2024 HOLIDAY BAROMETER

among Europeans, North Americans, Asians & Oceanians

Decoding global wanderlust: Insights into travel enthusiasm across 21 countries

Virginie Babinet

Chief Executive Officer - Travel Insurance & Assistance
Europ Assistance Group

“As we find ourselves at the cusp of a new era in travel, I am delighted to reflect on the insights gleaned from the Europ Assistance/IPSOS 2024 Holiday Barometer, a testament to the resilience and dynamism of the travel industry.

For over two decades, Europ Assistance & IPSOS has provided valuable insights into the evolving vacation intentions, preferences and decision-making factors of global travelers. This annual study offers a unique lens into the mindset of citizens worldwide, shedding light on how their choices are shaped by the world around them.

Amidst a multitude of challenges encompassing economic, geopolitical, environmental, social, and health concerns, the 2024 barometer reveals an intriguing and resilient appetite for travel. Despite the lingering impacts of the Covid-19 pandemic, historical inflation rates, geopolitical instability, and unforeseen climatic events, the desire to explore and experience new destinations remains stronger than ever.

This year’s findings highlight several encouraging trends:

- A surge in travel interest persists, even in the face of escalating geopolitical anxieties, indicating a remarkable resilience and a desire for escapism among travelers.
- While environmental, social, and governance (ESG) concerns loom large, they have not deterred individuals from exploring new destinations or engaging in travel activities, showcasing a commitment to personal fulfillment and experiences.
- Despite economic uncertainties and inflationary pressures, travelers continue to prioritize travel experiences, adapting their strategies and spending priorities to accommodate their wanderlust.

This juxtaposition of heightened global concerns with an increased appetite for travel underscores the intricate interplay between individual desires, societal anxieties, and the fundamental human need for exploration and escape. The barometer serves as an invaluable tool for industry stakeholders, helping them navigate contemporary challenges and opportunities while catering to evolving traveler needs and aspirations.

Originally focused on European nations, our Barometer has now expanded its scope to encompass 21 countries globally, including six new additions this year: India, Saudi Arabia, UAE, Hong-Kong, Japan, and Singapore. While trends in Western Europe and other Occidental regions remain consistent, we observe nuanced differences in Asia and India, where concerns about Covid-19 persist alongside other evolving trends.

As a leader in the travel assistance and insurance industry, it is our duty and privilege to share these crucial insights into summer travel trends with our customers, partners, and providers. We hope that this report will serve as a valuable resource, picking interest or guiding strategic decisions in an evolving landscape.”

Antoine Parisi

Group Chief Executive Officer,
Europ Assistance

The 2024 edition of our Holiday Barometer witnesses a remarkable resurgence of travel enthusiasm as people rediscover the world post-Covid. It also allows us to identify key drivers behind travelers’ choices, highlighting notable shifts in aspirations as well as new or increasing concerns. Overall, while a robust appetite for international travel stands out across various regions, safety and peace of mind remain paramount amidst global uncertainties.

In a world reshaped by inflation, geopolitical uncertainty, and environmental consciousness, this Barometer examines the interplay of economic, political, and ecological factors on traveling, each of them bringing new challenges and opportunities for our industry. As a global leader in travel insurance & assistance, Europ Assistance is committed to helping its partners anticipate and navigate the shifting tides reshaping the sector, inviting all stakeholders to join us in reflecting about the future of travel and creating safe, sustainable, yet enjoyable and fulfilling experiences for travelers.

Brice Teinturier

Managing Director

Thanks to our partnership with Europ Assistance on the Holiday Barometer, we now have two decades of data on the attitudes and concerns of travelers in Europe and around the world.

This unique survey enables us to understand travel intentions and the influence of the global context on the travel industry in 15 countries until now. This year it has taken on a new dimension, as we have extended its scope to six new countries in the Middle East and Asia, bringing the total to 21. A truly global survey, with a total of 21,000 people surveyed!

In this report, you will discover key information about the desire and expectations for travel and holidays, the impact of various concerns such as inflation, the geopolitical context and environmental issues on travel plans, and explore the emergence of new travel trends.

IN A NUTSHELL

11 Key learnings from the 2024 Barometer

1

Travel enthusiasm stays very strong across zones, continuing to progress, showing a recovery from the Covid period.

80% of Europeans are enthusiastic to travel this year (+8pts compared to 2022)

2

A desire to escape: strong appetite for international travel - with some variations across zones.

For 49% of Europeans, the ideal vacation in 2024 means traveling abroad - but it goes down to 29% for North Americans

3

Within Europe, a clear split between countries preferring domestic travel (mainly Southern Europe and France) vs international travel (all other countries).

1 out of 4 Italian, French and Spanish travelers taking holidays this summer are planning to travel only in their own country

4

Concerns about safety are very much present in travelers' minds, intensified by the geopolitical context.

49% of Europeans cite the risk of armed conflict in the destination zone as an essential factor influencing their destination's choice

5

European destinations remain the most popular ones, especially among European travelers where Spain, France and Italy occupy the podium in most countries.

Among the 10 European countries of the survey, Spain is the top spot in 6 of them

6

The perfect recipe for a successful vacation is considered to be: mixing rest, social & family interactions and discovery, way above reading or sports.

Relaxing and having peace of mind during holidays is the first expectation for 31% of Europeans and even higher in Southern Europe (37%)

7

Inflation is still very much a constraint; adaptations are being made to tackle it.

58% of Europeans and Middle Eastern travelers are opting for more budget-friendly accommodations

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.

Only 18% of Europeans include their ecological footprint as a consideration when choosing a destination

9

Solo traveling is still not very common, and even less in Europe than in other zones.

22% of Australian travelers plan to go solo, vs. 11% of Europeans

10

Workation, blurring the borders between work and vacation, tends to stagnate in Europe, and to be less widespread than in other zones : a slowdown of this trend among European actives.

27% of European actives plan to work remotely from a holiday destination, a steady figure since 2021 - the «post-covid» era

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).

9% of Europeans express they are very likely to take culinary trips

01

Amid global uncertainty, travel emerges as a refreshing escape and an anxiety reliever

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travel emerges as a refreshing escape and an anxiety reliever

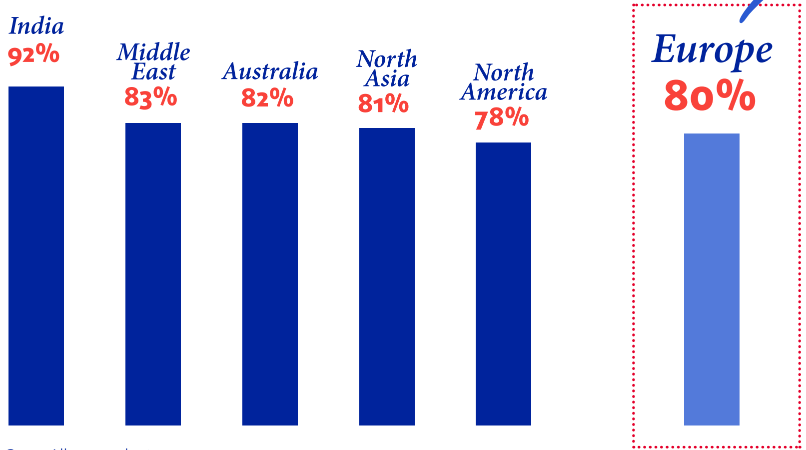
1.1 Enthusiasm to travel is widespread all over the globe...

Despite global concerns surrounding inflation, geopolitical tensions, and conflicts, the desire to travel remains remarkably resilient across all regions surveyed. Approximately 80% of the population exhibits enthusiasm for travel, with a significant portion—ranging from a third (31% in North Asia) to nearly half (53% in India)—expressing genuine excitement about embarking on new adventures.

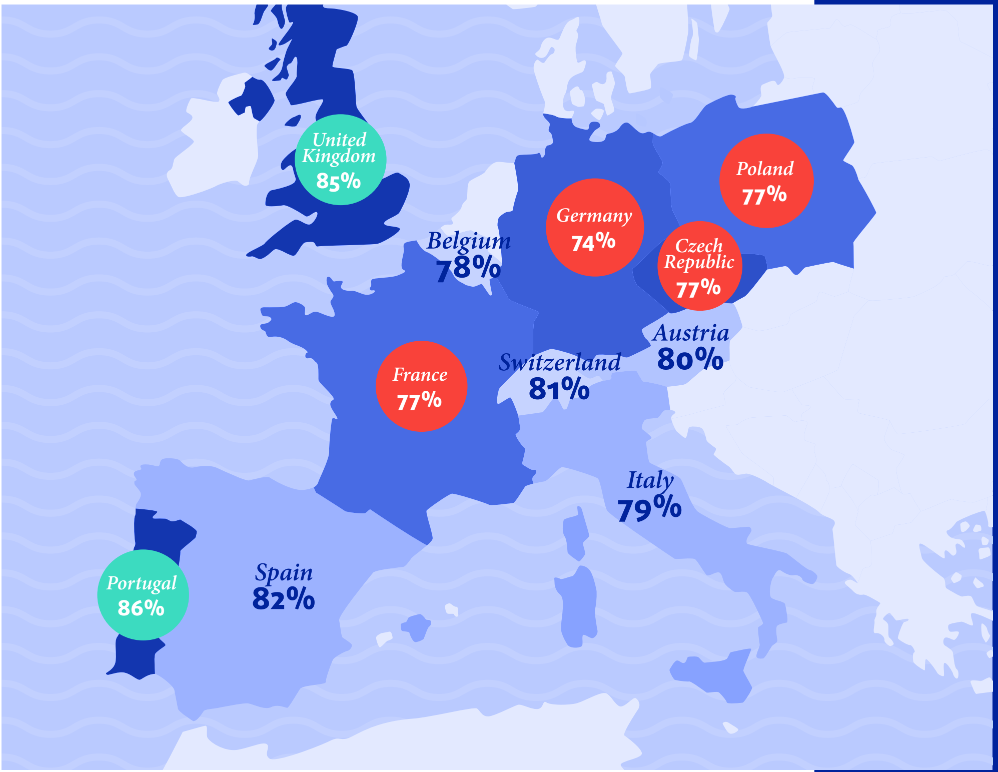
However, there are notable variations observed among the 21 countries included in the survey. Japan registers the lowest enthusiasm score, with 71% of its population expressing eagerness to travel. Conversely, India emerges as the frontrunner, boasting the highest enthusiasm level at 92%.

In Europe, Germany records the lowest enthusiasm score, with only 74% of Germans identifying as travel enthusiasts.

% of people saying they are excited or happy to travel this year



Base: All respondents



In Europe, 84% of the 18-34 y.o are enthusiastic to travel this year (VS 80% of the general population).

The excitement for travel is notably varied across different demographic segments, with age and income playing significant roles in shaping enthusiasm levels.

Younger individuals, typically those under 35 years old, exhibit a heightened sense of enthusiasm, with 84% identifying as travel enthusiasts in Europe. In comparison, the enthusiasm slightly diminishes among older age groups, with 78% of individuals aged 35 and above expressing similar sentiments, and 75% among those aged 55 or more.

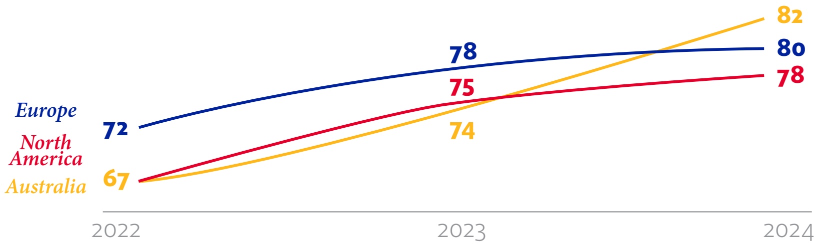
Moreover, **the level of income strongly influences travel enthusiasm**, particularly in the current context of inflation. A striking 88% of high-income earners express excitement or happiness about traveling this year, underscoring their readiness to embark on new adventures. In contrast, only 69% of individuals classified as low-income share the same level of enthusiasm, highlighting the differential impact of economic factors on travel aspirations.

1.2 ... And has been growing over the past years, with highest growth in Australia

In Europe, the momentum of travel enthusiasm, which experienced a notable surge last year, **persists and continues to flourish**, reaching an impressive 80%. This upward trajectory is particularly evident in Western Europe, where enthusiasm levels have risen by 4 points, and Eastern Europe, witnessing a commendable increase of 3 points. However, Southern Europe shows a slight stagnation, with enthusiasm levels remaining relatively stable, declining by just 1 point.

A similar trend unfolds in North America, characterized by robust enthusiasm levels. Canada leads the charge with a notable increase of 5 points, while the USA demonstrates a commendable uptick of 1 point. Additionally, Australia experiences a significant surge in travel enthusiasm, boasting an impressive increase of 8 points.

Evolution of travel enthusiasm since 2022



1.3 Unleashing wanderlust: survey reveals powerful desire for international travel among respondents

When asked about what their ideal 2024 vacations would look like, only 7% to 15% of the population across zones would stay home (9% in Europe), with one exception across the 21 countries surveyed: Japan where 27% would prefer to stay home, the highest score among the whole survey. The Japanese, less enthusiastic about traveling in general, confirm their preference to stay home when thinking about the ideal holiday.

Apart from this exception, **the desire to travel during holidays is predominant across zones, and especially international travel in 2 zones in particular: Europe and North Asia**, where the proportion of people picturing themselves traveling abroad outweighs the proportion of people picturing themselves in their own country.

Australia and Middle East show **a mix of preferences**: abroad and domestic travel are very close, while in India and North America, domestic holidays largely prevail.

#1 *Homers*	#1 *Domestic Travelers*	#1 *Travelers abroad*
Japan **27%**	India **62%** Spain **59%**	Belgium **68%**

Within Europe: should I stay or should I go?

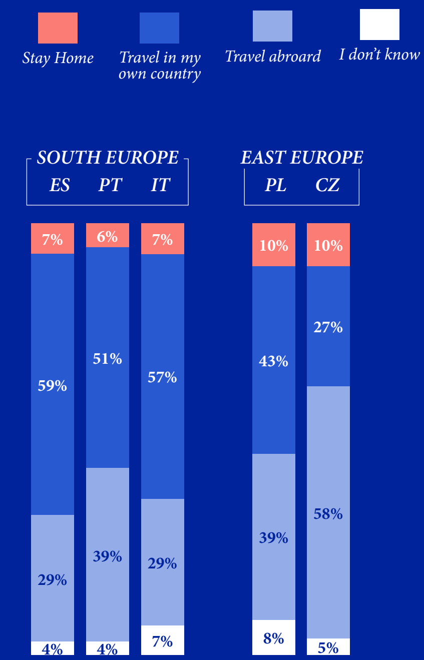
Ideal vacation destination shows **important differences within Europe, with a clear split between Southern Europe & France on one hand, and other countries on the other hand.**

Indeed, Spain, Italy, Portugal and France all reach more than 50% for domestic travel preference. On the other hand, travel abroad gets the majority in the UK, Germany, Belgium, Switzerland, Austria and Czech Republic (between 55% to 68%).

A difference that could be linked to different reasons:

- Favorable weather conditions in Southern Europe (weather is more quoted as a motivation by German and Austrian travelers) – however some places might become too hot in the coming years.
- Traveling within Europe in the summer are more common for some populations (in Germany, Austria, Belgium and Czech Republic).
- Having been at a specific place or location and wanting to return there is more often a motivation to choose the destination country than in France and Southern Europe.
- Tourist attractiveness of close countries.

When you think of the ideal summer vacation in 2024, where would you primarily want to go?



Base : all respondents

1.4 The perfect recipe for a successful vacation: mixing rest, social & family interactions and discovery, way above reading or sports

Whether in one's own country or abroad, vacation expectations revolve around 3 main areas:

- **Relaxing holidays:** relaxing and having peace of mind during holidays is the main expectation in Europe, and also high in other zones. For 31% of Europeans, it is their first expectation, and even higher in Southern Europe (37% "first")
- **Social & family holidays:** coming together with family & friends, is often the second highest expectation, even first in North America and Middle East.
- **Discovery holidays:** the main expectation in India and Australia, discovery of new cultures & change of scenery ranks in the top 3 expectations across zones. Holidays remain a perfect occasion to open to the world and other cultures.

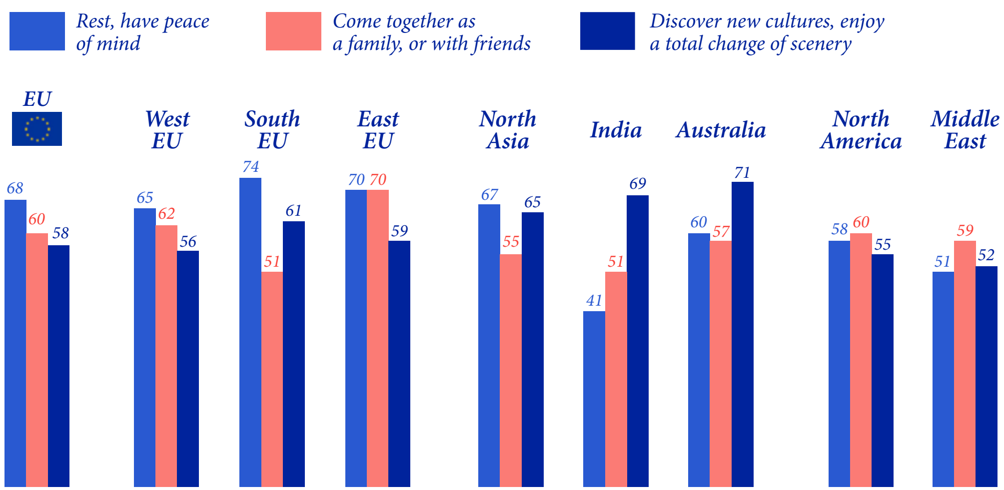
Those 3 types of holidays cover most vacationers' expectations: when looking at the first expectation quoted, those 3 possibilities represent 80% of mentions overall in Europe, meaning that other activities such as reading or sports are only chosen by a minority.

Those preferences, however, are **not mutually exclusive and go hand in hand together:**

- **Europeans who choose "rest" first,** also quote "coming together with family / friends" (57%) and "discover new cultures" (44%)
- **Those who quote "discover new cultures" first"** also wish to rest (55%) and enjoy their family & friends (46%)

→ *No opposition or contradiction between change of scenery, social interactions, and rest. The ideal vacation should have it all!*

When you think of THE IDEAL [summer vacation/ vacation] in 2024, what would you primarily want to do?



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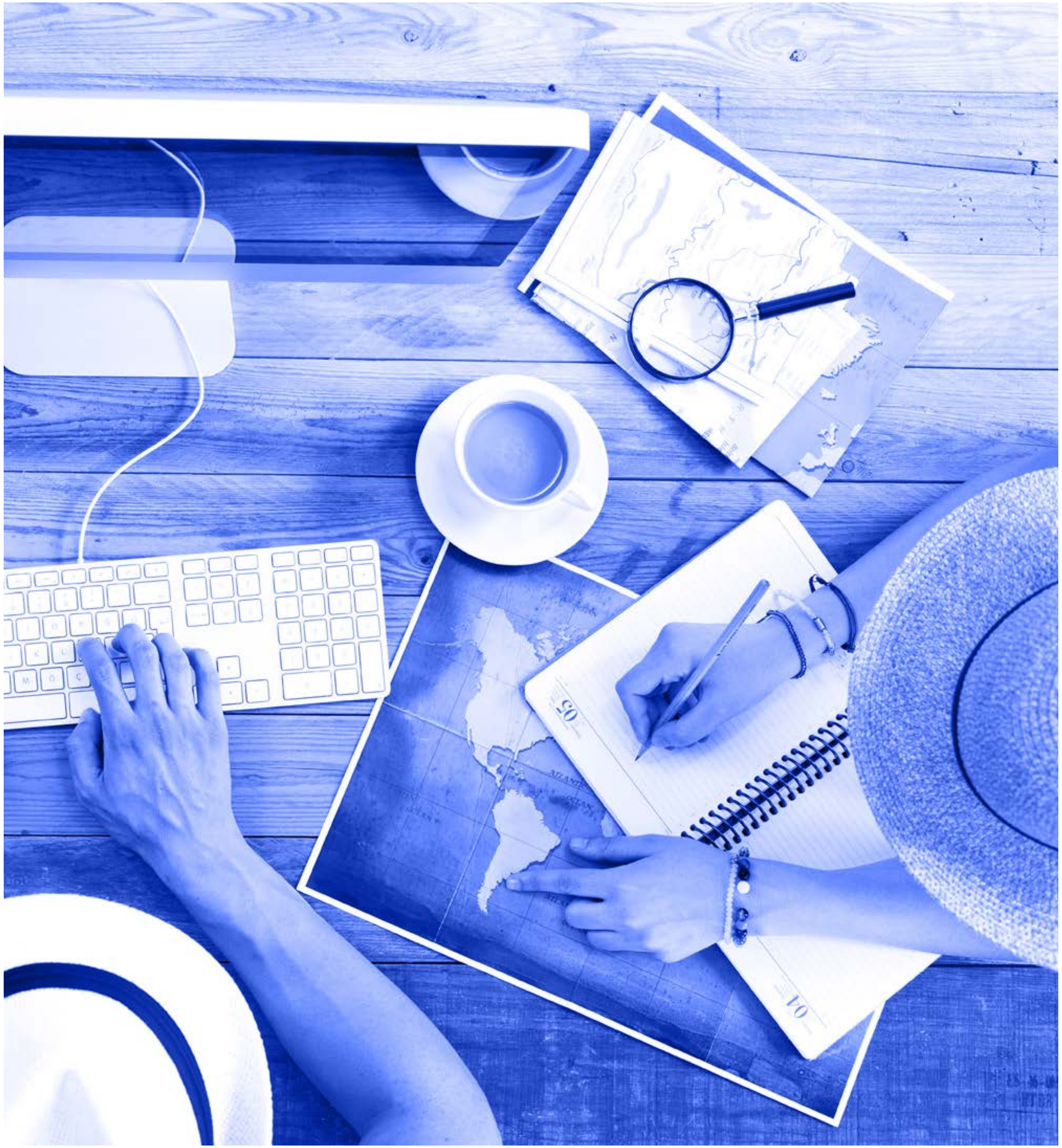
Base: Those who plan to take holidays



02

Reality checks: multiple global issues impacting travel intentions

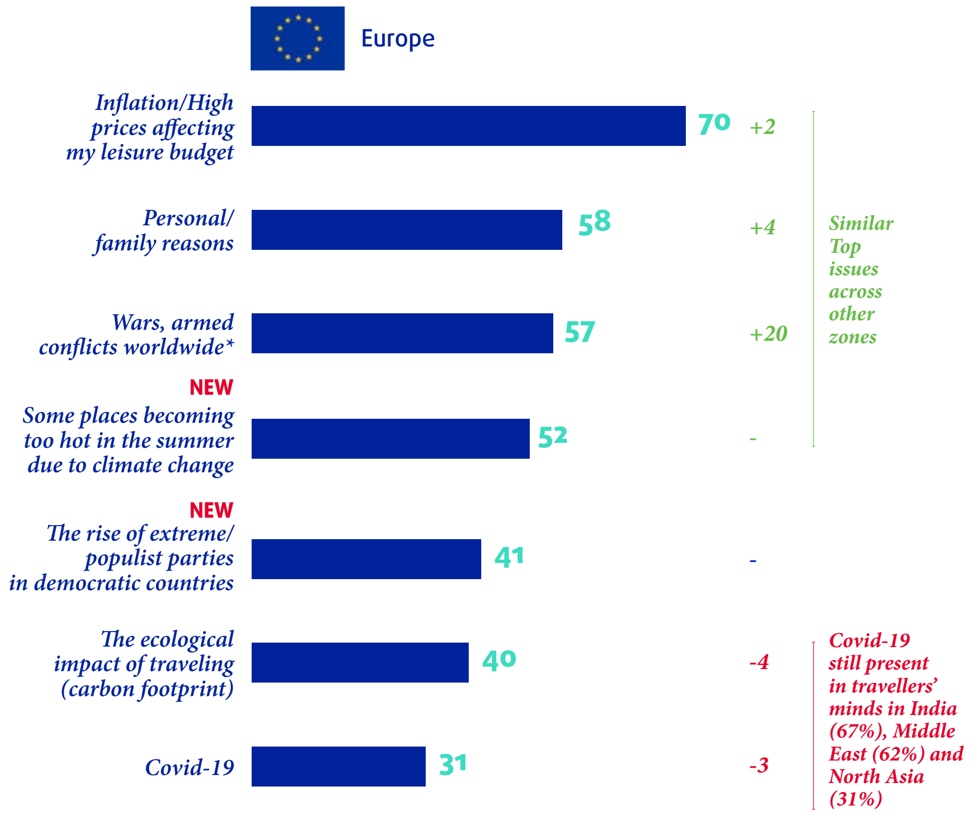
Reality checks:
multiple global issues impacting travel intentions

In a world facing numerous challenges, several factors are influencing travel enthusiasm, with the following topping the list:

- **Geopolitical Tensions:** Ongoing armed conflicts and geopolitical uncertainty worldwide are significant concerns for travelers.
- **Inflation and Purchasing Power:** Economic pressures, including inflation, continue to impact travelers' financial decisions.
- **Family/personal reasons:** on top of contextual concerns, personal situations are still very important when considering travel.
- **Global warming:** The rising temperatures in summer destinations are already a reality, impacting travelers' choices.

While health risks are no longer a major concern for Western travelers, with only 26% of Europeans (-4 pts), 27% of Australians, and 30% of North Americans considering them «essential», when choosing a holiday destination, health remains a more pronounced issue in India (56%), the Middle East (62%), and North Asia (49%).

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



*Item modified in 2024. 2023 item was «The war in Ukraine»
Base: All respondents

2.1 Concerns about safety, intensified by the geopolitical context

The turbulent international landscape significantly influences travelers' perceptions. Wars and armed conflicts worldwide increasingly affect travel desires, with a notable 20-point increase in Europe compared to 2023 (measured by impact «at least somewhat» – noting last year's specific mention of the conflict in Ukraine). This concern is particularly serious, with 27% of Europeans indicating that armed conflicts «very much» impact their desire to travel.

In comparison, the emergence of extreme/populist parties in democratic countries is a less pressing issue: only 13% of Europeans state that it «very much» impacts their desire (41% «at least somewhat»).

For half of Europeans (49%), the risk related to armed conflicts is an essential factor in their choice of destination.

Once travelers have decided to embark on a journey, safety consistently ranks among the top three motivations for selecting a destination in all zones, except Europe, where it remains the fourth criterion.

Still considering the factors influencing destination choice, safety-related concerns are confirmed to be increasingly prominent. Foremost among these is the risk of armed conflict in the destination zone, which has seen a significant uptick of 28 points in Europe. This surge has led to an impressive 49% of Europeans citing it as an «essential» factor.

Similarly, in North America, this risk is being given greater consideration, with a notable increase of 23 points. (Note that in 2023, the item specifically mentioned the «war in Ukraine».)

Other risks associated with terrorist attacks (+8 points in Europe), social unrest (+5 points), and the political climate (+6 points) are also on the rise. These trends underscore a pervasive climate of anxiety regarding tensions worldwide.

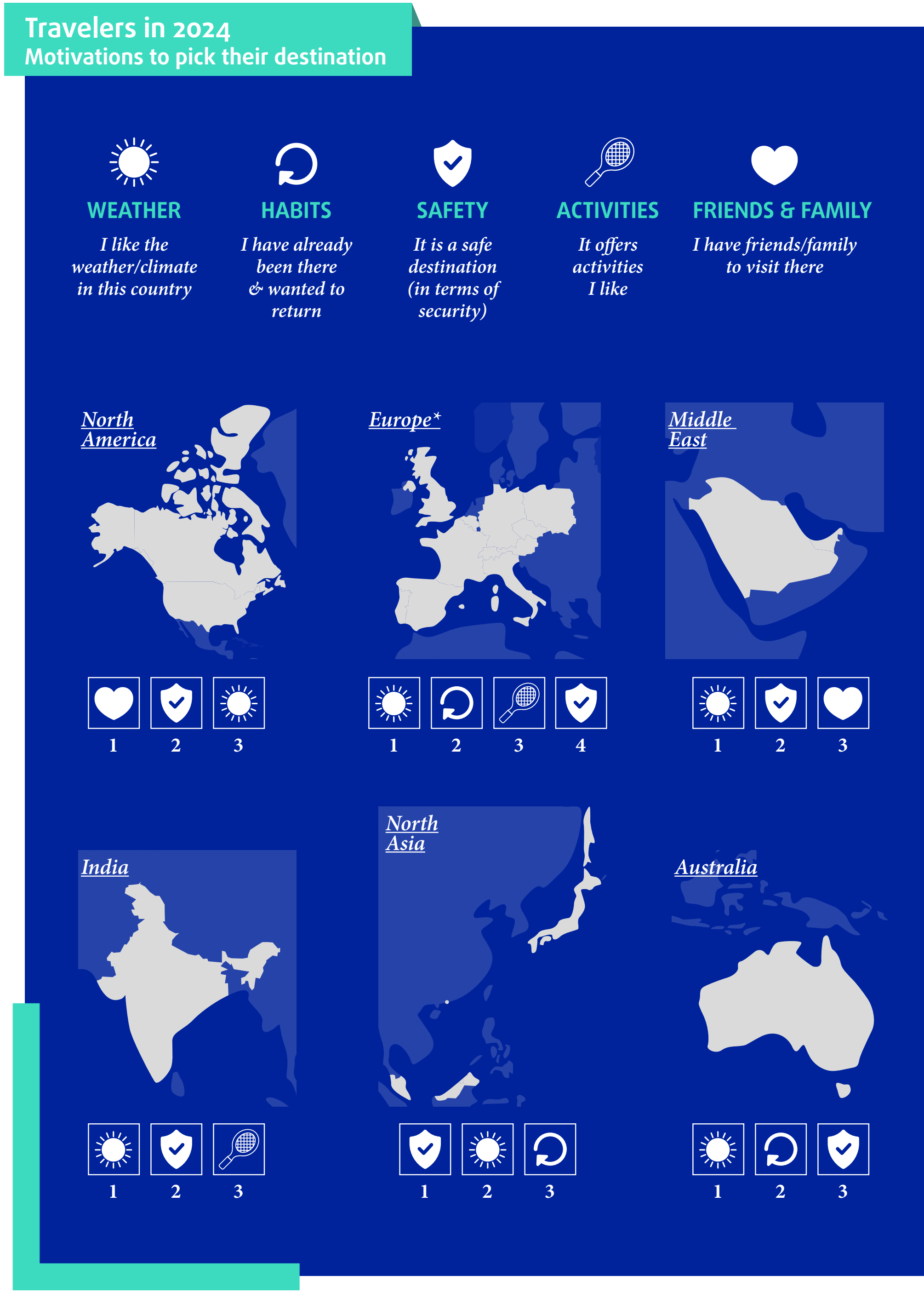
Focus: avoiding conflict zones… but also specific countries for political reasons

In the midst of geopolitical unrest, travelers are increasingly cautious about their destination choices, particularly steering clear of areas embroiled in conflict or fraught with political tensions.

Notably, three countries stand out as the most avoided in 2024 due to ongoing conflicts: Israel, Russia, and Ukraine. A significant portion of European travelers who claim that political climate is important for them will avoid those regions (18% Israel, 21% Russia, 14% Ukraine).

Furthermore, countries neighboring conflict zones or with unfavorable political climates are also facing avoidance by travelers. For instance, Egypt, Turkey, Iran, and China are among the nations that could be sidelined due to their proximity to conflict or perceived political instability. In the Middle-East region, travelers express hesitancy towards neighboring countries like Iraq, Lebanon, and Jordan.

Interestingly, while European travelers maintain a relatively steady interest in visiting the United States, other nations display more apprehension, particularly concerning the prevailing political climate. For instance, among travelers for whom political considerations are an important criteria, 12% in Australia could avoid traveling in the US, 7% in India, 9% in Canada, and 9% in North Asia.



In Europe, Safety and Activities' score are very close, hence the addition of this 4th criterion.

2.2 Inflation & purchasing power: adaptation strategies to continue to travel

Inflation and rising prices undoubtedly influence the desire to travel, with 30% of Europeans expressing a significant impact («very much»), and 70% indicating at least some degree of concern. However, what's remarkable is the resilience shown by travelers in adapting to these economic realities.

Across Southern Europe and beyond, where worries about inflation persist, travelers are finding innovative ways to navigate these challenges. While concerns remain high, there's a growing sense of adaptability and resourcefulness among adventurers.

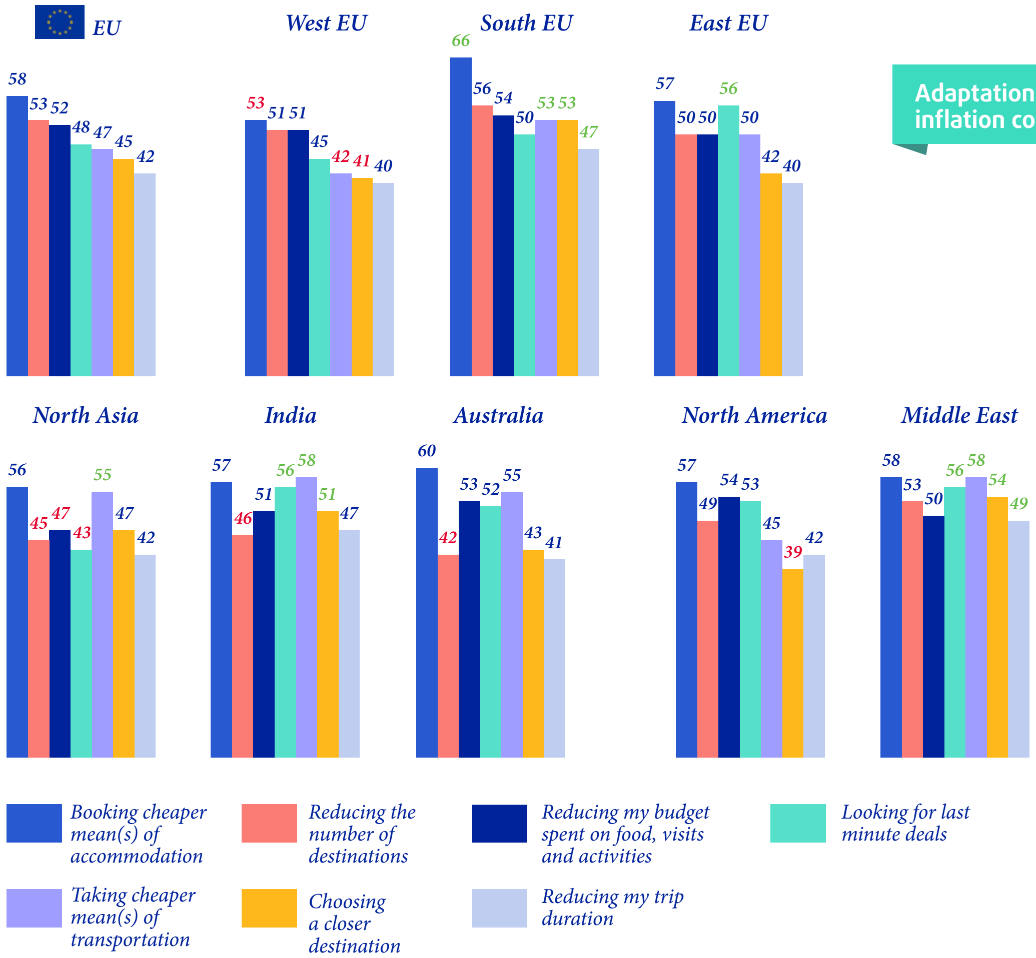
In response to the economic landscape, travelers who anticipate an impact of inflation in their travel plans are making thoughtful adjustements to cope:

- Many are opting for more budget-friendly accommodations, with 58% in Europe and Middle East considering this pragmatic approach (56% in North Asia and 57% in the US).
- Others are streamlining their itineraries, with 53% planning to consolidate their destinations.
- Travelers demonstrate a willingness to reduce expenditures on food, visits and activities to reallocate funds towards enhancing their overall travel experiences, this is the case for 52% of European travelers.
- Additionally, the cost of living in destination countries is becoming a more significant factor in travel decisions, highlighting travelers' savvy approach to planning.

What's heartening to see is that, despite these challenges, travelers remain determined to embark on their journeys, demonstrating a resilient spirit and an unwavering passion for exploration.

Cheaper holiday accommodations is the first adaptation made by 58% of European travelers when impacted by inflation.

Adaptation of travel plans due to inflation context



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2.3 Environment, the « climate paradox »

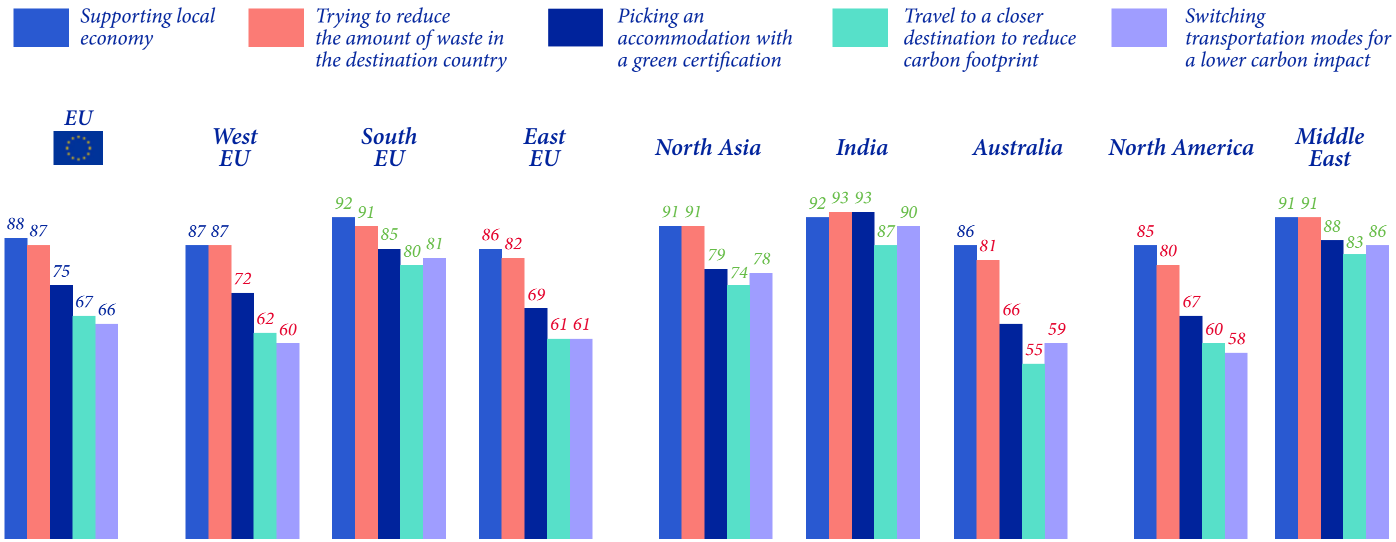
Embracing sustainable travel practices: A global movement

In a world where climate change is an undeniable reality, travelers are demonstrating a commendable commitment to responsible tourism. While the ecological footprint of travel remains a consideration for only 18% of European travelers when choosing a destination, there's a growing consciousness about environmental impact.

Awareness vs. Action: Striking a balance

While travelers may not always prioritize eco-conscious choices in transportation and accommodation, there's a notable shift towards mindful travel practices. Supporting local economies and minimizing waste have become widespread behaviors, with 88% of Europeans and 85% of North Americans actively incorporating these principles into their journeys.

Here are some initiatives for a more sustainable way of traveling. Where do you stand regarding the following responsible practices?



Question with different items and scales of those who responsed Yes to willingness to adopt sustainable travel practices (% whether people are already doing it or would be ready to do it)
Base: Travelers

Navigating climate concerns: Adapting to changing realities

The effects of climate change are becoming increasingly evident, with some destinations experiencing extreme heat due to global warming. However, travelers are resilient, with 19% in Southern Europe and significant percentages in India, UAE, and Saudi Arabia actively considering these climate impacts when planning their trips.

Towards a greener future: Incremental steps matter

While significant changes in travel behaviors may take time, travelers are embracing small but meaningful steps towards sustainability. From supporting local communities to minimizing waste, these incremental efforts signify a collective commitment to creating a more environmentally conscious travel landscape.

Focus : the "say/do gap"

Bridging the gap: Turning environmental awareness into action

Exploring the «say-do gap,» we uncover a common phenomenon in the realm of environmental preservation: the divide between intentions and actions. While a significant majority of the population acknowledges the urgency of addressing global warming, translating this awareness into tangible actions presents its challenges.

Empowering change: Aligning values with behavior

Green actions are widely esteemed in society, recognized as a moral imperative for safeguarding our planet. However, the journey from intention to action is often hindered by immediate concerns such as pricing or convenience. Despite this, there's a growing realization that individual actions matter and can collectively make a significant impact.

Overcoming challenges: Paving the way for sustainable practices

Challenges abound, from ingrained habits to cultural norms, yet the tide is turning towards a more sustainable future. While altering behaviors may seem daunting, each step forward, no matter how small, contributes to a broader movement towards environmental stewardship.

A path forward: Inspiring change through collective action

As we navigate the complexities of the «say-do gap,» let us embrace a spirit of optimism and possibility. By fostering awareness, empowering individuals, and championing collective action, we can bridge the divide between intention and action, paving the way for a greener, more sustainable world.

03

Summer 2024: strong intentions to travel despite divergent patterns across regions

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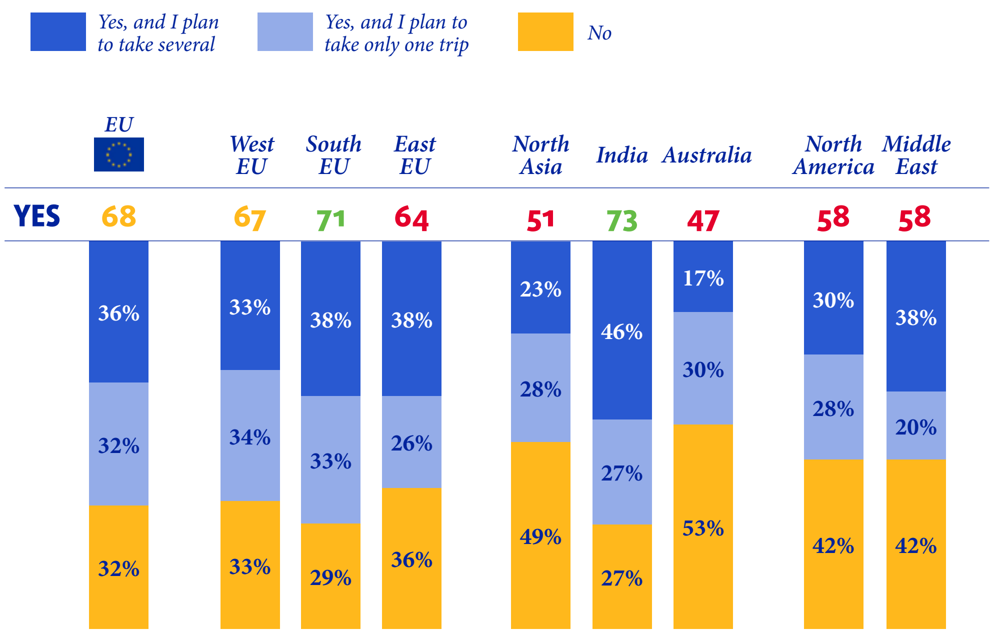
3.1 Going on summer holidays: A predominantly European phenomenon

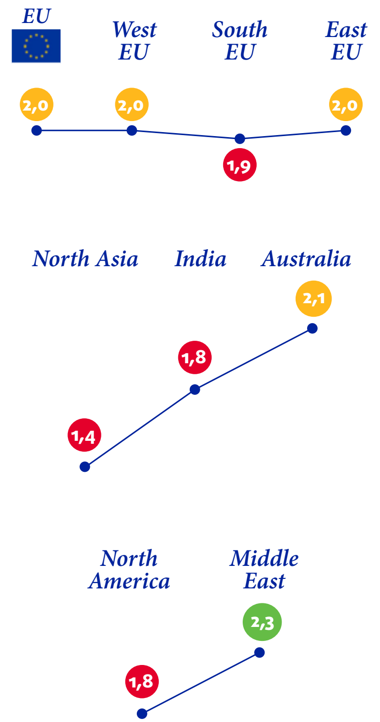
While travel enthusiasm remains high across the globe, there's a notable distinction in summer holiday habits. **Europeans lead the charge, with over two-thirds (68%) planning a summer getaway**, showcasing a deeply rooted tradition, especially in Southern Europe, where the desire to explore new destinations runs high. In contrast, summer travel is less prevalent in other regions, with only around half of Australians (47%) and US citizens (53%) planning trips, and even fewer in Japan, where just three out of ten (29%) are gearing up for summer adventures.

Do you plan to go on a trip this summer / between June and September?



Base: Travelers

In total, how long will you be away on a trip this summer / between June and September



Base: Travelers

2 out of 3 Europeans plan to go on a trip this summer

The allure of extended summer vacations remains a cherished tradition in Europe, where travelers typically indulge in two-week getaways. **This cultural norm underlines the significance of summer holidays**, shaping travel plans across the continent. In contrast, other regions showcase shorter trip durations, reflecting diverse cultural and lifestyle preferences.

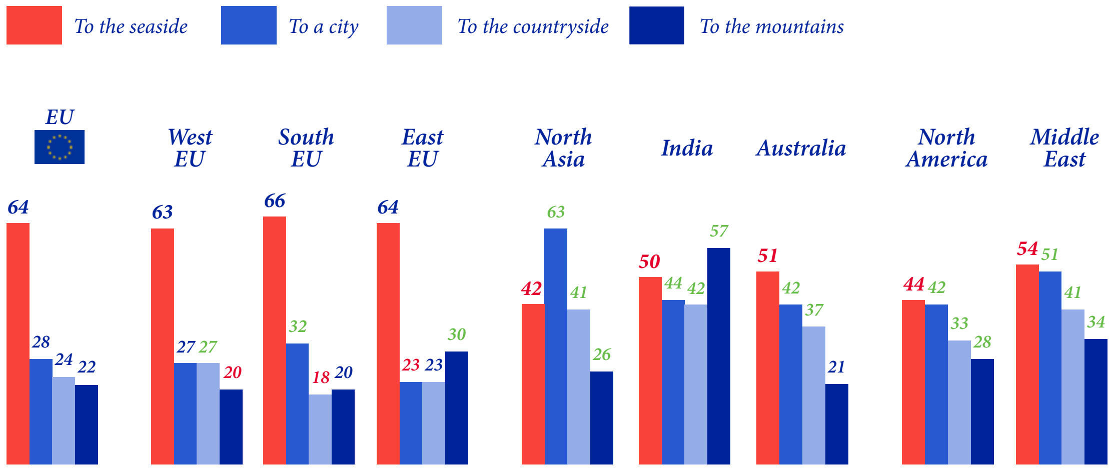
Notably, Middle Eastern travelers emerge as champions of extended vacations, with an average trip duration of 2.3 weeks, highlighting a penchant for immersive travel experiences.

3.2 Travel destinations: seaside predominant in Europe, challenged by city trips in other zones

As travelers gear up for summer adventures between June and September, their destination preferences unveil intriguing insights into global travel trends. Let's explore how these preferences vary across different regions.

- **Destination preferences vary significantly among travelers planning trips between June and September,** reflecting diverse interests and cultural inclinations.
- **In Europe, the allure of the seaside remains strong,** with two-thirds of travelers (66%) favoring coastal retreats over mountainous landscapes, countryside escapes, or urban adventures.
- **Conversely, in North Asia, the majority (63%) opt for city getaways,** underscoring a preference for vibrant urban experiences.
- **Notably, North Americans, Australians and Middle Easterners exhibit a balanced affinity for both seaside and city trips**, with approximately half of travelers in each region choosing each option..

Destination: For your next trip, do you intend to go mainly...



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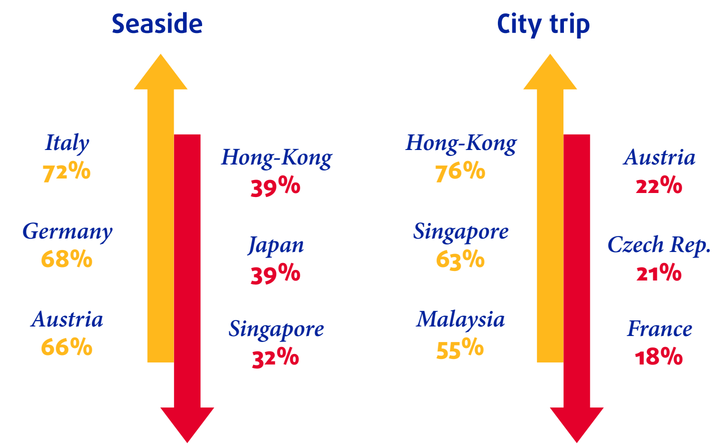
Base: Travelers

Top 3/ bottom 3 of countries attracted by seaside or city trip



3.3 Top Destinations: Southern Europeans love their own countries!

Let's take a fascinating glimpse into the travel preferences of «homebody» populations, exploring countries where travelers opt to explore their own backyard. This insight offers valuable perspectives on regional tourism trends.

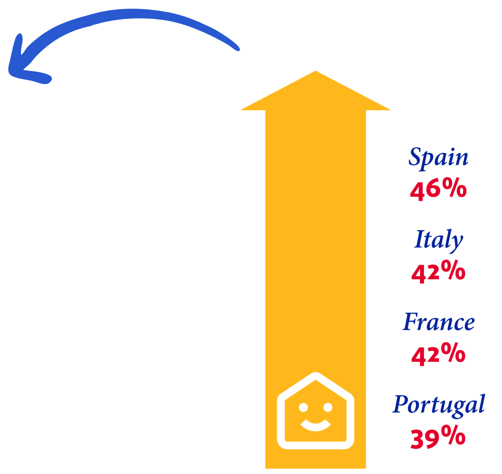
- **Touristic European destinations, particularly those with abundant coastlines, emerge as «homebody's» favorites**, with a significant proportion of travelers choosing domestic travel.
- **In Spain, nearly half of Spanish travelers (46%) plan to explore their own country this summer,** drawn to the allure of local attractions and coastal treasures.
- **Similarly, Italy (42%), France (42%), and Portugal (39%) showcase a strong inclination towards domestic tourism**, reflecting a consistent trend observed across multiple editions of the barometer.
- **This trend aligns with Europe's penchant for seaside destinations**, where extensive coastlines offer ample opportunities for exploration and relaxation.

1 out of 4 Italians, French and Spanish travelers are planning to travel only in their own country.

- **Italian, French, and Spanish travelers exhibit a notable preference for domestic exploration**, with a quarter of them planning to immerse themselves solely in their own country's delights.
- **Countries with vast continental expanses, offering a wealth of diverse landscapes and attractions within their borders, resonate with this trend:**
  - In Canada, a significant 36% of travelers plan to indulge in domestic travel adventures.
  - Similarly, Australia captures the imaginations of its citizens, with 32% opting to explore the wonders of their own country.
- **Conversely, a spirit of adventure drives travelers in compact or landlocked nations to seek experiences beyond their borders,** with over half of them planning exclusively international trips:
  - In Singapore, an impressive 70% of travelers are gearing up for overseas explorations.
  - Meanwhile, in Honk Kong (62%), UAE (56%), and Switzerland (55%), more than half of the population is set on international journeys, embodying the spirit of global wanderlust.

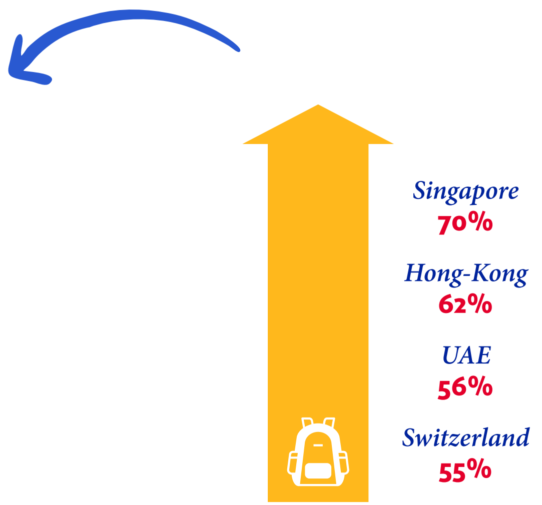
Homebodies	*Adventurers*
Countries where at least 30% of travelers will travel in their own country	Countries where at least 50% of travelers will travel abroad

TOP 4 HOMEBODY COUNTRIES
Staying in their home country



Base: Travelers

TOP 4 ADVENTURER COUNTRIES
Going exclusively abroad



Base: Travelers

When travelers go abroad, where do they go?

• **Travelers from US and Canada are captivated by European destinations, with Italy claiming the top spot** as the preferred destination for both groups. Additionally, France secures a podium position among US travelers, underscoring its timeless appeal and cultural richness.

TOP DESTINATIONS for North American travelers outside own country

USA:

1	Italy
2	Canada
3	France

Canada:

1	USA
2	Italy
3	Mexico/ Japan

EUROPEAN TRAVELERS: a winning trio

• **Italy, Spain, and France** emerge as the top destinations for European travelers, forming a formidable trio of favored destinations.

✓ **Spain** claims the top spot in six out of ten countries, including Poland, Italy, and Britain, showcasing its universal appeal. Notably, it appears in eight out of ten «destination podiums.»

✓ **Italy** features prominently in all destination podiums, securing the top spot in Spain and most Central/Eastern European countries within the scope, such as Switzerland, Austria, and the Czech Republic.

✓ **France** garners a place in the top three for six out of ten countries, with Belgian travelers particularly drawn to its charms, as evidenced by 27% planning to visit France.

• Additionally, **Greece and Croatia** emerge as sought-after destinations for European travelers.

EUROPE: Top 3 destinations outside own country

Uk	Spain 16%, France 10%, Italy 8%
Portugal	Spain 23%, Italy 10%, France 8%
France	Spain 15%, Italy 10%, Greece, 5% Portugal
Spain	Italy 13%, France 9%, Portugal 8%
Belgium	France 27%, Spain 17%, Italy 12%
Italy	Spain 13%, France 10%, Greece 7%
Germany	Spain 17%, Italy 14%, Austria 8%
CZ	Italy 16%, Croatia 12%, Slovakia 10%
Switzerland	Italy 26%, France 17%, Spain 16%
Poland	Spain 10%, Italy 8%, Greece 7%
Austria	Italy 27%, Croatia 16%, Spain, Greece 13%

• **Beyond Europe, Japan emerges as a favored destination**:

✓ **Australia:** Claiming the top spot as the first destination for Australian travelers.

✓ **North Asia:** Securing a top-two position in all surveyed North-Asian countries, particularly - dominating in Hong-Kong, where 41% of travelers plan to visit Japan between June and September.

✓ **Canada:** Ranks among the top three desired destinations.

• **Saudis and Emiratis** exhibit a preference for neighboring countries, with Turkey emerging as a top destination, securing a podium position among travelers from both countries.

OUSTIDE EUROPE : Top 3 destinations outside own country

USA	Italy 7%, Canada 7%, France 5%
Hong-Kong	Japan 41%, China 20%, Thailand 15%
Singapore	Malaysia 25%, Japan 23%, Thailand 20%
Canada	USA 21%, Italy 5%, Mexico, Japan 4%
KSA	Egypt 28%, UAE 14%, Turkey 13%
Malaysia	Thailand 25%, Japan 18%, Indonesia 15%
India	Singapore 15%, Australia 12%, UAE 11%
UAE	KSA 13%, India 13%, Turkey 10%
Japan	USA 8%, South Korea 5%, China 3%
Australia	Japan 8%, New Zealand 8%, USA, Italy, Thailand 5%

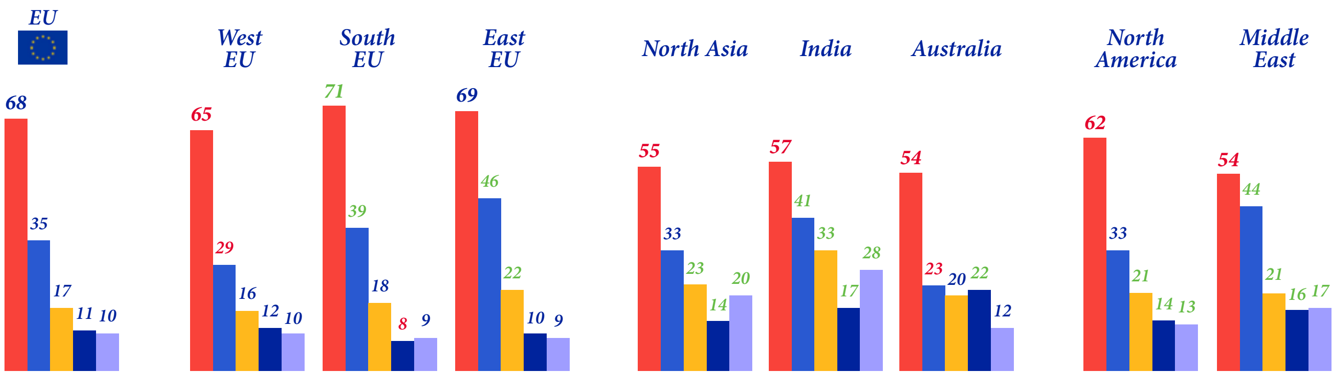
3.4 Travel intentions unveiled: companions, modes of accommodation, transport?

Not only the favored destinations but also the travel modes unveil cultural differences.

Travel with whom? While family trips remain common globally, cultural nuances are apparent:

- 7 out of 10 European travelers plan to journey with their partners, a proportion significantly higher than in other parts of the globe.
- 1 in 4 Indian people and 1 out of 5 in North Asia intend to travel with their parents, a trend less prevalent in Europe and North America.
- Solo travel remains niche, except in Australia, and to a lesser extent, the UAE and Japan.

With whom do you plan on going on a trip this summer / between June and September



Please note the totals in the graph might add up to more than 100% because multiple answer options were allowed
Base: Travelers

Focus on the European "Solo Travelers"

AVERAGE PROFILE:

- **Skewed towards men (56% vs. 48% overall).**
- Not necessarily younger than average: 19% aged between 25 to 34 years old vs. 15% overall, with a notable representation of individuals aged 55 to 64 years old (20% vs. 17%).
- Particularly prominent among Swiss travelers (16%) and German travelers (14%), compared to 11% for European travelers in general.

For one third, **having new friendly or romantic encounters** is part of an ideal summer vacation, compared to 17% of European travelers in general.

They are also more adventurous overall, partly matching the backpacker stereotype.

- More likely **to experiment new travel trends:**
  - ✓ **8 out of 10 say they would be likely to try slow tourism (78% vs. 69% for Europeans travelers overall)**
  - ✓ Almost half would try wellbeing trips/tours (46% vs. 38% overall)
  - ✓ Almost one third are likely to travel for the purpose of doing extreme/adventure sports (31% vs. 23% overall)
- More inclined to **travel abroad only** (60% vs. 54% overall)
- Also more likely **to explore so-called less touristic destinations** (78% vs. 70% overall).
- **3 out of 10 plan to go on a summer trip of at least 3 weeks (29% vs. 23% for Europeans travelers overall)**
- They have a more "balanced" profile in terms of destination's choices than European travelers overall, being less drawn to the seaside but more attracted to mountains, countryside and cities.

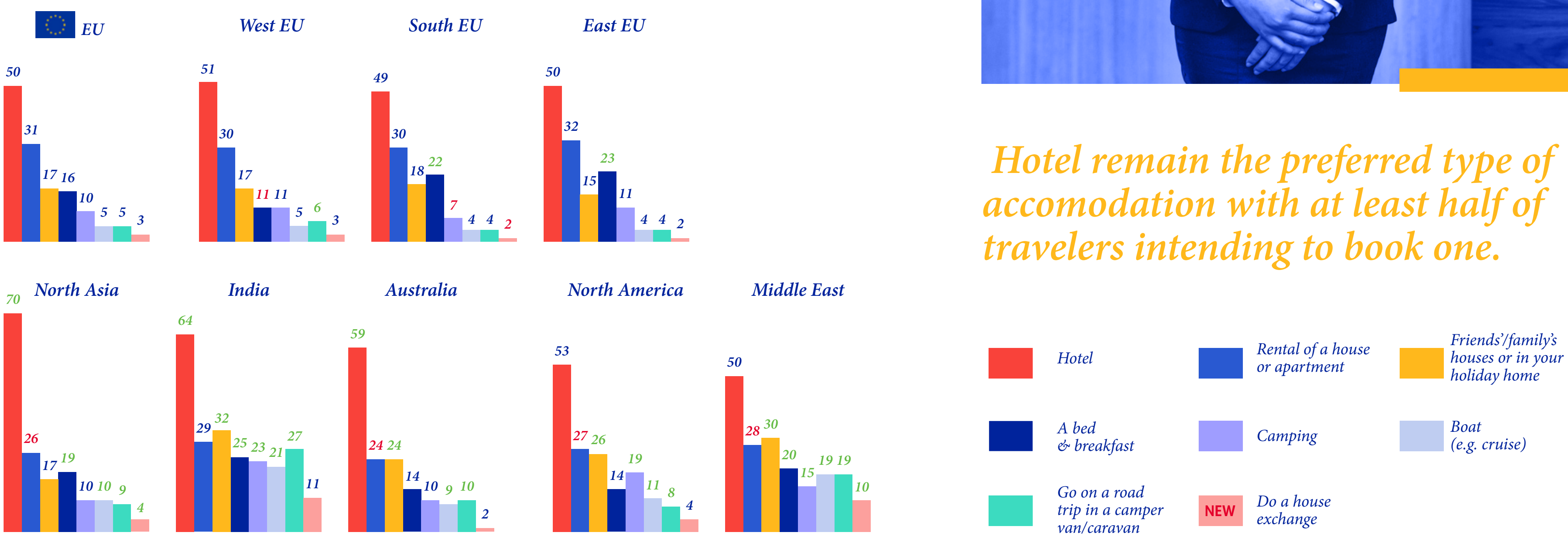
Preferred types of accommodation: travelers tend to have a «classic» approach.

Regardless of the geographies, **hotel remain the preferred type of accommodation** with at least half of travelers intending to book one (up to 64% in India and 70 in North Asia). **House or apartment rental** is planned by about a third, with growing interest in North America (27%, +9 pts compared to 2023).

Outside of these two dominating accommodations types, and to a lesser extent friends'/family's houses or bed & breakfast, **other modes still remain "niche".** A few local specificities and trends can be noted:

- **Within Europe,** French travelers are signficantly less appealed by hotels (31% vs. 50% for Europe overall) as opposed to friends''/family's houses (26% vs. 17%) and camping (15% vs. 10%)
- **North Asian travelers** have a very strong preference for **hotels** (84% of Japanese travelers intend to stay in an hotel, 75% of Hong-Kongers)
- There is strong interest in **cruises in the Middle East** (19% of Saudis and 18% of Emiratis intend to go on a cruise), and **in the US** (14%, +4 pts compared to 2023)

Type of accommodation planned



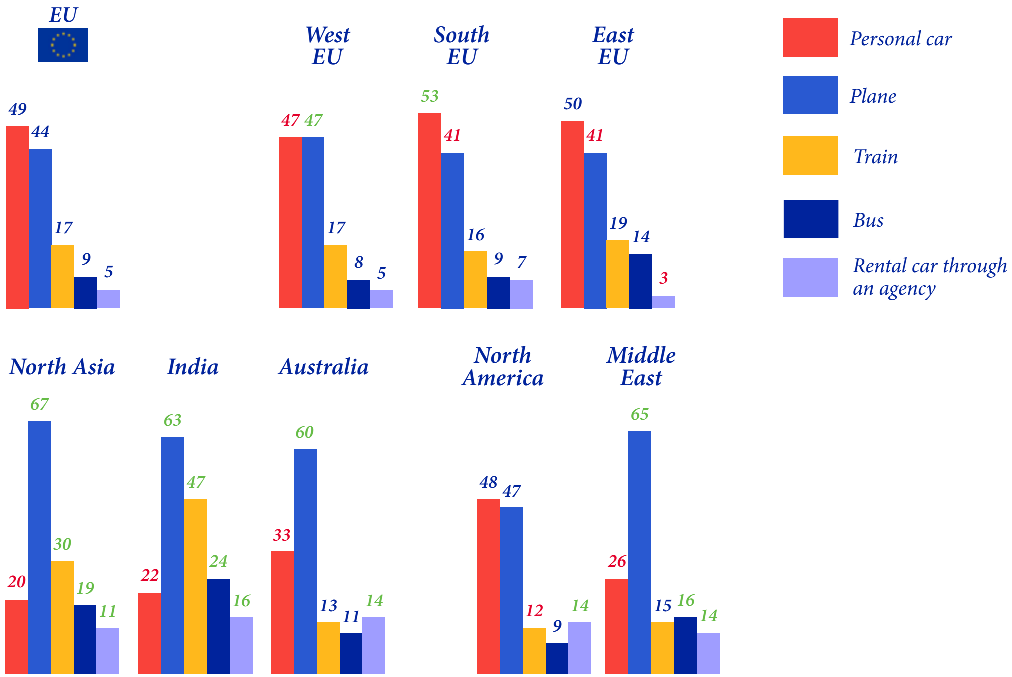
Please note the totals in the graph might add up to more than 100% because multiple answer options were allowed
Base: Travelers

Hotel remain the preferred type of accomodation with at least half of travelers intending to book one.

Modes of transportation are aligned with trip distance

A first glimpse at the results could lead to an analysis based on geographies and their impact on travel constraints. **Plane** is used by between **60% and 67% of travelers** in Australia, India, North Asia and Middle East, and is in fact a necessity for many willing to travel abroad **(up to 78% in Hong-Kong, 75% in Singapore, 70% in UAE)**. Also taking into account the fact that many Europeans chose to travel in their own country or to bordering countries, the domination of **personal car** is quite logical.

What kind of transportation will you use to go to your holidays destination?



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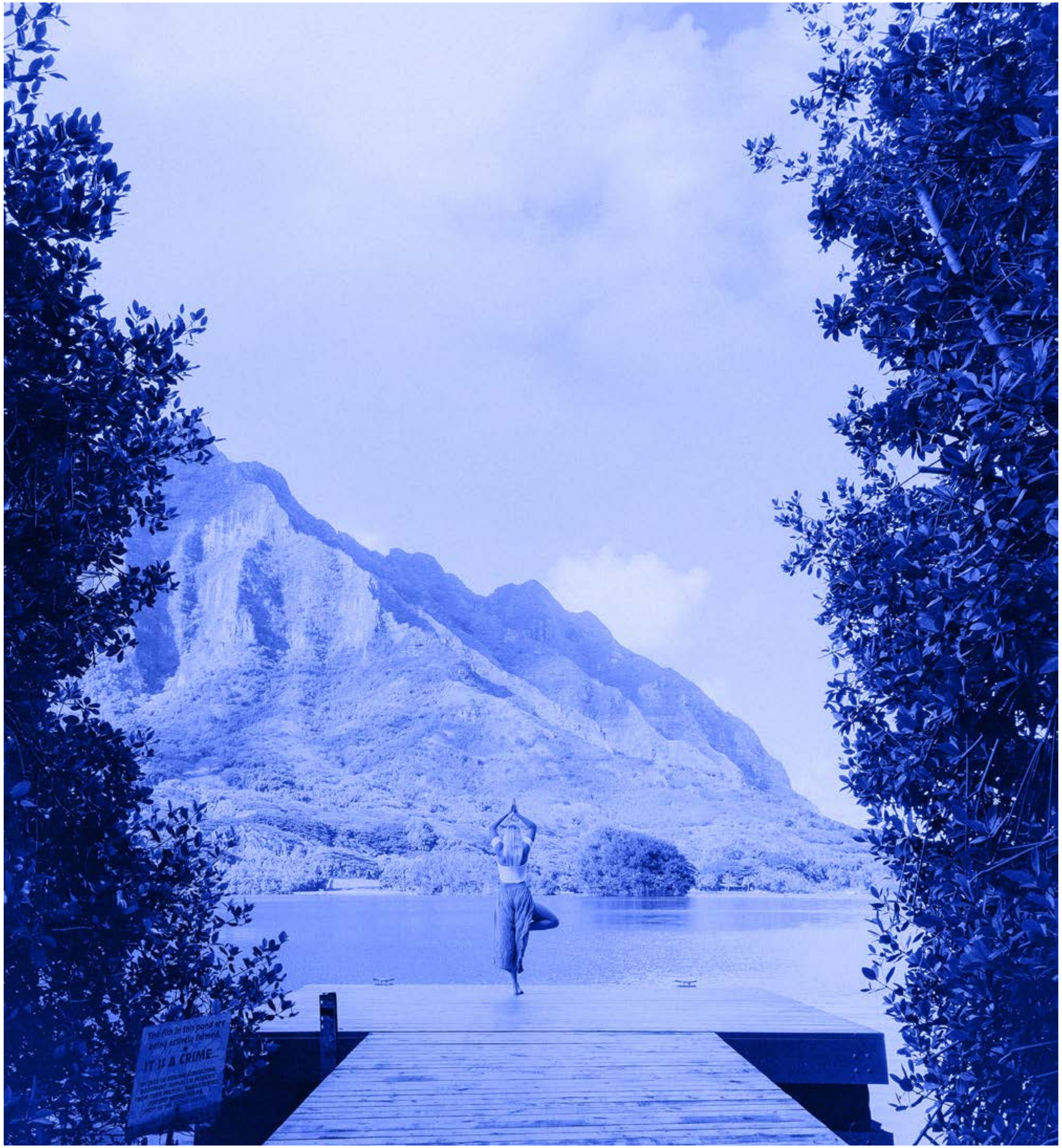
Base: Travelers

However, other reasons emerge (example of Europe)

A closer view into Europe, crossing the mode of transportation with the reasons for choice, reveals interesting patterns:

- As previously identified, for a third, **plane** is the only way possible to reach their destination **(vs. 21% for all modes of transportation).**
- The choice of **personal car** is more driven by convenience and force of habit **(4 out of 10 cite this reason).**
- **Train** is still used by a minority, as we can see above (less than 1 European traveler out of 5), but interestingly, **¼ of train users** mention that one reason for taking the train is that it is more environmentally friendly **(26% vs. only 9% for all modes of transportation)**.



04

Exploring emerging travel trends: insights from the holiday barometer

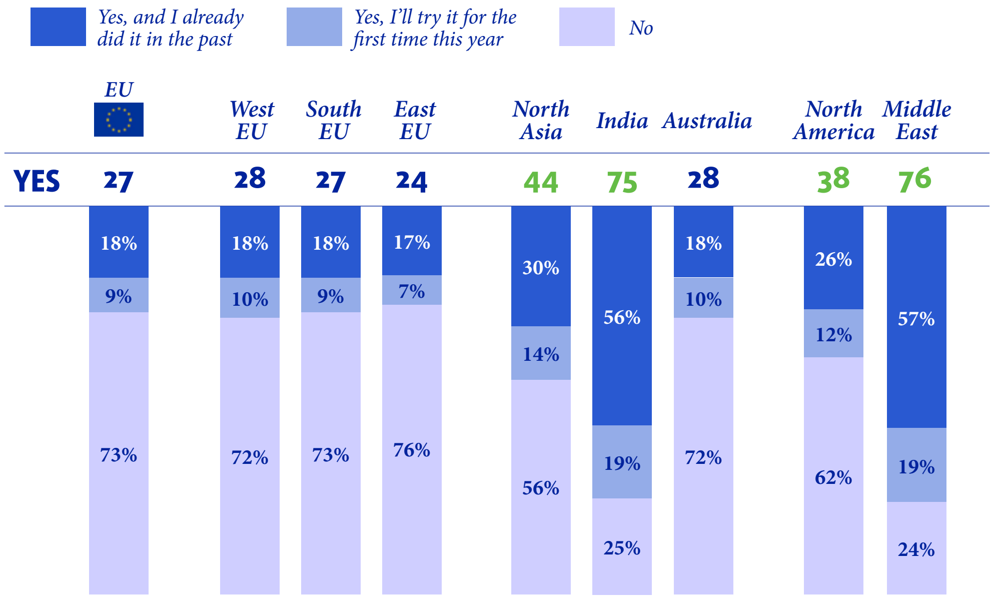
Exploring emerging travel trends:

insights from the holiday barometer

The Holiday Barometer also endeavors to capture emerging trends in travel. This year, our focus has been on different topics aimed at understanding and analyzing the evolving landscape of the travel industry. The 2024 edition features a dedicated exploration of several key areas, including:

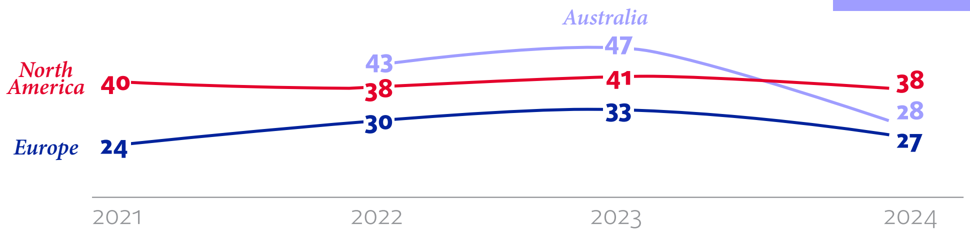
- **Workation:** Embracing the growing integration of work and leisure travel.
- **Slow Tourism:** Recognizing the shift towards more mindful, immersive travel experiences.
- **Wellness Trips/Tours:** Responding to the increasing demand for travel focused on health, relaxation and personal rejuvenation.
- **Culinary Trips/Tours:** Exploring the appeal of travel centered around local cuisine, food culture and gastronomic exploration.

Do you intend to work from a holiday location this summer / during you next trip?



Base: Active travelers

Evolution of workation intentions since 2021



4.1 Workation: are Europeans falling behind or simply placing greater importance on vacations?

• Embracing workation: a blurring of work and vacation

A quarter of active European travelers intend to embark on a «workation» this year – defined as the seamless integration of work and vacation, where individuals work remotely from a holiday destination. Interestingly, this trend is even more pronounced in the Middle East (76%), India (75%), and to a lesser extent, in North Asia (44%) and North America (38%).

• Stability in western countries: workation holds its ground post-Covid

Despite the widespread adoption of remote work during the pandemic, the concept of workation appears to have maintained steady figures in Western countries.

• Embracing change: breaking free from routine and extending vacations

Across all regions, half of active travelers are motivated by the opportunity to break free from their traditional work routines and enjoy longer vacations.

Moreover, while Europeans may be less inclined towards «workations,» those who do plan to embark on this adventure are showing a penchant for international destinations, with over a third intending to spend their time abroad, marking the highest proportion globally.

4.2 Other travel trends

Slow tourism

The trend of Slow tourism, defined as «taking time to explore local history and culture while supporting the environment,» is gaining significant traction, with 69% of Europeans expressing their likelihood to try it, and 21% indicating they are very likely to do so. This trend is particularly strong in France, Portugal, Poland, and Italy, where between 24% to 27% of respondents express being «very likely» to embrace Slow tourism.

69% of Europeans are likely to try it, 21% «very likely».

Some niche travel trends start to emerge:

Wellbeing trips/tours

As niche travel trends continue to evolve, the concept of wellbeing trips and tours, such as yoga retreats or detox getaways, is steadily gaining interest. Among Europeans, 38% express a likelihood to try them, with 10% indicating they are «very likely» to embark on such journeys. Interestingly, there's a notable surge in interest among younger demographics, with 51% of Europeans under the age of 35 showing enthusiasm, compared to 34% of those aged 35 and above. Furthermore, this trend seems to resonate slightly more with women, with 42% expressing interest compared to 34% of men would be likely to try them.

Furthermore, this trend seems to resonate slightly more with women, with 42% expressing interest compared to 34% of men.

Culinary trips/tours

Culinary trips and tours, featuring experiences such as cooking classes and gastronomic explorations, are emerging as another exciting trend in travel. Among Europeans, 37% express a likelihood to indulge in these experiences, with 9% indicating they are «very likely» to do so. Similar to wellbeing tours, there's a notable enthusiasm among younger Europeans, surpassing that of their older counterparts. However, unlike wellbeing tours, this trend doesn't show significant differences by gender, with both men and women expressing equal interest in culinary adventures.

37% of Europeans are likely to try it, 9% «very likely».

Conclusion

The Europ Assistance's 2024 Holiday Barometer highlights the widespread enthusiasm for travel despite global uncertainties, underscoring its remarkable resilience worldwide. While significant variations are observed in travel enthusiasm levels across regions and demographic groups, with higher levels of enthusiasm among the young and high-income individuals, this survey reveals a continued growth in travel appetite over recent years, notably in Australia.

Travelers express strong desire to explore new destinations, with a pronounced preference for international travel, especially in Europe and North Asia. However, marked differences are observed in destination preferences across countries, with a clear preference for coastal destinations in Europe and urban travel in North Asia.

In terms of holiday expectations, travelers are primarily seeking relaxing, social, and discovery experiences, with a strong preference for "family and friends" vacations. As significant challenges affect travel intentions – including geopolitical tensions, inflation, or environmental concerns – more than ever travelers seek security and peace of mind so they can nurture their appetite for exploration.

Indeed, despite these challenges, travelers remain determined to continue their journeys, demonstrating unwavering resilience and passion for escaping and discovering. Emerging trends, such as «workation» and slow tourism, indicate evolving travel preferences, with a growing interest in more immersive and wellness-focused experiences.

In conclusion, the report underscores the need for a diversified and inclusive approach to address the changing needs of travelers while considering global challenges.

Survey Methodology

The 2024 edition of the Holiday Barometer from Europ Assistance and Ipsos was conducted in 21 countries including the United States, Canada, United Kingdom, Italy, France, Spain, Switzerland, Germany, Austria, Portugal, Belgium, Poland, Czech Republic, Malaysia, Australia, Hong-Kong, Japan, Singapore, India, Saudi Arabia and United Arab countries. In each country, 1,000 consumers aged 18 years and older took part in an online questionnaire. Each sample was put together using the quota method (gender, age, profession) after stratification by region and by city size. The survey was conducted between March 27th and April 22nd and investigated consumer holiday plans and travel preferences.

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Contact: Katya Skorik, Group Head of Travel Business Line - kskorik@europ-assistance.com