



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

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



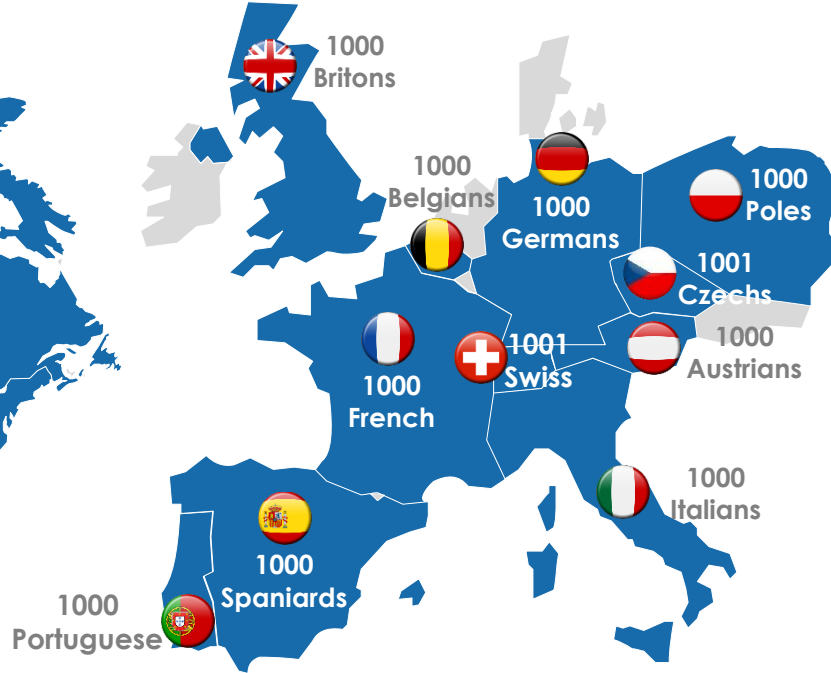
# SCOPE OF THE SURVEY

15 COUNTRIES  
15,000 INTERVIEWS

## American scope



## European scope



## Asian/Oceanian scope

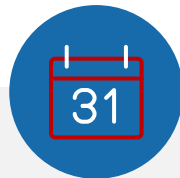


# METHODOLOGY



## Samples

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



## Timeline

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



## Method of data collection

Online survey in the 15 countries

# CONTENT

**CURRENT STATE OF  
MIND & CONCERNS**

P.5

1

**FAVORITE  
DESTINATIONS**

P.39

3

**BACK TO 2021 SUMMER  
HOLIDAYS**

P.69

5

**APPENDICES**  
P.83

7

**2022 SUMMER  
HOLIDAY PLANS**

P.23

2

**2022 SUMMER HOLIDAYS  
ORGANIZATION**

P.51

4

**NEW TRAVEL  
PRACTICES**

P.74

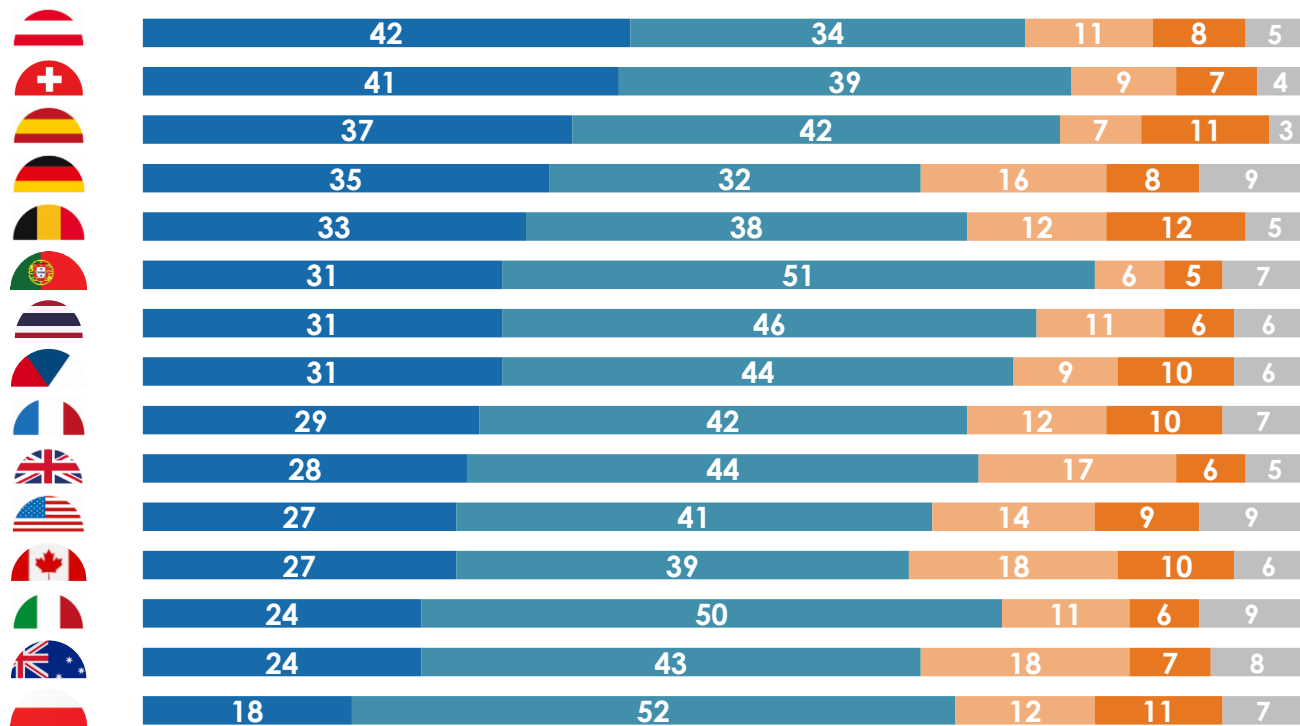
6

# 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

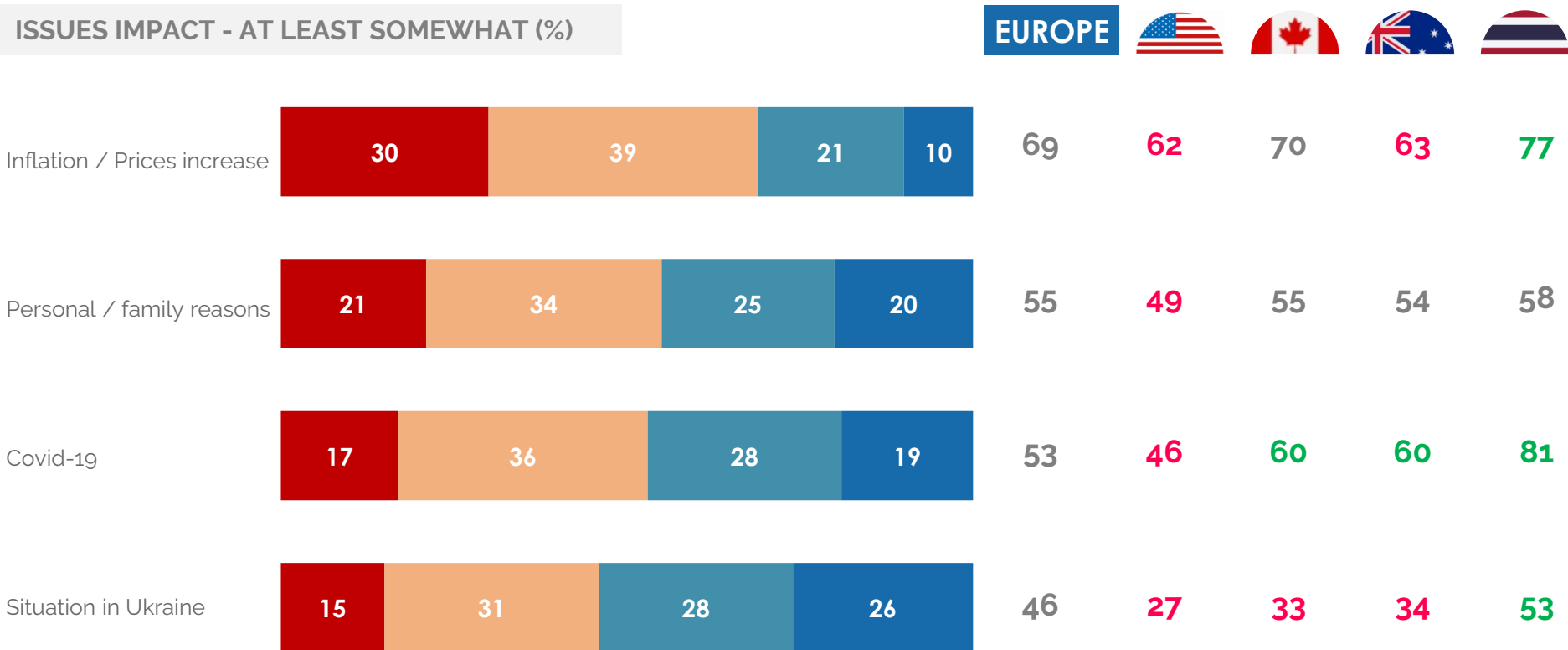
## TRAVEL ENTHUSIASM (%)



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



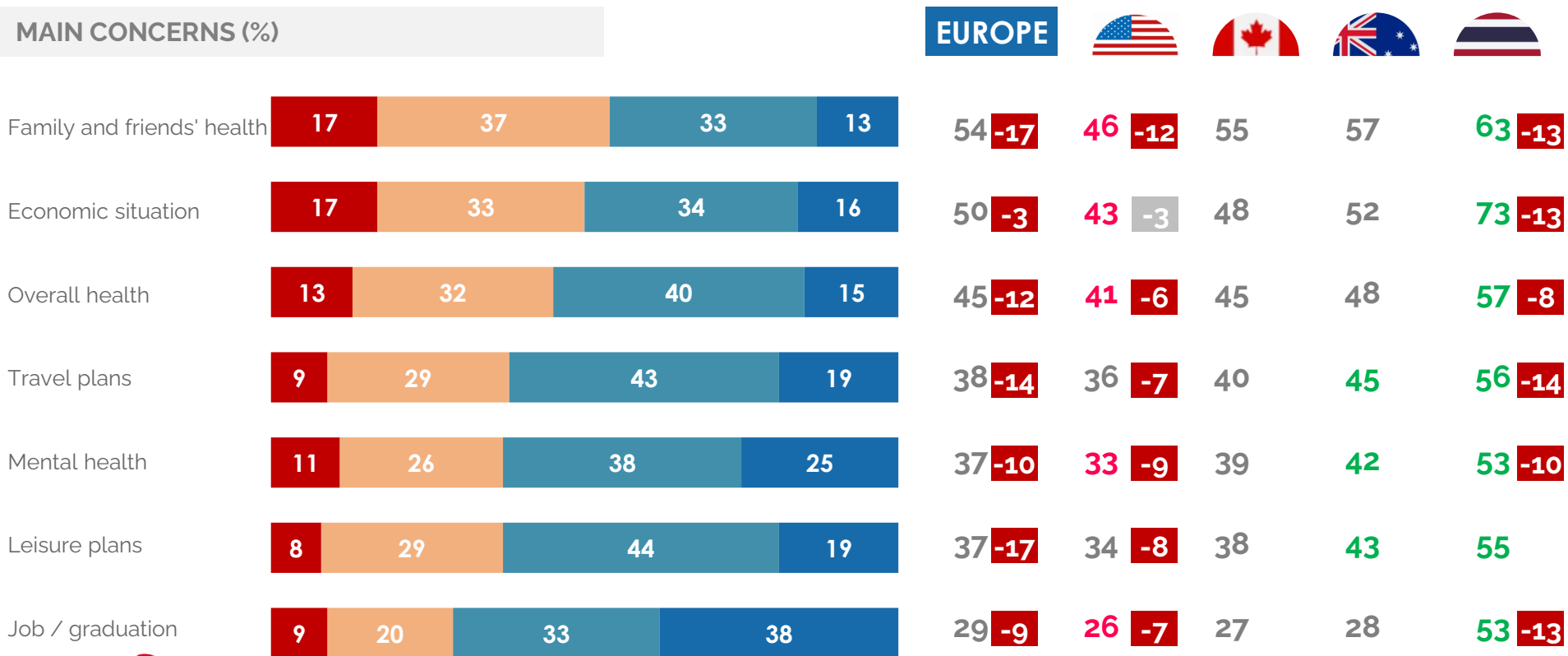
How do each of the following issues impact your enthusiasm and desire to travel this year?

Very much Somewhat A little Not at all

GAME CHANGERS



# 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

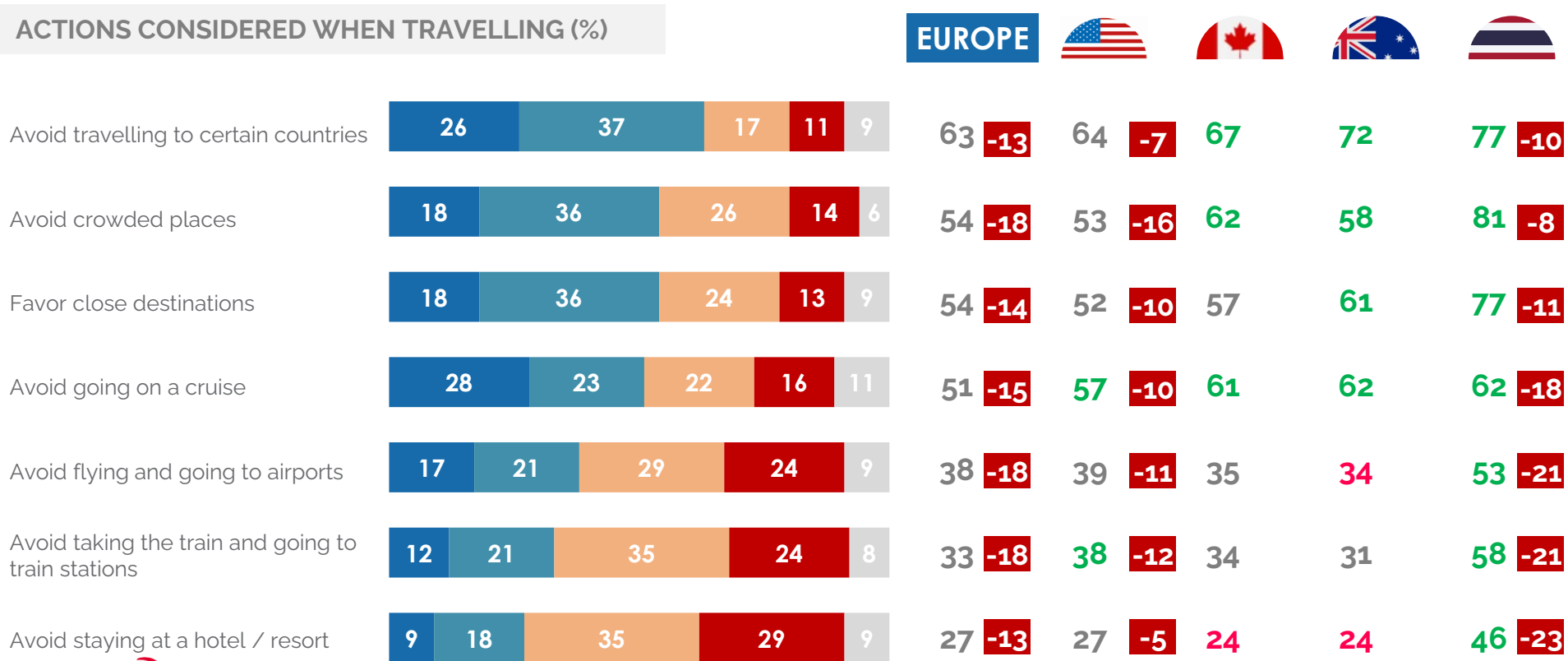


Are you concerned about the following regarding COVID-19?

Very concerned Quite concerned Not very concerned Not concerned at all



# 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



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

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

# 2.

## 2022 SUMMER HOLIDAY PLANS

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



# SUMMER PLANS ARE INCREASING COMPARED TO 2021

## SUMMER HOLIDAY PLANS

EUROPE

71%

(+14 versus 2021)

USA

60%

(+10 vs 2021)

CANADA

61%

THAILAND

69%

(+25 vs 2021)

AUSTRALIA

52%

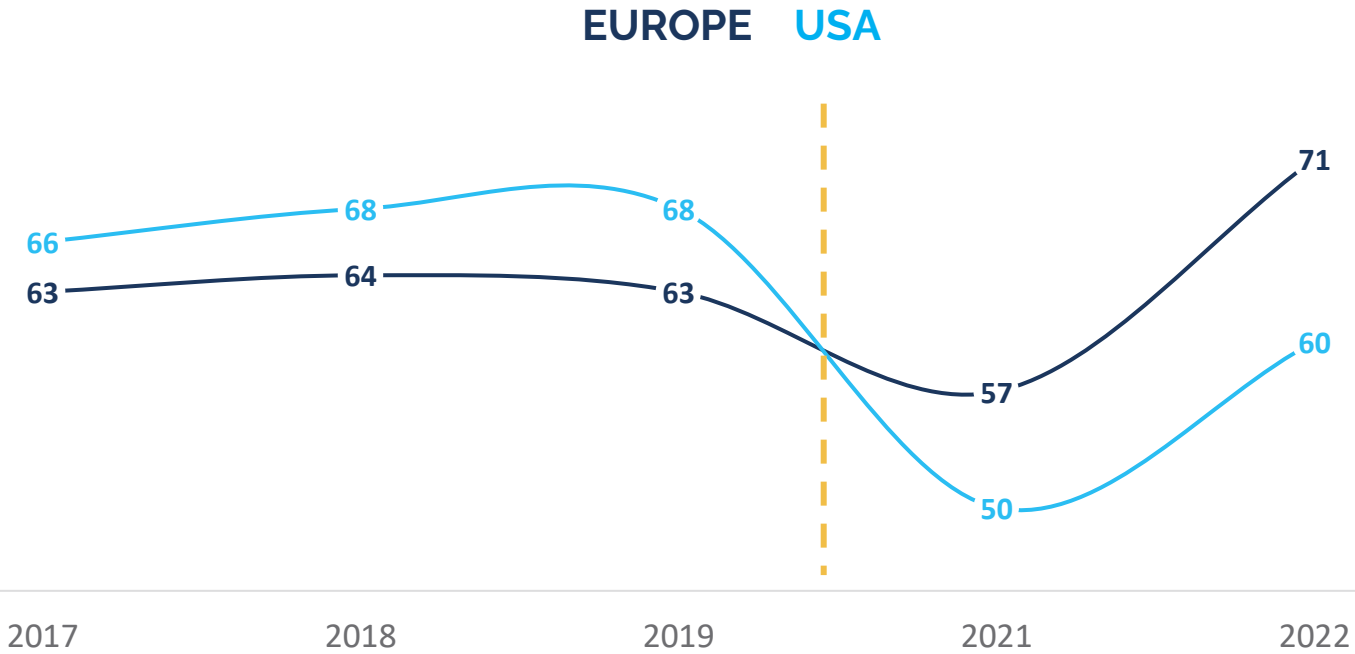
Do you plan to go on a trip this summer, in other words between June and September?  
Several trips + only one trip

GAME CHANGERS



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

EVOLUTION OF HOLIDAY PLANS (%)



# AMONG EUROPEANS, THE SITUATION IS UNIFORMLY POSITIVE

## SUMMER HOLIDAY PLANS

AUSTRIA

75%

+14pts vs 2021

BELGIUM

71%

+18pts

CZECH REP

73%

+8pts

FRANCE

74%

+7pts

GERMANY

61%

+19pts

ITALY

76%

+9pts

POLAND

75%

+9pts

PORTUGAL

79%

+17pts

SPAIN

78%

+20pts

SWITZERLAND

75%

+12pts

UNITED  
KINGDOM

68%

+18pts

# 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



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

# 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

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

## SUMMER HOLIDAY BUDGET

**AUSTRIA**

**€2 162**

**+4%**

**BELGIUM**

**€2 289**

**+15%**

**CZECH REP**

**Kč 28 421**

**+6%**

**€1 153**

**FRANCE**

**€1 806**

**+11%**

**GERMANY**

**€2 128**

**+15%**

**ITALY**

**€1 740**

**+10%**

**POLAND**

**Zł 4 499**

**+14%**

**€969**

**PORTUGAL**

**€1 543**

**+15%**

**SPAIN**

**€1 503**

**+20%**

**SWITZERLAND**

**CHF 2 912**

**+7%**

**€2 776**

**UNITED KINGDOM**

**£1 833**

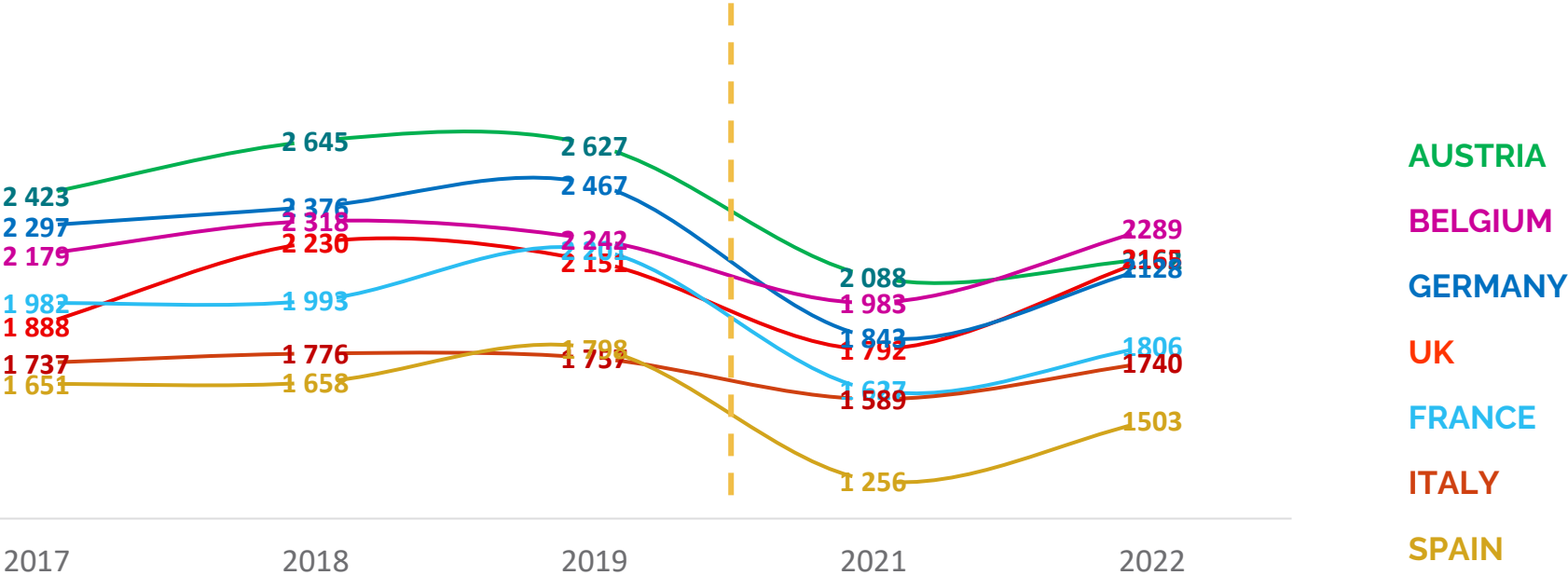
**+19%**

**€2 165**



# 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)



Base: Those who intend to go on holidays

An illustration of a woman with long black hair, wearing a yellow sun hat and a red bikini, sitting on a wooden swing. The swing is suspended by two ropes from a large green monstera leaf. The background is a tropical scene with a pink sky, a white sun, a blue sea with a white sailboat, and a sandy beach with waves. Various tropical leaves are scattered throughout the scene.

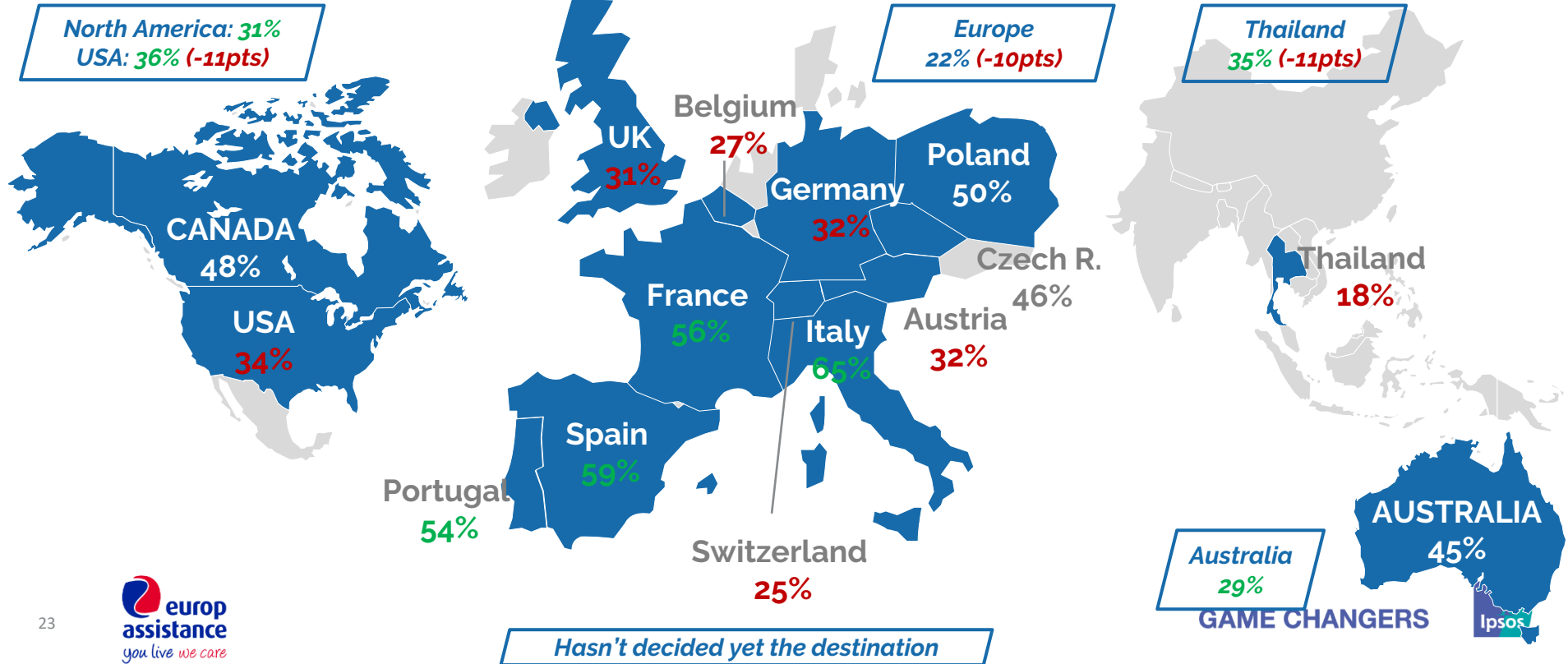
3.

## FAVORITE DESTINATIONS

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

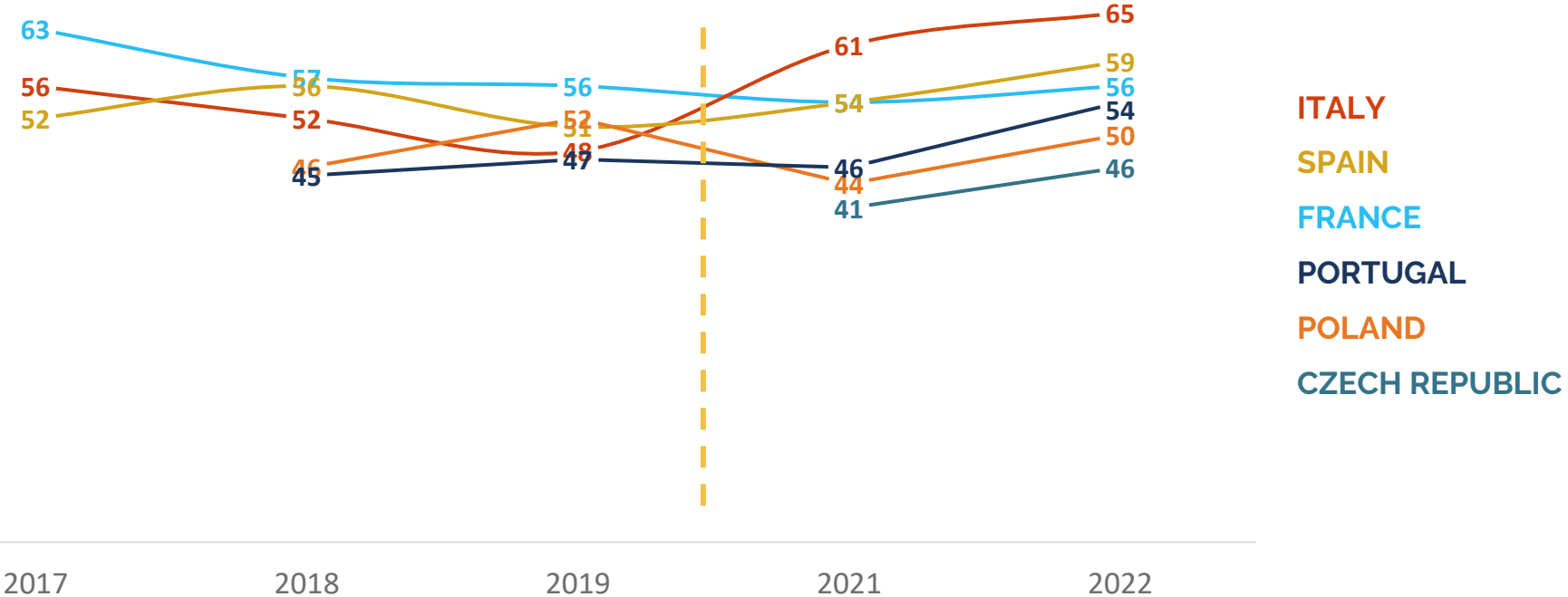
# ITALIAN, SPANISH & FRENCH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER

## HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



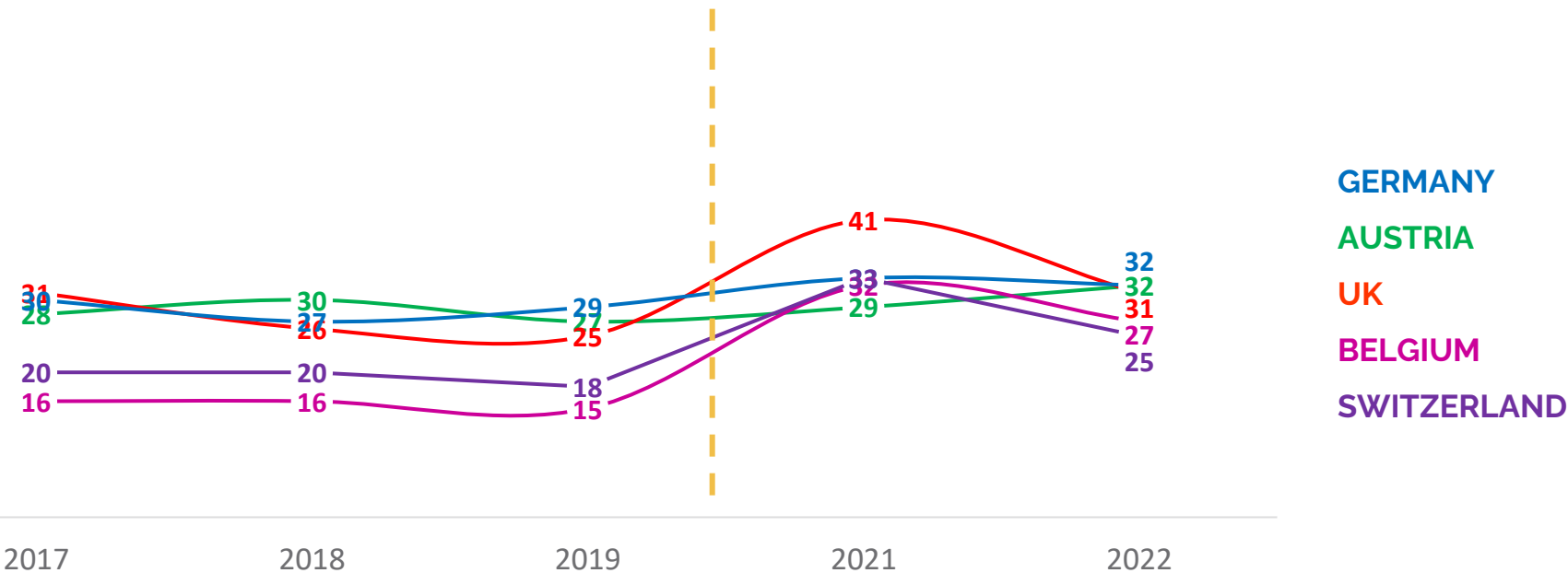
# EUROPEAN HOLIDAYMAKERS ARE STILL MORE LIKELY TO STAY IN THEIR OWN COUNTRY THAN THEY WERE IN 2019

HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)



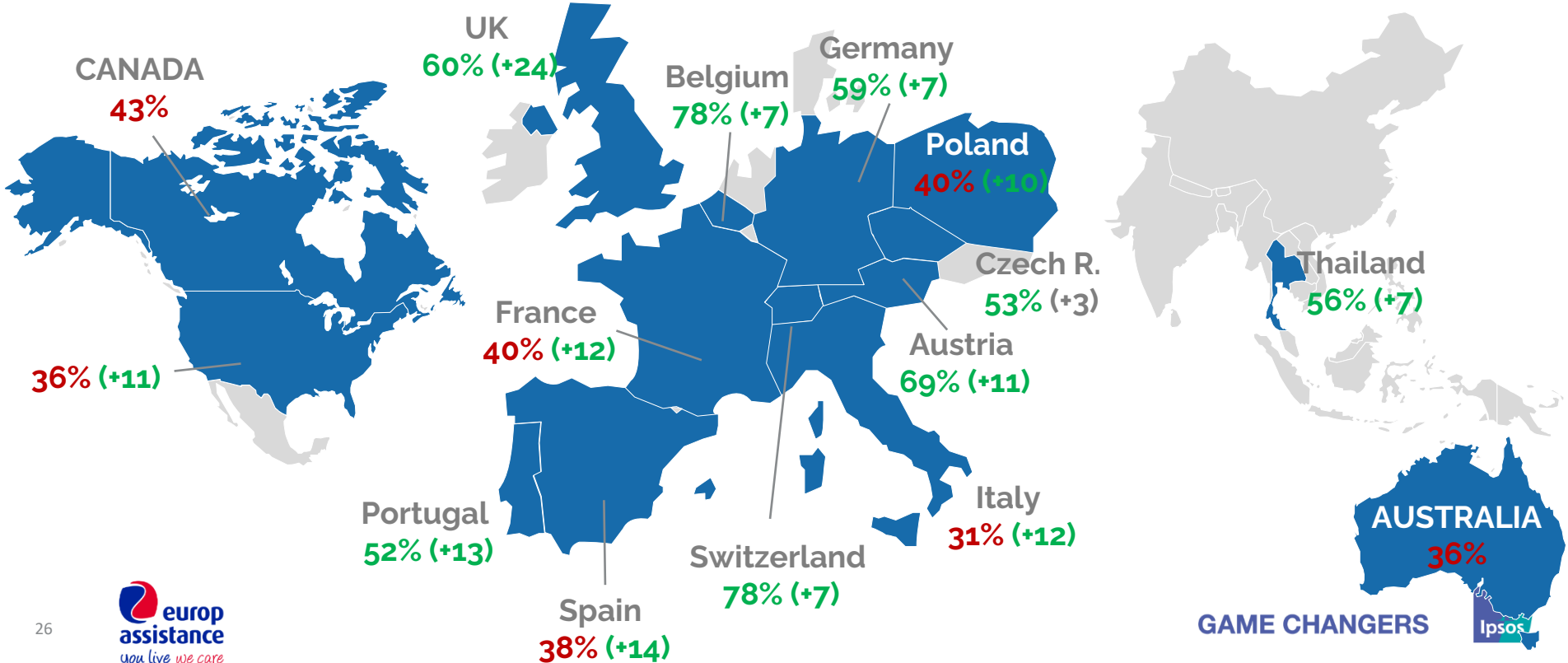
# EUROPEAN HOLIDAYMAKERS ARE STILL MORE LIKELY TO STAY IN THEIR OWN COUNTRY THAN THEY WERE IN 2019

HOLIDAY DESTINATION IN OWN COUNTRY BY EUROPEAN COUNTRY (%)



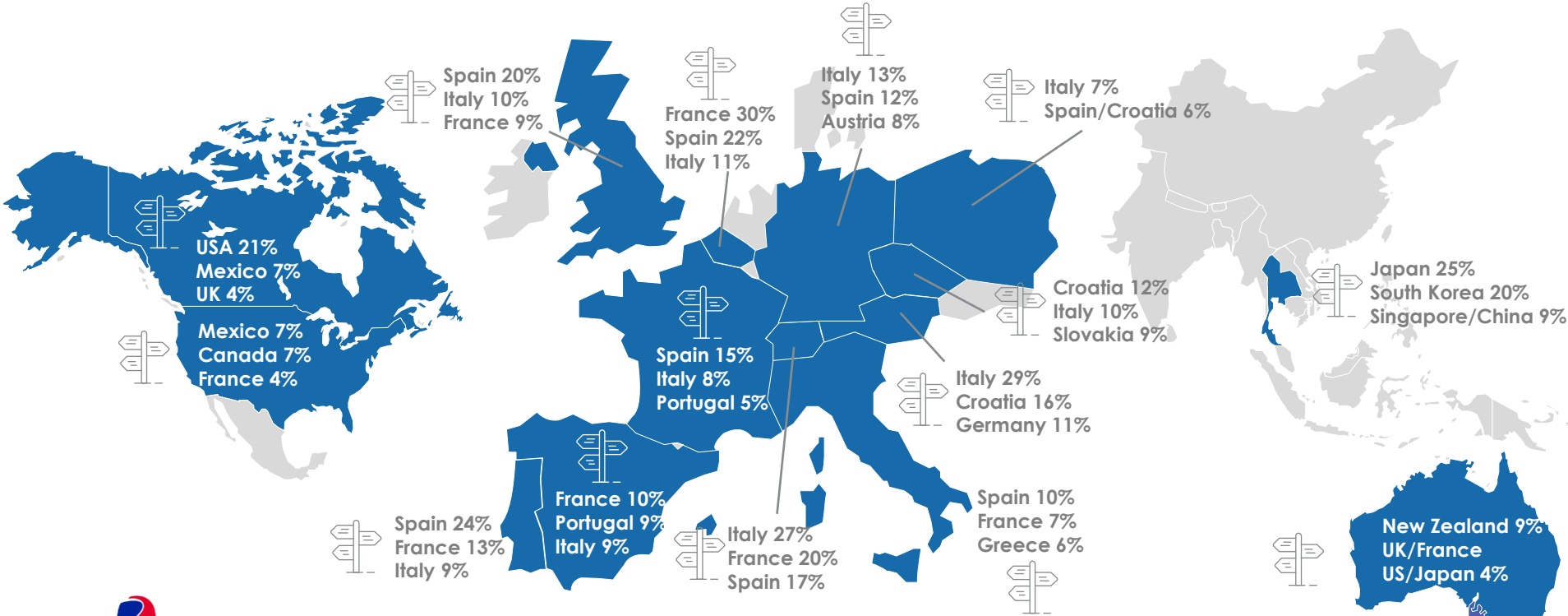
# HOLIDAYMAKERS ARE INCREASINGLY PLANNING TO TRAVEL ABROAD COMPARED TO LAST YEAR

## HOLIDAY PLANS ABROAD THIS SUMMER












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

## FOREIGN DESTINATIONS PLANNED THIS SUMMER



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

## SUMMER HOLIDAY PREFERENCES (%)

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







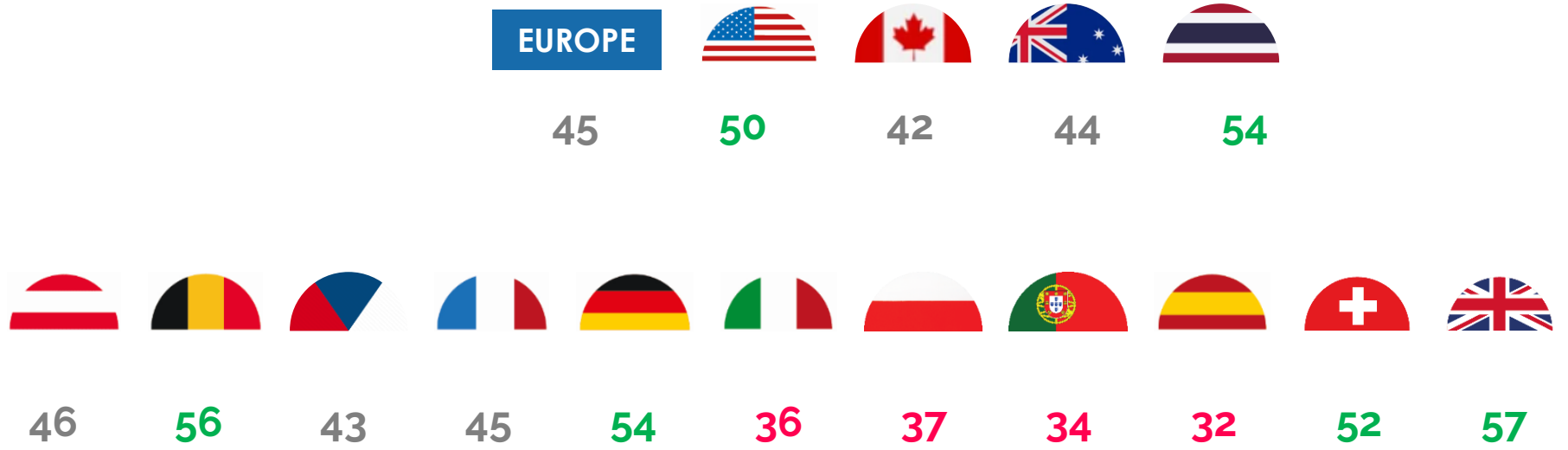
# 4.

## 2022 SUMMER HOLIDAYS ORGANIZATION

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

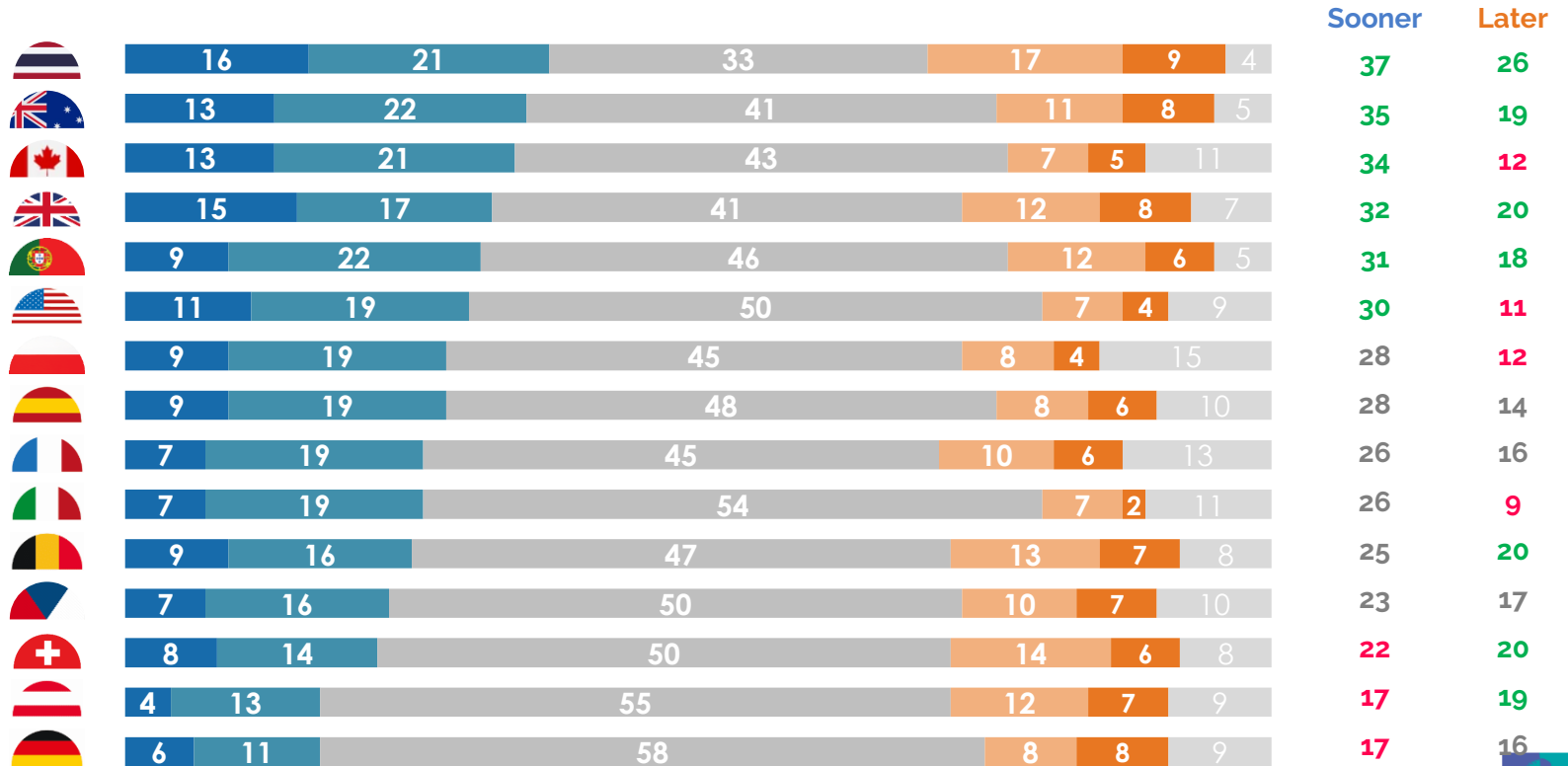
# HOLIDAYMAKERS FROM THE UK, BELGIUM, THAILAND, GERMANY, SWITZERLAND AND THE US ARE THE MOST ORGANIZED, AS MORE THAN HALF OF THEM HAVE ALREADY BOOKED AT LEAST PART OF THEIR TRIP

## SUMMER HOLIDAY RESERVATION (%)



# 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**

**GAME CHANGERS**





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

## TRANSPORTATION (%)

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





# 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 <b>+5</b>	57 <b>-6</b>	64	68	66 <b>+15</b>
Used to taking this mode of transportation	38 <b>-5</b>	40	37	31	40
More affordable	25	39	35	26	35
Less risk for infection	11 <b>-11</b>	12 <b>-11</b>	16	15	31 <b>-5</b>
Less risk to infect others	7 <b>-6</b>	10 <b>-7</b>	9	12	22 <b>-6</b>

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

## PREFERRED TYPE OF ACCOMMODATION (%)

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

# 6.

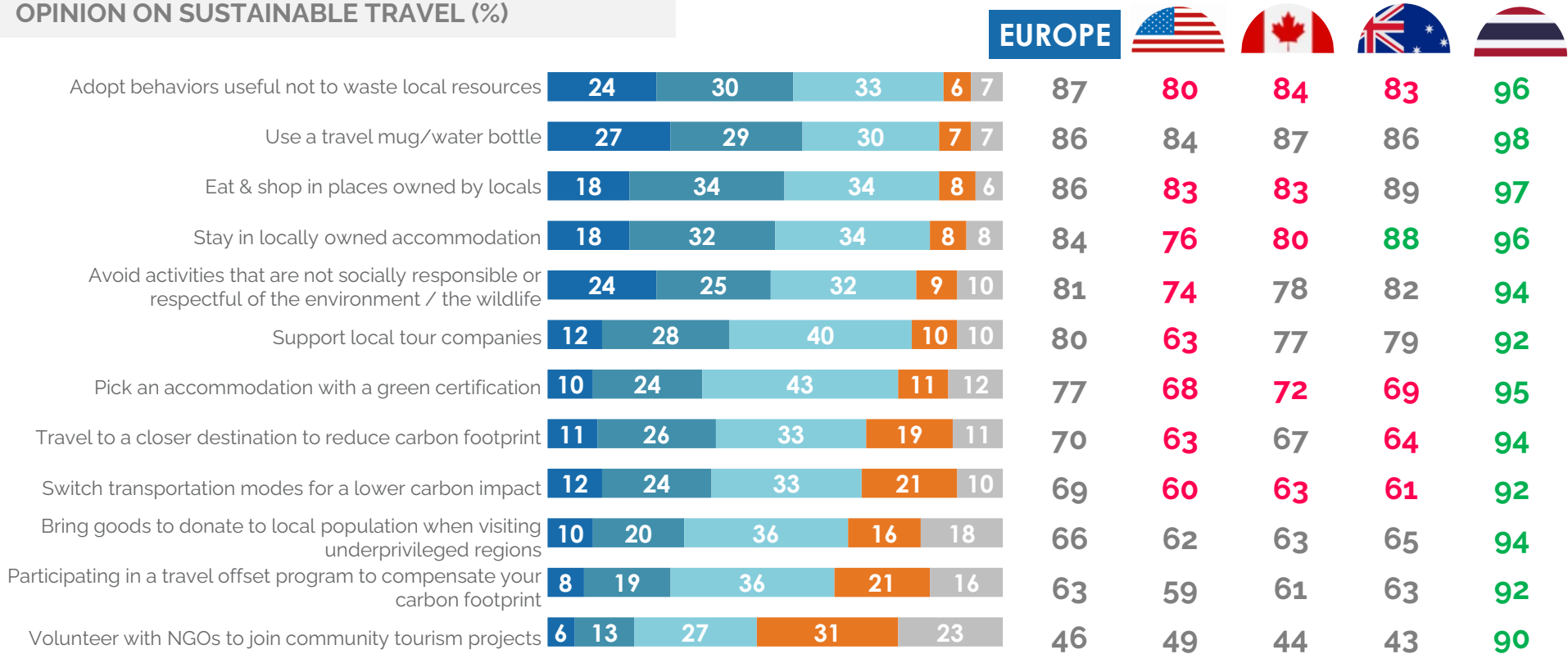
## NEW TRAVEL PRACTICES

- > 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 (%)



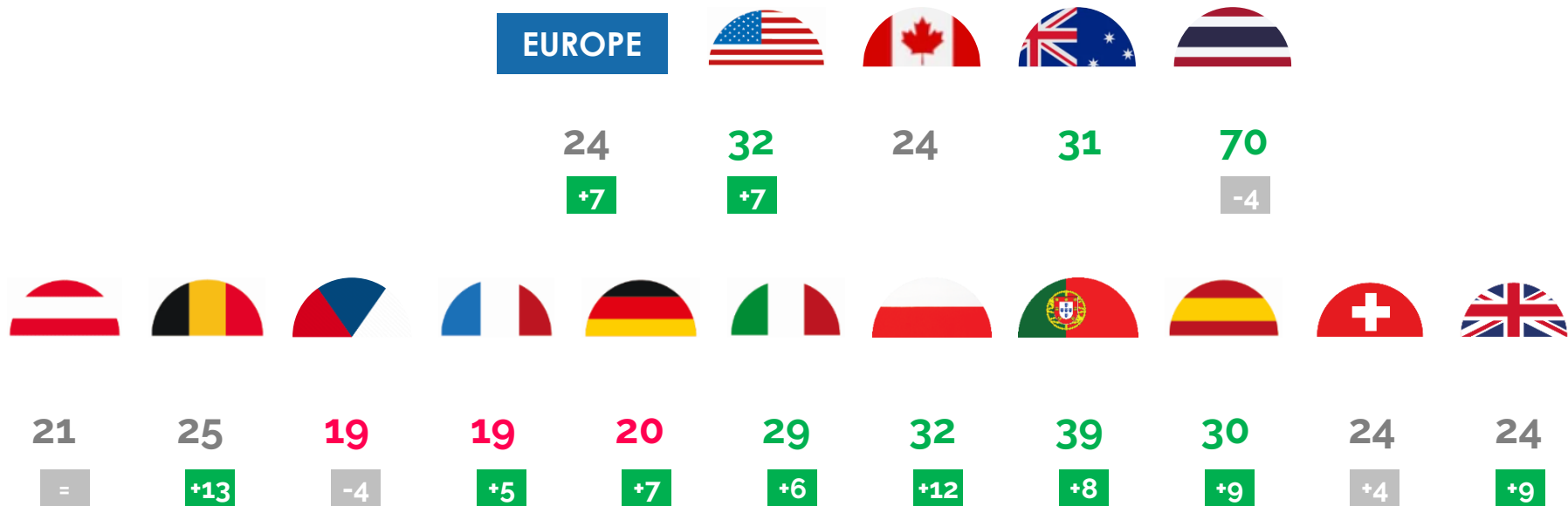
**Yes, and I am already doing it every time** **Yes, and I am doing it when I can**  
**Yes, I would be ready to do it** **No, I would not want to do it** **Not concerned**

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 (%)



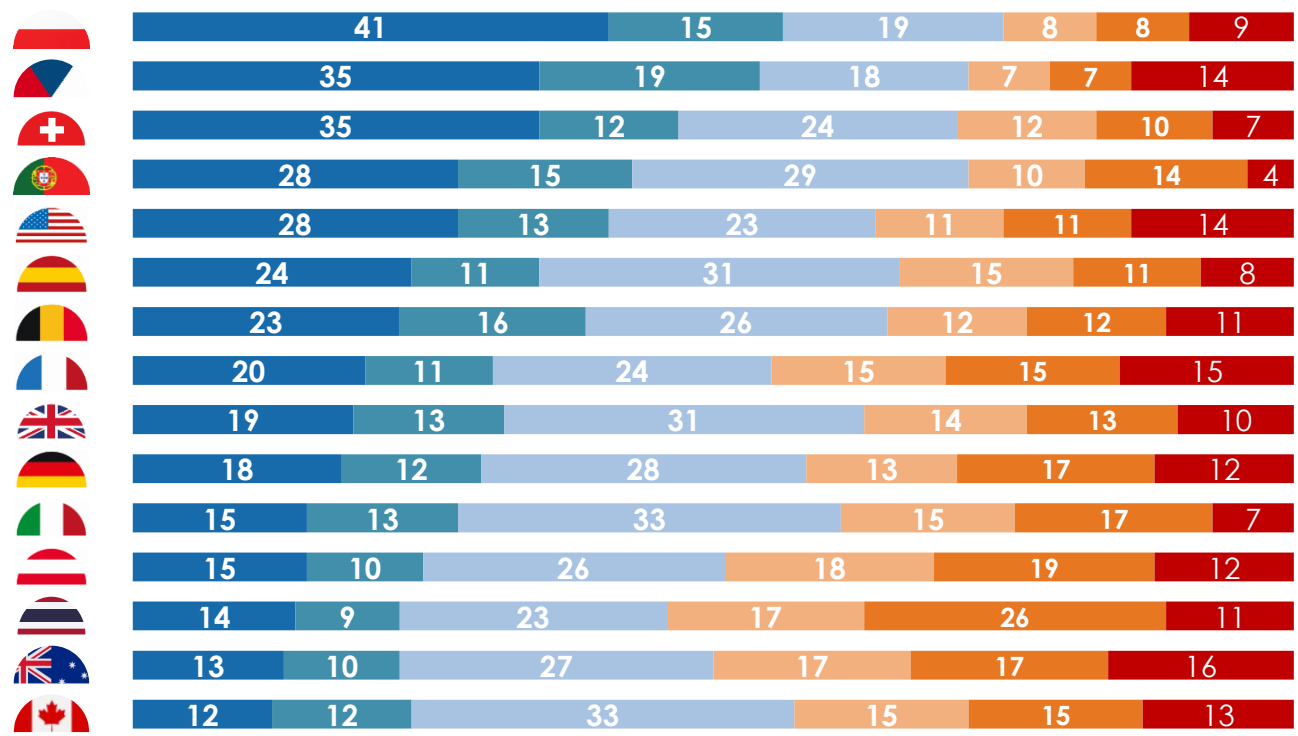
# FOR WORKATION, RESPONDENTS PREFER TO BOOK A HOTEL, EXCEPT FOR THE THAIS WHO WOULD RATHER STAY AT A FRIEND'S PLACE

## 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

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

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



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

It is already possible 2022 2023 2024 After 2024 Never

GAME CHANGERS



End of document

# CONTACTS

STEPHANIE STORNE

Senior Researcher

[stephanie.storne@ipsos.com](mailto:stephanie.storne@ipsos.com)

01 41 98 93 48



MARGAUX SCHMITT

Researcher

[margaux.schmitt@ipsos.com](mailto:margaux.schmitt@ipsos.com)

01 41 98 93 09



ANTOINE LANOTTE

Researcher

[antoine.lanotte@ipsos.com](mailto:antoine.lanotte@ipsos.com)

01 41 98 99 68



**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](http://www.syntec-etudes.com)), French Union of Market Research companies
- **ESOMAR** ([www.esomar.org](http://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



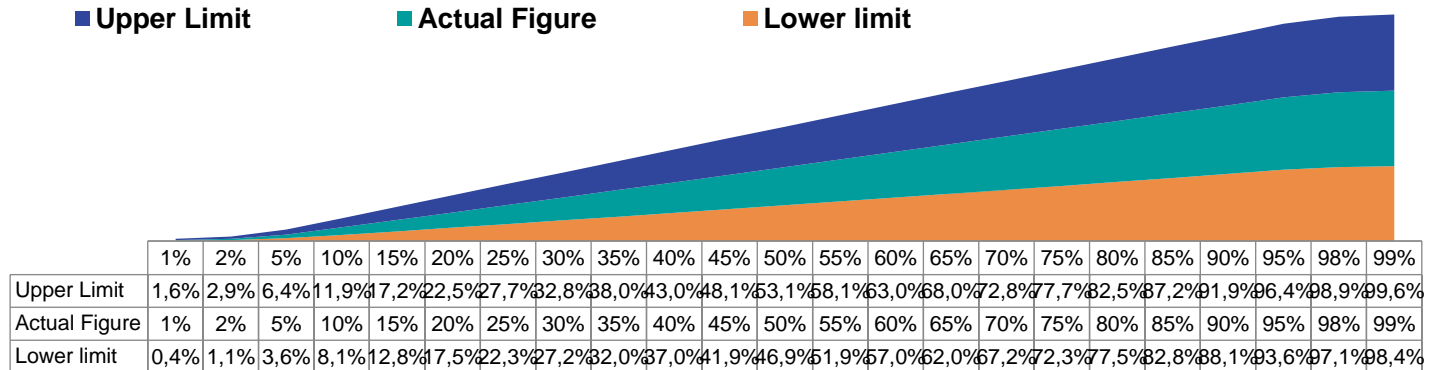


# RELIABILITY OF RESULTS SPREADSHEET

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  
[www.ipsos.com](http://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.**