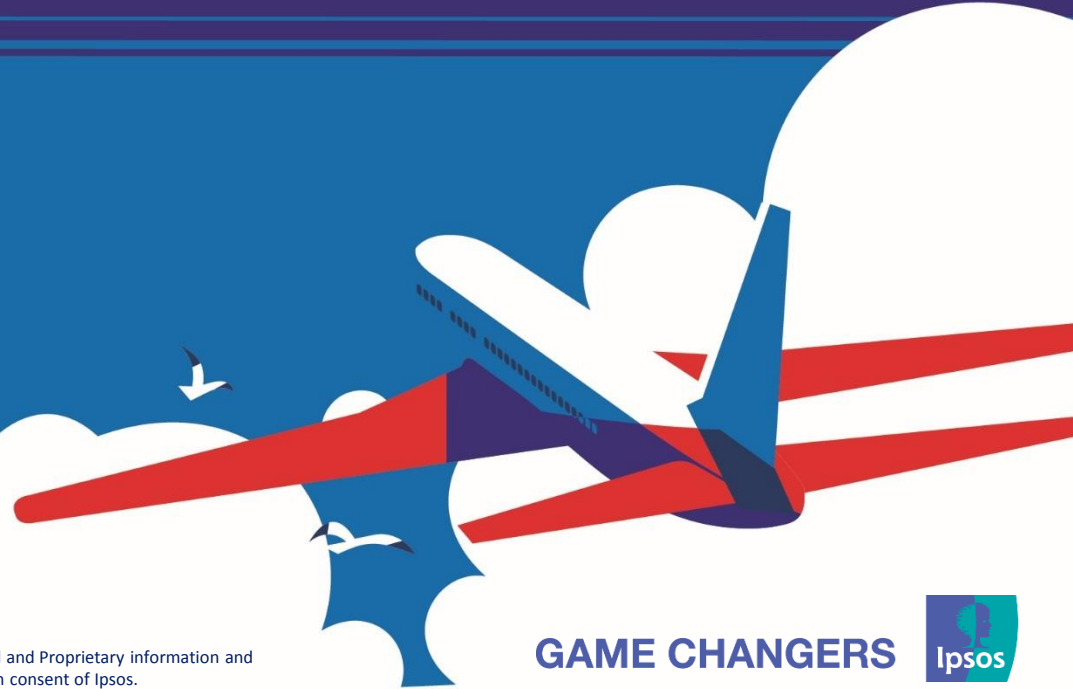


Holiday Barometer among Europeans & Americans

IPSOS/EUROP ASSISTANCE SURVEY

19TH EDITION



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GAME CHANGERS



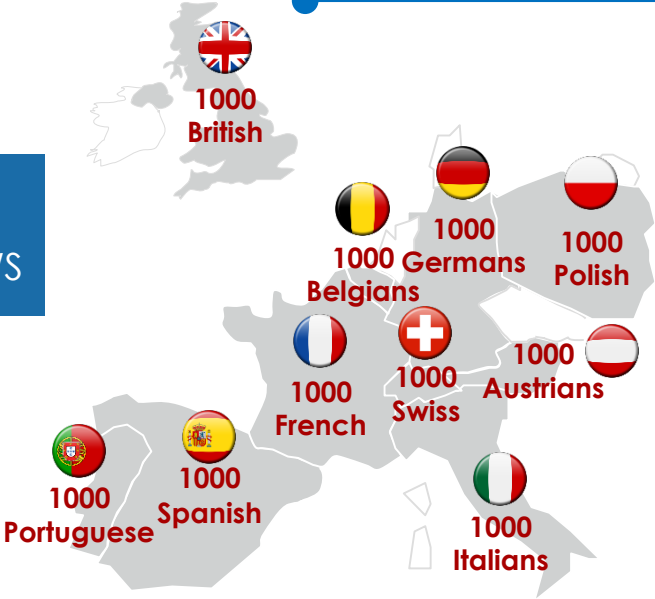
SCOPE OF THE 2019 SURVEY

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

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1. SUMMER HOLIDAY PLANS

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



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%

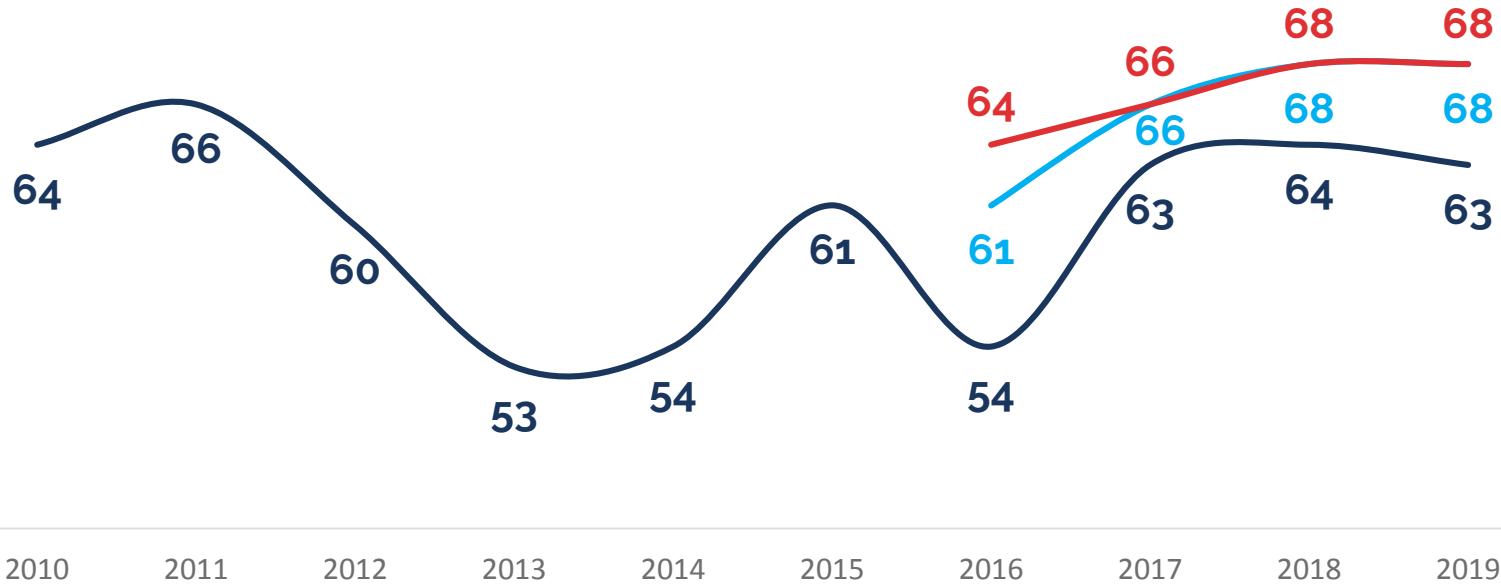
= (= vs 2018)



CONSOLIDATING A POSITIVE TREND SINCE 2016

EVOLUTION OF HOLIDAY PLANS (%)

EUROPE USA BRAZIL



BUT AMONG EUROPEANS, SITUATIONS ARE QUITE DIVERSE

SUMMER HOLIDAY PLANS

AUSTRIA

70%
+4pts

FRANCE

69%
=

BELGIUM

65%
+2pts

UNITED
KINGDOM

64%
-2pts

GERMANY

63%
-1pt

SWITZERLAND

62%
-4pts

ITALY

61%
-1pt

POLAND

61%
+1pt

PORTUGAL

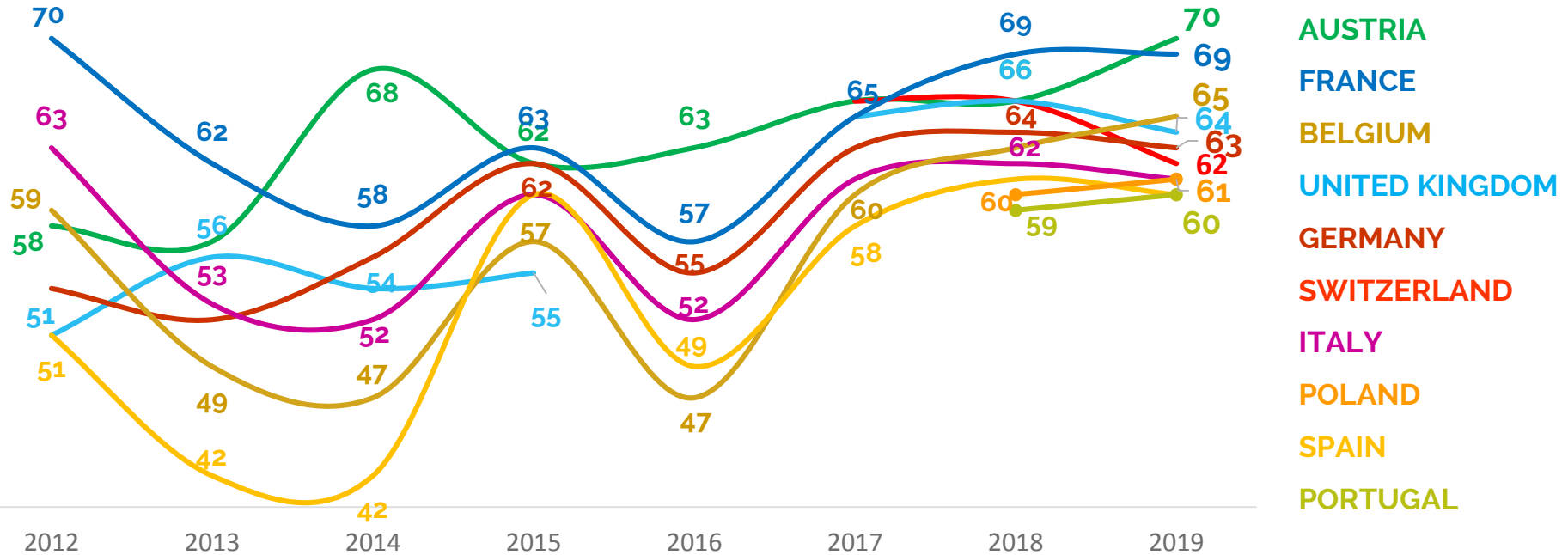
60%
+1pt

SPAIN

60%
-1pt

OVERALL, EXCEPT FOR SWITZERLAND, HOLIDAY PLANS ARE CONSOLIDATING

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)



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)

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

SUMMER HOLIDAY BUDGET

SWITZERLAND

CHF 3,250
=
(€2,856)

AUSTRIA

€2,627
-1%

GERMANY

€2,467
+4%

BELGIUM

€2,242
-3%

FRANCE

€2,201
+10%

UNITED KINGDOM

£1,861
-5%
(€2,151)

SPAIN

€1,798
+8%

ITALY

€1,757
-1%

PORTUGAL

€1,333
-3%

POLAND

Zł 4,341
=
(€1,010)

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

SUMMER HOLIDAY DURATION

(weeks on average)



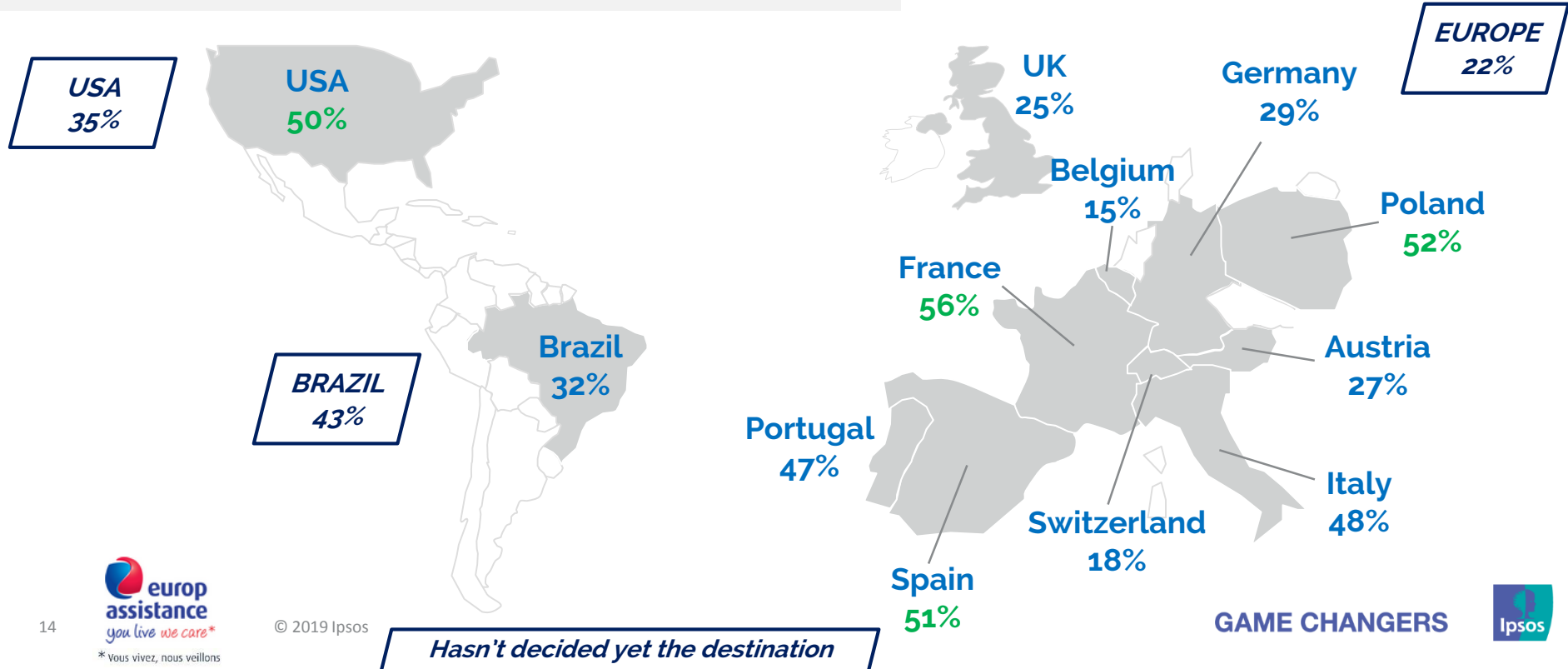
2.

FAVORITE DESTINATIONS

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

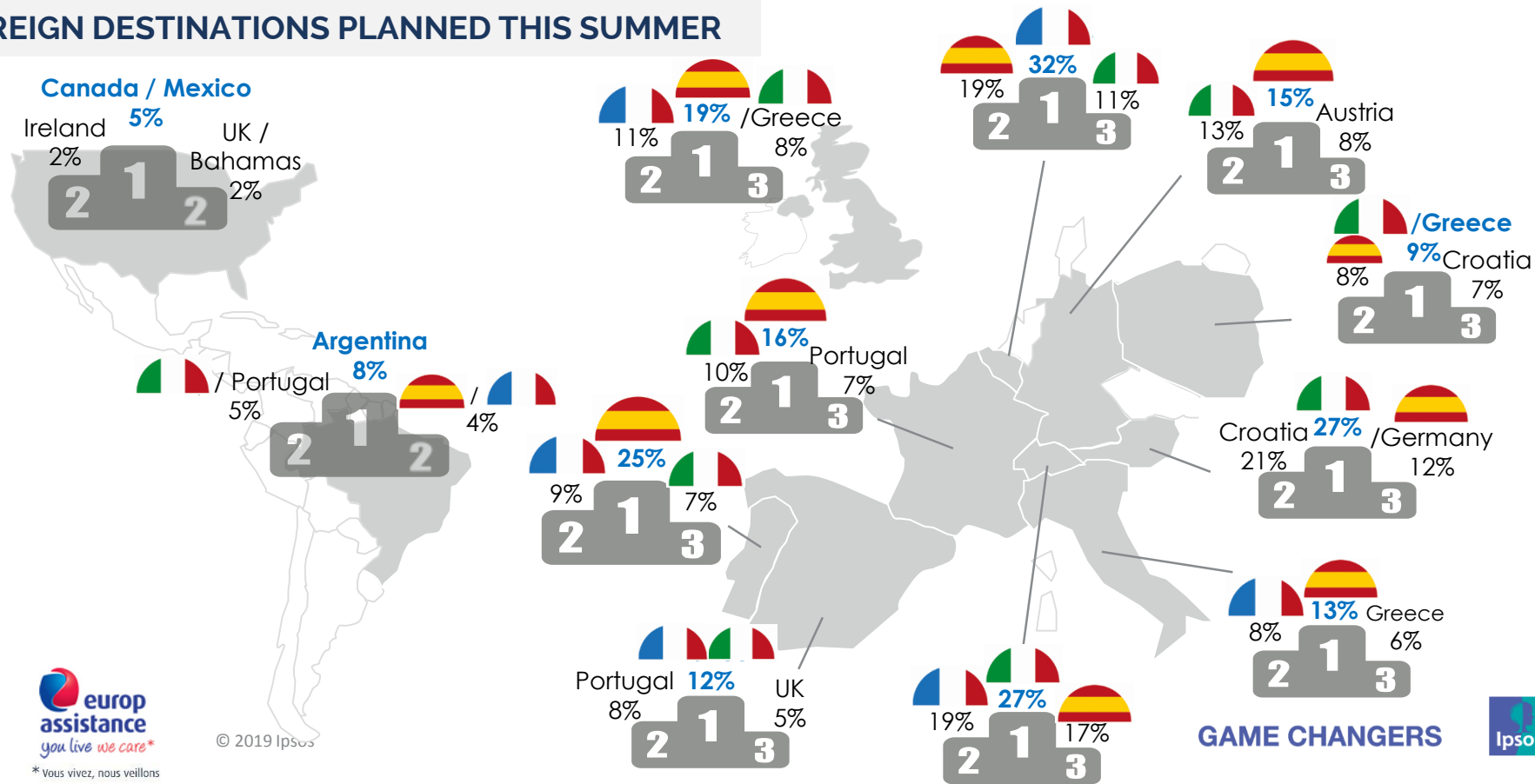
AMERICAN, SPANISH, FRENCH AND POLISH HOLIDAYMAKERS ARE MOSTLY STAYING IN THEIR OWN COUNTRY DURING SUMMER. AMERICANS AND BRAZILIANS ARE THE MOST UNDECISIVE

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

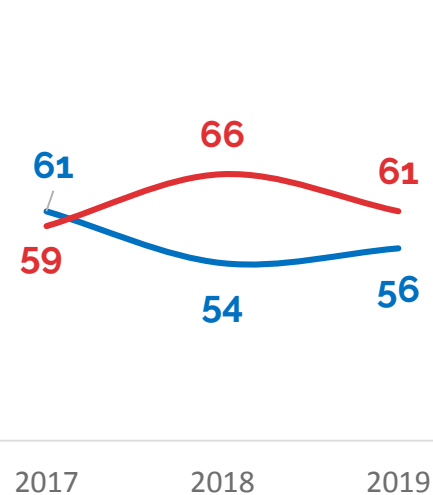
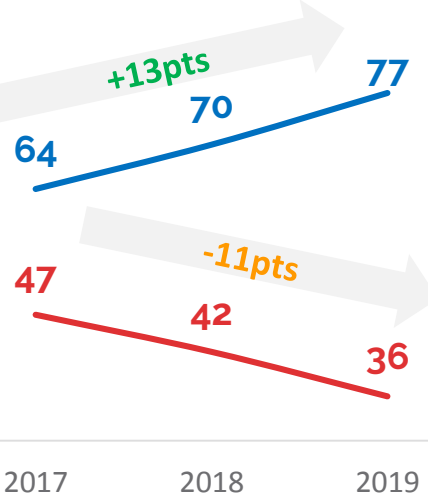
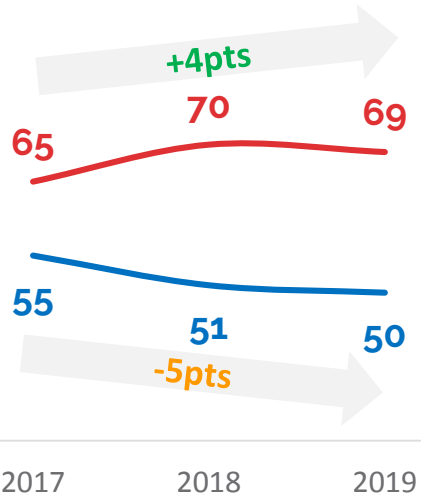


EUROPEANS ARE INCREASINGLY GOING ABROAD WHEREAS AMERICANS ARE INCREASINGLY TRAVELLING WITHIN THE UNITED STATES

HOLIDAY PLANS FOR THE SUMMER

Among those who have already decided their destination

EUROPE



IN ONE'S OWN COUNTRY

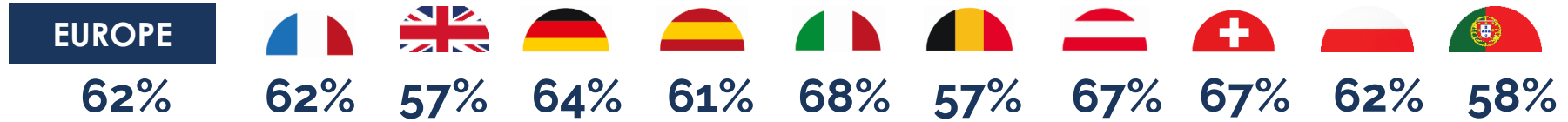
ABROAD

GAME CHANGERS



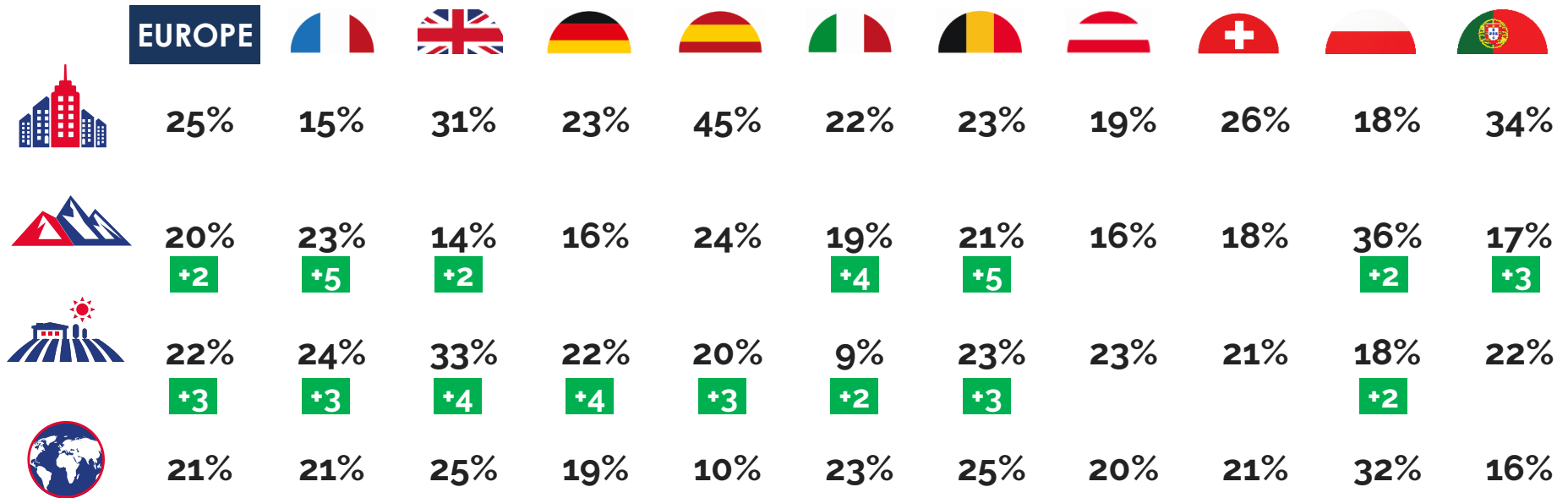
THE SEASIDE DOMINATES SUMMER DESTINATIONS FOR THE EUROPEANS

SUMMER HOLIDAY PREFERENCES



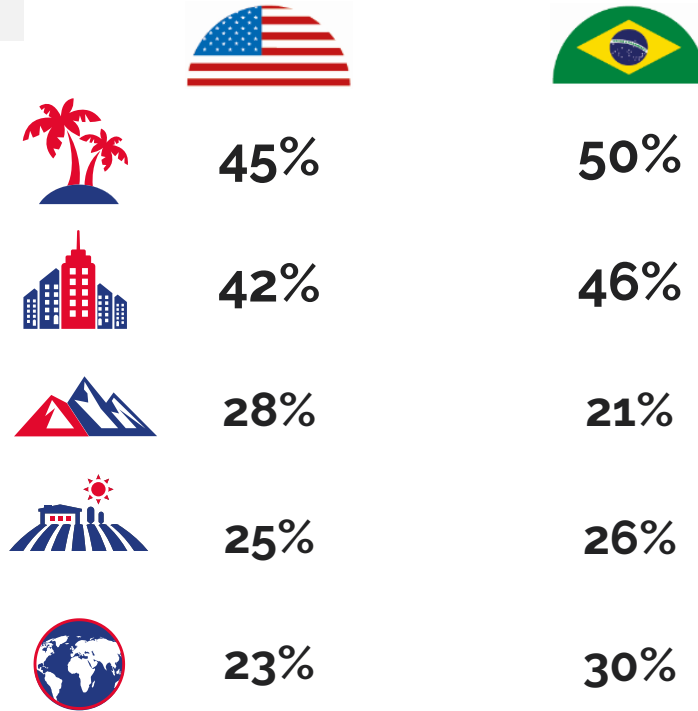
YET, EUROPEANS ARE INCREASINGLY ATTRACTED BY THE MOUNTAINS AND THE COUNTRYSIDE

SUMMER HOLIDAY PREFERENCES



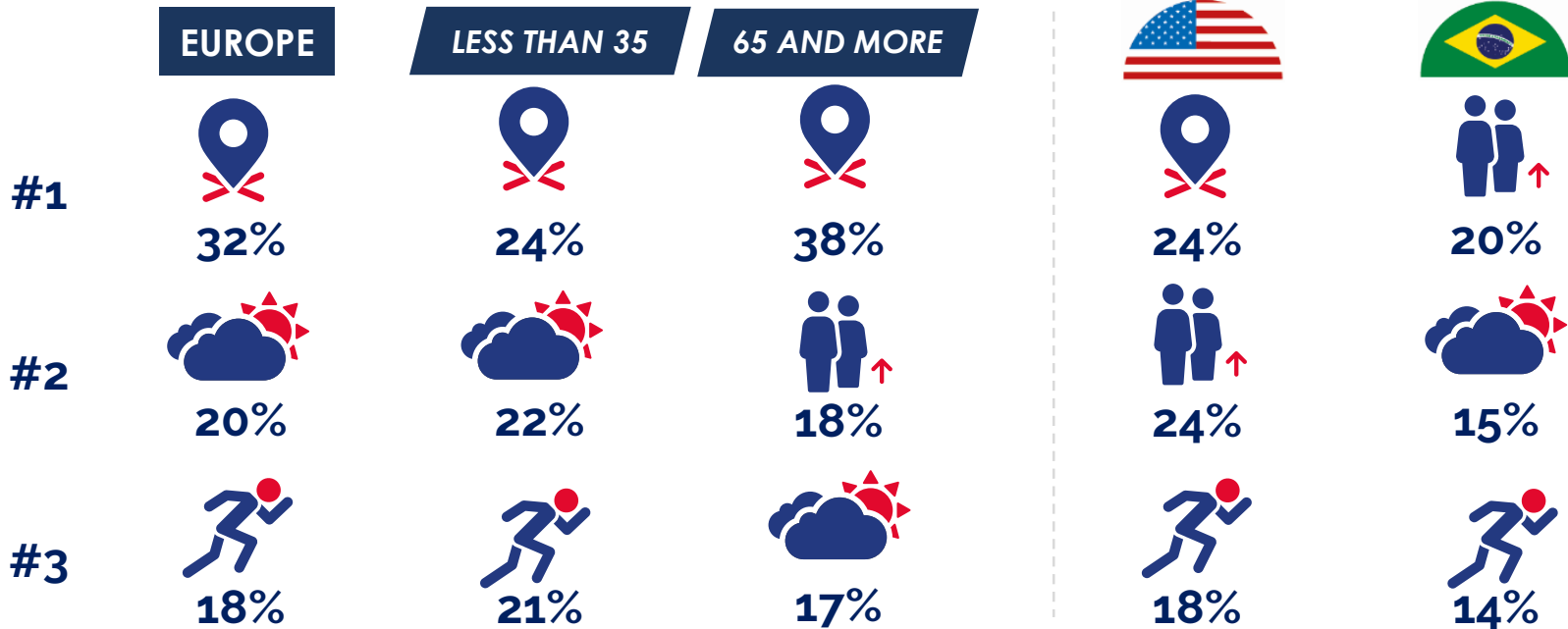
AMERICANS AND BRAZILIANS ARE ALMOST EQUALLY INTERESTED IN THE SEASIDE AND CITY TRIPS

SUMMER HOLIDAY PREFERENCES



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%

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



Factor	Percentage	USA Rank	Brazil Rank
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



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	
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		
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)

3.



SUMMER HOLIDAYS ACTIVITIES

- > Travel partners
- > Summer activities
- > Focus on atypical activities
- > Relationship to work during summer holidays
- > Focus on children activities



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%

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

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

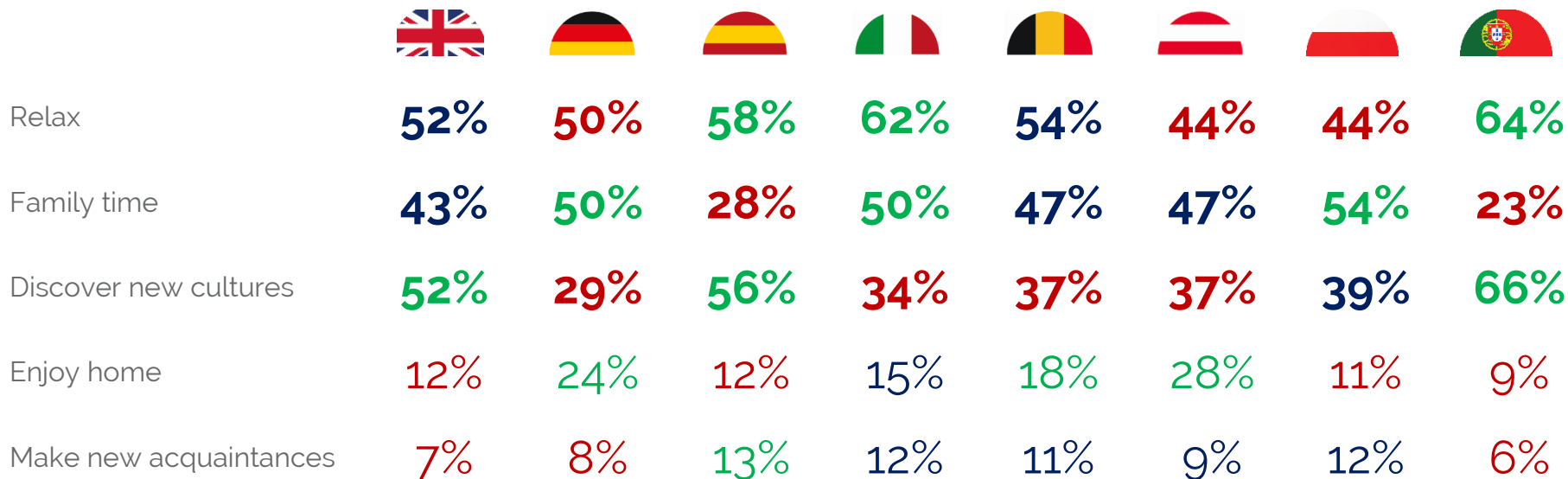
EUROPE



Activity	EUROPE	USA	Brazil
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%

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

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS



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%

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%

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

ATYPICAL ACTIVITIES – NATURE ORIENTED

Camping in the wilderness

52%



46%



40%



35%



Staying in a cabin in the nature

44%



38%



34%



28%



Ecological trip

33%



25%



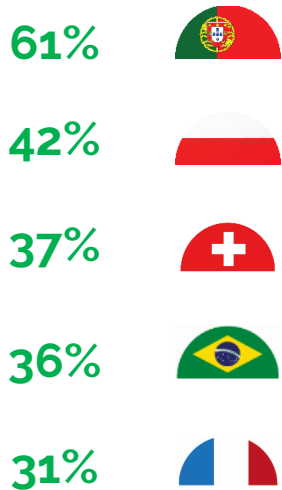
21%



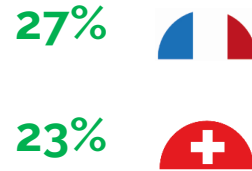
IN FRANCE AND SWITZERLAND, IMMERSIVE ACTIVITIES THAT ALLOW TO DISCOVER NEW CULTURES AND PEOPLE ARE WELL APPRECIATED

ATYPICAL ACTIVITIES – PEOPLE ORIENTED

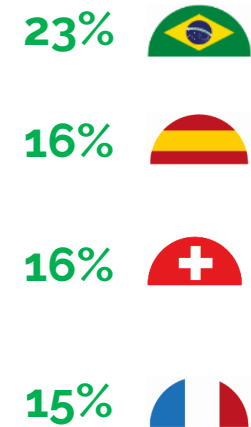
Staying at a local's home



Backpacked around the world



Solidarity tourism



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

RELATIONSHIP TO WORK DURING HOLIDAYS

EUROPE

Among those concerned

69% +3 You will completely disconnect from your job

19% -1 You will still check your emails, but will not necessarily respond to them

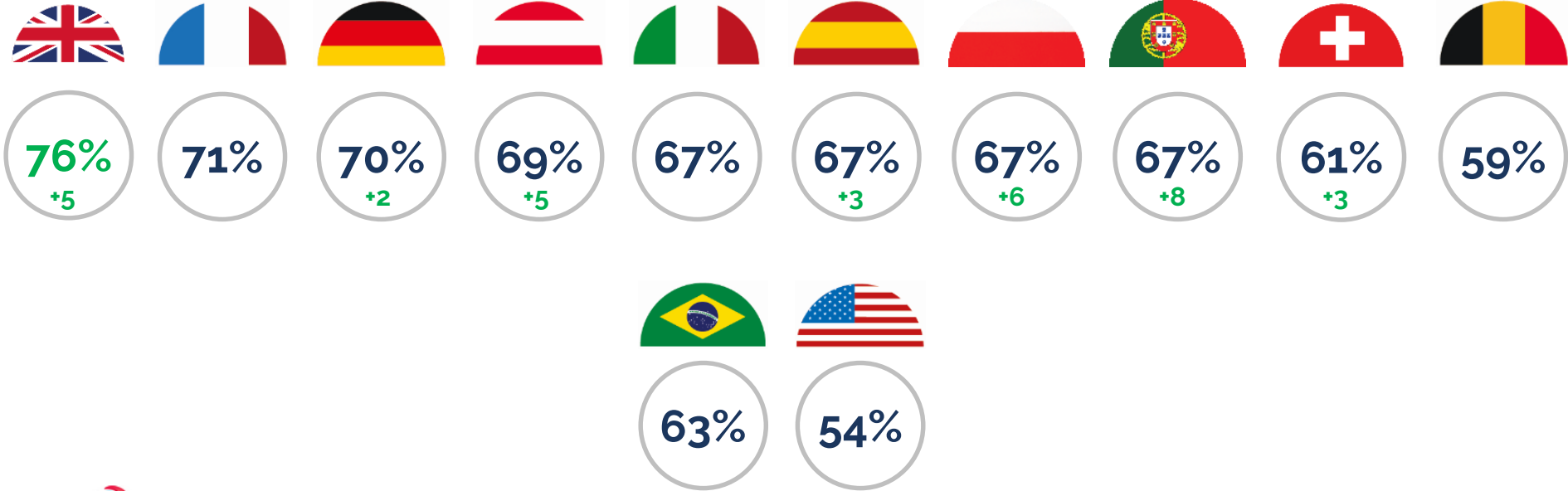
9% -1 You will answer emails and/or calls

4% = You will continue to work, even if only from time to time

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

WILL COMPLETELY DISCONNECT FROM YOUR JOB

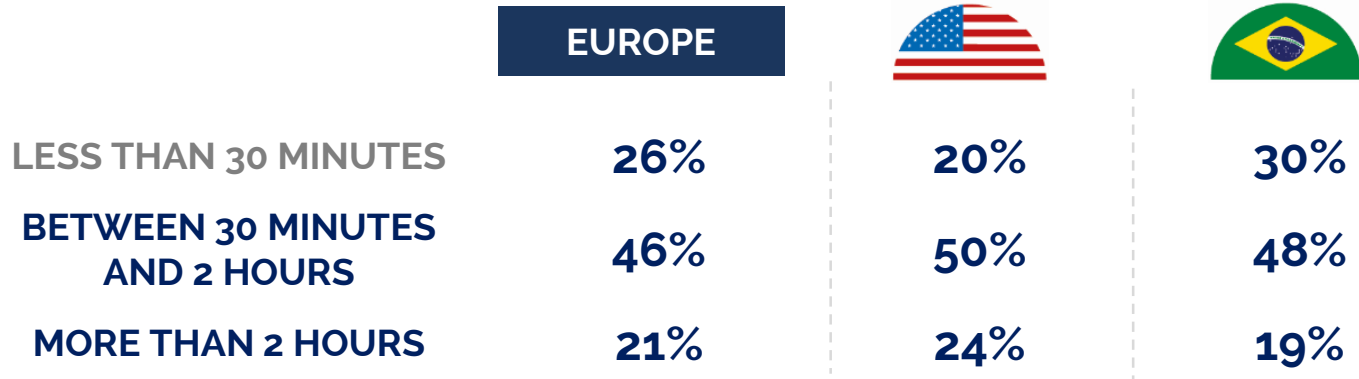
Among those concerned



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



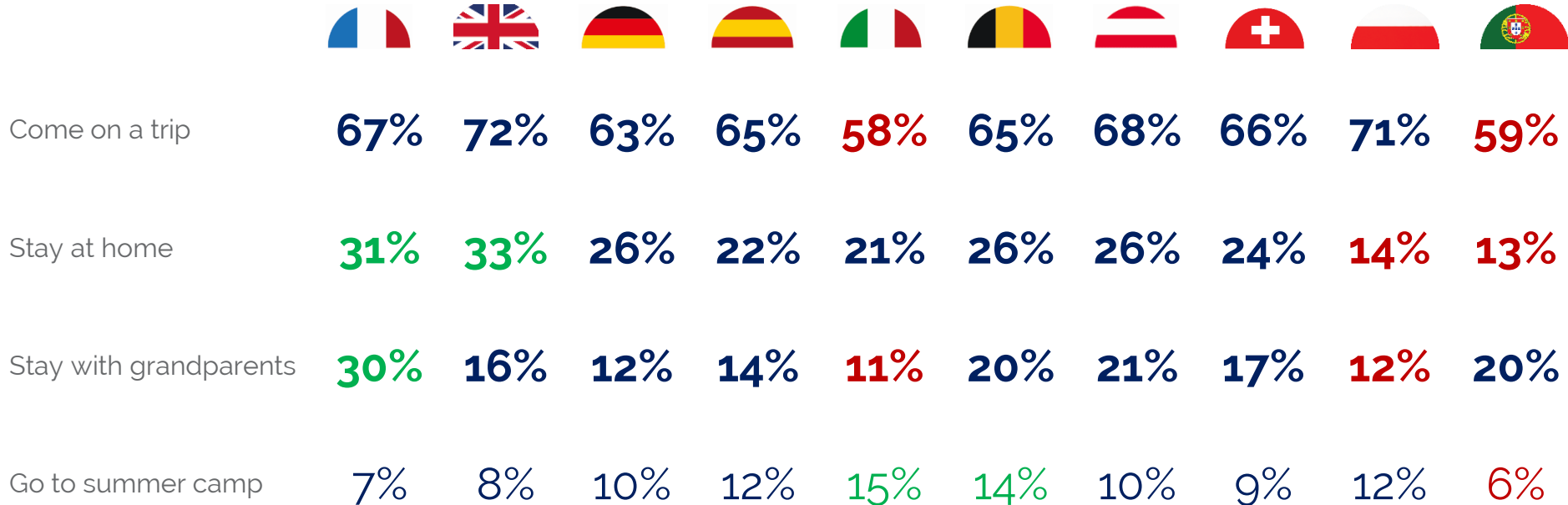
CHILDREN MOSTLY TRAVEL WITH THEIR PARENTS DURING SUMMER HOLIDAYS. STAYING AT HOME AND GOING TO SUMMER CAMP IS ALSO MORE POPULAR IN THE US THAN ELSEWHERE

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



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%

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		
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%

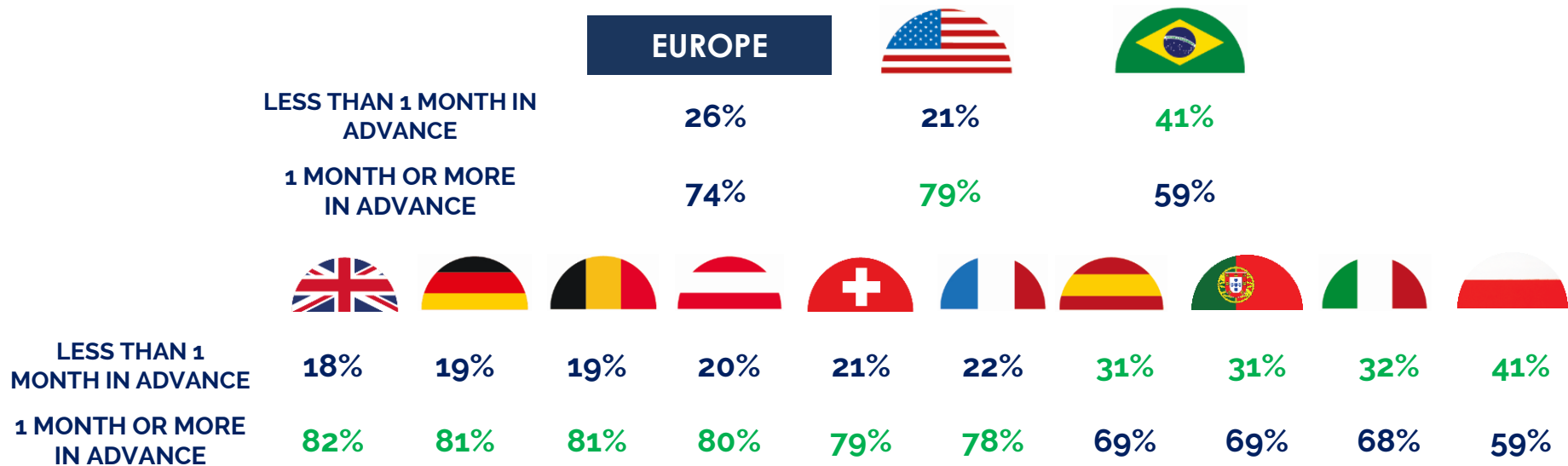
PEOPLE TRAVELING ALONE ARE MORE LIKELY TO GO BACK TO THE SAME PLACE AND PLAN VERY LITTLE IN ADVANCE, AND LESS LIKELY TO LOOK FOR THE BEST DEALS

TRAVELERS TYPE

	<i>FAMILY</i>	<i>FRIENDS</i>	<i>ALONE</i>
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%

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





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%

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

PREFERRED TYPE OF ACCOMMODATION

	EUROPE		
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%

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

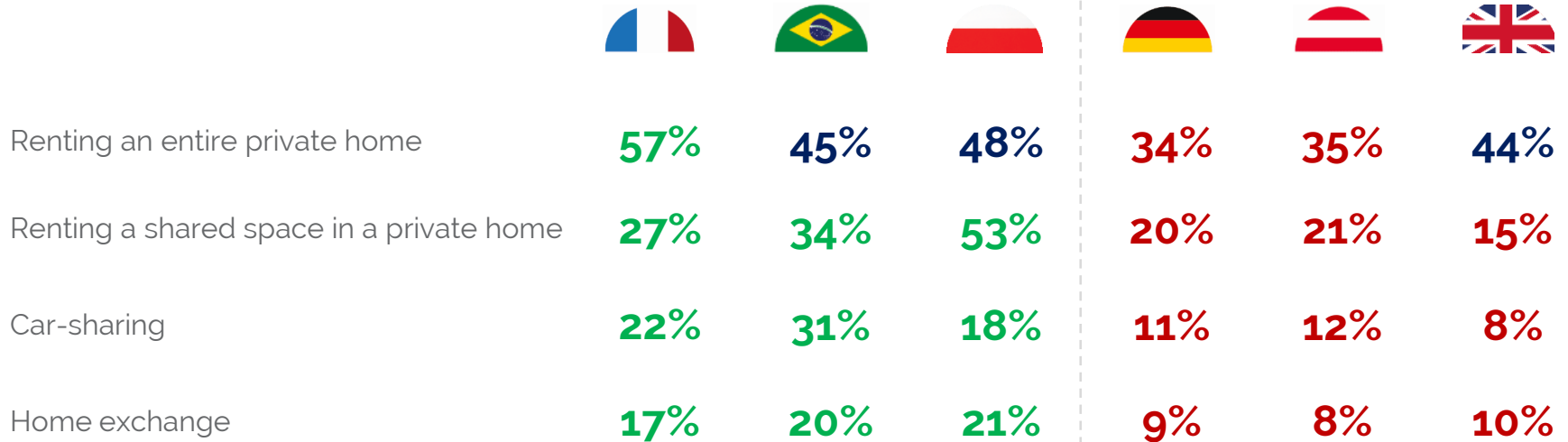
PREFERRED TYPE OF ACCOMMODATION

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



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%

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%

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

REVIEW POSTING AFTER A TRIP

	EUROPE		
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?

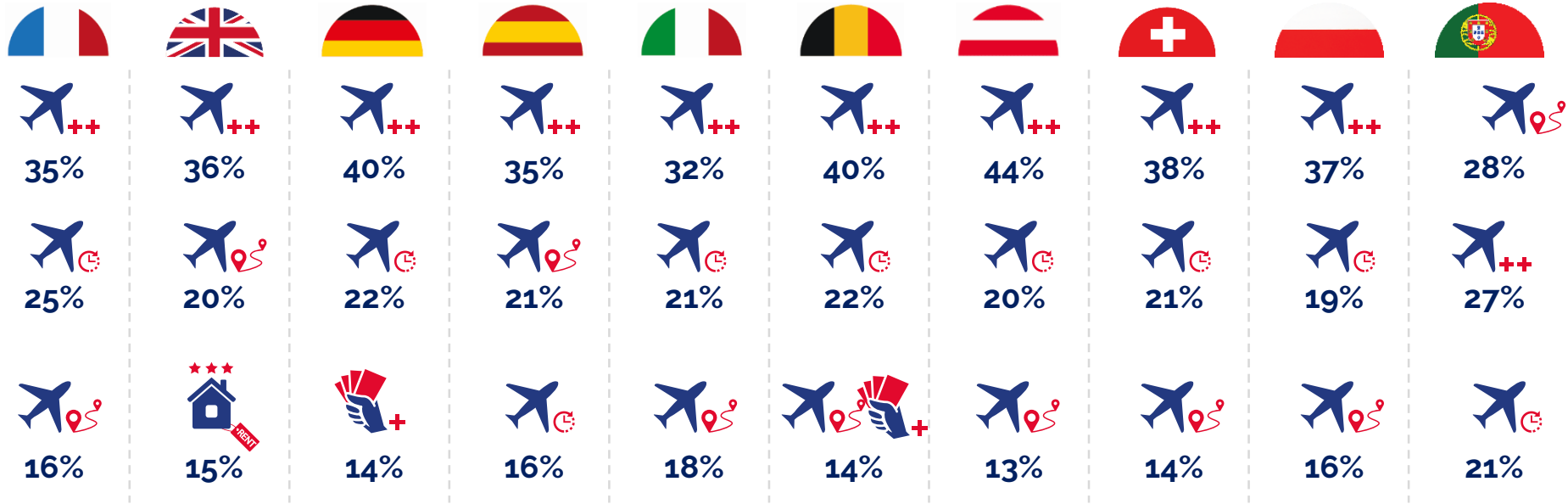
WITH A DOUBLED BUDGET, HOLIDAYMAKERS WOULD TRAVEL MORE FREQUENTLY, LONGER AND FURTHER. MANY DIFFERENCES DEPENDING ON THE COUNTRY

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...




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



Wonder of the World

11%

GREAT WALL OF CHINA



Wonder of the World

7%

TAJ MAHAL



Wonder of the World


7%

STATUE OF LIBERTY




6%

GRAND CANYON



5%

NIAGARA FALLS



4%

COLISEUM



Wonder of the World

4%

MACHU PICCHU



Wonder of the World

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	11%
Mont Rushmore	11%
Pyramids	8%
Yellowstone	8%
Statue of Liberty	7%
Great Wall of China	5%
Niagara Falls	5%
Machu Picchu	4%
Taj Mahal	3%
Yosemite	3%



EIFFEL TOWER	19%
Corcovado Christ	15%
Pyramids	8%
Statue of Liberty	8%
Disneyland	5%
Coliseum	4%
Fernando de Noronha	4%
Machu Picchu	3%
Pisa Tower	3%
Sugarloaf Mountain	3%
Iguazù Falls	3%



PYRAMIDS	14%
Taj Mahal	9%
Great Wall of China	8%
Eiffel Tower	7%
Statue of Liberty	7%
Machu Picchu	6%
Grand Canyon	5%
Niagara Falls	5%
Pisa Tower	3%
The Louvre	3%
Mont Saint Michel	3%



PYRAMIDS	17%
Grand Canyon	11%
Great Wall of China	10%
Taj Mahal	9%
Eiffel Tower	8%
Machu Picchu	7%
Statue of Liberty	5%
Niagara Falls	5%
Barrier Reef	4%
Northern Lights	4%
Stonehenge	4%
Ayers Rock	4%



PYRAMIDS	12%
Taj Mahal	8%
Machu Picchu	7%
Eiffel Tower	6%
Great Wall of China	6%
Statue of Liberty	5%
Grand Canyon	5%
Niagara Falls	3%
Pisa Tower	3%
Coliseum	2%
Petra	2%
Angkor Vat	2%

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%

France

#2

14%

Egypt

#3

11%



United States

44%

France

12%

Egypt

8%



Brazil

23%

France

20%

United States

10%

AMERICANS MENTION MORE NATURAL SITES THAN EUROPEANS AND BRAZILIANS

MONUMENTS OR SITES TO VISIT AT LEAST ONCE IN YOUR LIFE

EUROPE



Monuments
52%

Monuments
47%

Monuments
43%

Natural sites
18%

Natural sites
39%

Natural sites
13%

6.

COUNTRY FACT SHEETS



* Vous vivez, nous veillons

GAME CHANGERS



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

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%

(+XX / -XX) : Evolution vs 2018

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

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

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

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

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%

(+XX / -XX) : Evolution vs 2018

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%

(+XX / -XX) : Evolution vs 2018

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%

(+XX / -XX) : Evolution vs 2018

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%

(+XX / -XX) : Evolution vs 2018

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

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

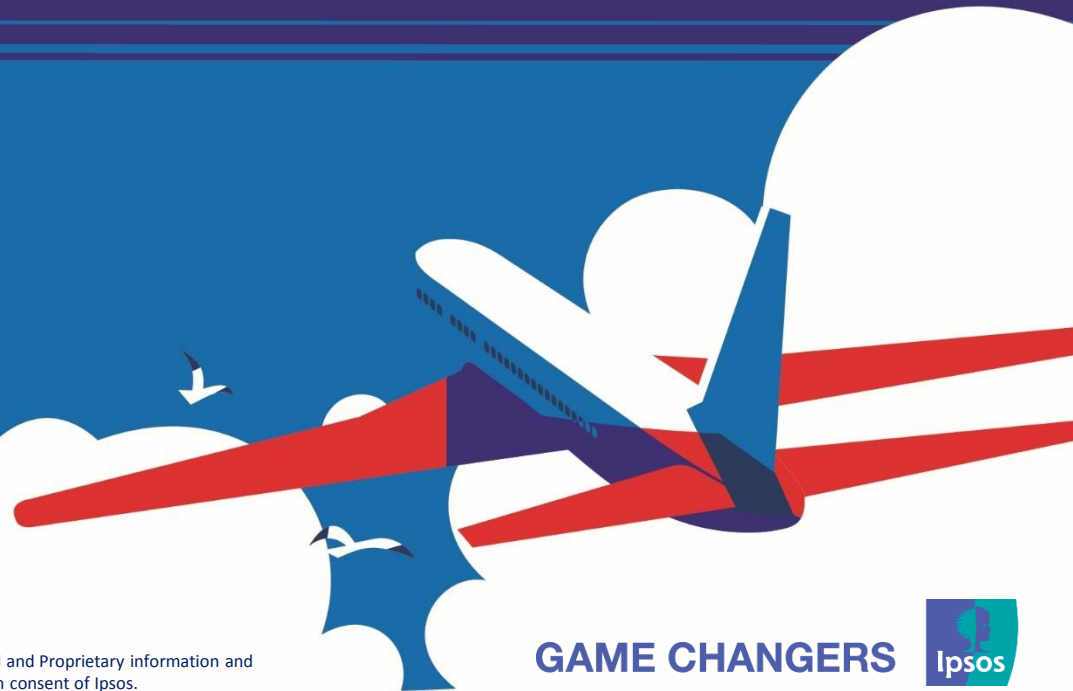
IF THE HOLIDAY BUDGET
WAS DOUBLED
**Travel to other destinations / Travel
longer**
21% vs Europe 20% / 17%

FAVORITE MONUMENTS/SITES TO VISIT

Eiffel Tower 19%
Corcovado Christ 15%
Pyramids / Statue of Liberty 8%

(+XX / -XX) : Evolution vs 2018

End of document



* Vous vivez, nous veillons

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GAME CHANGERS

