAME CHANGERS

4.

2022 SUMMER HOLIDAYS ORGANIZATION

> Holiday reservation

> Travel partners

> Children’s holidays

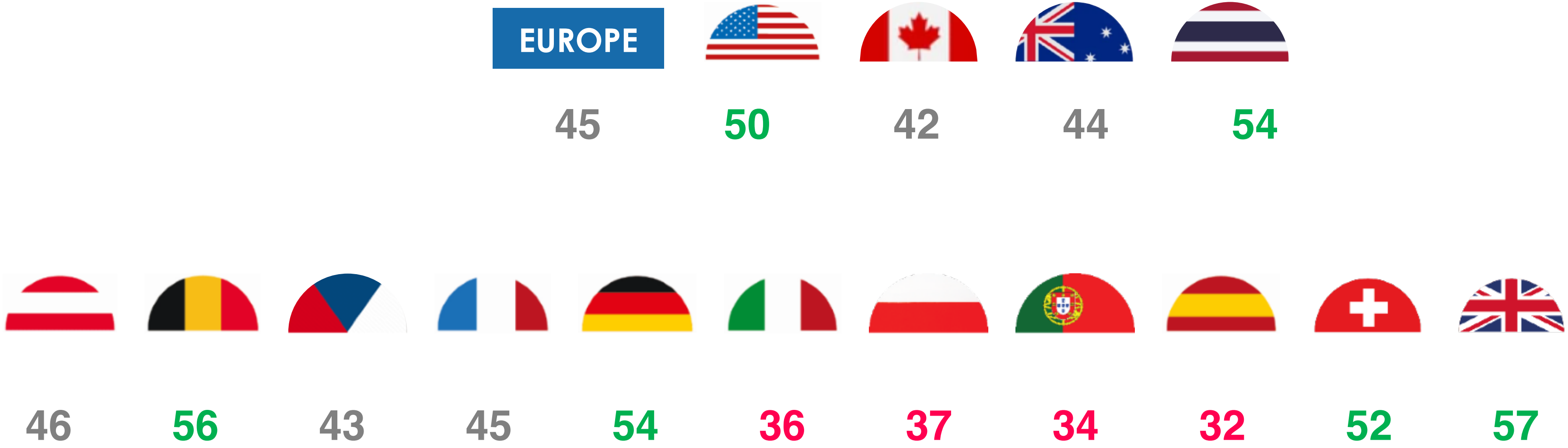
> Transportation

> Accommodation

> Activities

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

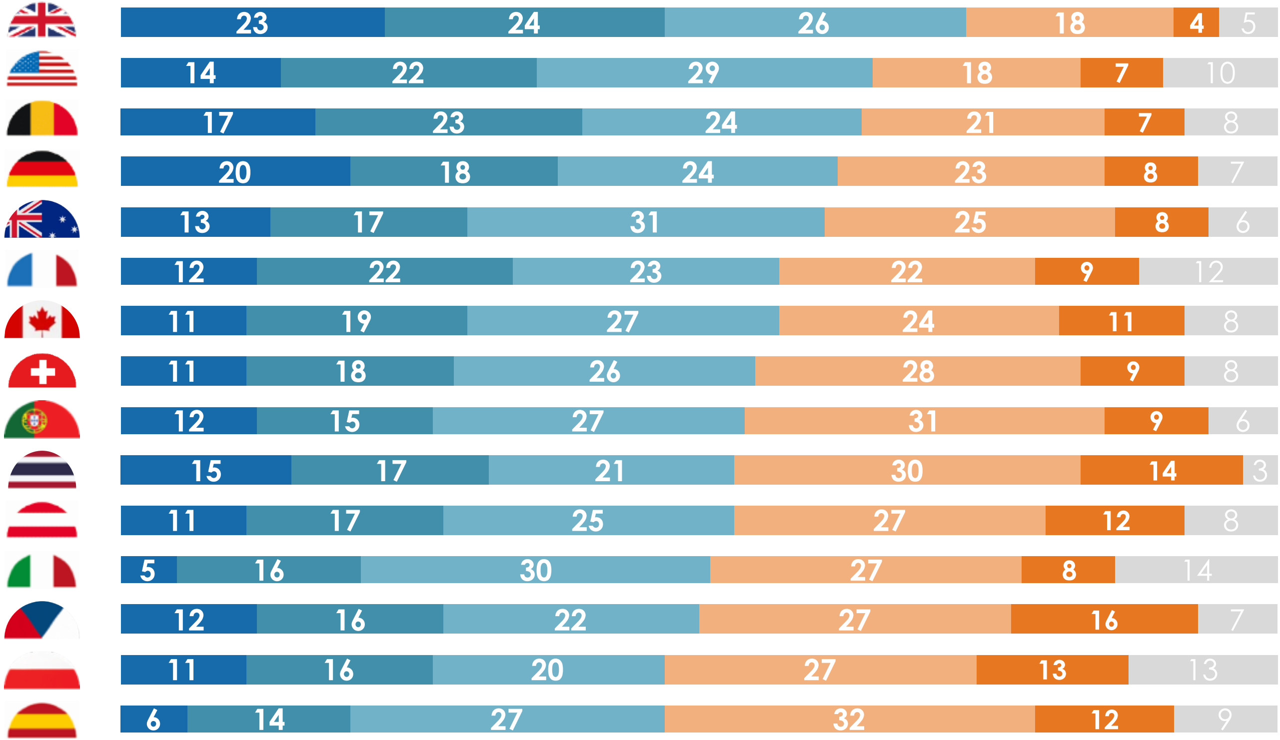
SUMMER HOLIDAY RESERVATION (%)



Have you already made reservations for your summer trip(s)?
Already booked everything + already booked part of my trip

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

SUMMER HOLIDAY RESERVATION (%)



How much in advance have you planned, or do you plan to book your trip?

> 6 months   4-6 months   2-4 months   2 months – 15 days   <15 days   DK

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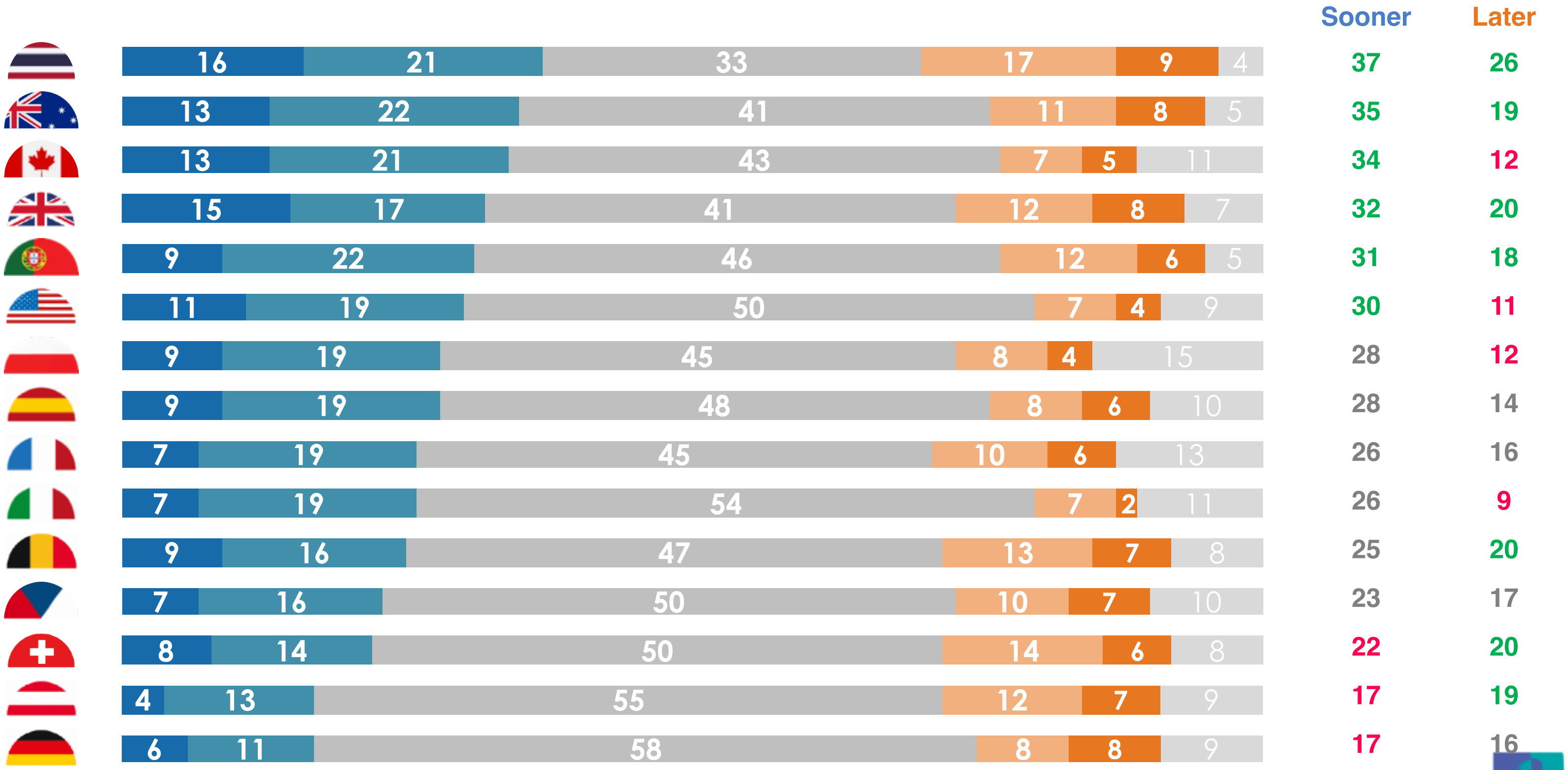
IN MOST COUNTRIES, HOLIDAYMAKERS WILL BOOK THEIR TRIP IN THE SAME TIMELINE AS LAST YEAR

SUMMER HOLIDAY RESERVATION (%)



Compared to last year, would you say that you have booked or that you plan to book your trip :

Much sooner **Slightly sooner** **More or less the same** **Slightly later** **Much later** **DK**

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

TRAVEL PARTNERS (%)

	EUROPE	USA	Canada	Australia	Thailand
Partner	65	55	57	58	28
Children	33	34	26	26	52
Friends	18	21	19	16	21
Alone	11	17	16	17	12
Parents	9	12	10	8	20
Extended family	8	11	6	8	22
Siblings	7	13	10	6	19

With whom do you plan on going on a trip this summer?

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

CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS (%)

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

And how do your children spend their summer?

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

TRANSPORTATION (%)

	EUROPE				
Personal car	55 -9	48 -7	49	39	45
Plane	33 [illegible]	43 +5	40	48	46
Train	15	7	8	10	9
Bus	7	6	4	8	8
Rental car through an agency	4	11	12	12	7
Boat	4	5	3	4	5
Rental car between private individuals	3	7	4	6	6
Carpooling	3	8	4	3	7
Bike	3	4	3	4	4
Camper van	3	5	5	5	6
Motorbike	2	4	2	3	7

What kind of transportation will you use this summer to go to your holiday destination?

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

CRITERIA OF CHOICE OF TRANSPORTATION MODE (%)

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

Why will you choose this mode of transportation? Is it because:

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

PREFERRED TYPE OF ACCOMMODATION (%)

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

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

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

CRITERIA OF CHOICE OF ACCOMODATION (%)

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

Why will you choose this mode of accomodation? Is it because:

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

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

When you think of THE IDEAL summer vacation in 2022, what would you primarily want to do?

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

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

6.

NEW TRAVEL PRACTICES

> Sustainable travel

> Workation

> Optimism regarding the return to normal

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

OPINION ON SUSTAINABLE TRAVEL (%)

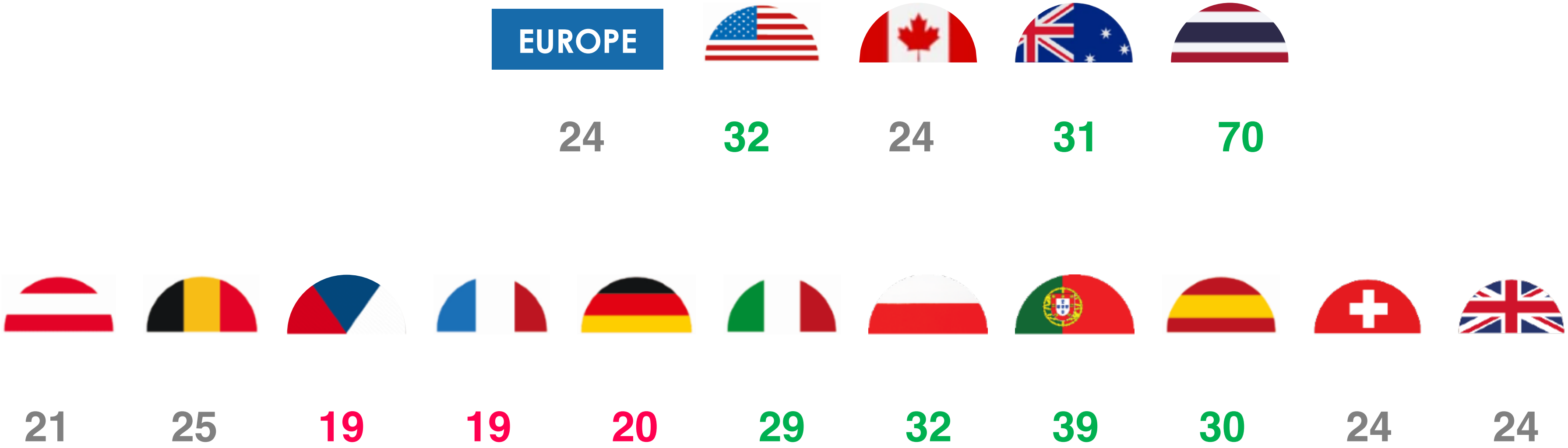
						EUROPE				
Adopt behaviors useful not to waste local resources	24	30	33	6	7	87	80	84	83	96
Use a travel mug/water bottle	27	29	30	7	7	86	84	87	86	98
Eat & shop in places owned by locals	18	34	34	8	6	86	83	83	89	97
Stay in locally owned accommodation	18	32	34	8	8	84	76	80	88	96
Avoid activities that are not socially responsible or respectful of the environment / the wildlife	24	25	32	9	10	81	74	78	82	94
Support local tour companies	12	28	40	10	10	80	63	77	79	92
Pick an accommodation with a green certification	10	24	43	11	12	77	68	72	69	95
Travel to a closer destination to reduce carbon footprint	11	26	33	19	11	70	63	67	64	94
Switch transportation modes for a lower carbon impact	12	24	33	21	10	69	60	63	61	92
Bring goods to donate to local population when visiting underprivileged regions	10	20	36	16	18	66	62	63	65	94
Participating in a travel offset program to compensate your carbon footprint	8	19	36	21	16	63	59	61	63	92
Volunteer with NGOs to join community tourism projects	6	13	27	31	23	46	49	44	43	90

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

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

WORKATION INTENTION IS PARTICULARLY HIGH AMONG THAIS, AMERICANS AND PORTUGUESE

WORKATION INTENTION AMONG THE ACTIVES (%)



Do you intend to work from a holiday location this summer (workation)?
Question asked to active people

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

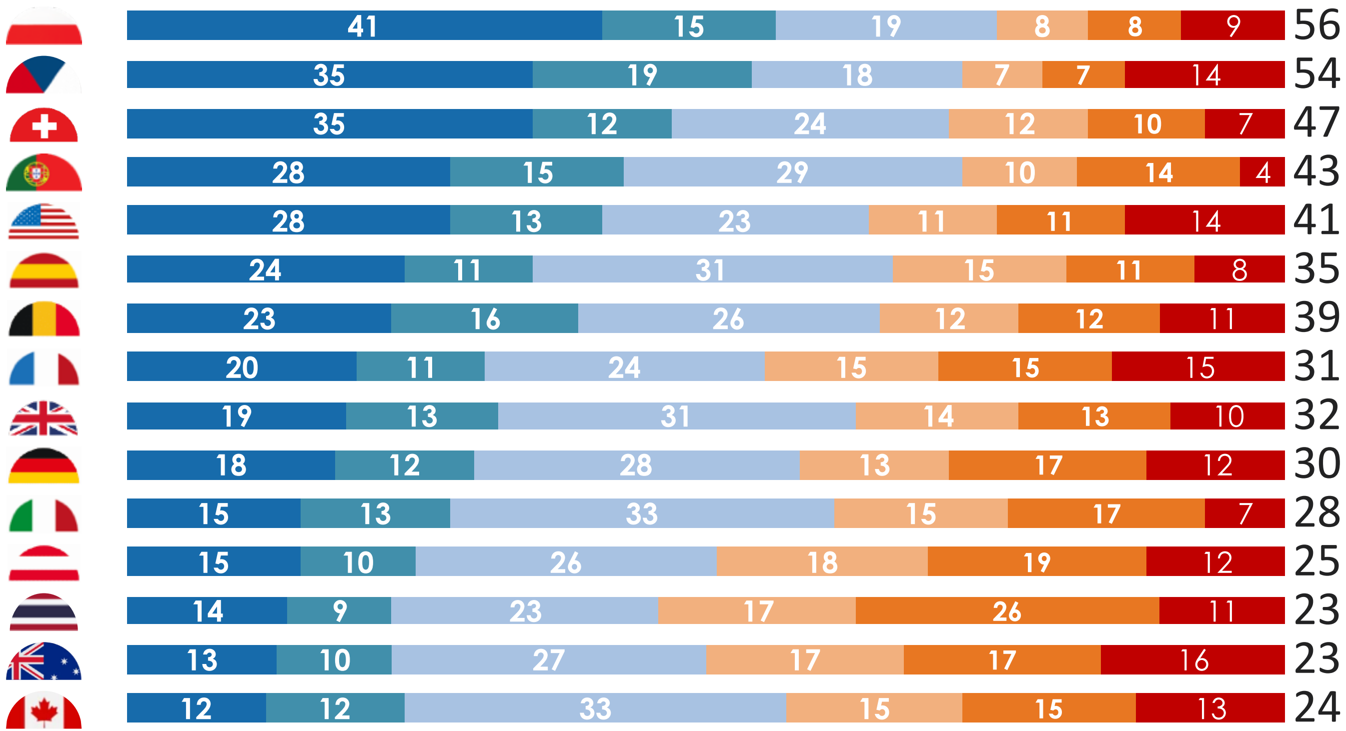
PREFERRED ACCOMMODATION FOR WORKATION (%)

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

For your workation, do you mostly intend to:
Question asked to those who intend to work from a holiday location

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

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



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

It is already possible 2022 2023 2024 After 2024 Never

europ assistance you live we care

GAME CHANGERS Ipsos

End of document

APPENDICES

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This project has been designed according to Ipsos Quality standards.
It was reviewed and approved by: *Guillaume Petit, Service Line Leader*

OUR COMMITMENT

Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- SYNTEC (www.syntec-etudes.com), French Union of Market Research companies
- ESOMAR (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : https://www.ipsos.com/en/privacy-data-protection

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.

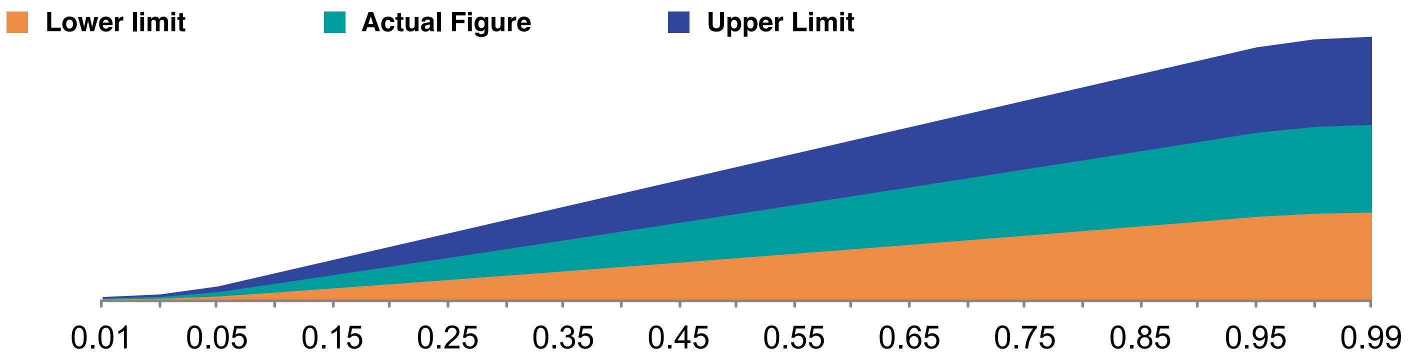
- This project was carried out in accordance with these international Codes and Quality standards

RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

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

The proportions observed are between :



SURVEY OVERVIEW

CAWI survey – Online panel

SAMPLE

- **Target** : Male/female aged 18 y.o and older
- **Selection of the respondent** : participant selection using a quota method
- **Sample representativeness** : gender, age, occupation, region, city size

DATA COLLECTION

- **Fieldwork dates : 26 April** -15 May
- **Sample achieved : 15000** interviews
- **Data collection** : online
- 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 PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, age, region, occupation

RELIABILITY OF RESULTS :
SELF COMPLETION ONLINE SURVEYS IIS

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
- 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
- Data Map

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
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GAME CHANGERS

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

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

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

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

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

