Holiday Barometer among Europeans & Americans

IPSOS/EUROP ASSISTANCE SURVEY

19TH EDITION

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GAME CHANGERS Ipsos

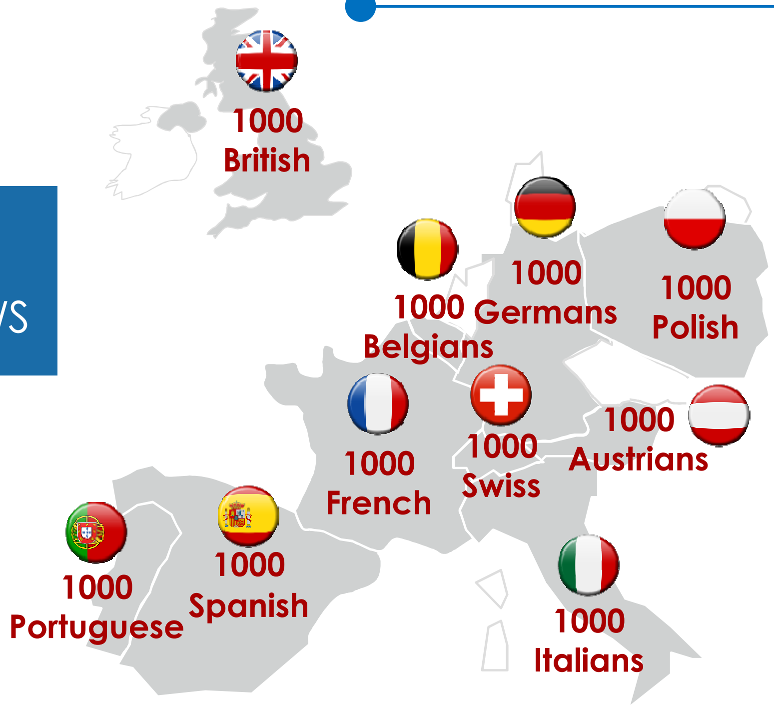
SCOPE OF THE 2019 SURVEY

American scope

12 COUNTRIES

12,000 INTERVIEWS

European scope



METHODOLOGY

Samples

In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older (aged 16 and up in Brazil), put together using the quota method (gender, age, profession) after stratification by region and by city size.

Timeline

The field studies were carried out between March 18th and April 10th 2019

Method of data collection

Online survey in the 12 countries

CONTENTS

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1.

SUMMER HOLIDAY PLANS

> Summer holiday plans
> Budget
> Summer trip duration

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SUMMER HOLIDAY PLANS ARE STABLE IN 2019 AMONG EUROPEANS AND AMERICANS

SUMMER HOLIDAY PLANS

EUROPE

63%

= *(-1 versus 2018)*

USA

68%

= *(= vs 2018)*

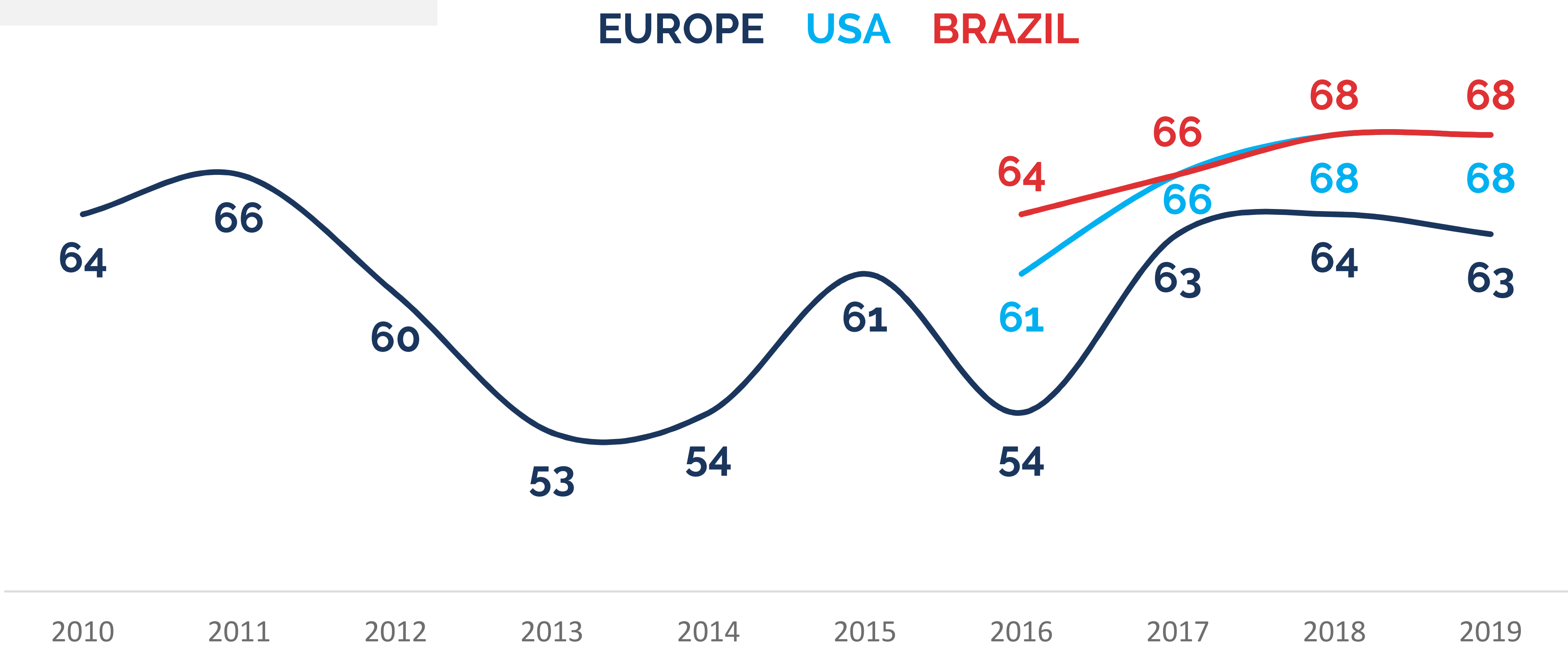
BRAZIL

68%

= *(= vs 2018)*

CONSOLIDATING A POSITIVE TREND SINCE 2016

EVOLUTION OF HOLIDAY PLANS (%)



GAME CHANGERS

BUT AMONG EUROPEANS, SITUATIONS ARE QUITE DIVERSE

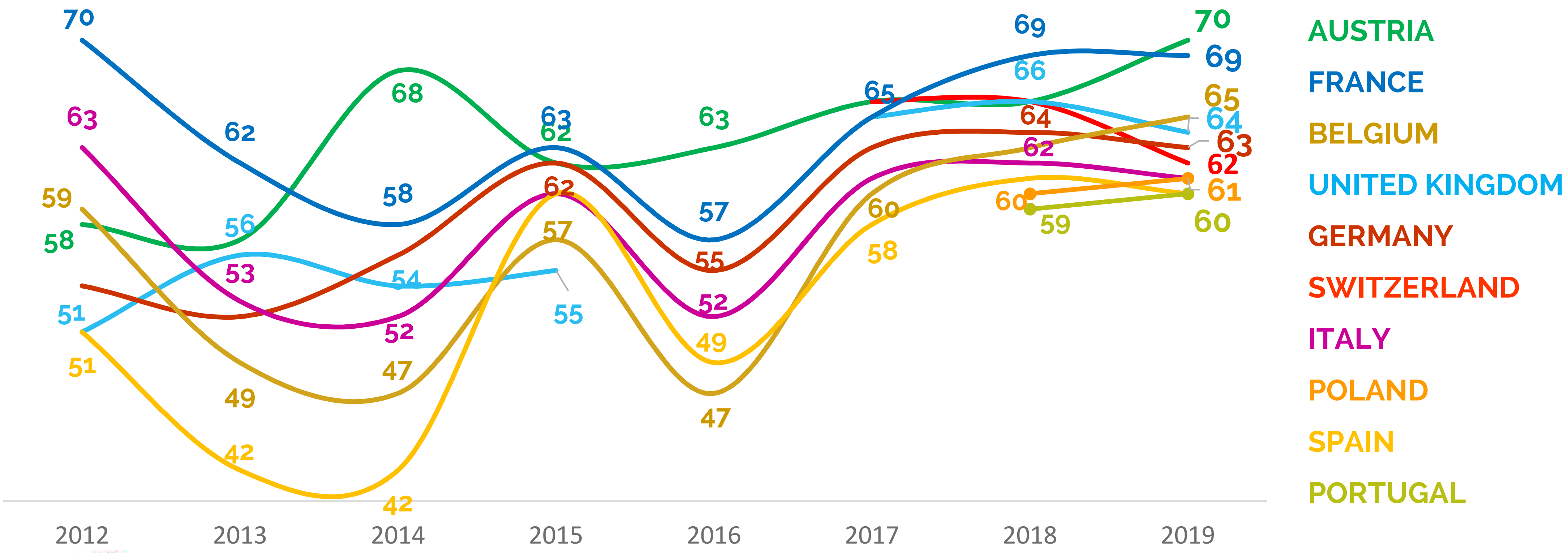
SUMMER HOLIDAY PLANS

AUSTRIA	FRANCE	BELGIUM	UNITED KINGDOM	GERMANY
70%	69%	65%	64%	63%
+4pts	*=*	*+2pts*	*-2pts*	*-1pt*

SWITZERLAND	ITALY	POLAND	PORTUGAL	SPAIN
62%	61%	61%	60%	60%
-4pts	*-1pt*	*+1pt*	*+1pt*	*-1pt*

OVERALL, EXCEPT FOR SWITZERLAND, HOLIDAY PLANS ARE CONSOLIDATING

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)



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GAME CHANGERS Ipsos

THE AVERAGE BUDGET IS INCREASING IN EUROPE, BUT DECREASING FOR AMERICANS

SUMMER HOLIDAY BUDGET

EUROPE

€ 2,019 *+3% vs 2018*

HOLIDAY BUDGET IN THE EURO ZONE
(Excluding United Kingdom, Switzerland and Poland)
€2,099 *+5% VS 2018*

USA

$ 2,373 *-10%*
(€2,131)

BRAZIL

R$ 5,058 *-3%*
(€1,138)

Exchange rate applied

1 GBP = €1.16 1 CHF = €0.88 1 PLN = €0.23 1 USD = €0.90 1 BRL = €0.22

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THE BUDGET INCREASE IN EUROPE IS DRIVEN BY FRANCE, SPAIN AND GERMANY

SUMMER HOLIDAY BUDGET

SWITZERLAND	AUSTRIA	GERMANY	BELGIUM	FRANCE
CHF 3,250	€2,627	€2,467	€2,242	€2,201
=	-1%	+4%	-3%	+10%
(€2,856)				

UNITED KINGDOM	SPAIN	ITALY	PORTUGAL	POLAND
£1,861	€1,798	€1,757	€1,333	Zł 4,341
-5%	+8%	-1%	-3%	=
(€2,151)				(€1,010)

Exchange rate applied

1 GBP = €1.16 1 CHF = €0.88 1 PLN = €0.23

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FRANCE AND BRAZIL ARE THE ONLY COUNTRIES TO TAKE 2 WEEKS OR MORE OF SUMMER HOLIDAYS

SUMMER HOLIDAY DURATION

(weeks on average)

2.

FAVORITE DESTINATIONS

> Summer destinations (country)

> Summer destinations (type of location)

> Choice criteria for destination

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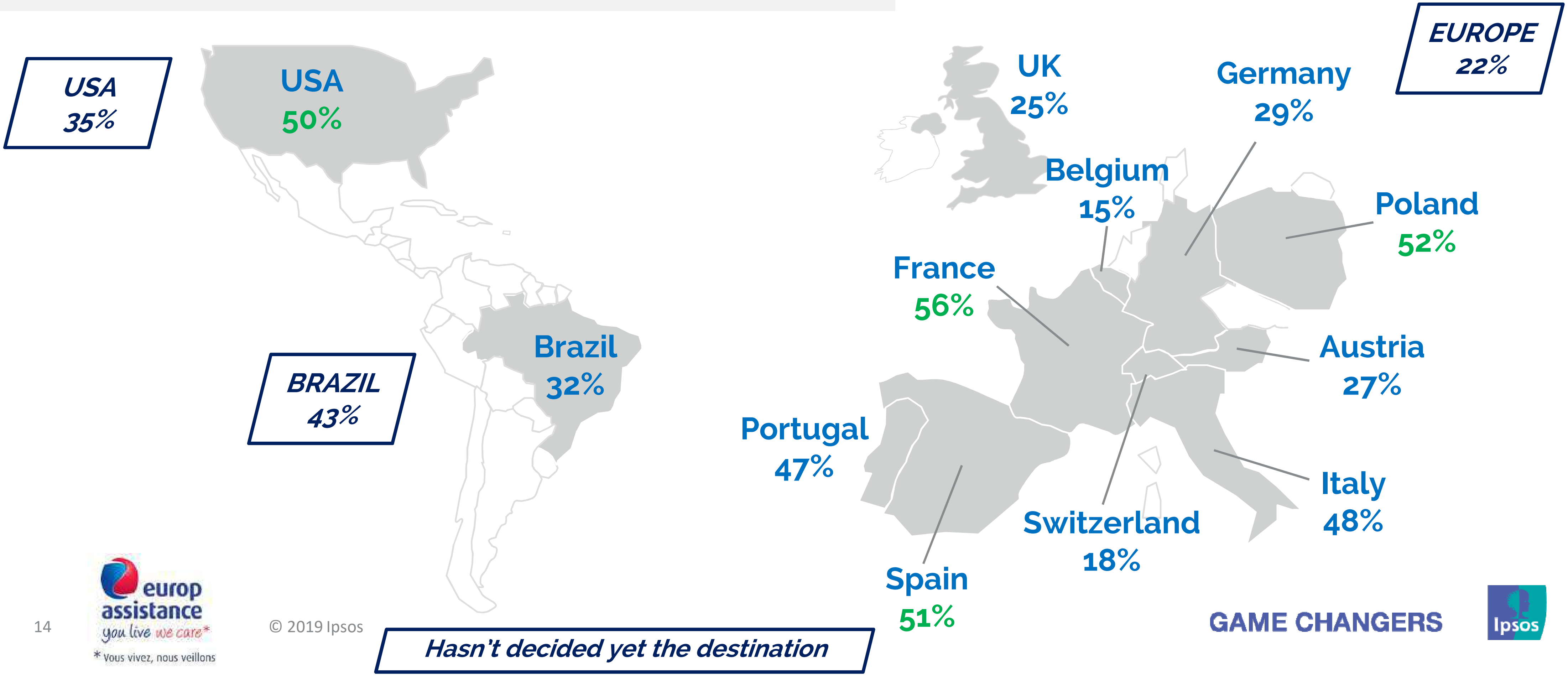
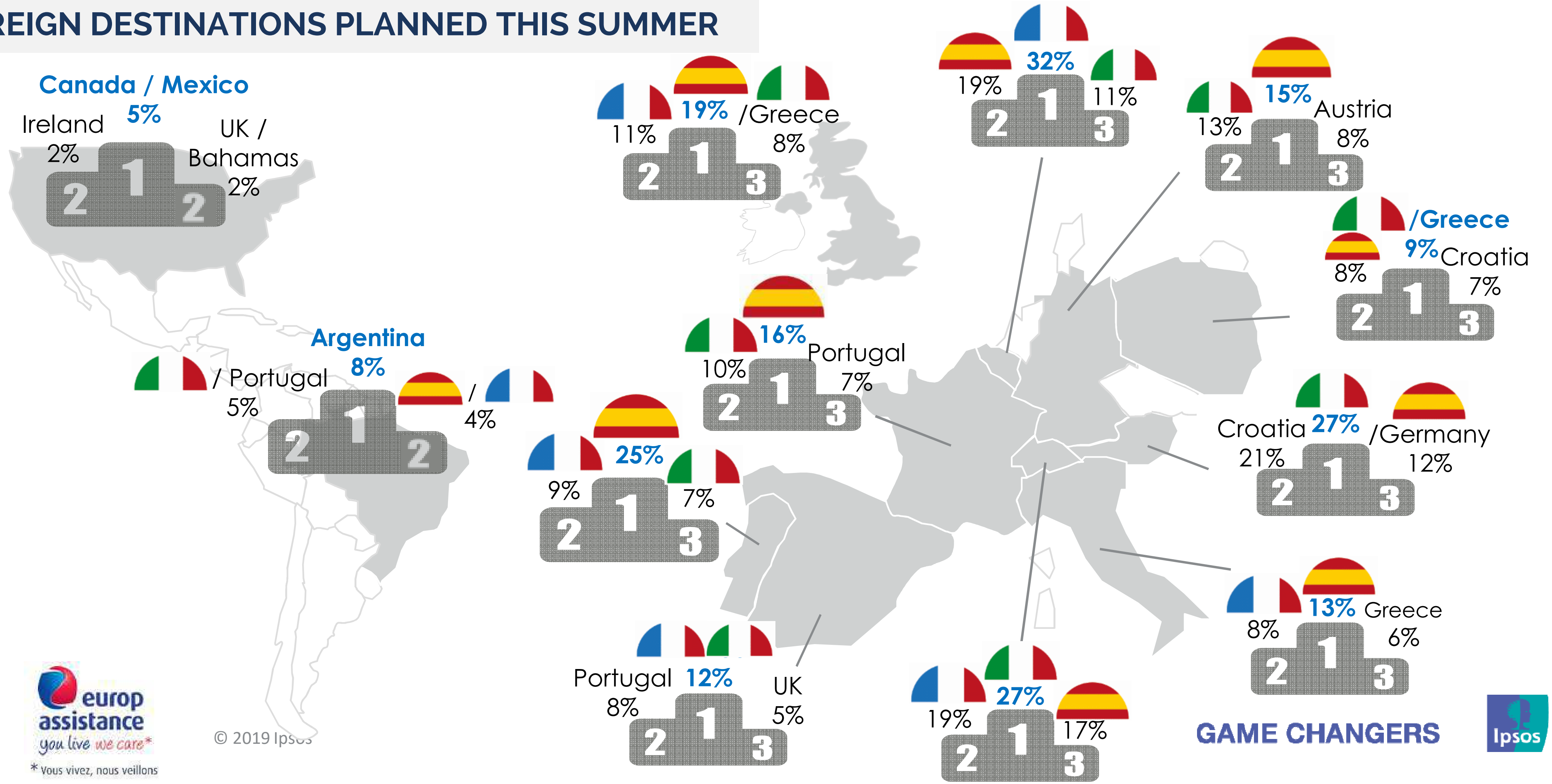
AMERICAN, SPANISH, FRENCH AND POLISH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER. AMERICANS AND BRAZILIANS ARE THE MOST UNDECISIVE

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



WHEN AMERICANS AND BRAZILIANS INTEND TO GO ABROAD, THEY CHOSE NEIGHBORING COUNTRIES FIRST. IN EUROPE, FRANCE, SPAIN AND ITALY ARE STILL ON THE PODIUM

FOREIGN DESTINATIONS PLANNED THIS SUMMER



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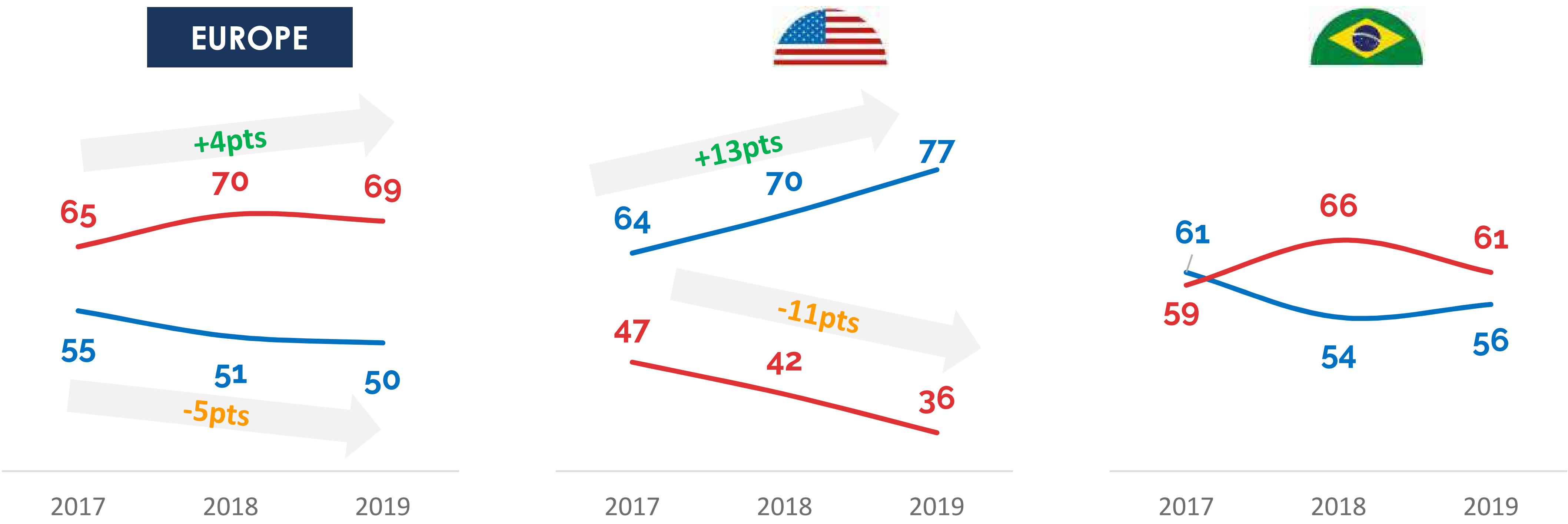
EUROPEANS ARE INCREASINGLY GOING ABROAD WHEREAS AMERICANS ARE INCREASINGLY TRAVELLING WITHIN THE UNITED STATES

HOLIDAY PLANS FOR THE SUMMER

Among those who have already decided their destination



IN ONE'S OWN COUNTRY ABROAD

THE SEASIDE DOMINATES SUMMER DESTINATIONS FOR THE EUROPEANS

SUMMER HOLIDAY PREFERENCES

EUROPE										
62%	62%	57%	64%	61%	68%	57%	67%	67%	62%	58%

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YET, EUROPEANS ARE INCREASINGLY ATTRACTED BY THE MOUNTAINS AND THE COUNTRYSIDE

SUMMER HOLIDAY PREFERENCES

	EUROPE										
	25%	15%	31%	23%	45%	22%	23%	19%	26%	18%	34%
	20% +2	23% +5	14% +2	16%	24%	19% +4	21% +5	16%	18%	36% +2	17% +3
	22% +3	24% +3	33% +4	22% +4	20% +3	9% +2	23% +3	23%	21%	18% +2	22%
	21%	21%	25%	19%	10%	23%	25%	20%	21%	32%	16%

City Mountains Countryside Tour

AMERICANS AND BRAZILIANS ARE ALMOST EQUALLY INTERESTED IN THE SEASIDE AND CITY TRIPS

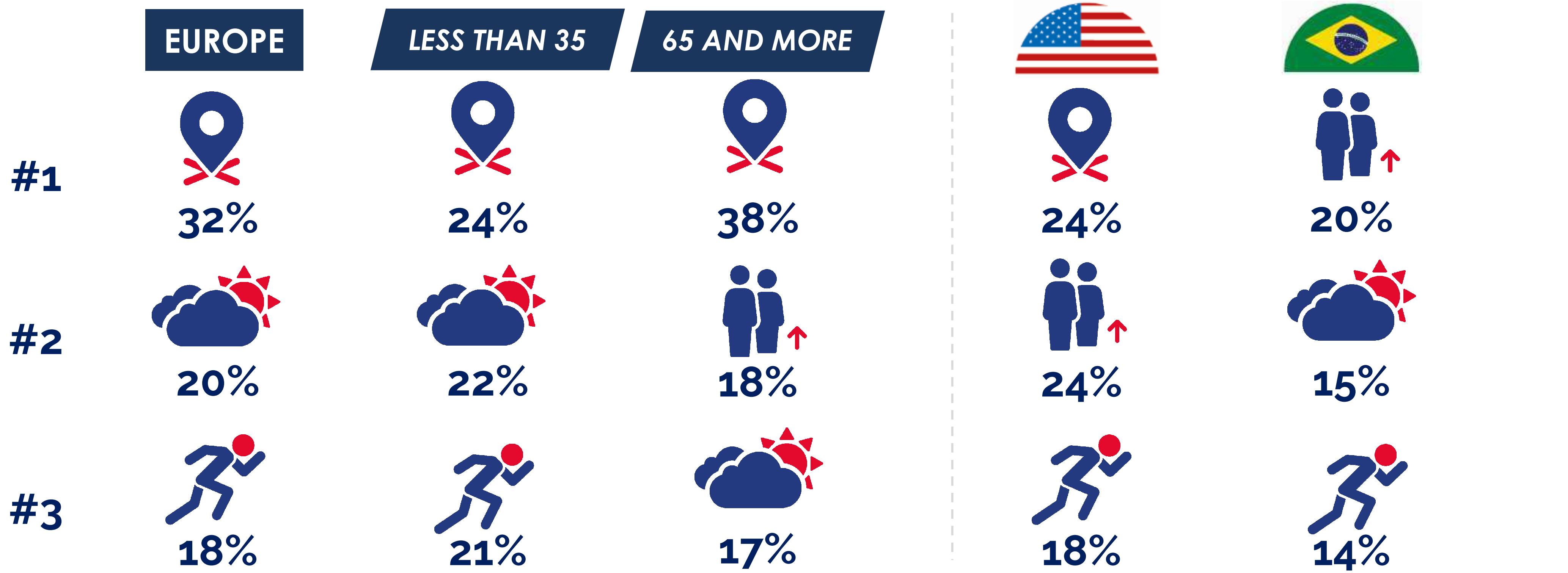
SUMMER HOLIDAY PREFERENCES

	45%	50%
	42%	46%
	28%	21%
	25%	26%
	23%	30%

Seaside City Mountains Countryside Tour

ACTIVITIES AND RECOMMENDATIONS ARE A MAJOR MOTIVATION FOR YOUNGER PEOPLE WHEREAS THE ELDERLY FAVOR VISITING FRIENDS AND FAMILY

MOTIVATIONS FOR THE CHOICE OF DESTINATION



#4: Recommendation 18%

Already been there | Activities | Weather | Has friends there | Good deal

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AMERICANS TAKE MORE IN CONSIDERATION TRAVEL TIME AND RISK OF PERSONAL ATTACK WHEN CHOOSING THEIR DESTINATION, BRAZILIANS HEALTH AND TERRORIST RISKS. BUDGET REMAINS #1 FOR ALL.

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

	EUROPE	RANK 2019 (USA)	RANK 2019 (Brazil)
The budget you intend on allocating	53%	#1	#1
The climate	47%	#3	#10
The possibility of taking part in leisure or cultural activities	43%	#2	#5
The risk of a terrorist attack	42%	#5	#3
Health risks	38%	#7	#2
The risk of a personal attack	38%	#4	#4
The risk of a Zika virus infection	34%	#11	#6
The quality of the tourist infrastructures on site	32%	#10	#7
The time it takes to travel to your holiday destination	30%	#6	#16
The political climate in the destination country	30%	#11	#14

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ECOLOGICAL FOOTPRINT OF THE TRIP RANKS QUITE HIGH FOR BRAZILIANS COMPARED TO OTHER COUNTRIES, AND SO DOES THE LANGUAGE FOR THE AMERICANS

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

	EUROPE	RANK 2019 (USA)	RANK 2019 (Brazil)
Risks of social unrest	29%	#9	#12
The risk of a natural disaster	28%	#13	#7
Your ability to speak the destination country's language	20%	#7	#14
The economic situation in your holiday destination	18%	#14	#16
The ecological footprint of the trip	17%	#17	#9
The quality of the internet access	15%	#16	#12
The exchange rates of the destination country's currency	15%	#15	#11

HOLIDAYMAKERS ARE LESS FEARFUL OF THE TERRORIST RISK THAN 2 YEARS AGO. EUROPEANS ARE ALSO LESS FEARFUL OF RISKS OVERALL

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

	EUROPE	USA	BRAZIL
The risk of a terrorist attack	**42%** *(-6pts)*	**33%** *(-7pts)*	**61%** *(-7pts)*
The risk of a personal attack	38% *(-3pts)*		
The risk of a Zika virus infection	34% *(-1pt)*		
Risks of social unrest	29% *(-4pts)*		
The risk of a natural disaster	28% *(-1pt)*		

(-XX; +XX : Evolution vs 2017)

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3.

SUMMER HOLIDAYS ACTIVITIES

> Travel partners

> Summer activities

> Focus on atypical activities

> Relationship to work during summer holidays

> Focus on children activities

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GAME CHANGERS Ipsos

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

TRAVEL PARTNERS

	EUROPE		
Your partner	**71%**	**67%**	**57%**
Your children	**34%**	**31%**	**42%**
Your friends	17%	18%	17%
Your parents	9%	14%	15%
Alone	9%	12%	12%
Your siblings	6%	11%	8%
Your extended family	4%	8%	6%

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HOLIDAYMAKERS STILL PLAN TO ENJOY A RELAXING SUMMER VACATION SUROUNDED BY THEIR FAMILY MEMBERS, ESPECIALLY IN BRAZIL

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

	EUROPE		
Relax, have peace of mind	**54%**	**40%**	**44%**
Come together as a family, with your spouse or with friends	**45%**	**47%**	**41%**
Discover new cultures, enjoy a total change of scenery	**42%**	**44%**	**27%**
Enjoy your home	15%	13%	22%
Take time to read, learn new things	12%	15%	21%
Play sports (rambling, mountain climbing, etc.)	11%	12%	13%
Make new friendly or romantic acquaintances	10%	10%	15%

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SPANISH, PORTUGUESE AND BRITISH HOLIDAYMAKERS ENJOY DISCOVERING NEW CULTURES. GERMANS, ITALIANS AND POLISH PREFER SPENDING TIME WITH THEIR FAMILY

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

Relax	52%	50%	58%	62%	54%	44%	44%	64%
Family time	43%	50%	28%	50%	47%	47%	54%	23%
Discover new cultures	52%	29%	56%	34%	37%	37%	39%	66%
Enjoy home	12%	24%	12%	15%	18%	28%	11%	9%
Make new acquaintances	7%	8%	13%	12%	11%	9%	12%	6%

WHEN TRAVELING WITH FRIENDS, EUROPEANS TEND TO ENJOY MORE ACTIVE HOLIDAYS

EUROPE

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS	*FAMILY*	*FRIENDS*	*ALONE*
Relax, have peace of mind	**53%**	**44%**	**53%**
Come together as a family, with your spouse or with friends	**51%**	**44%**	**21%**
Discover new cultures, enjoy a total change of scenery	**48%**	**53%**	**51%**
Enjoy your home	10%	9%	14%
Take time to read, learn new things	11%	12%	17%
Play sports (rambling, mountain climbing, etc.)	12%	16%	13%
Make new friendly or romantic acquaintances	9%	18%	19%

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AMERICANS AND BRAZILIANS HAVE TRIED MORE ATYPICAL ACTIVITIES WHEN TRAVELING THAN THE EUROPEANS

ATYPICAL ACTIVITIES	EUROPE		
Camping in the wilderness	28%	46%	22%
Staying at a local's home	27%	28%	36%
Staying in a cabin in the nature	22%	38%	34%
Backpacked around the world	16%	7%	18%
Ecological trip	15%	15%	33%
Solidarity tourism	12%	12%	23%
Hosting travelers	8%	7%	19%
Swapping apartment/house	6%	5%	14%

AMONG THE EUROPEANS, THE FRENCH, SPANISH, SWISS, POLISH AND PORTUGUESE ARE THE MOST INTERESTED BY NEW TYPES OF ACTIVITIES

ATYPICAL ACTIVITIES

EUROPE

Camping in the wilderness	25%	40%	30%	52%	35%
Staying at a local's home	31%	22%	37%	42%	61%
Staying in a cabin in the nature	14%	22%	28%	44%	18%
Backpacked around the world	27%	16%	23%	17%	9%
Ecological trip	15%	25%	15%	21%	16%
Solidarity tourism	15%	16%	16%	10%	9%

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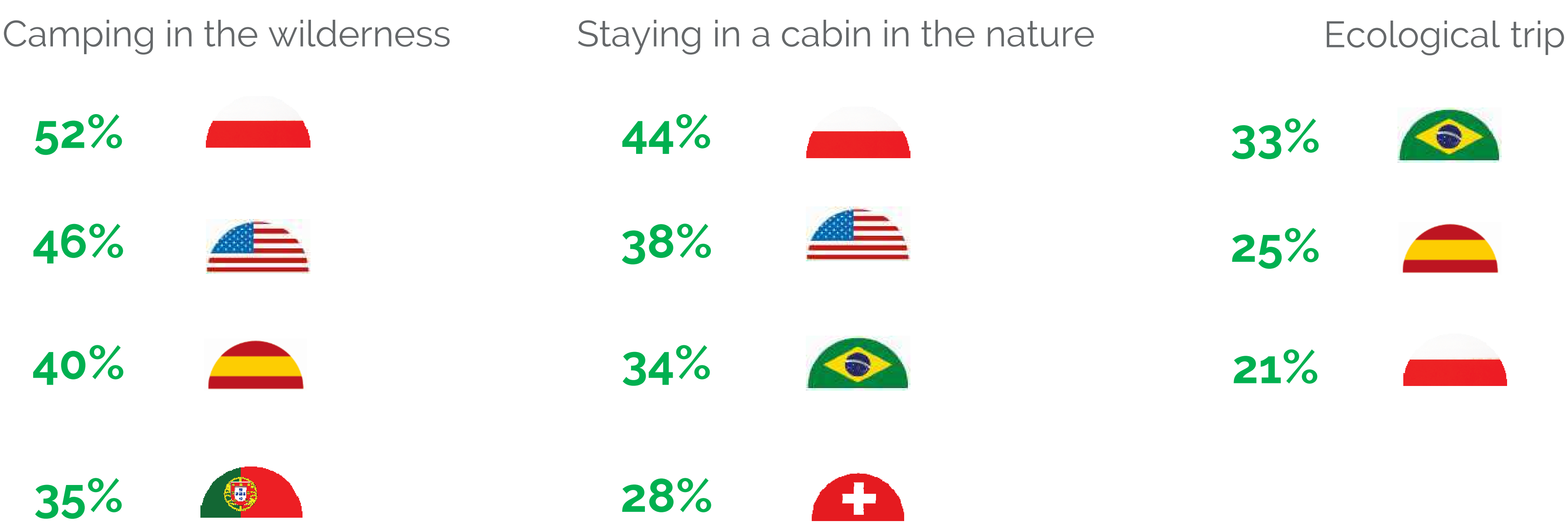
NATURE ORIENTED ACTIVITIES ARE MOSTLY POPULAR IN POLAND AND IN THE US

ATYPICAL ACTIVITIES – NATURE ORIENTED



IN FRANCE AND SWITZERLAND, IMMERSIVE ACTIVITIES THAT ALLOW TO DISCOVER NEW CULTURES AND PEOPLE ARE WELL APPRECIATED

ATYPICAL ACTIVITIES – PEOPLE ORIENTED

Staying at a local's home

61%

42%

37%

36%

31%

Backpacked around the world

27%

23%

Solidarity tourism

23%

16%

16%

15%

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MOST OF THE EUROPEANS WILL COMPLETELY DISCONNECT FROM WORK DURING THEIR HOLIDAYS

RELATIONSHIP TO WORK DURING HOLIDAYS

Among those concerned

EUROPE

69%	+3	You will completely disconnect from your job
19%	-1	You will still check your emails, but will not necessarily respond to them
9%	-1	You will answer emails and/or calls
4%	=	You will continue to work, even if only from time to time

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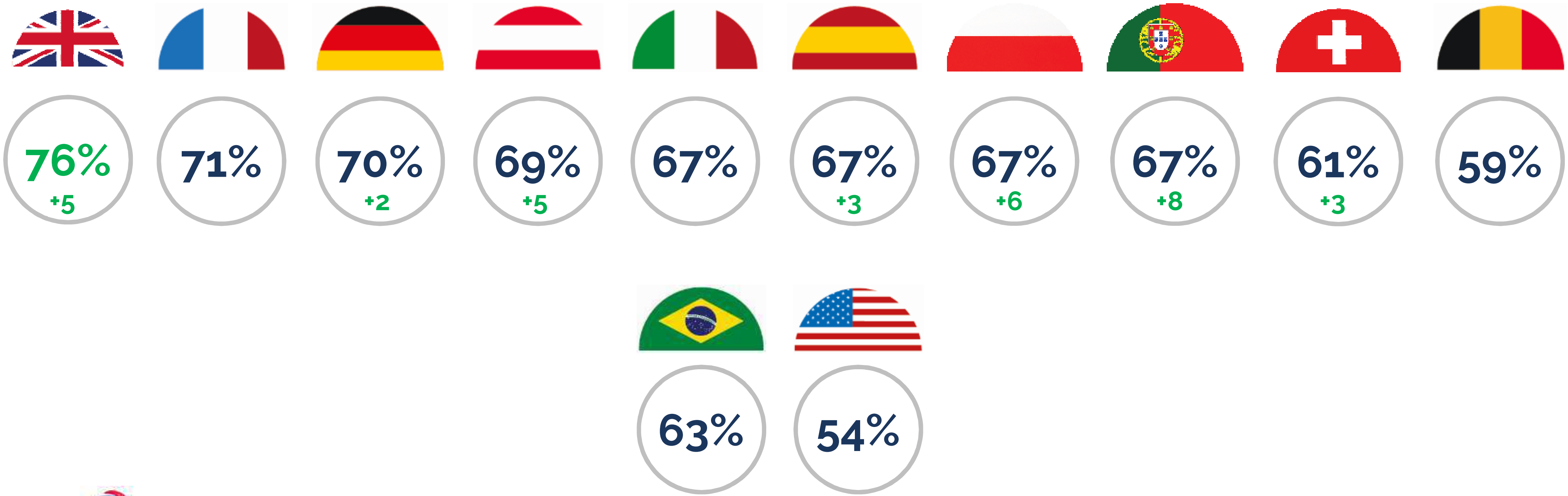
THE TENDENCY TO COMPLETELY DISCONNECT FROM WORK IS GROWING AMONG THE EUROPEANS

WILL COMPLETELY DISCONNECT FROM YOUR JOB

Among those concerned



MOST OF THE HOLIDAYMAKERS WHO INTEND TO WORK DURING SUMMER HOLIDAYS PLAN TO DO IT FOR LESS THAN 2 HOURS PER WEEK

INTENDED WORK DURATION PER WEEK

Among concerned people

	EUROPE	USA	BRAZIL
LESS THAN 30 MINUTES	26%	20%	30%
BETWEEN 30 MINUTES AND 2 HOURS	46%	50%	48%
MORE THAN 2 HOURS	21%	24%	19%

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

CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS

	EUROPE		
Come on a trip	66%	59%	46%
Stay at home	25%	36%	27%
Stay with their grandparents	17%	17%	17%
Go to summer camp	10%	17%	7%
Go on holidays with friends	7%	5%	9%
Go to school	2%	4%	4%

STAYING AT HOME OR WITH GRANDPARENTS IS PARTICULARLY COMMON IN FRANCE

CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS

Come on a trip	67%	72%	63%	65%	58%	65%	68%	66%	71%	59%
Stay at home	31%	33%	26%	22%	21%	26%	26%	24%	14%	13%
Stay with grandparents	30%	16%	12%	14%	11%	20%	21%	17%	12%	20%
Go to summer camp	7%	8%	10%	12%	15%	14%	10%	9%	12%	6%

WHEN GROWING OLDER, MORE CHILDREN TEND TO SPEND HOLIDAYS WITH THEIR FRIENDS BUT A MAJORITY OF THEM STILL COME ON A TRIP WITH THEIR PARENTS

CHILDREN ACTIVITIES DURING SUMMER HOLIDAYS

EUROPE

	3 y.o or less	4 to 8 y.o	9 to 12 y.o	More than 12 y.o
Come on a trip	**71%**	**70%**	**70%**	**67%**
Stay at home	**24%**	**26%**	**25%**	**29%**
Stay with their grandparents	**17%**	**23%**	**20%**	**12%**
Go to summer camp	6%	13%	15%	12%
Go on holidays with friends	3%	5%	7%	13%
Go to school	2%	5%	3%	1%

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4.

HOLIDAY ORGANIZATION

> Traveler types

> Anticipation of booking

> Accommodation

> Focus on atypical accommodation

> Choice criteria for accommodation

> Review posting after a trip

BEFORE GOING ON A TRIP, EUROPEANS AND AMERICANS ARE MOSTLY LOOKING FOR THE BEST DEALS, ESPECIALLY YOUNGER PEOPLE

TRAVELERS TYPE

	EUROPE	LESS THAN 35	65 AND MORE	USA	BRAZIL
Looks for the best deals before booking	**34%**	**39%**	**25%**	**37%**	**26%**
Plans the bare minimum only	**26%**	**25%**	**29%**	**22%**	**20%**
Plans every details	16%	18%	14%	14%	27%
Plans very little in advance	13%	11%	17%	16%	17%
Gets back most often to the same place	11%	7%	15%	11%	10%

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PEOPLE TRAVELING ALONE ARE MORE LIKELY TO GO BACK TO THE SAME PLACE AND PLAN VERY LITTLE IN ADVANCE, AND LESS LIKELY TO LOOK FOR THE BEST DEALS

TRAVELERS TYPE

	FAMILY	FRIENDS	ALONE
Looks for the best deals before booking	**36%**	**39%**	**25%**
Plans the bare minimum only	**30%**	**33%**	**32%**
Plans every details	16%	15%	16%
Plans very little in advance	11%	10%	16%
Gets back most often to the same place	7%	3%	11%

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IN EUROPE, NORTHERN COUNTRIES ANTICIPATE MORE THAN SOUTHERN COUNTRIES. AMERICANS ARE AMONG THOSE WHO ANTICIPATE THE MOST, BRAZILIANS THE LEAST

ANTICIPATION OF BOOKING/ PAYMENT FOR A TRIP

	EUROPE	USA	Brazil
LESS THAN 1 MONTH IN ADVANCE	26%	21%	41%
1 MONTH OR MORE IN ADVANCE	74%	79%	59%

	UK	Germany	Belgium	Austria	Switzerland	France	Spain	Portugal	Italy	Poland
LESS THAN 1 MONTH IN ADVANCE	18%	19%	19%	20%	21%	22%	31%	31%	32%	41%
1 MONTH OR MORE IN ADVANCE	82%	81%	81%	80%	79%	78%	69%	69%	68%	59%

AMONG EUROPEANS, YOUNGER PEOPLE ANTICIPATE LESS THEIR HOLIDAYS THAN THE ELDERLY

ANTICIPATION OF BOOKING/ PAYMENT FOR A TRIP (%)

	EUROPE	LESS THAN 35	65 AND MORE
LESS THAN 1 MONTH IN ADVANCE	26%	30%	22%
1 MONTH OR MORE IN ADVANCE	74%	70%	78%

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HOTEL REMAINS THE MOST POPULAR ACCOMMODATION AMONG HOLIDAYMAKERS, ESPECIALLY IN THE US. EUROPEANS ALSO ENJOY HOUSE RENTALS

PREFERRED TYPE OF ACCOMMODATION

	EUROPE	US	Brazil
Hotel	**48%**	**61%**	**56%**
Rental of a house or apartment	**34%**	16%	**21%**
Friends'/family's houses or in your holiday home	**23%**	**31%**	**33%**
A bed & breakfast	16%	13%	11%
Camping	11%	**17%**	9%
A motor home, camping trailer or mobile home	5%	6%	5%
Boat (e.g. cruise)	6%	11%	10%

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RENTING HOUSES OR APARTEMENT IS MOSTLY POPULAR AMONG THE YOUNGEST AND THE HOLIDAYMAKERS TRAVELING WITH FRIENDS

PREFERRED TYPE OF ACCOMMODATION

EUROPE

	LESS THAN 35	65 AND MORE	FAMILY	FRIENDS
Hotel	50%	51%	48%	53%
Rental of a house or apartment	38%	28%	34%	39%
Friends'/family's houses or in your holiday home	26%	24%	23%	26%
A bed & breakfast	20%	12%	16%	24%
Camping	14%	5%	11%	14%

THE FRENCH, BRAZILIAN AND POLISH HOLIDAYMAKERS ARE MORE INTERESTED TO TRY NEW KINDS OF ACCOMMODATION AND TRANSPORTATION MEANS

INTEREST FOR ATYPICAL ACCOMMODATION

Renting an entire private home	57%	45%	48%	34%	35%	44%
Renting a shared space in a private home	27%	34%	53%	20%	21%	15%
Car-sharing	22%	31%	18%	11%	12%	8%
Home exchange	17%	20%	21%	9%	8%	10%

VALUE FOR MONEY AND LOCATION ARE THE TWO MAIN CRITERIA WHEN CHOOSING A HOLIDAY ACCOMMODATION

CHOICE OF ACCOMODATION

	EUROPE		
Value for money	**66%**	**64%**	**55%**
Location	**52%**	**58%**	**42%**
Travelers' reviews	**31%**	**30%**	**27%**
Available services	**24%**	**27%**	**36%**
Pictures of the place	22%	18%	16%
Promotional offers	16%	19%	35%
Hotel chain reputation	13%	19%	23%

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TRAVELER'S REVIEWS ARE MOSTLY USED BY THE YOUNGEST AND THE HOLIDAYMAKERS TRAVELING WITH FRIENDS

CHOICE OF ACCOMODATION

EUROPE

	LESS THAN 35	65 AND MORE	FAMILY	FRIENDS
Location	48%	58%	52%	54%
Traveler's reviews	40%	18%	31%	37%
Pictures of the place	28%	14%	22%	25%
Promotional offers	20%	12%	16%	18%

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GAME CHANGERS Ipsos

COMING BACK FROM A TRIP, HOLIDAYMAKERS MOSTLY POST ONLINE REVIEWS ABOUT THE HOTEL THEY STAYED IN

REVIEW POSTING AFTER A TRIP

	EUROPE	US	Brazil
Hotel	62%	59%	70%
Restaurant	54%	60%	69%
Private rental	48%	39%	57%
Tourist attraction	45%	46%	66%
Airline	35%	39%	59%

5.

DREAM HOLIDAYS

> What if your summer holiday budget was doubled?

> What monuments or sites would you like to visit at least once in your life?

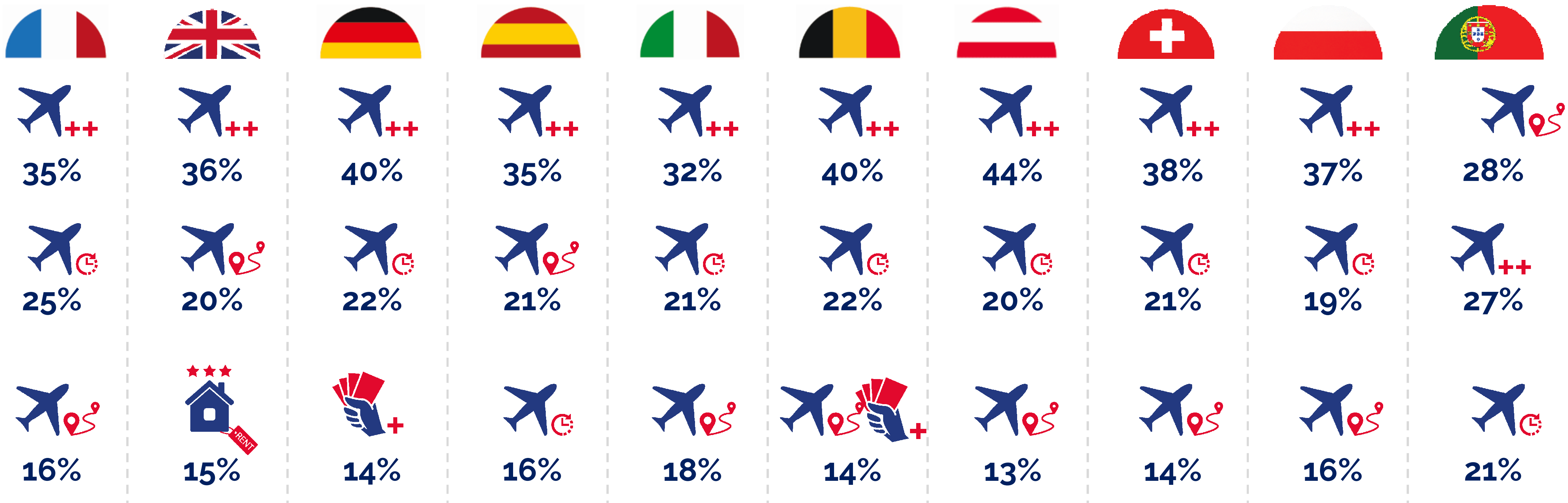
WITH A DOUBLED BUDGET, HOLIDAYMAKERS WOULD TRAVEL MORE FREQUENTLY, LONGER AND FURTHER. MANY DIFFERENCES DEPENDING ON THE COUNTRY

WHAT IF YOUR SUMMER HOLIDAY BUDGET WAS DOUBLED?

	EUROPE	USA	Brazil
Would travel more frequently	36%	30%	20%
Would travel longer	20%	17%	21%
Would travel to other destinations	17%	20%	21%
Would book a better accommodation	9%	10%	10%
Would spend more on site	13%	14%	14%
Would improve transportation	3%	5%	4%
Would bring more people with them	3%	4%	10%

GERMANS AND BELGIANS WOULD ALSO SPEND MORE ON SITE

WHAT IF YOUR SUMMER HOLIDAY BUDGET WAS DOUBLED?
Would travel…



More frequently | Longer | To other destinations | Better accommodation | Spend more on site

5 OF THE TOP 10 SITES EUROPEANS WOULD WANT TO SEE ARE WONDERS OF THE WORLD

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

EUROPE

EIFFEL TOWER

12%

PYRAMIDS

11%

GREAT WALL OF CHINA

7%

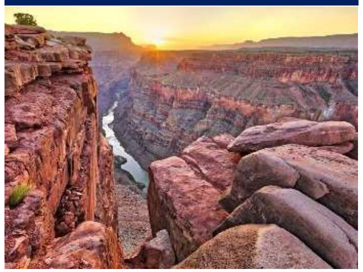
TAJ MAHAL

7%

STATUE OF LIBERTY

6%

GRAND CANYON



5%

NIAGARA FALLS

4%

COLISEUM

4%

MACHU PICCHU

4%

PISA TOWER

3%

THE EIFFEL TOWER IS #1 IN 7 EUROPEAN COUNTRIES

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

													
EIFFEL TOWER	**16%**	**EIFFEL TOWER**	**16%**	**EIFFEL TOWER**	**9%**	**EIFFEL TOWER**	**19%**	**EIFFEL TOWER**	**14%**	**EIFFEL TOWER**	**12%**	**EIFFEL TOWER**	**15%**
Pyramids	11%	Pyramids	12%	Coliseum	6%	Pyramids	12%	Pyramids	14%	Pyramids	9%	Taj Mahal	10%
Statue of Liberty	8%	Taj Mahal	11%	Pyramids	5%	Statue of Liberty	10%	Great Wall of China	11%	Great Wall of China	9%	Pyramids	8%
Great Wall of China	6%	Great Wall of China	8%	Great Wall of China	3%	Great Wall of China	9%	Statue of Liberty	9%	Grand Canyon	6%	Great Wall of China	5%
Niagara Falls	6%	Statue of Liberty	7%	Statue of Liberty	3%	Taj Mahal	7%	Taj Mahal	8%	Coliseum	5%	Machu Picchu	5%
Taj Mahal	5%	Coliseum	6%	Taj Mahal	2%	Machu Picchu	7%	Machu Picchu	6%	Vatican	4%	Vatican	3%
Grand Canyon	4%	Pisa Tower	5%	Machu Picchu	2%	Grand Canyon	4%	Niagara Falls	6%	The Louvre	4%	The Louvre	3%
Machu Picchu	3%	Grand Canyon	4%	Niagara Falls	2%	Niagara Falls	4%	Grand Canyon	5%	Wavel Castle	4%	Statue of Liberty	3%
Coliseum	3%	Machu Picchu	4%	Petra	2%	Pisa Tower	3%	Coliseum	4%	Statue of Liberty	3%	Pisa Tower	3%
Pisa Tower	3%	Niagara Falls	3%	Sagrada Familia	2%	Big Ben	3%	Pisa Tower	3%	Machu Picchu	3%	Disneyland	3%
Golden Gate Bridge	3%	Petra	3%			Ayers Rock	3%	Northern Lights	3%	Niagara Falls	3%		
						Golden Gate Bridge	3%						
						Sydney Opera	3%						

Different from the European Top 10

THE EIFFEL TOWER IS ALSO IN THE TOP 3 FOR AMERICANS AND BRAZILIANS. THE EGYPTIAN PYRAMIDS ARE THE OTHER DREAM MONUMENT TO VISIT

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

									
Grand Canyon	22%	EIFFEL TOWER	19%	PYRAMIDS	14%	PYRAMIDS	17%	PYRAMIDS	12%
EIFFEL TOWER	11%	Corcovado Christ	15%	Taj Mahal	9%	Grand Canyon	11%	Taj Mahal	8%
Mont Rushmore	11%	Pyramids	8%	Great Wall of China	8%	Great Wall of China	10%	Machu Picchu	7%
Pyramids	8%	Statue of Liberty	8%	Eiffel Tower	7%	Taj Mahal	9%	Eiffel Tower	6%
Yellowstone	8%	Disneyland	5%	Statue of Liberty	7%	Eiffel Tower	8%	Great Wall of China	6%
Statue of Liberty	7%	Coliseum	4%	Machu Picchu	6%	Machu Picchu	7%	Statue of Liberty	5%
Great Wall of China	5%	Fernando de Noronha	4%	Grand Canyon	5%	Statue of Liberty	5%	Grand Canyon	5%
Niagara Falls	5%	Machu Picchu	3%	Niagara Falls	5%	Niagara Falls	5%	Niagara Falls	3%
Machu Picchu	4%	Pisa Tower	3%	Pisa Tower	3%	Barrier Reef	4%	Pisa Tower	3%
Taj Mahal	3%	Sugarloaf Mountain	3%	The Louvre	3%	Northern Lights	4%	Coliseum	2%
Yosemite	3%	Iguazù Falls	3%	Mont Saint Michel	3%	Stonehenge	4%	Petra	2%
						Ayers Rock	4%	Angkor Vat	2%

Different from the European Top 10

LIVING IN VAST COUNTRIES, AMERICANS AND BRAZILIANS FAVOR NATIONAL MONUMENTS OR SITES TO VISIT

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

Countries of the most quoted places

	EUROPE		
#1	**United States** **18%**	**United States** **44%**	**Brazil** **23%**
#2	France 14%	France 12%	France 20%
#3	Egypt 11%	Egypt 8%	United States 10%

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Ipsos

AMERICANS MENTION MORE NATURAL SITES THAN EUROPEANS AND BRAZILIANS

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

EUROPE	USA	BRAZIL
Monuments 52%	Monuments 47%	Monuments 43%
Natural sites 18%	Natural sites 39%	Natural sites 13%

6. COUNTRY FACT SHEETS

FRANCE

HOLIDAY PLANS

HOLIDAY PLANS 69% (=)
Vs Europe 63% (-1pt)

BUDGET €2,201 (+10%)
Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY
56% (-1pt)

PREFERRED FOREIGN DESTINATIONS
Spain 16% (=)
Italy 10% (+2pts)
Portugal 7% (=)

ECOLOGICAL TRIPS

Has already been on one 15%
Would be interested in it 39%

Ecological footprint of the trip plays a vital role in choosing a destination
16%

DOMINANT TRAVELER TYPE

Planning the bare minimum, such as hotel and transportation
34% *Vs Europe 26%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED
Would travel more frequently
35% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT
Pyramids 14%
Taj Mahal 9%
Great Wall of China 8%

(+XX / -XX) : Evolution vs 2018

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UNITED KINGDOM

HOLIDAY PLANS

HOLIDAY PLANS 64% (-2pts)
Vs Europe 63% (-1pt)

BUDGET £1,861 (-5%)
Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY
25% (-1pt)

PREFERRED FOREIGN DESTINATIONS
Spain 19% (+1pt)
France 11% (=)
Italy 8% (-2pts) – Greece 8% (+1 pt)

ECOLOGICAL TRIPS

Has already been on one 9%
Would be interested in it 31%

Ecological footprint of the trip plays a vital role in choosing a destination
10%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking
39% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED
Would travel more frequently
36% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT
Pyramids 17%
Grand Canyon 11%
Great Wall of China 10%

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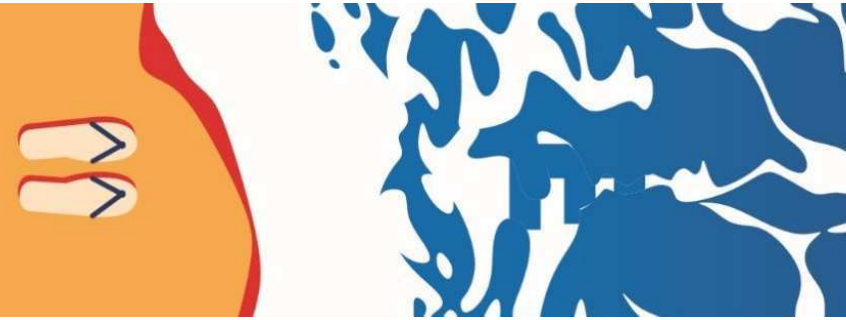
GERMANY



HOLIDAY PLANS

HOLIDAY PLANS 63% (-1pt)

Vs Europe 63% (-1pt)

BUDGET €2,467 (+4%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

29% (+2pts)

PREFERRED FOREIGN DESTINATIONS

Spain 15% (=)

Italy 13% (-1pt)

Austria 8% (=)

ECOLOGICAL TRIPS

Has already been on one 9%

Would be interested in it 25%

Ecological footprint of the trip plays a vital role in choosing a destination

14%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

37% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

40% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 16%

Pyramids 11%

Statue of Liberty 8%

(+XX / -XX) : Evolution vs 2018

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SPAIN

HOLIDAY PLANS

HOLIDAY PLANS 60% (-1pt)

Vs Europe 63% (-1pt)

BUDGET €1,798 (+8%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

51% (-5pts)

PREFERRED FOREIGN DESTINATIONS

France 12% (=) - Italy 12% (+2pts)

Portugal 8% (+1pt)

UK 5% (+1pt)

ECOLOGICAL TRIPS

Has already been on one 25%

Would be interested in it 40%

Ecological footprint of the trip plays a vital role in choosing a destination

18%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

39% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

35% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 16%

Pyramids 12%

Taj Mahal 11%

(+XX / -XX) : Evolution vs 2018

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ITALY

HOLIDAY PLANS

HOLIDAY PLANS 61% (-1pt)

Vs Europe 63% (-1pt)

BUDGET €1,757 (-1%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

48% (-4pts)

PREFERRED FOREIGN DESTINATIONS

Spain 13% (-1pt)

France 8% (=)

Greece 6% (-3pts)

ECOLOGICAL TRIPS

Has already been on one 16%

Would be interested in it 39%

Ecological footprint of the trip plays a vital role in choosing a destination

24%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

31% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

32% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 9%

Coliseum 6%

Pyramids 5%

(+XX / -XX) : Evolution vs 2018

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BELGIUM

HOLIDAY PLANS

HOLIDAY PLANS 65% (+2pts)
Vs Europe 63% (-1pt)

BUDGET €2,242 (-3%)
Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY
15% (-1pt)

PREFERRED FOREIGN DESTINATIONS
France 32% (-2pts)
Spain 19% (=)
Italy 11% (-1pt)

ECOLOGICAL TRIPS

Has already been on one 14%
Would be interested in it 32%

Ecological footprint of the trip plays a vital role in choosing a destination
13%

DOMINANT TRAVELER TYPE

Planning the bare minimum,
such as hotel and transportation
32% *Vs Europe 26%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED
Would travel more frequently
40% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT
Pyramids 12%
Taj Mahal 8%
Machu Picchu 7%

(+XX / -XX) : Evolution vs 2018

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AUSTRIA

HOLIDAY PLANS

HOLIDAY PLANS **70% (+4pts)**

Vs Europe 63% (-1pt)

BUDGET **€2,627 (-1%)**

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

27% (-3pts)

PREFERRED FOREIGN DESTINATIONS

Italy 27% (-2pts)

Croatia 21% (-2pts)

Germany 12% (+1pt) - Spain 12% (+2pts)

ECOLOGICAL TRIPS

Has already been on one **12%**

Would be interested in it **29%**

Ecological footprint of the trip plays a vital role in choosing a destination **15%**

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

40% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

44% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 19%

Pyramids 12%

Statue of Liberty 10%

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SWITZERLAND

HOLIDAY PLANS

HOLIDAY PLANS 62% (-4pts)
Vs Europe 63% (-1pt)

BUDGET CHF 3,250 (=)
Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY
18% (-2pts)

PREFERRED FOREIGN DESTINATIONS
Italy 27% (+2pts)
France 19% (+1pt)
Spain 17% (-2pts)

ECOLOGICAL TRIPS

Has already been on one 15%
Would be interested in it 36%

Ecological footprint of the trip plays a vital role in choosing a destination
16%

DOMINANT TRAVELER TYPE

Planning the bare minimum, such as hotel and transportation
35% *Vs Europe 26%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED
Would travel more frequently
38% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT
Eiffel Tower 14%
Pyramids 14%
Great Wall of China 11%

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POLAND

HOLIDAY PLANS

HOLIDAY PLANS 61% (+1pt)

Vs Europe 63% (-1pt)

BUDGET Zł 4,341 (-3pts)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

52% (+7pts)

PREFERRED FOREIGN DESTINATIONS

Italy 9% (+1pt) - Greece 9% (+2pts)

Spain 8% (-1pt)

Croatia 7% (+1pt)

ECOLOGICAL TRIPS

Has already been on one 21%

Would be interested in it 35%

Ecological footprint of the trip plays a vital role in choosing a destination

26%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

32% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

37% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 12%

Pyramids 9%

Great Wall of China 9%

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PORTUGAL

HOLIDAY PLANS

HOLIDAY PLANS 60% (+1pt)

Vs Europe 63% (-1pt)

BUDGET €1,333 (-3%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

47% (+2pts)

PREFERRED FOREIGN DESTINATIONS

Spain 25% (-1pt)

France 9% (=)

Italy 7% (-3pts)

ECOLOGICAL TRIPS

Has already been on one 16%

Would be interested in it 46%

Ecological footprint of the trip plays a vital role in choosing a destination 23%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

32% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel to other destinations

28% *vs Europe 17%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 15%

Taj Mahal 10%

Pyramids 8%

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UNITED STATES

HOLIDAY PLANS

HOLIDAY PLANS 68% (=)

Vs Europe 63% (-1pt)

BUDGET $2,373 (-10%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

50% (+4pts)

PREFERRED FOREIGN DESTINATIONS

Canada 5% (-1pt)- Mexico 5% (+1pt)

Bahamas 2% (-1pt) – UK 2% (=)

Ireland 2% (=)

ECOLOGICAL TRIPS

Has already been on one 15%

Would be interested in it 31%

Ecological footprint of the trip plays a vital role in choosing a destination

11%

DOMINANT TRAVELER TYPE

Looking (online) for the best deals & benefits before booking

37% *Vs Europe 34%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Would travel more frequently

30% *vs Europe 36%*

FAVORITE MONUMENTS/SITES TO VISIT

Grand Canyon 22%

Eiffel Tower / Mont Rushmore 11%

Pyramids 8%

(+XX / -XX) : Evolution vs 2018

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BRAZIL

HOLIDAY PLANS

HOLIDAY PLANS 68% (=)

Vs Europe 63% (-1pt)

BUDGET R$ 5,058 (-3%)

Vs Europe €2,019 (+3%)

HOLIDAYS IN THEIR OWN COUNTRY

32% (-1pt)

PREFERRED FOREIGN DESTINATIONS

Argentina 8% (-3pts)

Italy 5% (-1pt) - Portugal 5% (=)

France 4% (-1pt) – Espagne 4 % (=)

ECOLOGICAL TRIPS

Has already been on one 33%

Would be interested in it 40%

Ecological footprint of the trip plays a vital role in choosing a destination 52%

DOMINANT TRAVELER TYPE

Planning every detail of your trip

27% *Vs Europe 16%*

DREAM HOLIDAYS

IF THE HOLIDAY BUDGET WAS DOUBLED

Travel to other destinations / Travel longer

21% *vs Europe 20% / 17%*

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 19%

Corcovado Christ 15%

Pyramids / Statue of Liberty 8%

(+XX / -XX) : Evolution vs 2018

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End of document

GAME CHANGERS

Holiday Barometer among Europeans & Americans

IPSOS/EUROP ASSISTANCE SURVEY

19TH EDITION

INSURANCE REPORT

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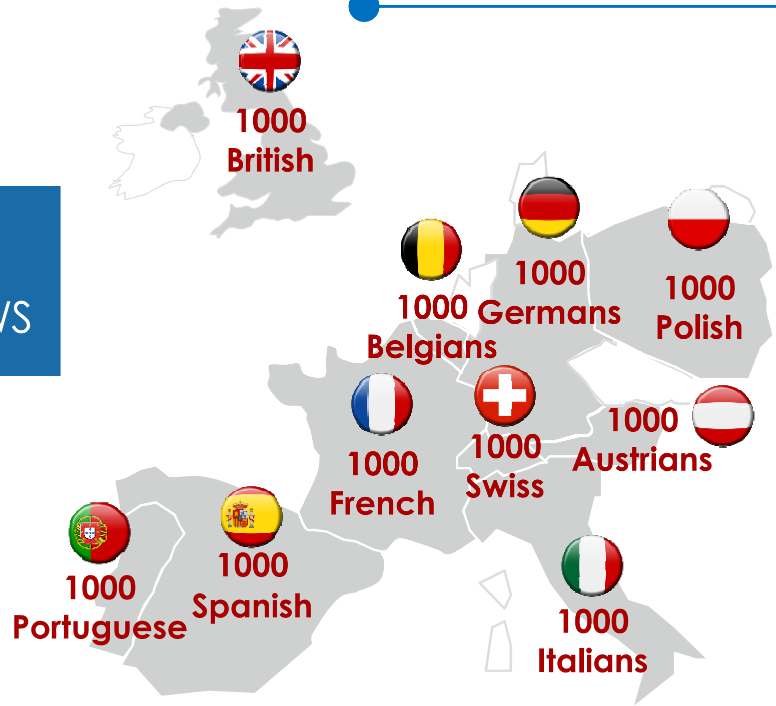
SCOPE OF THE 2019 SURVEY

American scope

12 COUNTRIES

12,000 INTERVIEWS

European scope



METHODOLOGY

Samples

In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older (aged 16 and up in Brazil), put together using the quota method (gender, age, profession) after stratification by region and by city size.

Timeline

The field studies were carried out between March 18th and April 10th 2019

Method of data collection

Online survey in the 12 countries

2 OUT OF 3 EUROPEANS ARE INSURED AGAINST A HEALTH PROBLEM OR A VEHICLE BREAKING DOWN WHEN TRAVELING

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When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?

	EUROPE	
Health problem for you or a family member that is accompanying you	66%	(+1pt)
Your vehicle breaks down	66%	(+1pt)
A problem concerning your home	65%	(+1pt)
A plane, train, car accident etc.	63%	(+1pt)
The loss of your personal belongings (luggage, clothes, money)	58%	(-1pt)

INSURANCE AGAINST TRANSPORT STRIKE/DELAYS IS THE BIGGEST INCREASE OF 2019

When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?

	EUROPE	
Illness amongst family or friends who are staying behind	49%	(+2pts)
The risk of a personal attack	47%	(+1pt)
The risk of a natural disaster (earthquake, volcanic eruption, flooding etc.)	41%	(+2pts)
A transport strike or delays	38%	(+5pts)
The risk of a terrorist attack	33%	(+2pts)

RISK COVERAGE – PER EUROPEAN COUNTRY – 1/2

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When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?

85%	66%	64%	72%	40%	80%	82%	78%	52%	54%
79%	77%	61%	70%	42%	81%	67%	74%	53%	63%
82%	64%	62%	72%	48%	78%	74%	74%	67%	59%
75%	77%	56%	68%	43%	71%	76%	75%	47%	54%
69%	80%	48%	62%	37%	55%	68%	75%	43%	49%

XX / XX significantly superior / inferior to 2018 results

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RISK COVERAGE – PER EUROPEAN COUNTRY – 2/2

When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?

63%	63%	32%	54%	26%	51%	51%	61%	35%	42%
54%	54%	47%	52%	34%	62%	52%	58%	41%	51%
59%	56%	25%	41%	28%	51%	41%	47%	33%	33%
41%	64%	26%	38%	27%	33%	44%	43%	30%	26%
48%	47%	18%	34%	24%	32%	30%	29%	23%	27%

XX / XX significantly superior / inferior to 2018 results

GAME CHANGERS

RISK COVERAGE – PER NON-EUROPEAN COUNTRY

When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?

62%	45%
65%	55%
65%	54%
63%	51%
50%	54%

34%	47%
45%	47%
32%	37%
27%	36%
19%	34%

XX / XX significantly superior / inferior to 2018 results

THE TOP 3 PROBLEMS ENCOUNTERED BY EUROPEANS WHEN TRAVELING ARE TRANSPORT DELAYS, VEHICLE BREAKING DOWN AND HEALTH PROBLEMS

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When going on a trip, did you already encounter the following issues ?

	EUROPE
A transport strike or delays	31%
Your vehicle breaks down	28%
Health problem for you or a family member that is accompanying you	27%
The loss of your personal belongings (luggage, clothes, money)	19%
Illness amongst family or friends who are staying behind	17%

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ACCIDENTS AND ATTACKS ARE MUCH LESS FREQUENT

When going on a trip, did you already encounter the following issues ?

	EUROPE
A problem concerning your home	11%
A plane, train, car accident etc.	11%
A personal attack	10%
A natural disaster (earthquake, volcanic eruption, flooding etc.)	8%
A terrorist attack	5%

ISSUES ENCOUNTERED – PER EUROPEAN COUNTRY - 1/2

When going on a trip, did you already encounter the following issues ?

	12%	6%	11%	15%	12%	11%	10%	11%	11%	14%
	22%	25%	29%	32%	24%	29%	33%	32%	27%	29%
	28%	16%	33%	36%	27%	26%	34%	34%	35%	30%
	11%	8%	11%	12%	14%	10%	14%	14%	11%	10%
	15%	18%	20%	25%	19%	17%	27%	31%	18%	12%

ISSUES ENCOUNTERED – PER EUROPEAN COUNTRY 2/2

When going on a trip, did you already encounter the following issues ?

	8%	7%	11%	11%	10%	11%	13%	15%	10%	11%
	12%	14%	17%	22%	20%	14%	18%	18%	20%	22%
	7%	7%	9%	8%	10%	8%	8%	12%	7%	7%
	39%	28%	23%	35%	40%	31%	31%	45%	34%	15%
	4%	3%	4%	7%	7%	7%	2%	6%	5%	6%

GAME CHANGERS

ISSUES ENCOUNTERED - PER NON EUROPEAN COUNTRIES

When going on a trip, did you already encounter the following issues ?

	10%	20%
	27%	39%
	22%	34%
	10%	15%
	20%	26%

	7%	21%
	15%	30%
	10%	14%
	15%	36%
	3%	12%

TRANSPORTATION STRIKE/DELAYS IS THE FIRST PROBLEM ENCOUNTERED BUT IS FAR FROM BEING THE FIRST PROBLEM EUROPEANS INSURE THEMSELVES AGAINST

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INSURED AGAINST		EUROPE	*ALREADY ENCOUNTERED*	
Rank	*%*		*Rank*	*%*
#9	38%	A transport strike or delays	31%	#1
#1	66%	Your vehicle breaks down	28%	#2
#1	66%	Health problem while on holiday	27%	#3
#5	58%	The loss of your personal belongings	19%	#4
#6	49%	Health problem among those stayed behind	17%	#5
#3	65%	A problem concerning your home	11%	#6
#4	63%	A plane, train, car accident	11%	#6
#7	47%	Personal attack	10%	#8
#8	41%	Natural disaster	8%	#10
#10	33%	Terrorist attack	5%	#11

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IN 2019, THE COST ONLY COMES SECOND TO EXPLAIN THE REASON FOR NOT SUBSCRIBING A TRAVEL INSURANCE

Why did you decide not to purchase travel insurance for your vacation travel?

EUROPE

+4pts	34%	I didn't think about it
-3pts	30%	It is too expensive
-1pt	27%	I don't travel often enough
-3pts	24%	I don't take risks
-4pts	21%	I don't travel that far
+1pt	4%	I didn't find insurance that covered what I needed covered

REASONS FOR NON INSURANCE – PER EUROPEAN COUNTRY

Why did you decide not to purchase travel insurance for your vacation travel?

I didn't think about it	34%	32%	26%	35%	43%	45%	35%	42%	37%	20%
It is too expensive	46%	18%	29%	26%	28%	42%	34%	32%	41%	34%
I don't travel often enough	14%	38%	29%	24%	22%	27%	13%	33%	37%	38%
I don't take risks	19%	13%	28%	31%	24%	14%	14%	32%	10%	29%
I don't travel that far	17%	35%	21%	24%	18%	11%	23%	15%	18%	25%
I didn't find insurance that covered what I needed covered	0%	3%	3%	2%	3%	2%	8%	7%	4%	9%

GAME CHANGERS

REASONS FOR NON INSURANCE – PER NON-EUROPEAN COUNTRY

Why did you decide not to purchase travel insurance for your vacation travel?

		
I didn't think about it	36%	34%
It is too expensive	43%	31%
I don't travel often enough	35%	33%
I don't take risks	10%	5%
I don't travel that far	15%	24%
I didn't find insurance that covered what I needed covered	9%	4%

THE TRAVEL INSURANCE COMPANY IS STILL THE #1 CHANNEL FOR PURCHASING A TRAVEL INSURANCE

How did you ultimately make your purchase of travel insurance?

EUROPE

37%	-11pts	Directly from a travel insurance company
17%	-1pt	Through my credit card company
14%	-1pt	Online through a comparison website
14%	-2pts	Through a travel agent
13%	-	Directly from an insurance broker
9%	-1pt	Through an online travel agency website during checkout
8%	-	Directly from an assistance company
7%	=	Through my airline company when I purchased my travel
5%	=	Through the hotel or accommodations provider

NB: The decrease on travel insurance can be explained by the addition in 2019 of the 2 items « insurance broker » and « assistance company », that might have cannibalized it a little.

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INSURANCE SUBSCRIPTION CHANNELS – PER EUROPEAN COUNTRY

How did you ultimately make your purchase of travel insurance?

										
Directly from a travel insurance company	59%	24%	41%	18%	26%	33%	31%	54%	29%	40%
Through my credit card company	28%	15%	15%	13%	11%	13%	36%	15%	19%	10%
Online through a insurance comparison website	2%	39%	13%	13%	13%	3%	7%	5%	8%	14%
Through a travel agent	9%	7%	13%	27%	18%	16%	15%	9%	25%	20%
Directly from an insurance broker	7%	10%	18%	11%	9%	24%	26%	14%	21%	16%
Through an online travel agency website during checkout	5%	7%	9%	14%	17%	6%	10%	6%	8%	5%
Directly from an assistance company	6%	4%	8%	11%	8%	16%	7%	18%	9%	6%
Through my airline, cruise line, or railway company	5%	4%	6%	13%	12%	8%	6%	6%	9%	5%
Through the hotel provider	4%	5%	5%	7%	9%	5%	3%	4%	6%	6%

INSURANCE SUBSCRIPTION CHANNELS – PER NON-EUROPEAN COUNTRY

How did you ultimately make your purchase of travel insurance?

		
Directly from a travel insurance company	14%	21%
Through my credit card company	27%	14%
Online through a insurance comparison website	8%	15%
Through a travel agent	15%	27%
Directly from an insurance broker	19%	12%
Through an online travel agency website during checkout	17%	15%
Through my airline, cruise line, or railway company	17%	15%
Directly from an assistance company	4%	15%
Through the hotel provider	11%	10%

GAME CHANGERS

CANCELLATION AND MEDICAL SUPPORT STILL THE TRAVEL INSURANCE ESSENTIALS

Among the following items, which of these would be the three most critical elements when you are considering a travel insurance package?

EUROPE

-1pt	61%	Medical coverage
+1pt	52%	Trip cancellation
=	50%	Emergency medical transportation
+2pts	32%	Baggage loss/delay
-1pt	23%	Accidental death
+1pt	19%	Trip interruption
+2pt	13%	Inconvenience coverage
=	10%	Rental car damage
=	6%	Missed ports of call

GAME CHANGERS

TRAVEL INSURANCE ESSENTIALS – PER EUROPEAN COUNTRY 1/2

Among the following items, which of these would be the three most critical elements when you are considering a travel insurance package?

										
Emergency medical transportation	63%	53%	55%	36%	32%	54%	65%	56%	37%	51%
Trip cancellation	59%	56%	63%	56%	44%	52%	59%	56%	40%	21%
Medical coverage	56%	76%	59%	64%	47%	67%	65%	57%	62%	69%
Baggage loss/delay	32%	42%	22%	36%	37%	31%	29%	31%	38%	26%
Accidental death	26%	21%	12%	35%	18%	31%	16%	15%	37%	36%

XX / XX significantly superior / inferior to 2018 results

GAME CHANGERS

TRAVEL INSURANCE ESSENTIALS – PER EUROPEAN COUNTRY 2/2

Among the following items, which of these would be the three most critical elements when you are considering a travel insurance package?

Trip interruption	18%	11%	28%	20%	19%	14%	19%	27%	18%	13%
Rental car damage	10%	5%	7%	10%	14%	13%	7%	14%	18%	17%
Inconvenience coverage	6%	5%	7%	9%	35%	7%	6%	5%	18%	22%
Missed ports of call	6%	3%	7%	11%	3%	5%	8%	12%	10%	6%

XX / XX significantly superior / inferior to 2018 results

GAME CHANGERS

TRAVEL INSURANCE ESSENTIALS – PER NON-EUROPEAN COUNTRY 1/2

Among the following items, which of these would be the three most critical elements when you are considering a travel insurance package?

		
Emergency medical transportation	36%	33%
Trip cancellation	55%	27%
Medical coverage	44%	52%
Baggage loss/delay	41%	43%
Accidental death	18%	31%

		
Trip interruption	26%	14%
Rental car damage	25%	19%
Inconvenience coverage	11%	16%
Missed ports of call	5%	14%

XX / XX significantly superior / inferior to 2018 results

PRICE IS THE #1 CRITERIA WHEN PICKING A TRAVEL INSURANCE COMPANY

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When picking a travel insurance company, what would be the criteria influencing the most your choice ?

EUROPE

36%	Affordable prices
17%	Full range of products and services offered
15%	Reputation of the insurance company
11%	Availability of customized policy offers
7%	International presence of the company
7%	Having someone recommend it to you
1%	Seeing an advertisement for it
6%	Others

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CHOICE CRITERIA FOR A TRAVEL INSURANCE COMPANY – NON EUROPEAN COUNTRIES

When picking a travel insurance company, what would be the criteria influencing the most your choice ?

Affordable prices	29%	38%	42%	32%	32%	35%	34%	37%	41%	36%
Full range of products and services offered	13%	24%	15%	18%	12%	15%	20%	19%	19%	18%
Reputation of the insurance company	15%	19%	9%	17%	20%	15%	11%	9%	13%	16%
Availability of customized policy offers	18%	6%	13%	9%	9%	15%	13%	14%	9%	6%
International presence of the company	13%	2%	4%	11%	8%	10%	7%	9%	6%	7%
Having someone recommend it to you	6%	5%	8%	8%	8%	6%	9%	8%	8%	11%
Seeing an advertisement for it	1%	1%	0%	1%	2%	1%	1%	1%	1%	1%
Others	5%	5%	9%	4%	9%	3%	5%	3%	3%	5%

GAME CHANGERS

CHOICE CRITERIA FOR TRAVEL INSURANCE COMPANY – NON EUROPEAN COUNTRIES

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When picking a travel insurance company, what would be the criteria influencing the most your choice ?

		
Affordable prices	44%	31%
Full range of products and services offered	18%	14%
Reputation of the insurance company	16%	25%
Availability of customized policy offers	5%	6%
International presence of the company	2%	5%
Having someone recommend it to you	7%	11%
Seeing an advertisement for it	1%	3%
Others	7%	5%

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End of document

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