

HOLIDAY BAROMETER AMONG EUROPEANS, NORTH AMERICANS, ASIANS & OCEANIANS

Ipsos/Europ Assistance survey

22nd edition



April 2023



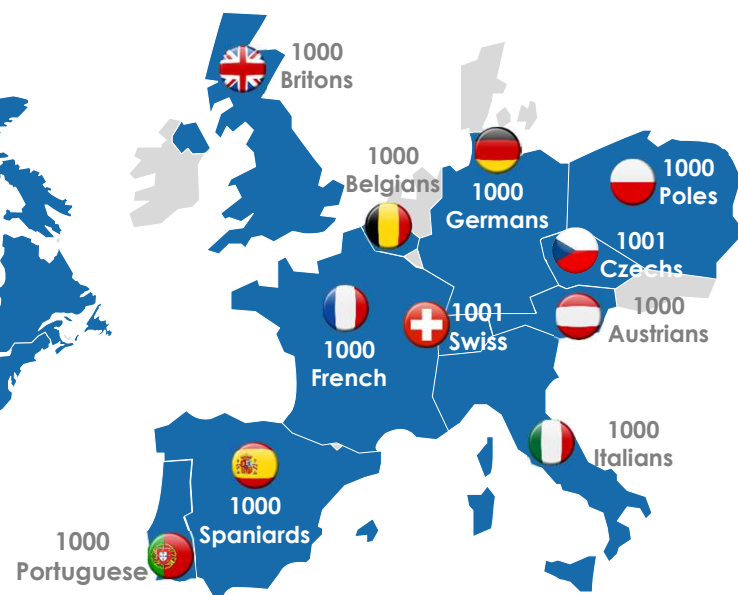
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SCOPE OF THE SURVEY

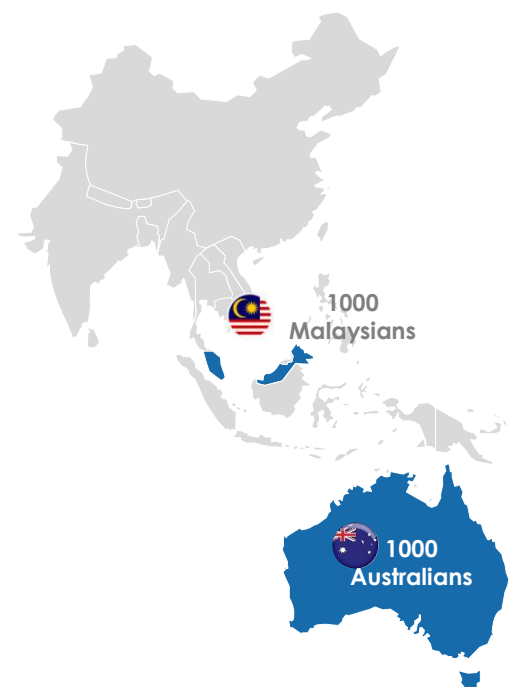
American scope



European scope



Asian/Oceanian scope



METHODOLOGY



Samples

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



Timeline

The field studies were carried out between March 20th and April 7th 2023



Method of data collection

Online survey in the 15 countries

READING NOTE: We present, in this report, two types of significative differences:

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

XX Significantly lower result in the country compared to EUROPE

Evolutions between 2023 and 2022 results

XX Significantly better result in 2023 compared to 2022

XX Significantly lower result in 2023 compared to 2022

CONTENT

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CURRENT STATE OF MIND & CONCERNS

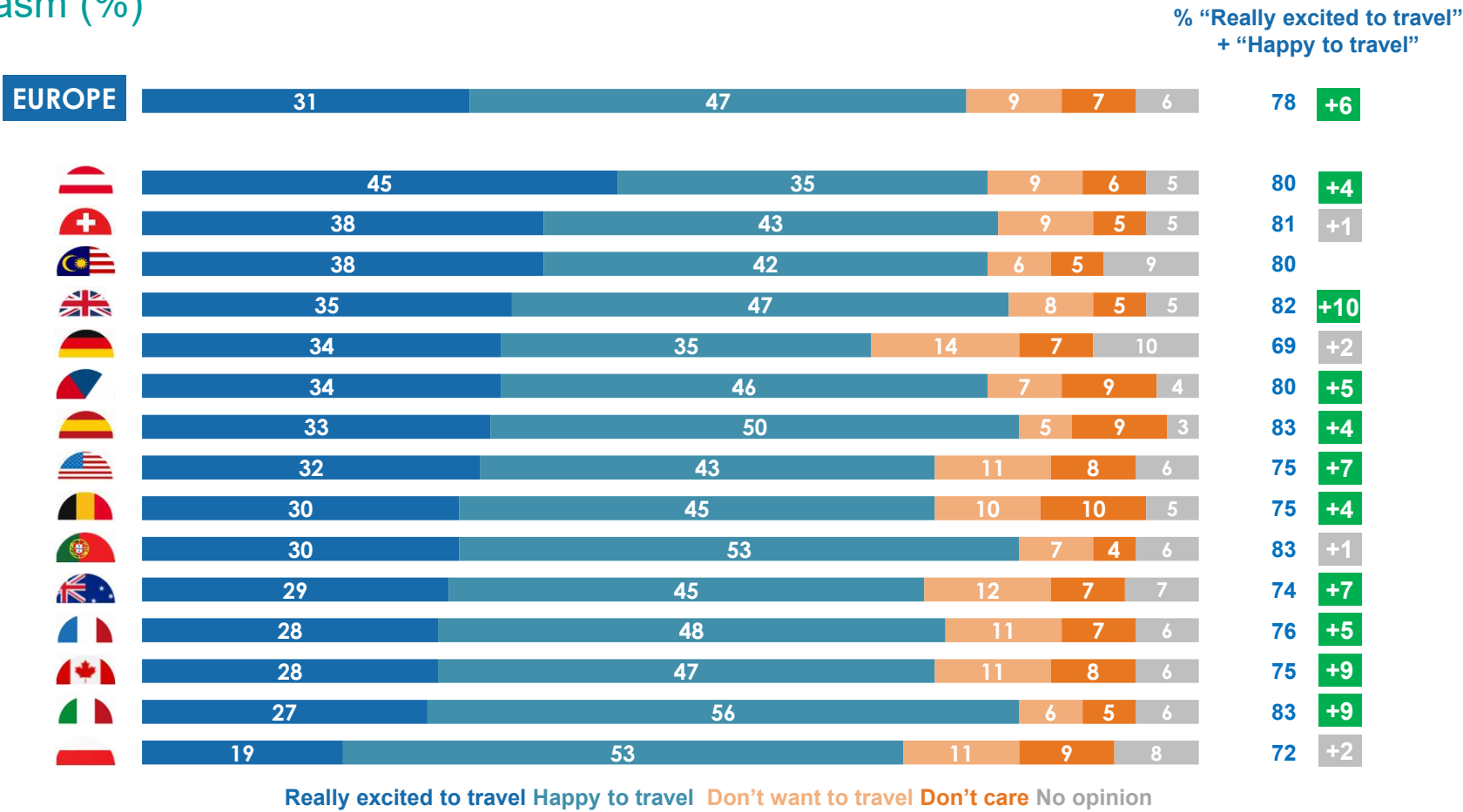
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- Travel enthusiasm
- Main concerns regarding the global situation
- Main concerns when traveling
- Durable of Covid-19 on travel habits



ENTHUSIASM TO TRAVEL IS GROWING THIS YEAR

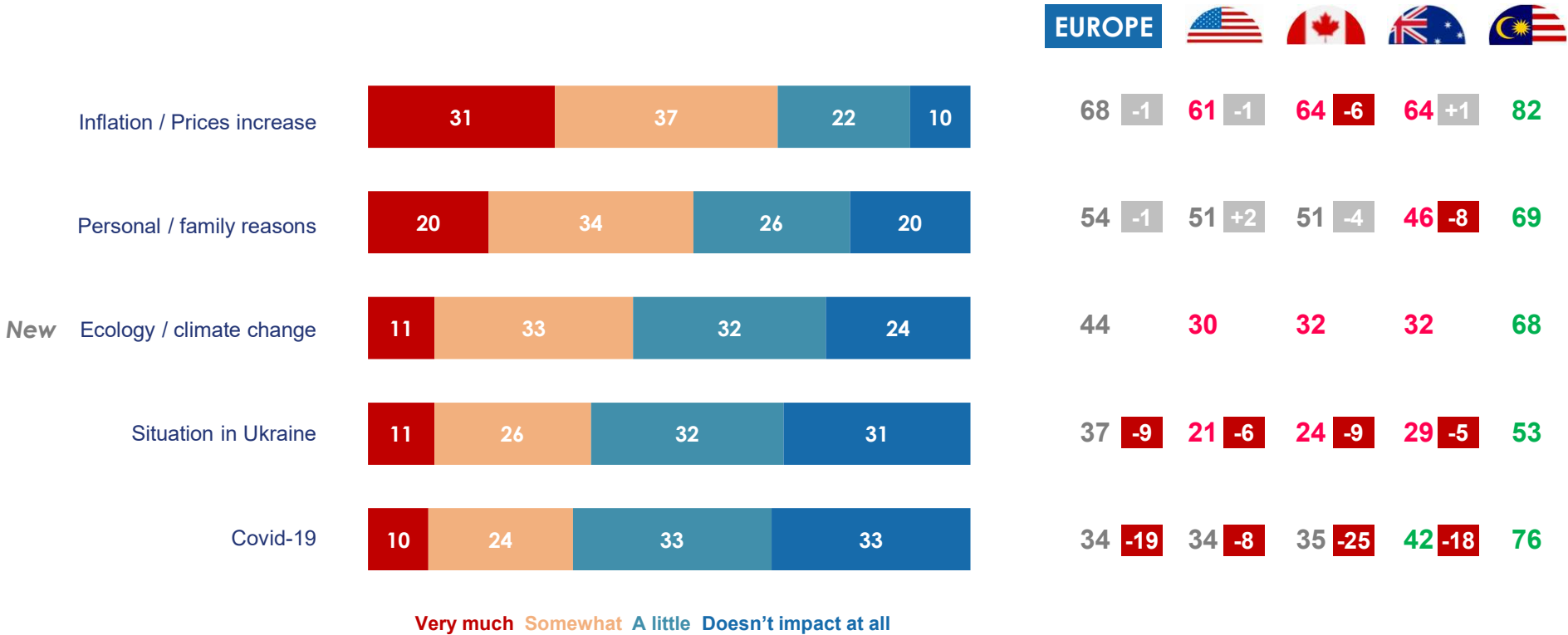
Travel enthusiasm (%)



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

INFLATION IS STILL THE MAIN REASON THAT NEGATIVELY IMPACTS ENTHUSIASM TO TRAVEL, WHILE IMPACT OF COVID-19 HAS DRASTICALLY DROPPED.












Issues impact - at least somewhat (%)



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

INFLATION HAS A STRONGER IMPACT IN SOUTHERN EUROPEAN COUNTRIES (PORTUGAL, FRANCE, SPAIN, ITALY) AND POLAND.












Issues impact (1/2) - At least somewhat (%)

											
Inflation / Prices increase	63	58	60	77	62	75	76	84	73	54	59
Personal / family reasons	49	51	46	57	48	66	57	73	62	50	45
New Ecology / climate change	38	34	24	49	42	55	45	61	46	42	31
Situation in Ukraine	31	28	28	33	36	47	47	56	43	31	23
Covid-19	23	29	28	30	31	43	39	48	39	27	27

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

INFLATION HAS A STRONGER IMPACT IN SOUTHERN EUROPEAN COUNTRIES (PORTUGAL, FRANCE, SPAIN, ITALY) AND POLAND.

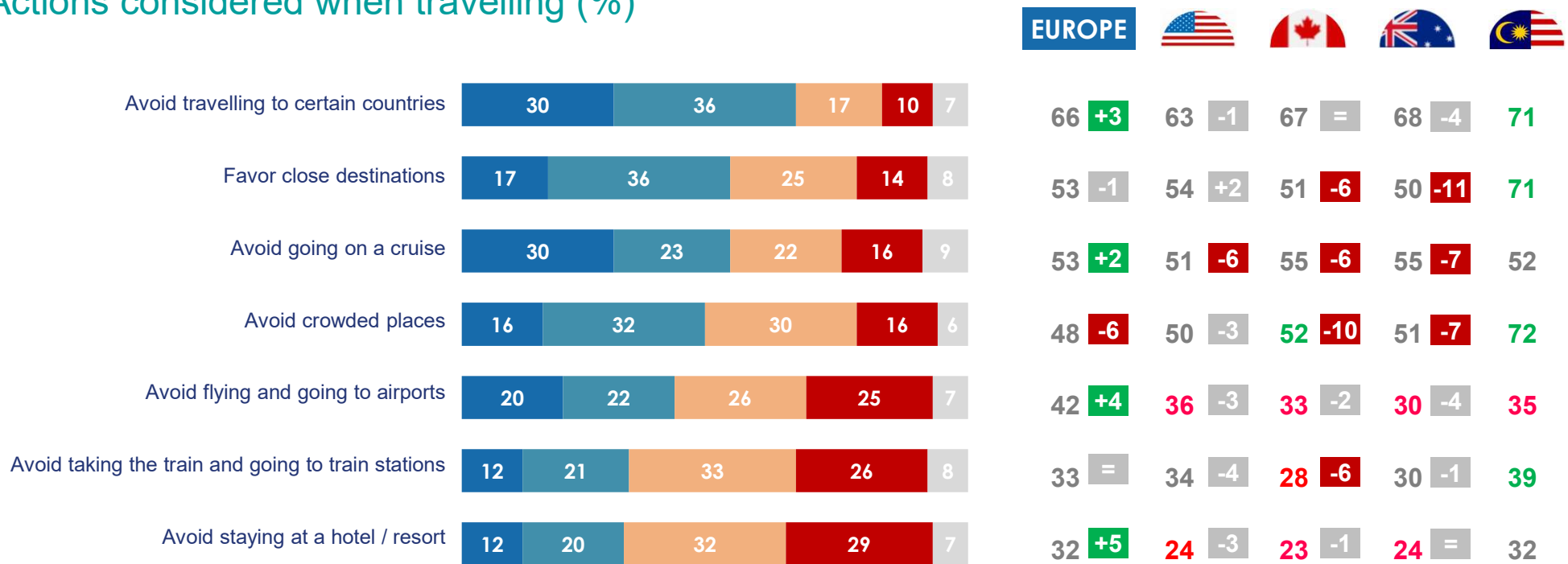
Issues impact (2/2) - At least somewhat (%) – evolution vs 2022 (%)

											
Inflation / Prices increase	-1	-4	-3	+5	-1	+1	-3	-1	-4	=	-1
Personal / family reasons	=	-3	-8	=	+2	+4	-5	-1	-1	-3	-1
New Ecology / climate change	-	-	-	-	-	-	-	-	-	-	-
Situation in Ukraine	-8	-15	-9	-10	-11	-10	-11	-2	-4	-5	-11
Covid-19	-21	-19	-9	-19	-20	-19	-11	-19	-22	-14	-23

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

WHEN TRAVELLING, RESPONDENTS STILL PLAN TO AVOID CERTAIN COUNTRIES, AN INCREASING PHENOMENON FOR EUROPEAN TRAVELERS. CROWDED PLACES SEEM LESS AND LESS FEARED.

Actions considered when travelling (%)














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

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

PORTUGUESE AND FRENCH TRAVELERS ARE THE MOST LIKELY TO CHOOSE THEIR DESTINATION COUNTRY CAREFULLY












Actions considered when travelling (%)

											
Avoid travelling to certain countries	66	61	56	71	63	66	58	76	69	65	65
Favor close destinations	51	46	44	54	49	63	49	72	62	49	44
Avoid going on a cruise	58	52	27	60	60	56	39	53	53	56	50
Avoid crowded places	31	48	58	57	33	56	53	76	52	44	44
Avoid flying and going to airports	39	40	33	48	46	44	46	37	39	40	29
Avoid taking the train and going to train stations	27	31	21	37	36	38	35	34	30	28	25
Avoid staying at a hotel / resort	22	29	24	41	28	35	31	37	36	27	24

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

CROWDED PLACES ARE STRONGLY LESS REDHIBITORY FOR GERMAN, ITALIAN AND BRITISH, AMONG OTHERS.

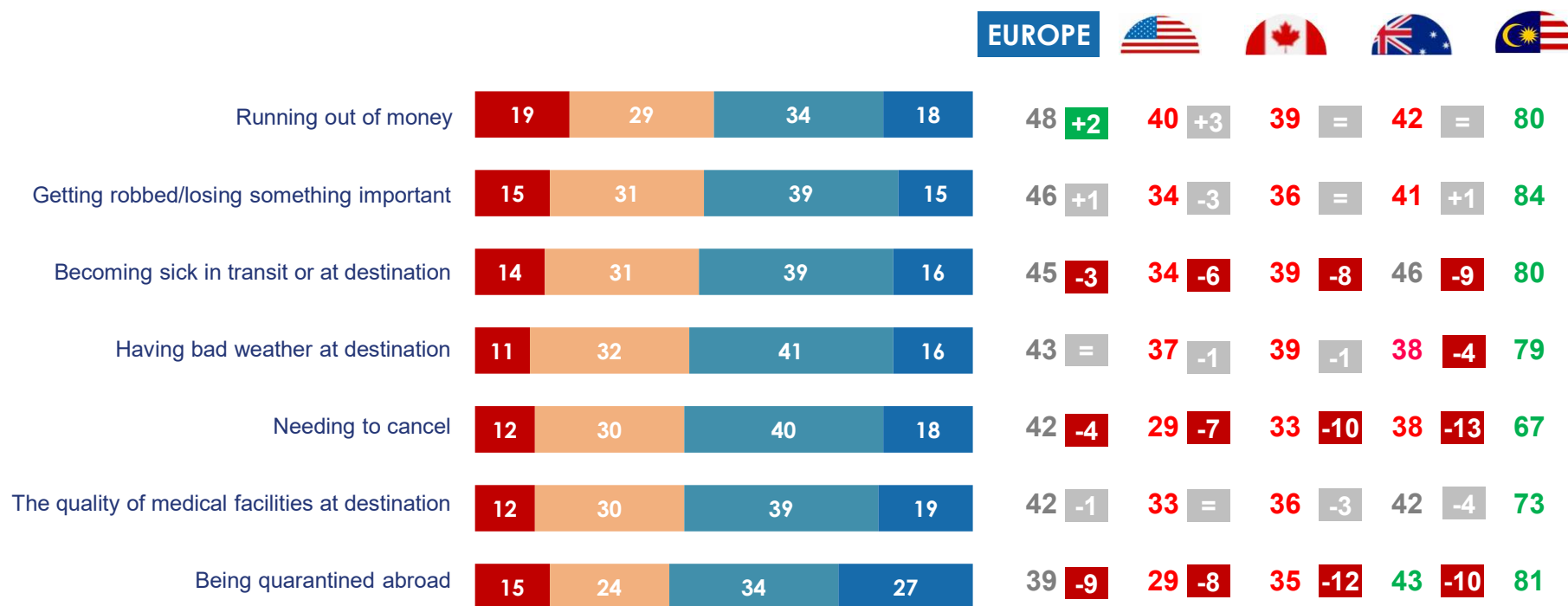
Actions considered when travelling – evolution vs 2022 (%)

											
Avoid travelling to certain countries	+1	+3	+4	+7	+1	-1	+7	+5	+2	+6	+2
Avoid crowded places	-9	-2	+7	+4	-12	-12	+4	+1	-7	+7	-10
Favor close destinations	-4	-4	-2	+1	-5	+1	+5	+3	-1	-1	-8
Avoid going on a cruise	=	+7	+4	+5	+3	+1	+7	+5	+3	+6	-5
Avoid flying and going to airports	+3	+3	+4	+7	+5	+1	+10	+2	+2	+6	-6
Avoid taking the train and going to train stations	-1	+1	+2	+5	+1	-4	+5	-2	-1	+3	-3
Avoid staying at a hotel / resort	=	+5	+8	+11	+1	+5	+6	+9	+8	+5	+1

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

FINANCIAL ISSUES APPEAR TO BE A DRAG ON TRAVELING THIS YEAR, A POSSIBLE CONSEQUENCE OF INFLATION.

Main concerns regarding next trip (1/2) (%)

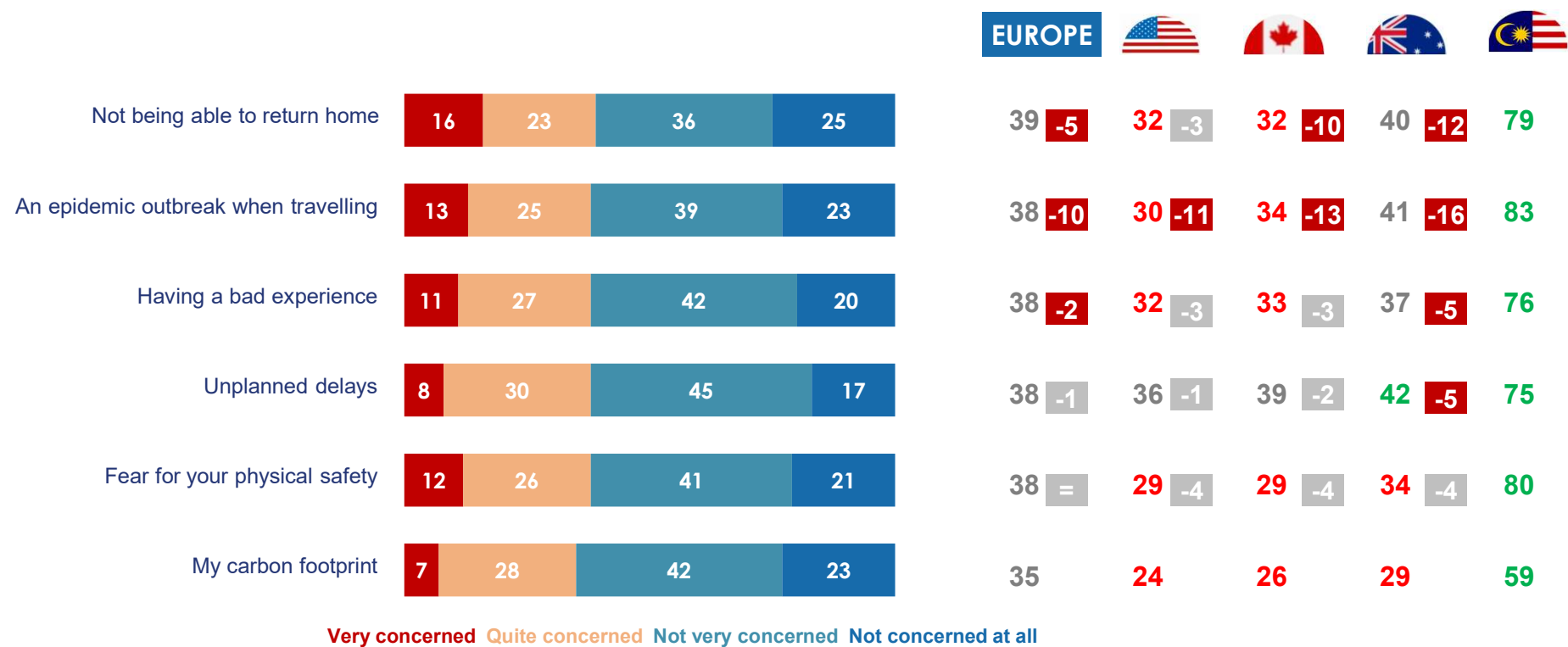


Very concerned Quite concerned Not very concerned Not concerned at all

Are you concerned about the following for your next trip?

THE FEAR OF COVID IS FADING AWAY: BEING QUARANTINED ABROAD AND EPIDEMIC OUTBREAKS ARE OF FAR LESS CONCERN TO THE PUBLIC.











Main concerns regarding next trip (2/2) (%)



Are you concerned about the following for your next trip?

THESE CONCERNS DIVIDE THE SURVEYED COUNTRIES IN TWO BLOCKS. PEOPLE FROM ITALY, POLAND, PORTUGAL AND SPAIN ARE MORE WORRIED ABOUT ALL POTENTIAL ISSUES...

Main concerns regarding next trip (1/2) (%)

											
Running out of money	37	42	31	52	38	55	63	63	64	39	33
Getting robbed/losing something important	32	43	35	48	31	55	55	65	72	37	33
Becoming sick in transit or at destination	29	37	31	41	34	59	56	63	67	33	33
Having bad weather at destination	33	40	35	47	31	54	52	60	53	32	36
Needing to cancel	30	35	27	42	32	53	46	51	61	32	34
The quality of medical facilities at destination	31	38	30	44	28	53	49	61	62	33	33
Being quarantined abroad	25	30	25	34	26	55	46	55	64	30	29

Are you concerned about the following for your next trip? Very + quite concerned

...WHILE TRAVELERS FROM AUSTRIA, GERMANY, BELGIUM, SWITZERLAND AND UK ARE RELATIVELY SERENE ON ALL SUBJECTS.











Main concerns regarding next trip (2/2) (%)



Are you concerned about the following for your next trip? Very + quite concerned

IN THE UK AND BELGIUM, ALL CONCERNS TURN OUT TO BE LESS IMPORTANT THIS YEAR.










Main concerns – evolution vs 2022 (%) – 1/2

											
Running out of money	-1	=	-3	+4	+4	+1	+3	-1	+1	=	-2
Getting robbed/losing something important	=	-7	-1	+2	+1	+4	=	+3	+1	+4	-3
Becoming sick in transit or at destination	-7	-9	-4	=	-2	+1	+2	-3	-3	=	-9
Having bad weather at destination	+1	-4	-2	=	+2	=	+1	+1	-1	-3	-1
Needing to cancel	-4	-9	=	-1	-3	+2	-3	-5	-2	-6	-11
The quality of medical facilities at destination	=	-3	+1	+4	-2	-3	+2	+1	-1	-1	-5
Being quarantined abroad	-12	-15	-3	-9	-12	-2	-3	-8	-4	-8	-16

Are you concerned about the following for your next trip? Very + quite concerned

IN THE UK AND BELGIUM, ALL CONCERNS TURN OUT TO BE LESS IMPORTANT THIS YEAR.

Main concerns – evolution vs 2022 (%) – 2/2

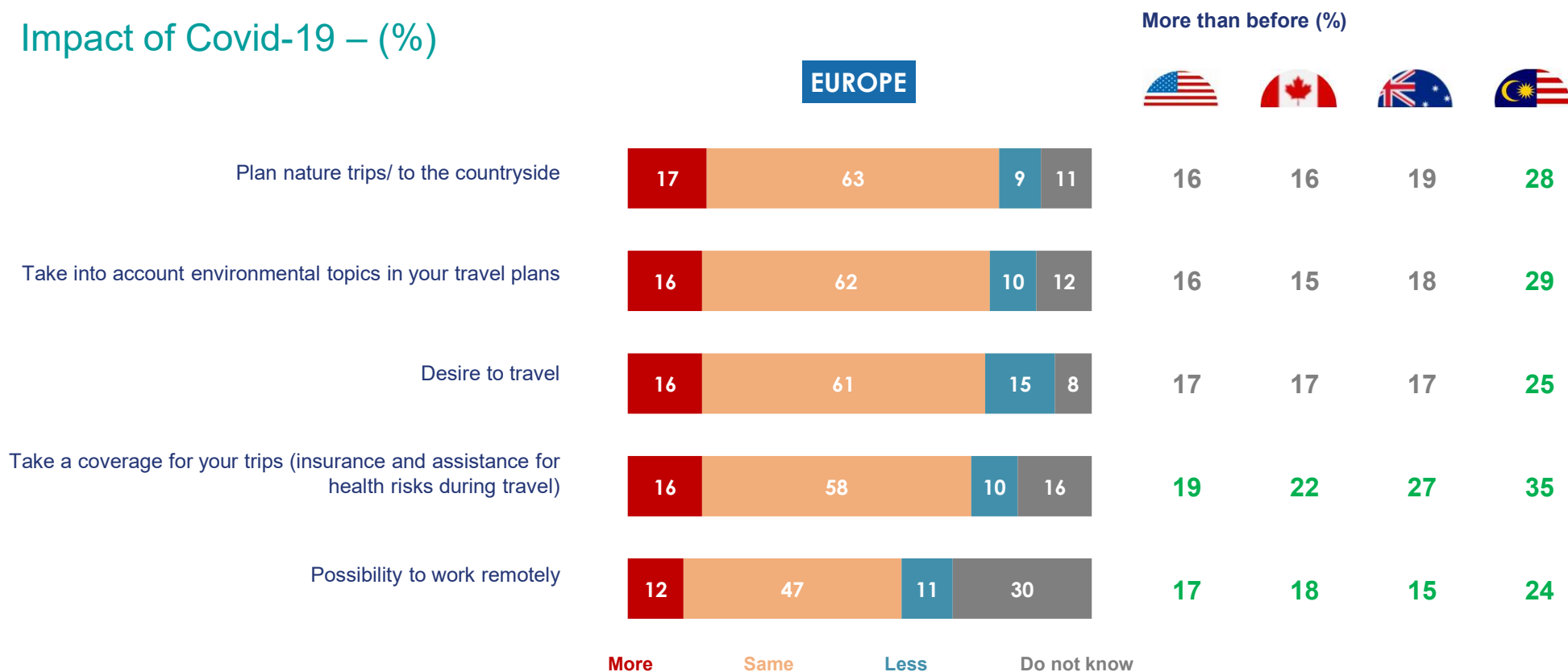
											
Not being able to return home	-5	-9	-2	-2	-5	-3	-1	-4	-4	-4	-13
An epidemic outbreak when travelling	-9	-15	-5	-12	-10	-8	-3	-12	-10	-7	-17
Having a bad experience	-4	-2	-1	+1	-1	-2	=	-1	-3	-3	-7
Unplanned delays	-2	-1	+1	+2	=	+3	-1	+7	=	-1	-7
Fear for your physical safety	-2	-4	-4	+2	+1	-2	+2	+3	=	=	-5
My carbon footprint	-	-	-	-	-	-	-	-	-	-	-

Are you concerned about the following for your next trip? Very + quite concerned

COVID-19 DOESN'T SEEM TO HAVE DURABLY IMPACTED TRAVEL HABITS.

★ New question 2023

Impact of Covid-19 – (%)














Considering the durable impact of the Covid-19 pandemic on your holiday habits, in the future, would you say you will...

IN PORTUGAL, RESPONDENTS HAVE CHANGED THEIR HABITS ON MORE DIMENSIONS. THE TREND IS THE OPPOSITE IN SEVERAL COUNTRIES SUCH AS GERMANY, AUSTRIA OR POLAND, AMONG OTHERS.

★ *New question 2023*

Impact of Covid-19 - More than before the Covid-19 pandemic – (%)

											
Plan nature trips/ to the countryside	20	11	13	17	15	18	14	24	19	13	18
Take into account environmental topics in your travel plans	14	11	7	17	12	21	13	24	21	12	15
Desire to travel	17	13	9	16	13	19	10	22	21	14	16
Take a coverage for your trips (insurance and assistance for health risks during travel)	16	14	14	16	15	16	15	17	17	14	20
Possibility to work remotely	11	9	9	13	9	12	12	21	10	10	15

Considering the durable impact of the Covid-19 pandemic on your holiday habits, in the future, would you say you will...

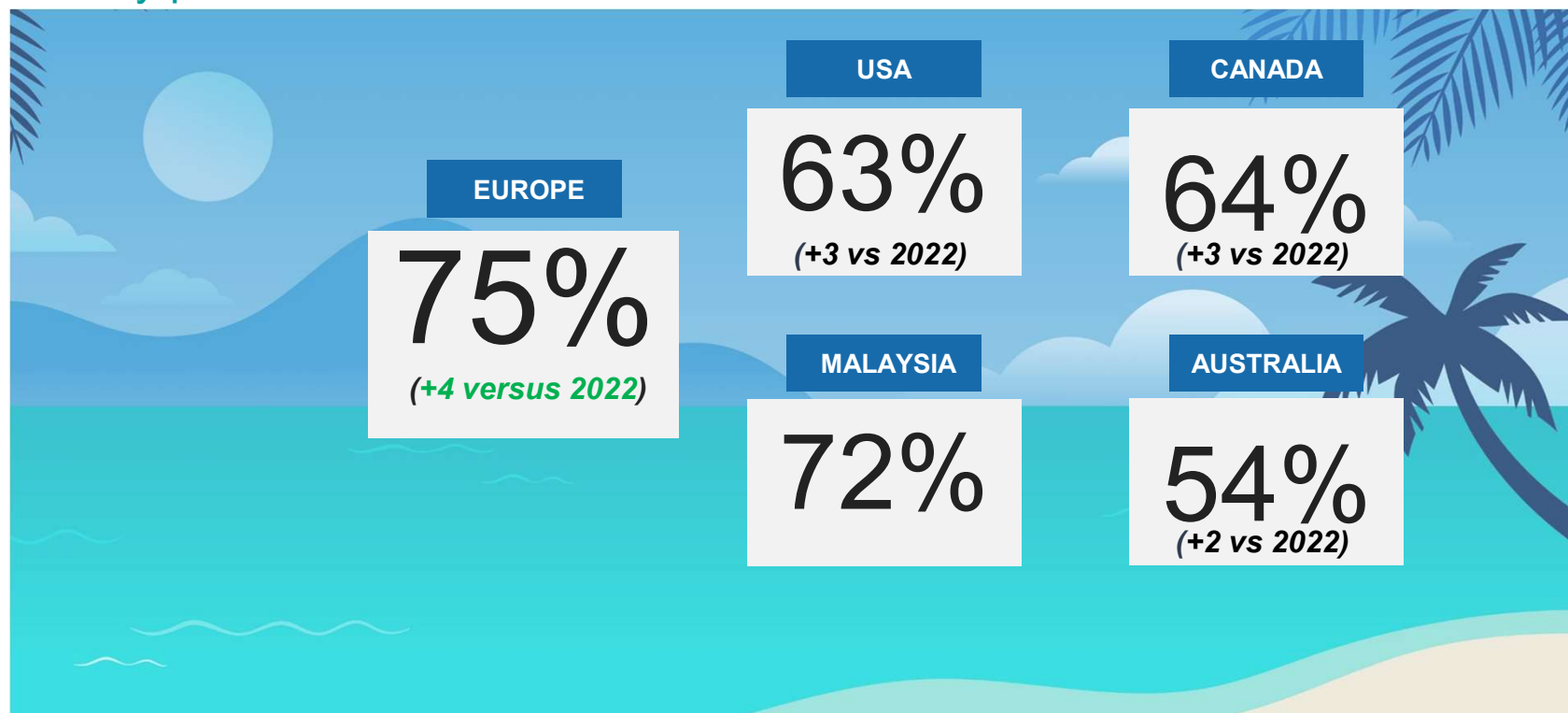
2023 SUMMER HOLIDAY PLANS

2

- Summer holiday plans
- Budget
- Adaptation of travel plans due to inflation context
- Summer trip duration

SUMMER PLANS CONTINUE TO INCREASE IN EUROPE, WITH 3 OUT 4 OF EUROPEANS PLANNING TO TRAVEL THIS YEAR.

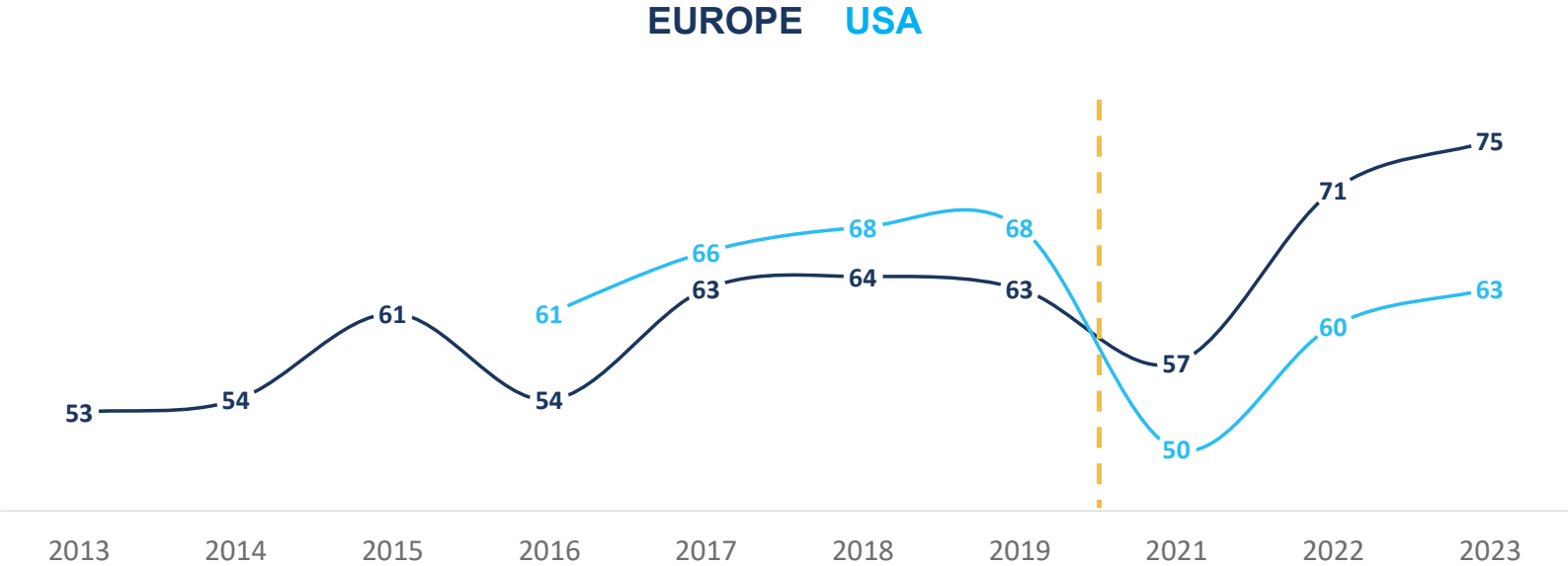
Summer holiday plans



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

THE POSITIVE TREND IS STRONGER IN EUROPE THAN IN THE USA, WHERE HOLIDAY PLANS ARE STILL NOT BACK TO PRE-COVID LEVELS.

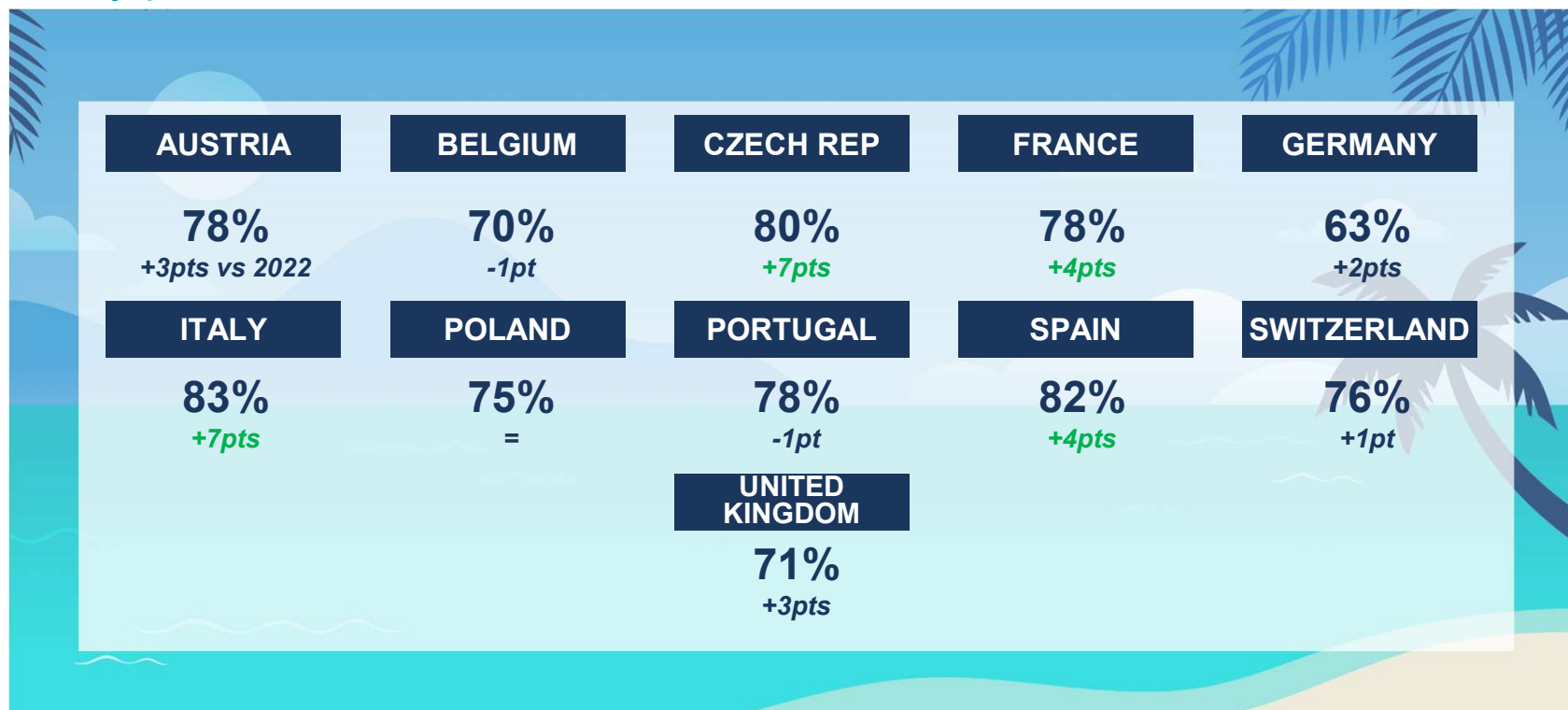
Evolution of holiday plans (%)



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

IN DETAILS, SUMMER HOLIDAY PLANS HAVE PARTICULARLY BOUNCED BACK IN ITALY AND CZECH REPUBLIC, ALSO IN FRANCE AND SPAIN TO A LESSER EXTENT.

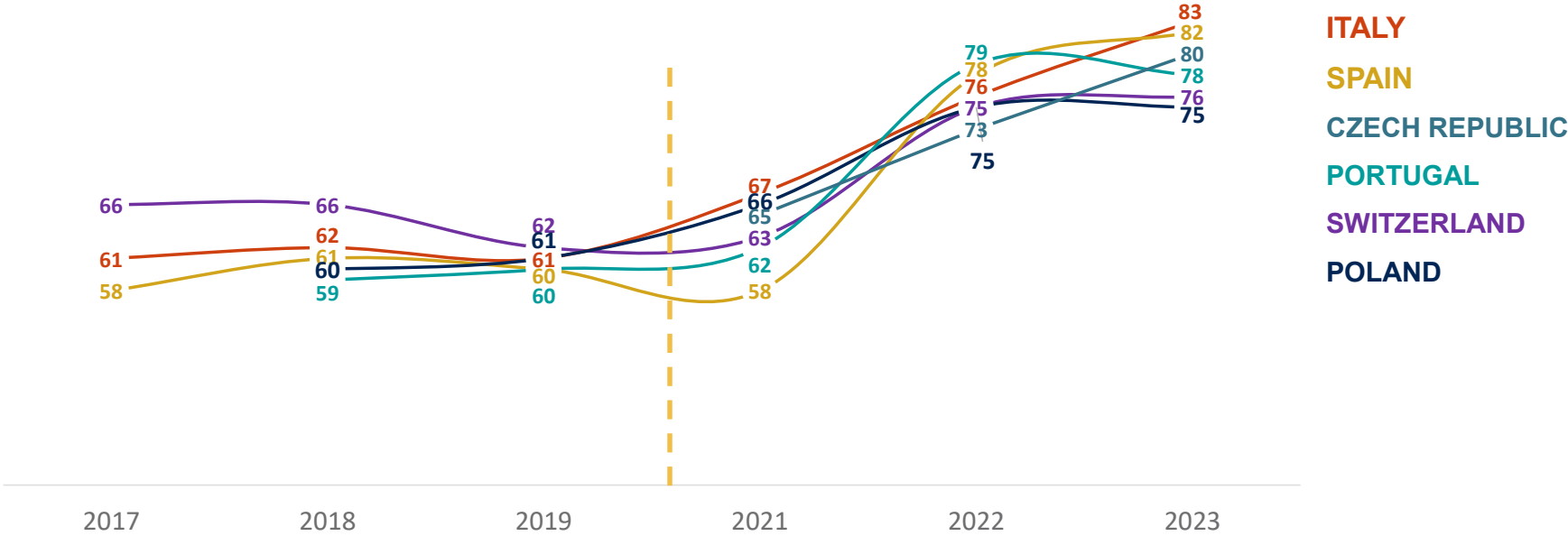
Summer holiday plans



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

SPAIN SHOWS THE STRONGEST POSITIVE TREND ON HOLIDAY PLANS SINCE THE COVID-19 CRISIS.

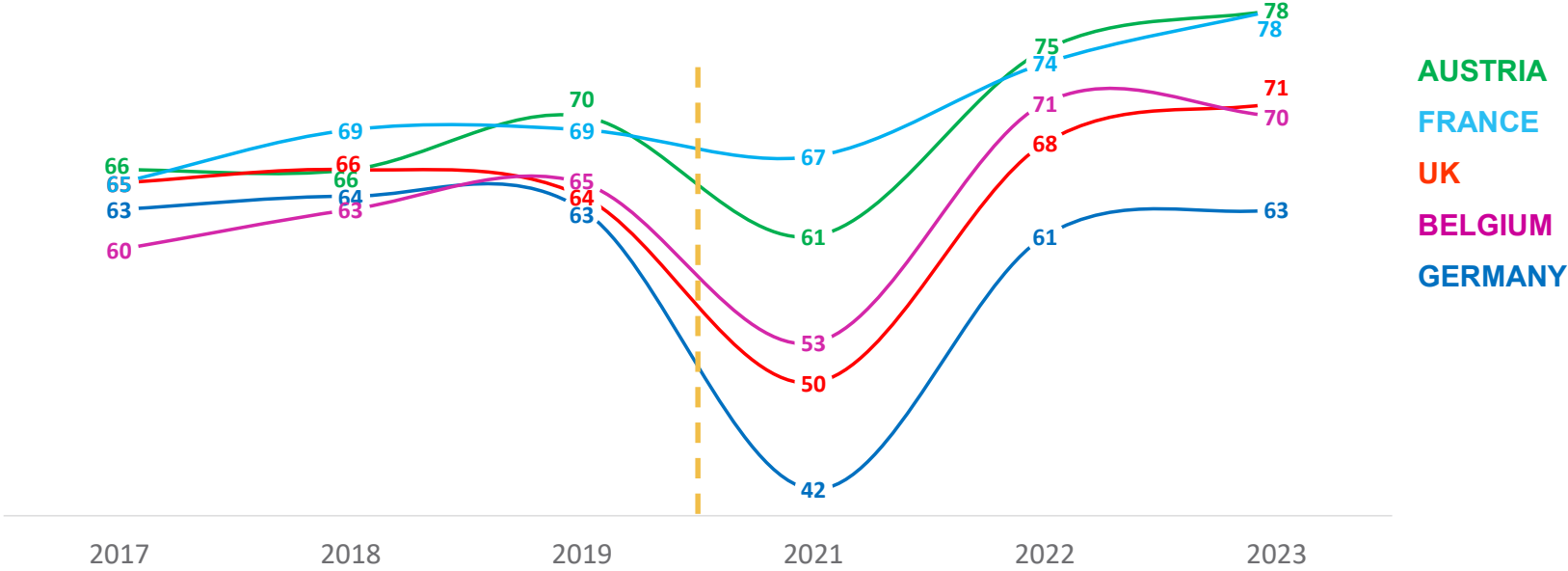
Summer holiday plans by European country (1/2) - (%)



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

HOLIDAY PLANS ARE LESS WIDESPREAD IN THE UK, BELGIUM AND ESPECIALLY IN GERMANY.





Summer holiday plans by European country (2/2) - (%)



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

FINANCIAL ISSUES ARE STILL THE MAIN REASON FOR NOT TRAVELING THIS YEAR, ON THE RISE

Main reasons not to travel in 2023 (%)

	EUROPE				
Couldn't afford it	47 +6	51 +6	50 +9	48 +5	45
Saving money	27 +1	37 +4	40 +6	32 +2	44
Will go at another time of the year	18 +4	19 -2	19 +5	28 +3	19
Want to enjoy a staycation	15 +1	18 +2	14 -5	9 +4	14
My health condition	11 +1	9 +2	9 +3	9 +2	10

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

THE EUROPEAN HOLIDAY BUDGET CONTINUES TO GROW THIS YEAR.

Summer holiday budget



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

IN DETAILS, THIS INCREASE IS MAINLY DRIVEN BY SWITZERLAND, POLAND, CZECH REPUBLIC AND GERMANY.

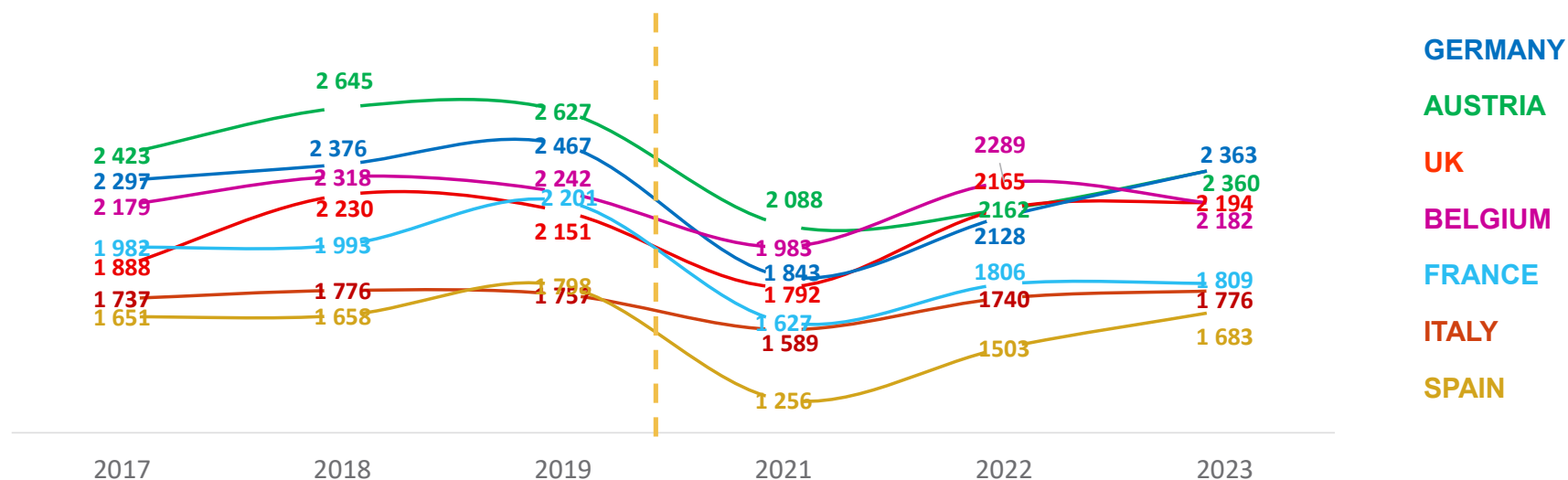
Summer holiday budget



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

THE BELGIAN HOLIDAY BUDGET IS THE ONLY ONE THAT DECLINES THIS YEAR

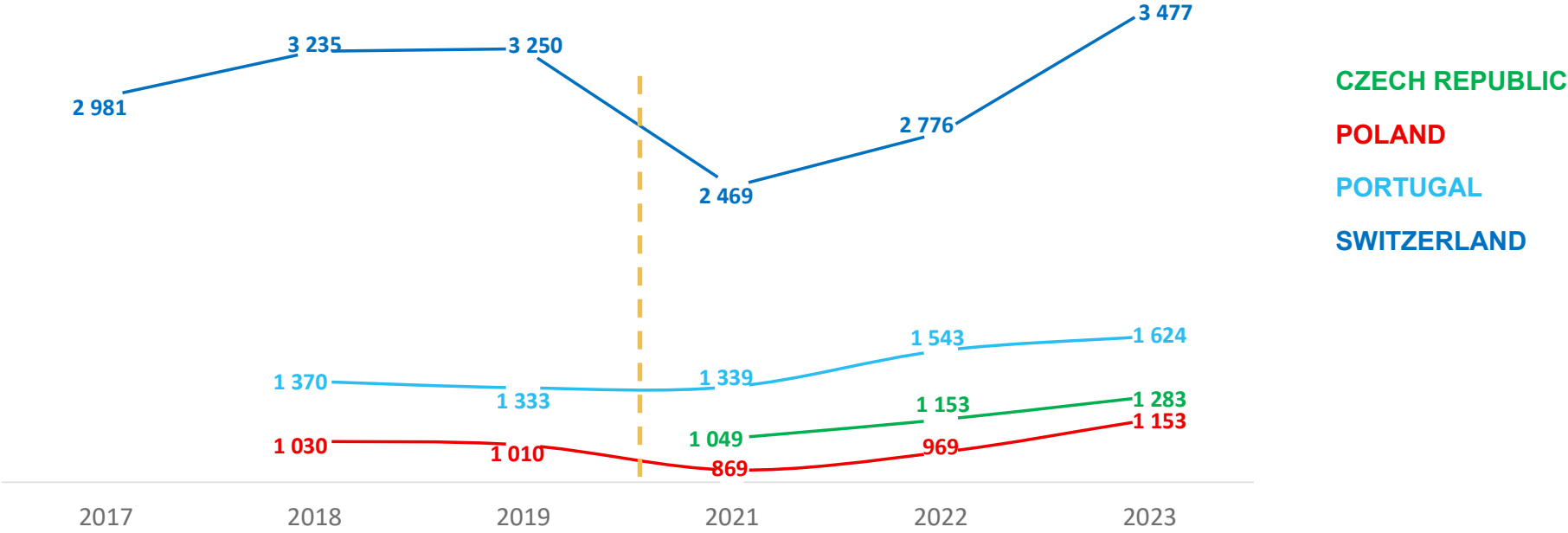
Summer holiday budget by European country (1/2) - (€)



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

A VERY STRONG INCREASE OF HOLIDAY BUDGET IN SWITZERLAND

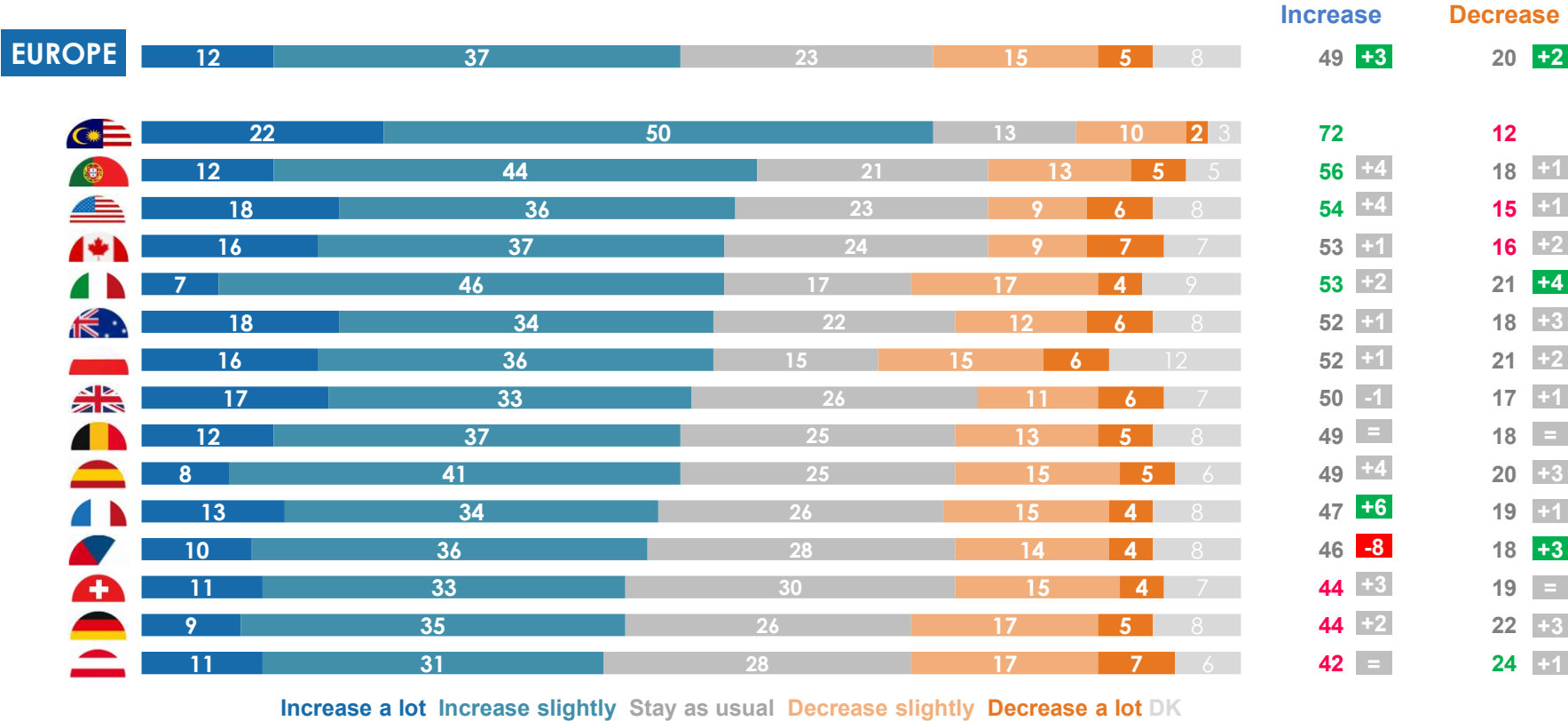
Summer holiday budget by European country (2/2) - (€)



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

AN OVERALL TREND TO INCREASE HOLIDAY BUDGET COMPARED TO LAST YEAR

Evolution of holiday budget (%)



How might your budget for your summer trip change compared to what you spent last year? Will it :

ABOUT ONE THIRD OF EUROPEANS WILL PAY MORE ATTENTION TO ACCOMODATION BUDGET AND ALSO LOOK FOR LAST MINUTE DEALS.

Adaptation of travel plans due to inflation context (Yes - %)

★ *New question 2023*

	EUROPE				
Taking a cheaper mean of accommodation	34	29	32	30	54
Looking for last minute special deals	32	37	33	36	44
Reducing my budget spent on food, visits and activities	29	32	30	31	35
Reducing the number of destinations	29	26	27	23	36
Choosing a closer destination	27	27	27	23	49
Taking a cheaper mean of transportation	25	26	25	28	52
Reducing my trip duration	23	24	22	24	37

Given the economic context of inflation, will you adapt your travel plans by:

FOR MOST COUNTRIES, A REDCUTION OF ACCOMMODATION BUDGET WILL BE THE FIRST ADAPTATION THEY WILL MAKE.

★ New question 2023

Adaptation of travel plans due to inflation context (Yes - %)

											
Taking a cheaper mean of accommodation	32	26	32	37	30	42	36	46	36	25	27
Looking for last minute special deals	29	23	24	30	27	38	31	40	40	26	29
Reducing my budget spent on food, visits and activities	26	21	21	32	27	31	27	34	32	23	30
Reducing the number of destinations	27	26	22	31	26	33	34	41	34	21	23
Choosing a closer destination	21	24	21	29	25	33	27	36	32	20	21
Taking a cheaper mean of transportation	25	20	23	23	22	30	28	35	31	20	20
Reducing my trip duration	18	17	16	26	20	28	23	29	27	17	18

Given the economic context of inflation, will you adapt your travel plans by:

AN AVERAGE DURATION AROUND 2 WEEKS FOR EUROPE, AUSTRALIA AND CANADA, WHILE HOLIDAYS ARE SHORTER IN THE USA AND MALAYSIA.

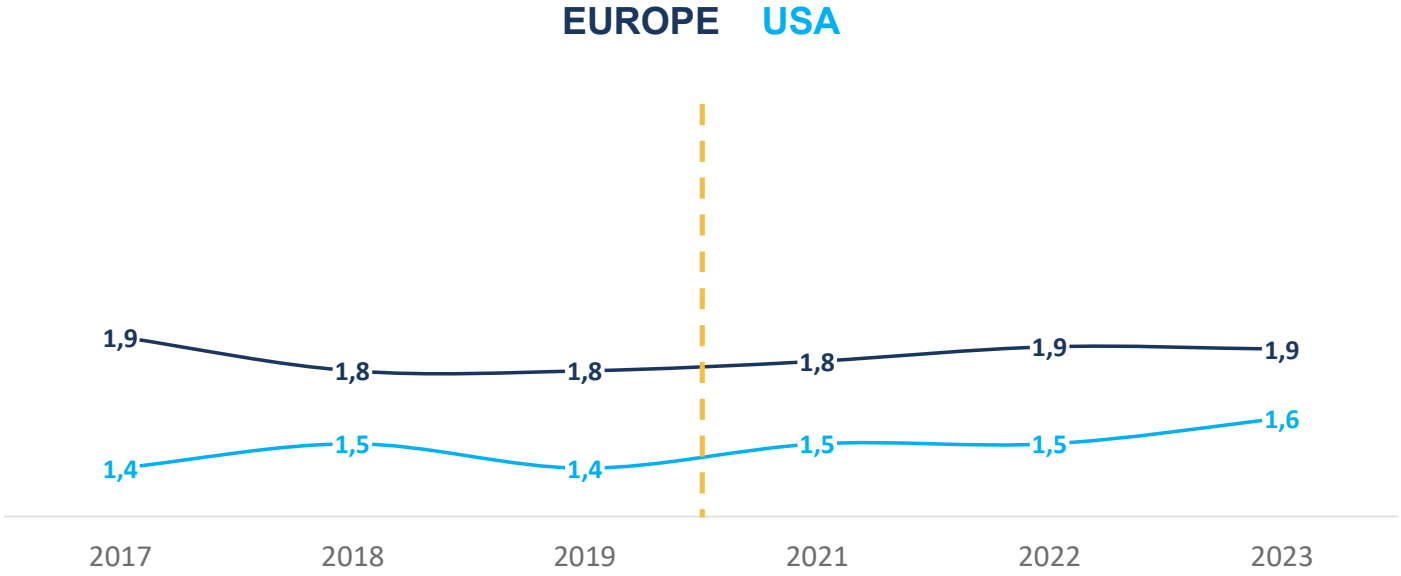
Summer holiday duration
(weeks on average)



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

HOLIDAY DURATION IS RATHER STABLE OVER THE YEARS, FOR EUROPE AND USA

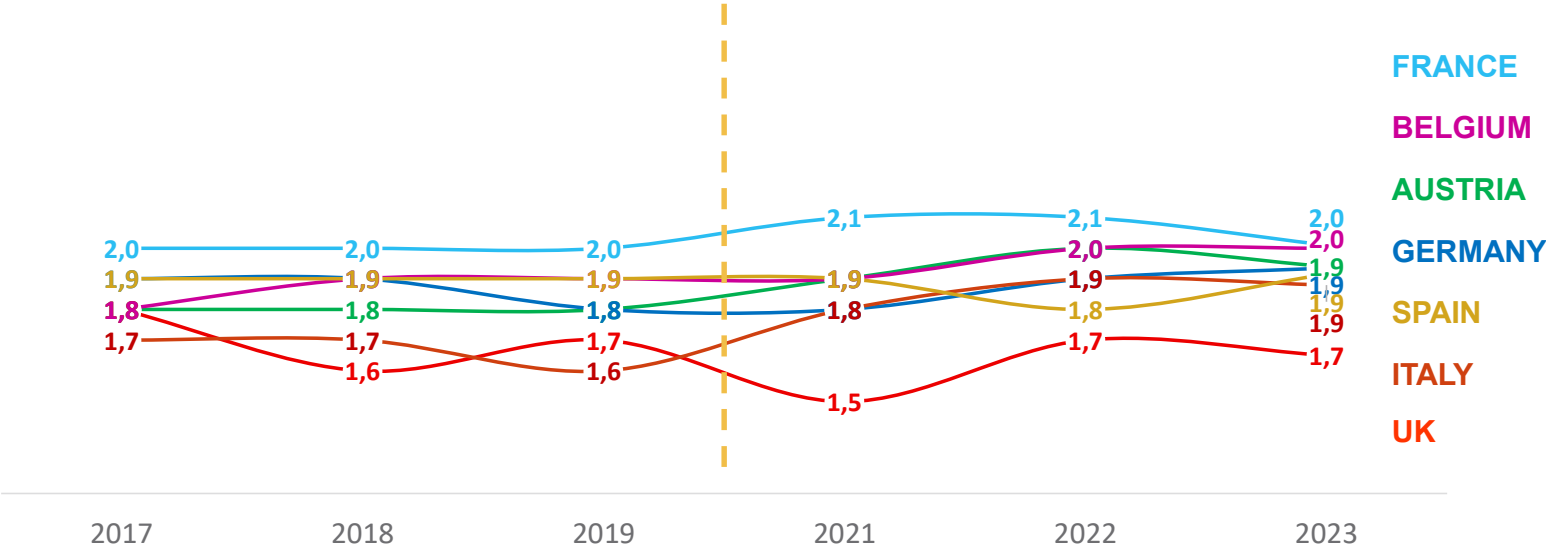
Evolution of holiday duration
(weeks on average)



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

IN EUROPE, THE UK SHOWS THE LOWEST HOLIDAY DURATION.

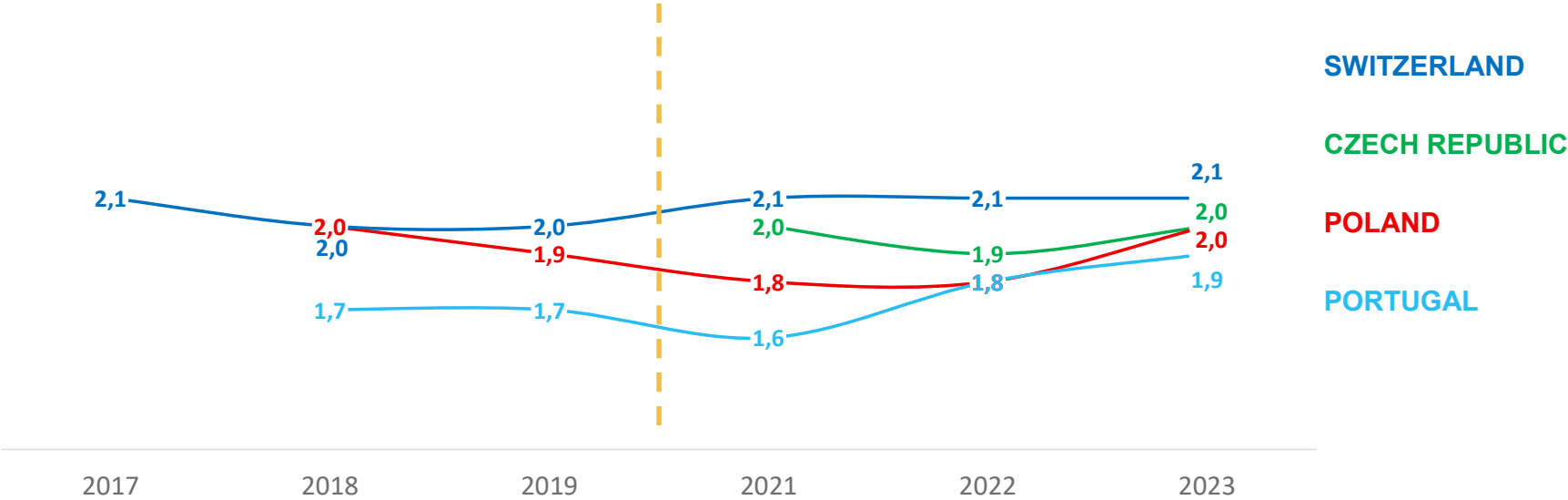
Evolution of holiday duration by European country (1/2)
(weeks on average)



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

AN INCREASE OF HOLIDAY DURATION IN PORTUGAL.

Evolution of holiday duration by European country (2/2)
(weeks on average)



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





FAVORITE DESTINATIONS

3

- Summer destinations (country)
- Summer holiday preferences
- Choice criteria for destination

INTENTION TO TRAVEL ABROAD INCREASES IN EUROPE AND AUSTRALIA

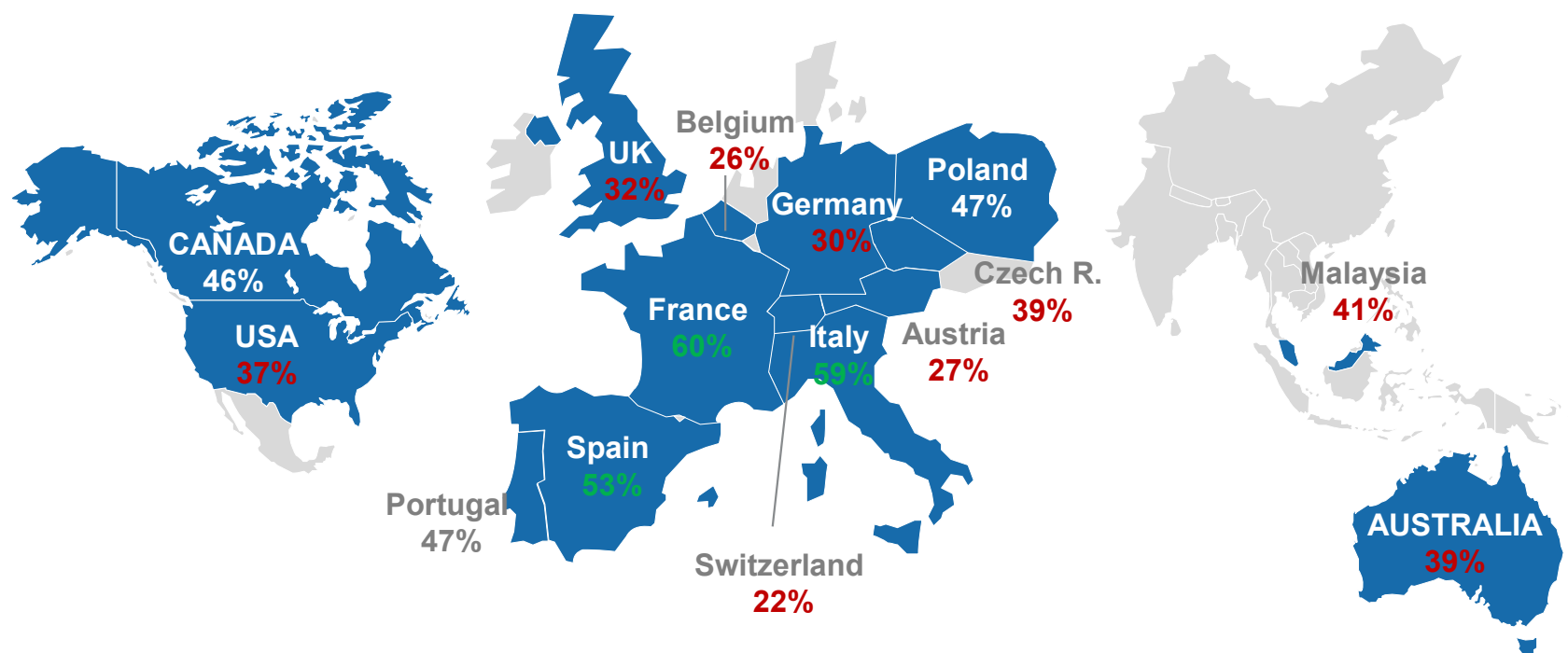
2023 Holiday plans (%)

	EUROPE				
... in their OWN COUNTRY	45 -2	37 +3	46 -2	39 -6	41
... ABROAD	52 +4	33 -3	44 +1	50 +14	69
... NOT DECIDED YET	22 =	38 +2	27 +2	23 -6	14

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

FRENCH, ITALIAN AND SPANISH HOLIDAYMAKERS ARE THE MOST LIKELY TO STAY IN THEIR OWN COUNTRY DURING SUMMER.

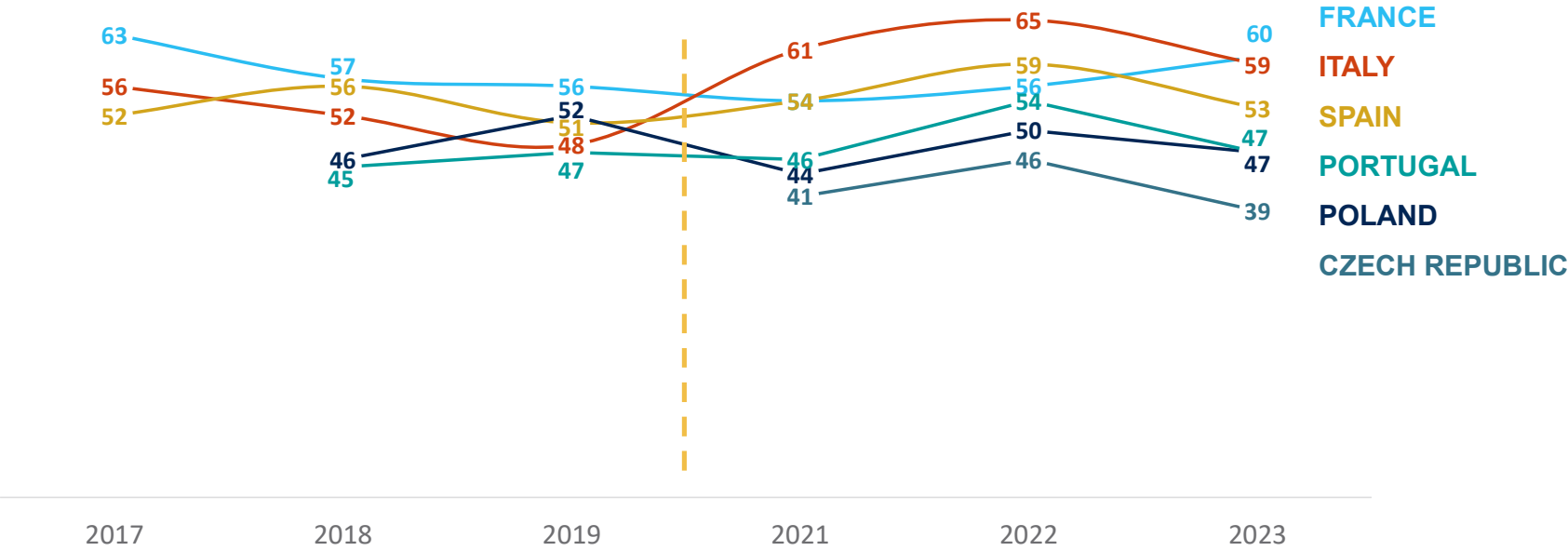
Holiday plans in one's own country this summer



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

APART FROM FRANCE, WHERE STAYING IN THEIR OWN COUNTRY CONTINUES TO PROGRESS AMONG HOLIDAYMAKERS, OTHER COUNTRIES SHOW A DECREASE, GETTING ALMOST BACK TO PRE-COVID SCORES.

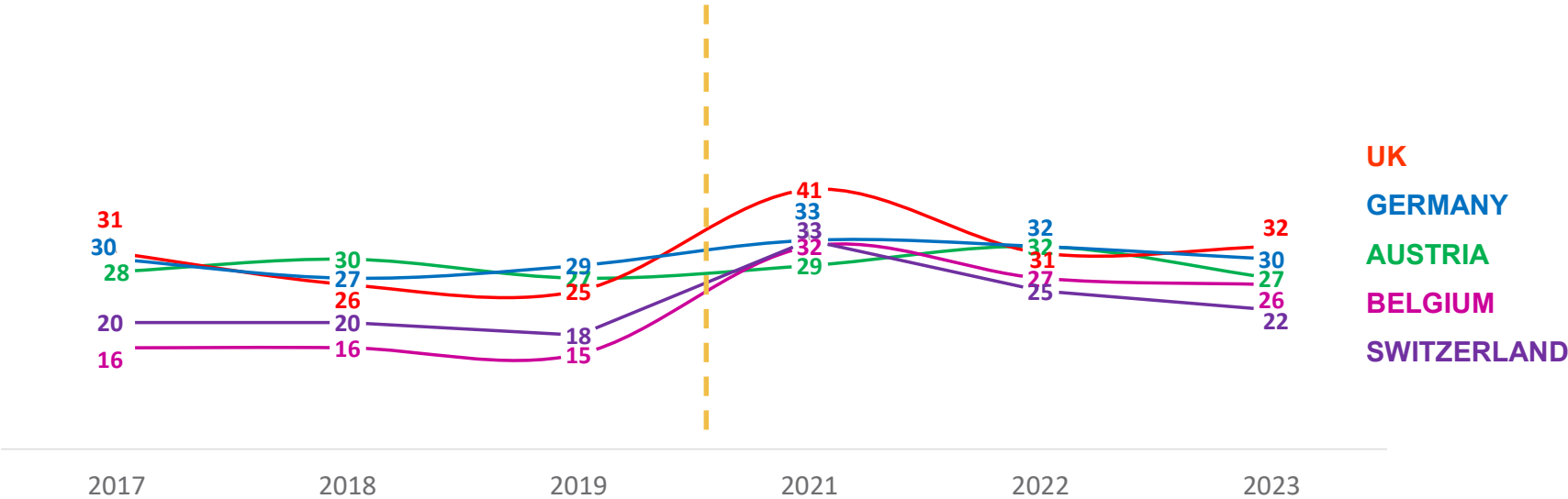
Holiday destination in own country by European country (%)



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

IN COUNTRIES WHERE HOLIDAYMAKERS USUALLY TRAVEL ABROAD A LOT, A STABILIZATION OF THOSE WHO WILL STAY IN THEIR COUNTRY.

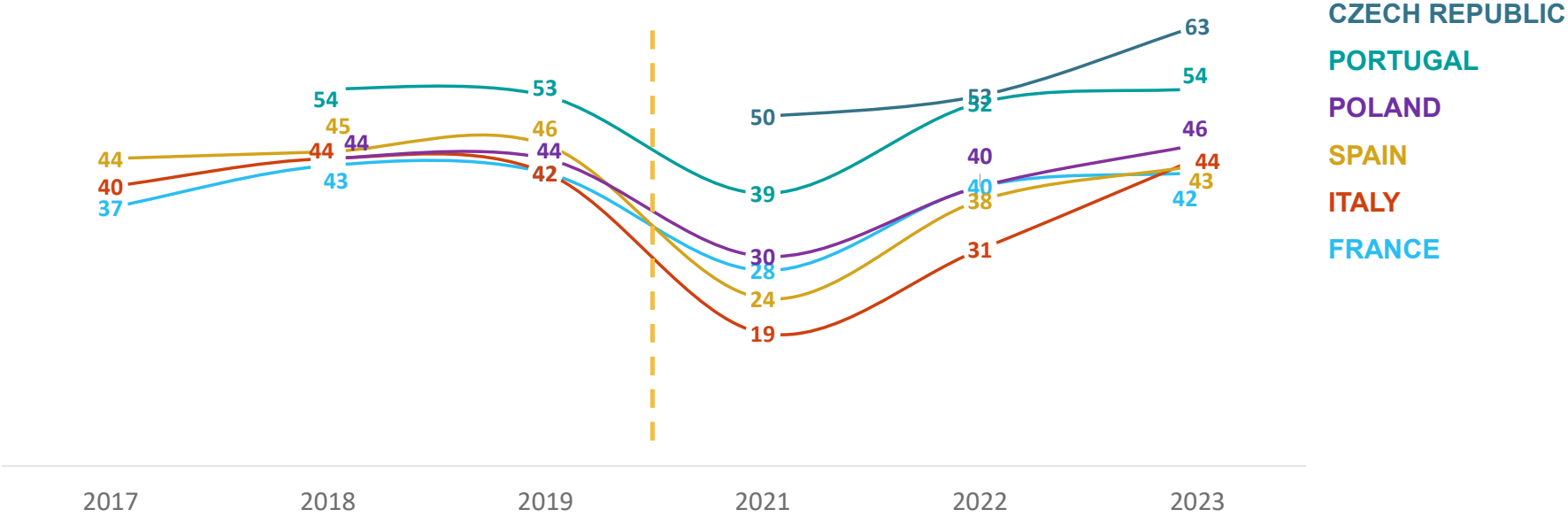
Holiday destination in own country by European country (%)



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

A STRONG INCREASE OF INTENTIONS TO TRAVEL ABROAD AMONG CZECH, POLISH AND ITALIAN HOLIDAYMAKERS.

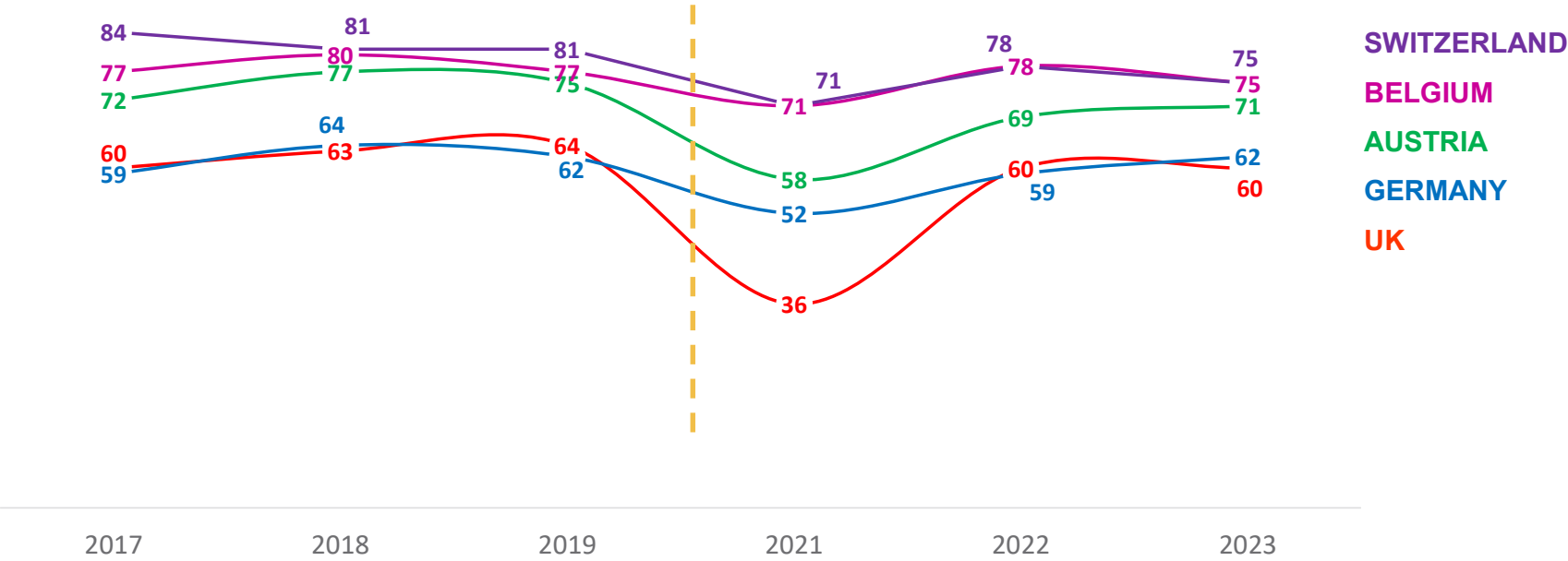
Holiday destination “Abroad” by European country (%)



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

A STABILIZATION OR EVEN DECREASE OF INTENTIONS TO TRAVEL ABROAD AMONG SWISS, BELGIAN AND BRITISH HOLIDAYMAKERS.

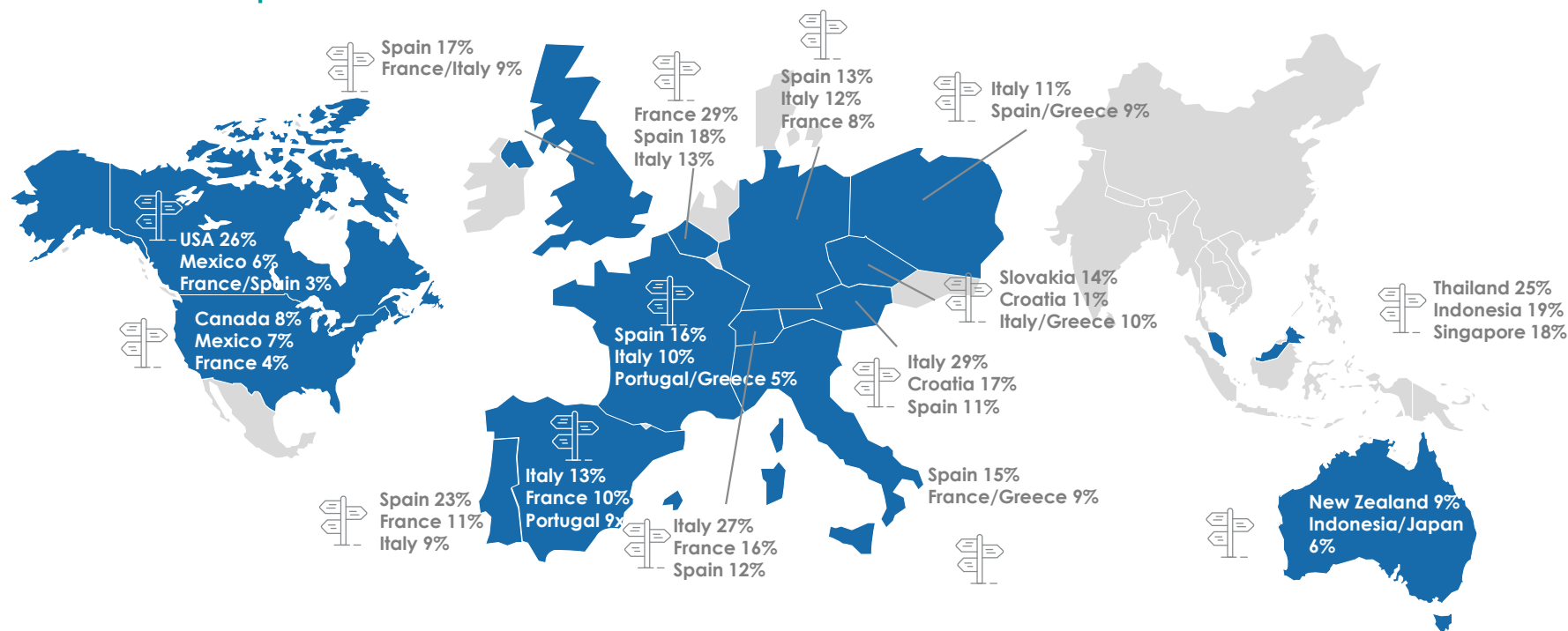
Holiday destination “Abroad” by European country (%)



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

WHEN THEY TRAVEL ABROAD, RESPONDENTS MOSTLY CHOOSE NEIGHBORING COUNTRIES. ITALY, FRANCE AND SPAIN ARE STILL THE MOST ATTRACTIVE DESTINATIONS IN EUROPE.










Foreign destinations planned this summer



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

THE SEASIDE REMAINS THE MOST POPULAR CHOICE FOR THE SUMMER HOLIDAYS, BUT CITIES HAVE GAINED IN ATTRACTIVITY.

















Summer holiday preferences (%)

		EUROPE				
Seaside		60 =	42 =	34 -1	52 +10	54
City		30 +4	45 +1	48 +10	43 +3	53
Countryside		25 +2	31 +3	34 -3	36 +3	42
Mountains		23 +2	26 =	26 =	23 +4	28
Tour		22 +2	30 +11	22 =	26 -3	47

For your summer trip do you intend to go mainly...

CITIES AS HOLIDAY DESTINATION PARTICULARLY PROGRESS IN PORTUGAL, THE UK AND GERMANY.

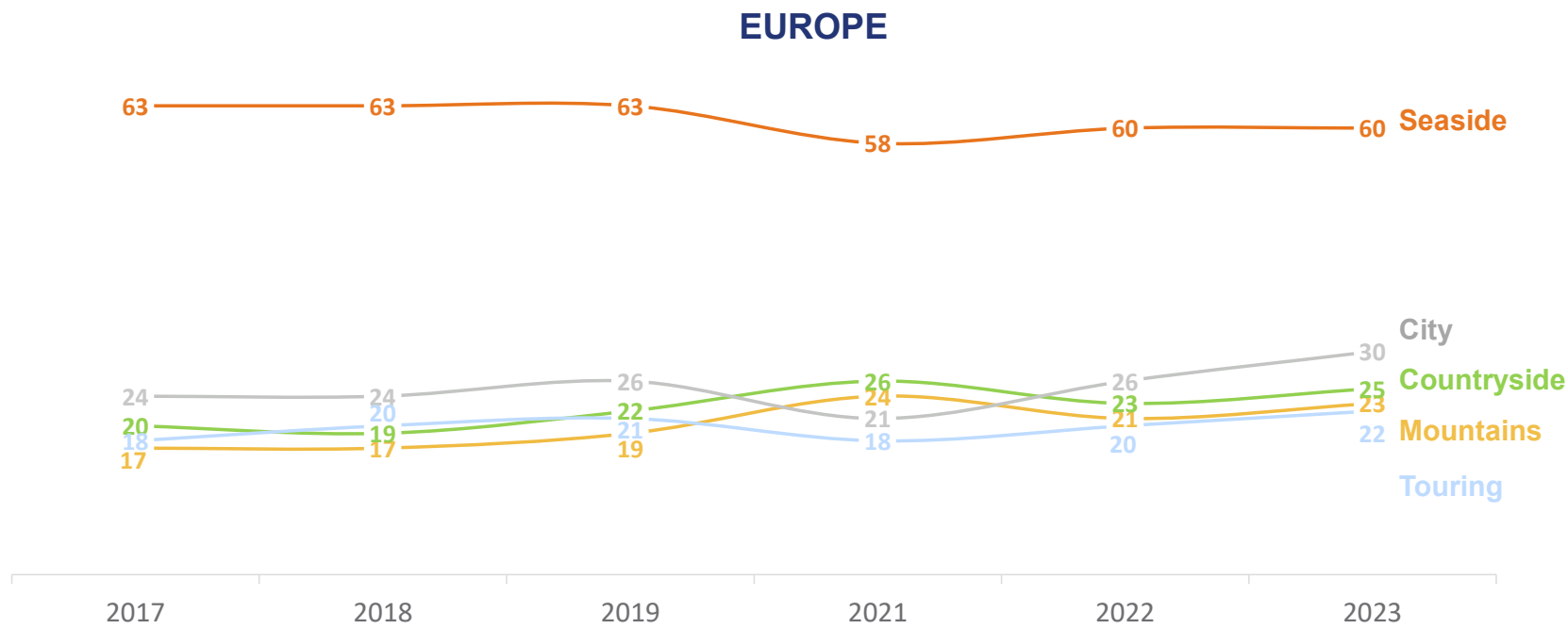
Summer holiday preferences (%)

												
Seaside		61 +2	56 +1	48 +5	65 =	58 +1	63 -3	61 +4	59 +1	60 -4	58 -2	57 +3
City		25 -1	25 -1	31 +2	20 +2	29 +6	26 +5	22 +1	39 +8	44 +5	32 +4	39 +7
Countryside		28 +3	26 +4	33 -3	24 -2	27 +2	11 +1	20 +1	26 +2	21 -3	27 +3	39 +6
Mountains		19 -3	19 -1	28 =	23 +3	21 +3	21 +1	34 -1	19 +2	25 =	20 =	17 +3
Tour		19 -3	22 +3	23 -2	18 +2	25 +5	22 =	30 +2	13 +3	15 -1	25 +4	25 +5

For your summer trip, do you intend to go mainly...

CITIES AS HOLIDAY DESTINATION ARE NOW MORE ATTRACTIVE THAN COUNTRYSIDE, MOUNTAINS AND TOURING.

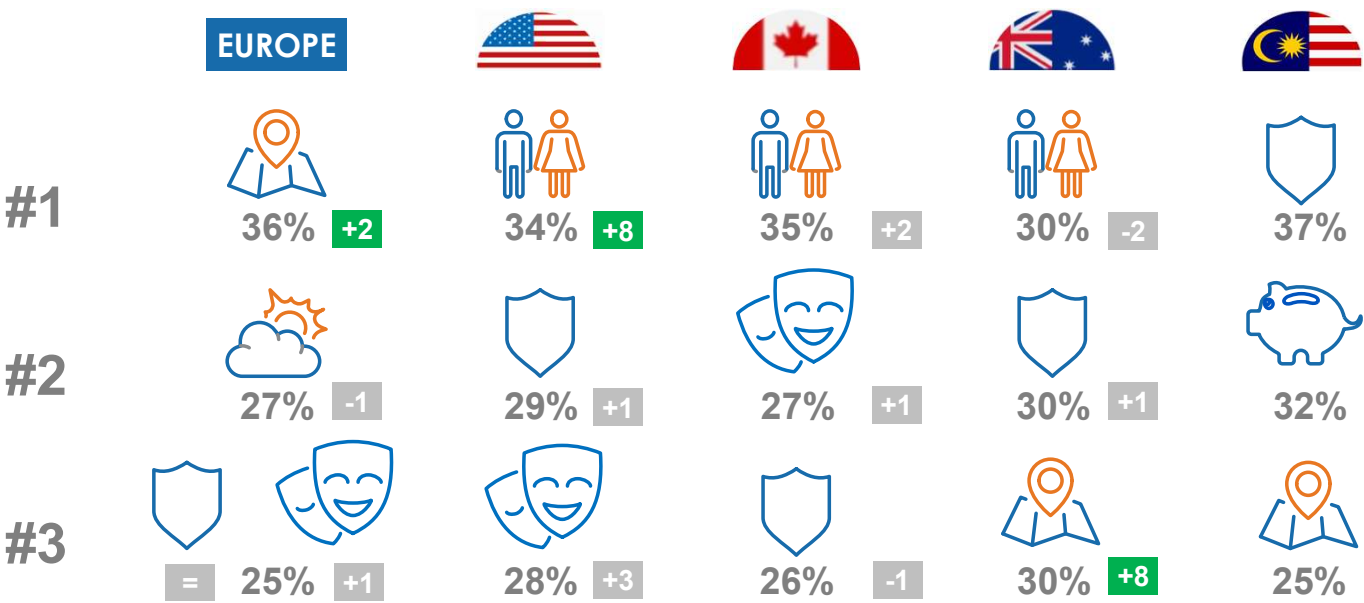
Summer holiday preferences (%)



For your summer trip, do you intend to go mainly...

WHEN THEY CHOOSE THEIR SUMMER DESTINATION, EUROPEAN TRAVELERS OFTEN TURN TO FAMILIAR PLACES. WEATHER IS THE 2ND MOST IMPORTANT CRITERIA.

Motivations for the choice of destination



What motivated you to pick summer destination?
(To those who already chose their destination)



BUDGET IS THE KEY CHOICE CRITERIA IN EUROPE AND THE USA, INCRASINGLY THIS YEAR. TO BE NOTED, A PROGRESSION OF ATTENTION PAID TO VARIOUS RISKS...

Factors that play an 'essential' role in choosing a destination 1/2

	TOP4 2023									
	EUROPE									
My intended budget	53	+3	56	+8	49	-3	52	+4	54	
The climate	47	=	40	-1	35	-1	32	-3	40	
Opportunities for leisure or cultural activities	45	+3	48	-1	45	+2	48	+2	44	
The quality of on-site tourist infrastructures	38	=	34	-3	30	-2	30	-3	44	
Travel time to my trip destination	36	+3	39	+3	32	+2	34	-1	37	
The risk of a terrorist attack	35	+3	34	+6	30	+2	31	+1	58	
The risk of a personal attack	35	+4	36	+2	32	+1	37	+4	56	
Health risks (other than COVID)	30	=	30	-2	28	-4	28	-5	54	
The risk of a natural disaster	29	+4	23	-5	21	-3	27	=	54	
The risks of social unrest	28	+3	28	=	23	=	25	-1	46	

For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination:

...HOWEVER THE FEAR OF CORONAVIRUS DECREASES THIS YEAR, BUT APPEARS MORE PRESENT IN MALAYSIANS' HOLIDAYMAKERS MINDS.

Factors that play an 'essential' role in choosing a destination 2/2

	EUROPE				
The political climate in the destination country	28 +1	24 -2	25 -2	28 +2	38
The quality of the internet access	24 +2	30 +1	23 -2	26 =	47
Your ability to speak the destination country's language	23 =	28 -5	25 =	28 +2	32
The risk of a coronavirus infection	23 -5	27 -2	22 -13	28 -7	54
The economic situation in the destination country	22 +2	26 +1	22 +1	21 =	35
The war in Ukraine	21 -2	18 -2	13 -4	17 -6	36
New The economic context in my country	21	23	22	23	38
The ecological footprint of the trip	19 +2	17 -3	18 +3	16 -2	29
The exchange rates of the destination country's currency	17 =	21 -4	24 +2	22 +2	44

For each of the following factors, please indicate whether it played or will play an essential role, an important but not essential role, or a secondary role in your choice of destination:

2023 SUMMER HOLIDAYS³ ORGANIZATION

- Holiday reservation
- Travel partners
- Transportation
- Accommodation
- Activities

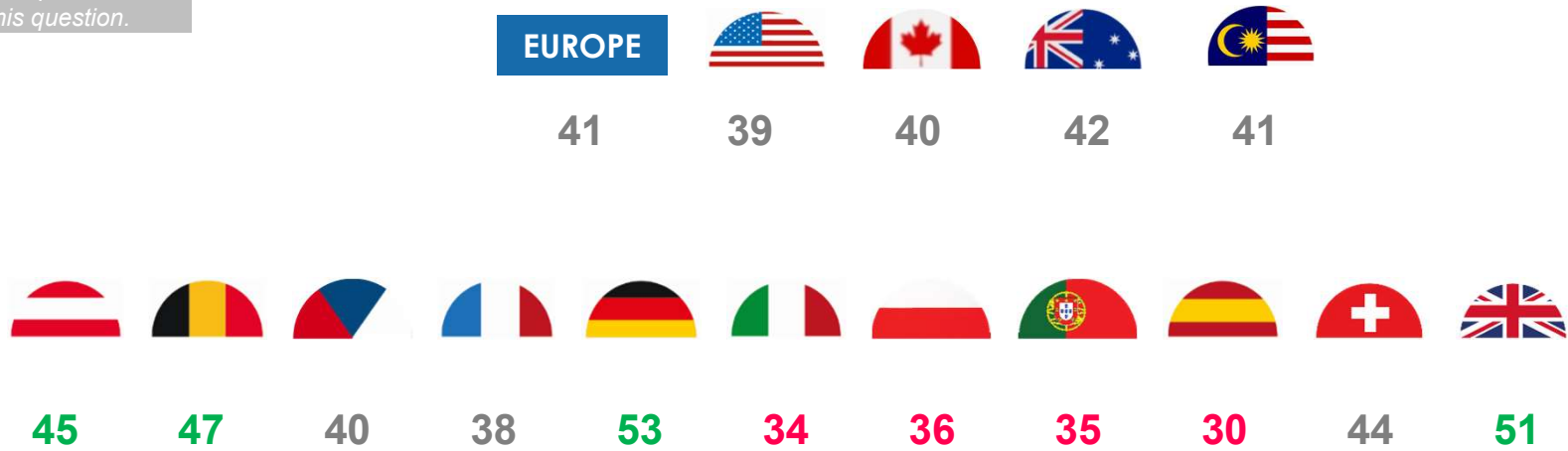
4



ALMOST TWO THIRDS OF TRAVELERS, WHATEVER THE ZONE, HAVEN'T BOOKED THEIR TRIP YET

Summer holiday reservation (%)

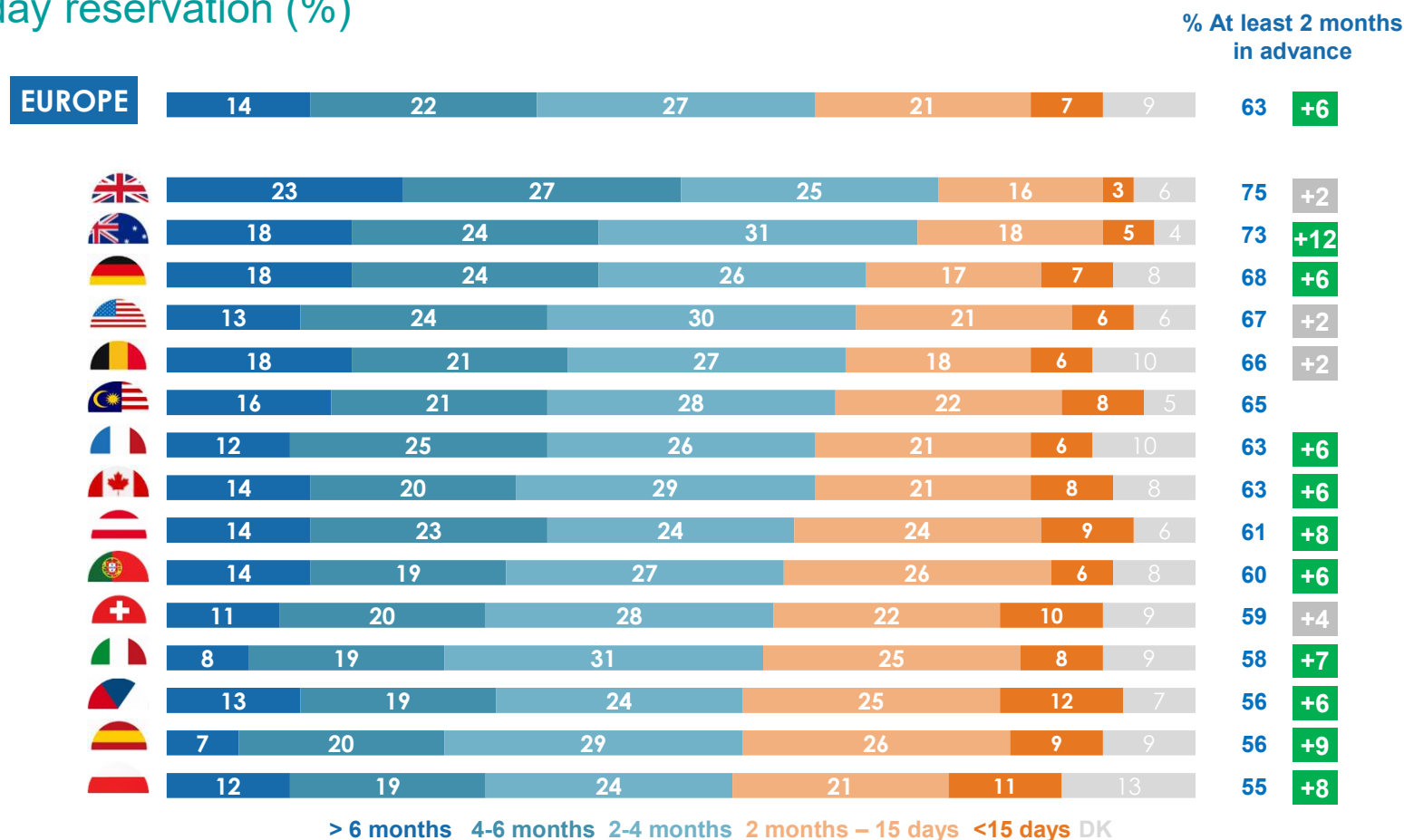
NB : Interviews were conducted one month earlier this year vs 2022.
Hence, we do not present évolutions for this question.



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

LAST MINUTE PLANS APPEAR LESS WIDESPREAD THIS YEAR.

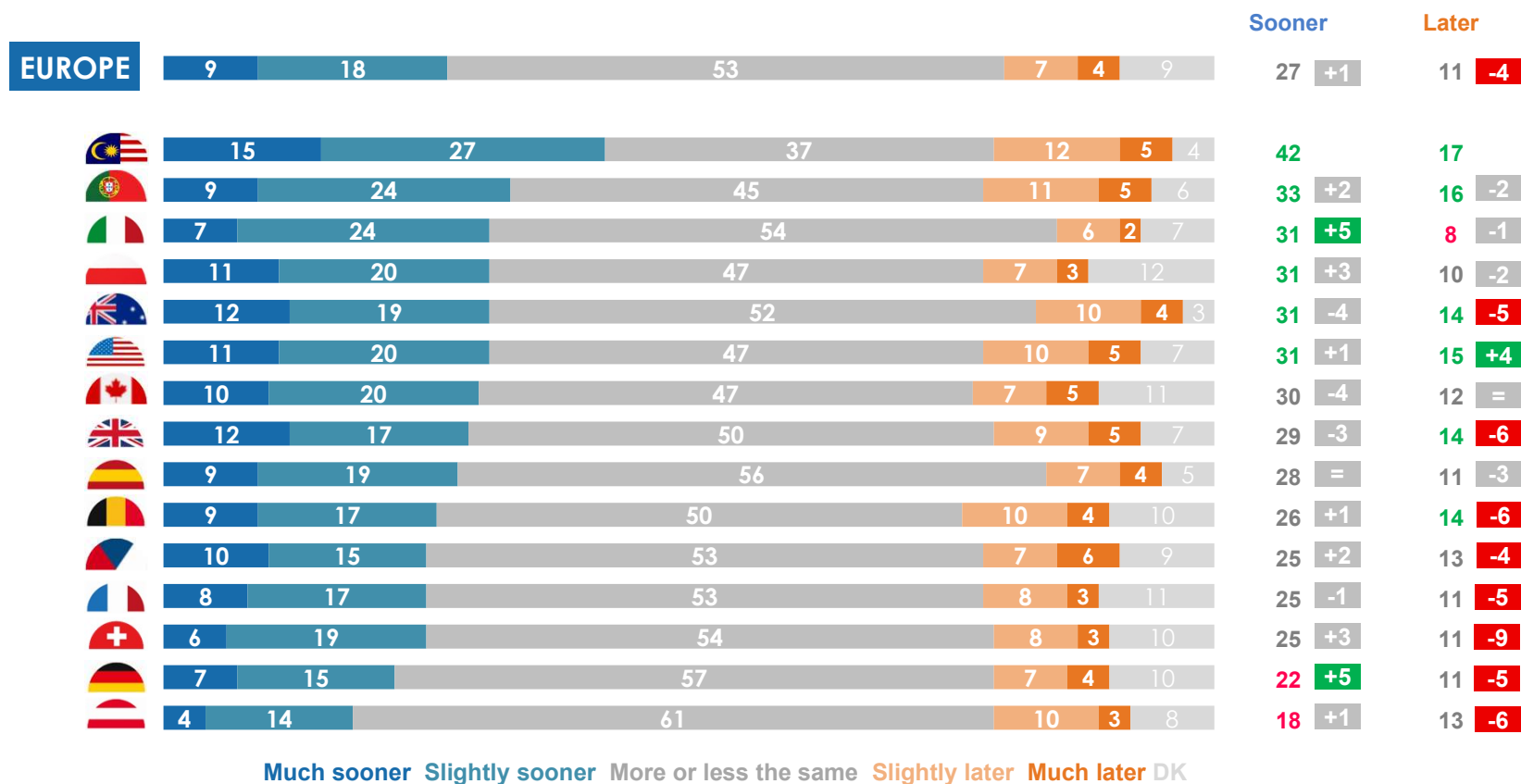
Summer holiday reservation (%)



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

1 EUROPEAN OUT OF 4 HAS OR WILL BOOK SOONER THIS YEAR.





Summer holiday reservation (%)



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

MOST OF THE TIME, SUMMER HOLIDAYS IS THE PERFECT TIME TO FOCUS ON IMMEDIATE FAMILY (PARTNERS AND CHILDREN).












Travel partners (%)

	EUROPE				
Your partner	67 +2	59 +4	58 +1	57 -1	43
Your children	34 +1	38 +4	29 +3	26 =	37
Your friends	18 =	21 =	22 +3	20 +4	23
On your own	11 =	16 -1	19 +3	20 +3	21
Your parents	9 =	12 =	10 =	11 +3	24
Your siblings	7 =	12 -1	10 =	10 +4	21
New Your grandchildren	5	6	3	2	3
New Your grandparents	1	1	1	1	3

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

MOST OF THE TIME, SUMMER HOLIDAYS IS THE PERFECT TIME TO FOCUS ON IMMEDIATE FAMILY IN EVERY COUNTRY





Travel partners (%)

											
Your partner	64 -1	64 +4	67 -1	67 +3	65 -1	67 =	69 +5	68 +2	69 =	60 -1	68 +6
Your children	28 -1	33 +2	39 -2	39 +2	25 =	33 =	43 +5	41 +4	39 +5	30 -1	31 -2
Your friends	19 =	16 =	24 =	14 -1	18 +2	23 -1	20 -1	10 -5	17 =	19 -1	18 -1
On your own	15 +4	11 +1	10 -2	9 -3	14 -1	10 +2	10 +1	11 +1	8 -2	14 =	12 +1
Your parents	9 +1	11 =	8 -1	9 =	8 =	7 =	10 +1	10 -1	10 -1	10 =	11 -1
Your siblings	5 =	7 -1	6 -1	7 =	6 -1	6 =	7 -1	8 +1	8 +1	8 +1	10 +2
New Your grandchildren	5	7	8	7	3	4	7	7	4	5	4
New Your grandparents	2	2	2	2	2	1	1	1	1	2	1

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

IF EUROPEANS STILL PREFER TO USE THEIR CAR TO GO TO THEIR HOLIDAY DESTINATION, THIS HABIT IS DECREASING WHILE THE PLANE REGAINS IN POPULARITY.












Transportation (%)

	EUROPE				
Personal car	50 -5	49 +1	48 -1	29 -10	32
Plane	37 +4	44 +1	42 +2	57 +9	55
Train	16 +1	5 -2	8 =	16 +6	18
Bus	8 +1	5 -1	6 +2	10 +2	13
Boat	5 +1	4 -1	3 =	5 +1	4
Rental car through an agency	4 =	12 +1	9 -3	13 +1	17
Rental car between private individuals	3 =	6 -1	5 +1	9 +3	11
Carpooling	3 =	5 -3	6 +2	3 =	7
Camper van	3 =	4 -1	4 -1	4 -1	4
Bike	2 -1	3 -1	2 -1	4 =	3
Motorbike	2 =	3 -1	3 +1	4 +1	7

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

PERSONAL CAR IS THE PREFERRED TRANSPORTATION MODE ACROSS EUROPE, ESPECIALLY IN FRANCE AND AUSTRIA. PLANE IS PARTICULARLY APPRECIATED IN PORTUGAL, SWITZERLAND AND THE UK.





Transportation (%)

														
Personal car	56-4	50+2	53-7	66-2	47-7	50-8	51-6	46-5	51-8	41-2	36-2			
Plane	38+6	37=	33+6	24+2	39+6	35+5	31+4	48+7	37+3	44+1	54+3			
Train	15-1	12+1	17=	13-2	15+1	17+1	18=	10+2	16+1	19+2	18+4			
Bus	8+3	5=	14-3	4=	10+5	7+2	13+2	9+3	8-1	7=	6-1			
Boat	3+1	3-1	2=	4+1	5=	8+2	2+1	2-1	5+2	6+1	5-1			
Rental car through an agency	2+1	4+1	2+1	3=	4+2	6+2	3+1	5=	5=	5=	5-1			
Rental car between private individuals	2=	3=	1-1	3=	3=	4+2	2+1	4+1	3+1	4=	4+1			
Carpooling	2=	3=	3=	3=	5+2	3+1	1=	2-1	4=	3+1	2=			
Camper van	3-1	3+1	3+2	3+1	5=	2-1	2-1	2-1	2+1	6+3	2-2			
Bike	2=	3=	4=	1-1	3-1	3=	2=	1=	1-1	4+1	2-1			
Motorbike	2=	2+1	1-1	2+1	2=	2-2	1-1	1=	2+1	4+2	1-1			

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

A MAJORITY OF TRAVELERS CHOOSE THEIR MODE OF TRANSPORTATION BY CONVENIENCE, THEN COMES HABIT TO A LESSER EXTENT THOUGH.

Criteria of choice of transportation mode (%)

	EUROPE				
It is the most convenient way to reach my destination	64 +2	63 +6	63 -1	68 =	68
I am used to taking this mode of transportation	38 =	38 -2	32 -5	31 =	40
It is more affordable for me	28 +3	40 +1	35 =	30 +4	43
New It is more environmentally friendly	9	10	10	11	25
There is less risk for COVID-19 infection	8 -3	12 =	10 -6	9 -6	16

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

HOTEL IS STILL THE MOST POPULAR ACCOMMODATION AMONG HOLIDAYMAKERS. THIS IS EVEN MORE THE CASE IN MALAYSIA.












Preferred type of accommodation (%)

	EUROPE				
Hotel	47 <small>+1</small>	56 <small>+4</small>	48 <small>+2</small>	51 <small>=</small>	61
Rental of a house or apartment	30 <small>=</small>	20 <small>=</small>	17 <small>+1</small>	25 <small>+3</small>	30
Friends'/family's houses or in your holiday home	21 <small>=</small>	25 <small>-2</small>	34 <small>+5</small>	24 <small>-1</small>	25
A bed & breakfast	15 <small>+1</small>	12 <small>=</small>	12 <small>-2</small>	16 <small>-1</small>	23
Camping	10 <small>=</small>	13 <small>-1</small>	17 <small>-3</small>	10 <small>=</small>	15
Boat (e.g. cruise)	5 <small>=</small>	10 <small>=</small>	7 <small>+2</small>	9 <small>+1</small>	11
Go on a road trip in a camper van/caravan	5 <small>+1</small>	9 <small>-1</small>	8 <small>=</small>	11 <small>+2</small>	13

Regarding your accommodations during your summer trip in 2023, do you mostly intend to:

FOR EUROPEAN TRAVELERS, HOTEL IS EVEN MORE APPRECIATED IN AUSTRIA, GERMANY, SPAIN, SWITZERLAND AND THE UK.





Preferred type of accommodation (%)

											
Hotel	61 +4	46 -1	49 +1	30 +1	54 +4	46 +2	48 -2	43 +2	51 -4	52 +6	51 +3
Rental of a house or apartment	22 -1	34 +5	14 -1	40 +1	27 -6	29 =	23 =	31 +1	30 =	25 -1	30 +2
Friends'/family's houses or in your holiday home	15 -2	18 =	19 -2	26 -3	17 +3	16 -5	24 +2	25 =	24 =	24 -4	20 +3
A bed & breakfast	11 -1	8 -1	32 -1	5 =	11 -1	31 +8	16 -1	21 =	11 -1	13 +2	14 =
Camping	8 =	11 +4	14 -1	17 -2	11 +3	6 =	6 =	6 -1	5 -1	11 +1	10 =
Boat (e.g. cruise)	4 =	3 -1	4 +1	2 -1	7 +1	4 -1	5 +2	3 +1	4 =	6 +1	9 +2
Go on a road trip in a camper van/caravan	3 =	5 =	4 +1	5 =	6 +1	3 =	4 +1	3 =	4 =	8 +4	6 +1

Regarding your accommodations during your summer trip in 2023, do you mostly intend to:

TWO CRITERIA ARE EQUALLY IMPORTANT IN THE CHOICE OF TRANSPORTATION MODE: HABIT AND BUDGET, THE LATTER PROGRESSING THIS YEAR.

Criteria of choice of accommodation (%)

	EUROPE				
I am used to taking this mode of accommodation	46 <small>-1</small>	46 <small>+2</small>	42 <small>=</small>	43 <small>-2</small>	44
It is more affordable for me	42 <small>+4</small>	46 <small>+6</small>	45 <small>-1</small>	43 <small>+3</small>	50
For all the services and activities proposed	27 <small>+2</small>	29 <small>+1</small>	26 <small>+2</small>	32 <small>+6</small>	36
It's a safe / well-protected accommodation	24 <small>+1</small>	31 <small>+1</small>	29 <small>-2</small>	34 <small>+4</small>	40
New It is more environmentally friendly	10	14	11	13	27
There is less risk for COVID-19 infection	7 <small>-4</small>	9 <small>-4</small>	11 <small>-5</small>	10 <small>-5</small>	16

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

IDEALLY, HOLIDAYMAKERS WOULD LIKE TO SPEND A RELAXING SUMMER WITH THEIR LOVED ONES. DISCOVERY OF NEW CULTURES COMES THIRD, IN PROGRESSION THIS YEAR.












Ideal activities during summer holidays (%)

	EUROPE				
Rest, have peace of mind	54 -2	47 -2	47 =	48 +2	51
Come together as a family, or with friends	47 +2	48 +4	46 -1	41 -2	56
Discover new cultures, enjoy a total change of scenery	44 +3	43 +6	39 +3	47 +6	40
Take time to read, learn new things	11 =	12 -5	11 -1	13 +1	14
Enjoy my home	11 -1	14 -1	18 +2	12 -2	13
Do sports (such as hiking, climbing...)	11 +1	9 -2	13 +2	7 -1	8
Have new friendly or romantic encounters	11 =	13 +2	13 +1	13 =	10

When you think of THE IDEAL summer vacation in 2023, what would you primarily want to do?

PORTUGUESE AND SPANISH LARGELY PRIORITIZE REST WHILE CZECH AND POLISH ARE THE MOST WILLING TO SPEND TIME WITH FRIENDS AND FAMILY.





Ideal activities during summer holidays (%)

											
Rest, have peace of mind	50	55	57	57	51	55	51	63	60	53	51
Come together as a family, or with friends	50	48	55	48	48	48	57	40	36	42	44
Discover new cultures, enjoy a total change of scenery	37	38	38	40	34	47	38	57	54	41	55
Take time to read, learn new things	8	14	6	13	9	8	11	11	12	11	14
Enjoy my home	14	16	10	12	17	8	10	6	7	13	9
Do sports (such as hiking, climbing...)	14	8	18	15	11	10	11	10	11	12	8
Have new friendly or romantic encounters	13	10	7	8	12	17	13	6	11	13	8

When you think of THE IDEAL summer vacation in 2023, what would you primarily want to do?

IN THE COMING SUMMER, TRAVELERS WILL ACTUALLY HAVE REST AND SPEND TIME WITH THEIR FAMILY AND FRIENDS, WHILE DISCOVERING NEW CULTURES INCREASES.











Actual activities during summer holidays (%)

	EUROPE				
Rest, have peace of mind	38 =	30 -2	33 =	30 =	42
Come together as a family, or with friends	37 +2	38 +4	38 -2	32 +3	42
Discover new cultures, enjoy a total change of scenery	25 +4	22 +2	19 +3	30 +9	34
Enjoy my home	15 -1	23 +3	24 =	17 -3	12
Take time to read, learn new things	9 =	11 -2	9 -1	11 +1	10
Do sports (such as hiking, climbing...)	9 +1	10 +1	11 +2	6 -1	6
Have new friendly or romantic encounters	7 +1	7 =	6 =	7 -1	8

And what do you think you will ACTUALLY be mainly doing for the summer vacation in 2023?

ITALIAN, PORTUGUESE AND SPANISH HOLIDAYMAKERS WILL MOSTLY SPEND TIME RELAXING WHILE THE AUSTRIANS WILL FOCUS ON FAMILY TIME.

Actual activities during summer holidays (%)

											
Relax	35 <small>-2</small>	40 <small>+3</small>	42 <small>=</small>	39 <small>+2</small>	33 <small>-4</small>	42 <small>=</small>	37 <small>=</small>	44 <small>-2</small>	47 <small>-1</small>	34 <small>-6</small>	33 <small>+2</small>
Family time	42 <small>+3</small>	37 <small>+1</small>	43 <small>=</small>	35 <small>+2</small>	39 <small>+1</small>	34 <small>-3</small>	39 <small>+5</small>	36 <small>+3</small>	31 <small>+1</small>	37 <small>-2</small>	38 <small>+2</small>
Discover cultures	21 <small>+2</small>	20 <small>+1</small>	22 <small>+2</small>	22 <small>=</small>	19 <small>+3</small>	28 <small>+4</small>	20 <small>+4</small>	32 <small>+2</small>	30 <small>+6</small>	25 <small>+4</small>	31 <small>+4</small>
Enjoy home	19 <small>-3</small>	21 <small>-1</small>	15 <small>-1</small>	13 <small>=</small>	19 <small>-2</small>	8 <small>-2</small>	15 <small>=</small>	14 <small>+2</small>	10 <small>-3</small>	14 <small>=</small>	17 <small>-2</small>
Read, learn	8 <small>-1</small>	13 <small>+1</small>	5 <small>-1</small>	12 <small>+2</small>	8 <small>-1</small>	8 <small>+1</small>	9 <small>=</small>	11 <small>+3</small>	10 <small>-1</small>	9 <small>=</small>	10 <small>=</small>
Do sports	11 <small>=</small>	9 <small>+1</small>	17 <small>+2</small>	11 <small>=</small>	10 <small>+1</small>	8 <small>+1</small>	9 <small>-1</small>	7 <small>-1</small>	8 <small>=</small>	12 <small>+3</small>	6 <small>+1</small>
Make new acquaintances	7 <small>+1</small>	7 <small>-2</small>	5 <small>+1</small>	6 <small>=</small>	7 <small>+1</small>	12 <small>+3</small>	6 <small>-1</small>	2 <small>-2</small>	7 <small>+1</small>	10 <small>+4</small>	5 <small>-1</small>

And what do you think you will ACTUALLY be mainly doing for the summer vacation in 2023?

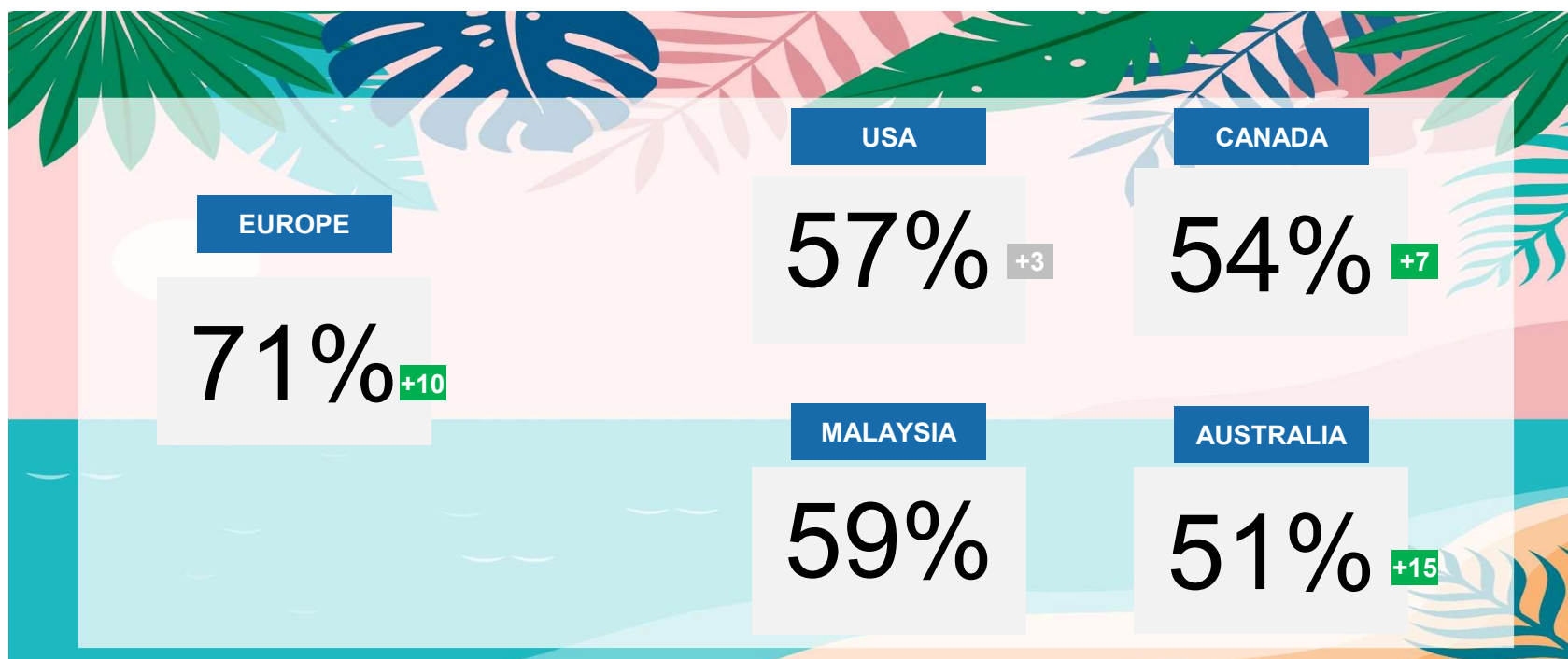
BACK TO 2022 SUMMER HOLIDAYS

- Summer travels
- Destinations

5

MORE THAN 2 OUT OF 3 EUROPEANS WENT ON TRIPS LAST SUMMER.

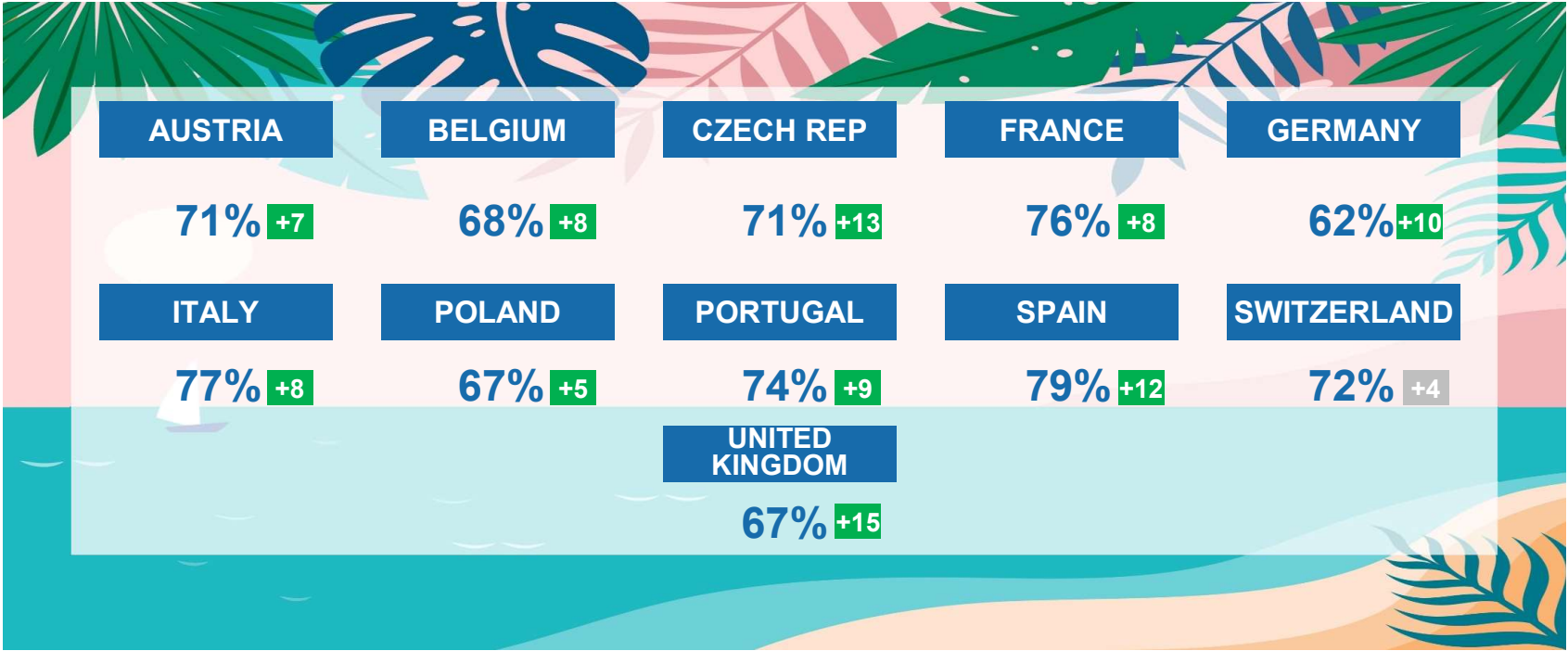
Summer holiday trips in 2022



Did you go on a trip last summer, in other words between June and September 2022? By going on a trip we mean a stay of 4 nights or more away from home, and excluding business trips.

IN EUROPE, SPANIARDS, FRENCH AND ITALIANS WERE THE ONES WHO WENT ON VACATION THE MOST LAST SUMMER.

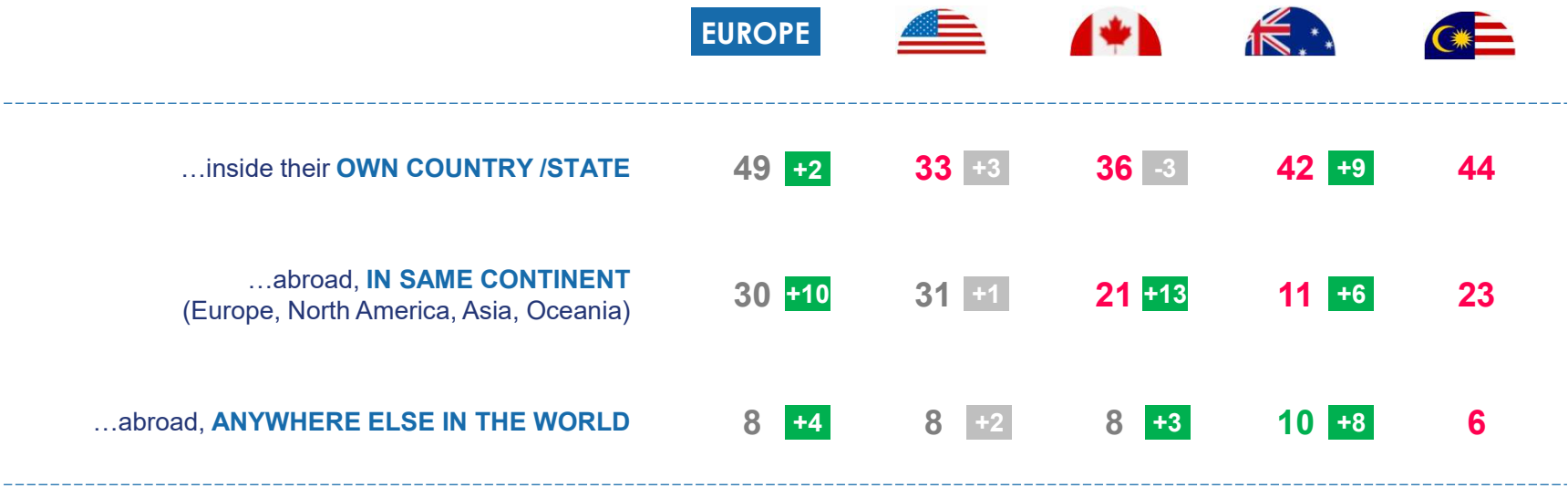
Summer holiday trips in 2022



Did you go on a trip last summer, in other words between June and September 2022? By going on a trip we mean a stay of 4 nights or more away from home and excluding business trips.

MOST EUROPEAN HOLIDAYMAKERS SPENT THEIR VACATIONS IN THEIR OWN COUNTRY IN 2022.

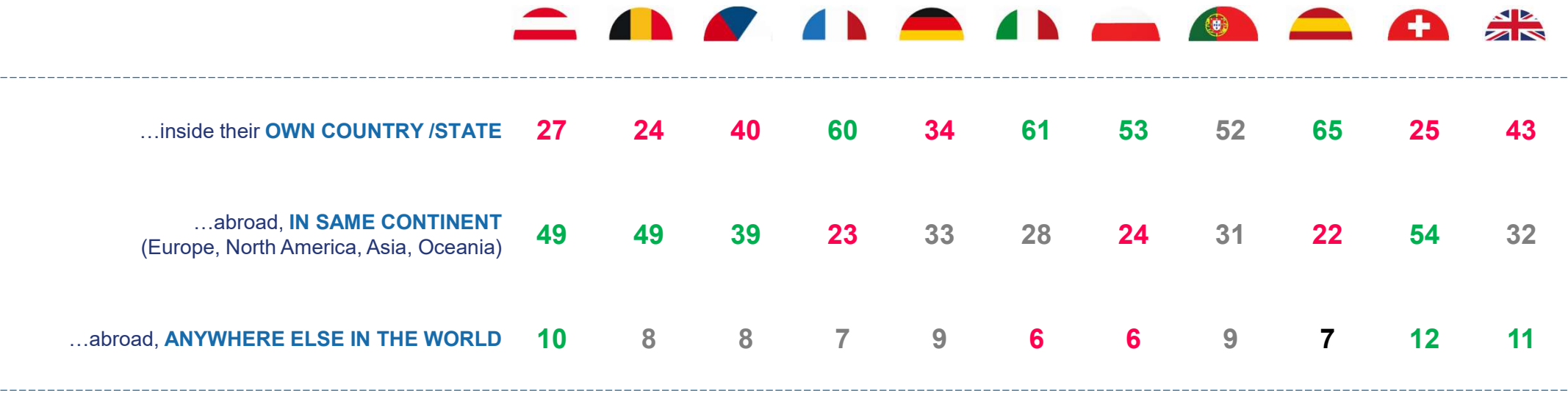
2022 summer destination (%)



And did you take...

EUROPEAN HOLIDAYMAKERS FROM FRANCE, ITALY, POLAND AND SPAIN TENDED TO STAY IN THEIR HOME COUNTRY. GOING TO BORDER COUNTRIES IS MORE FREQUENT IN AUSTRIA, BELGIUM, CZECH REPUBLIC AND SWITZERLAND.

2022 summer destination (%)



And did you take...

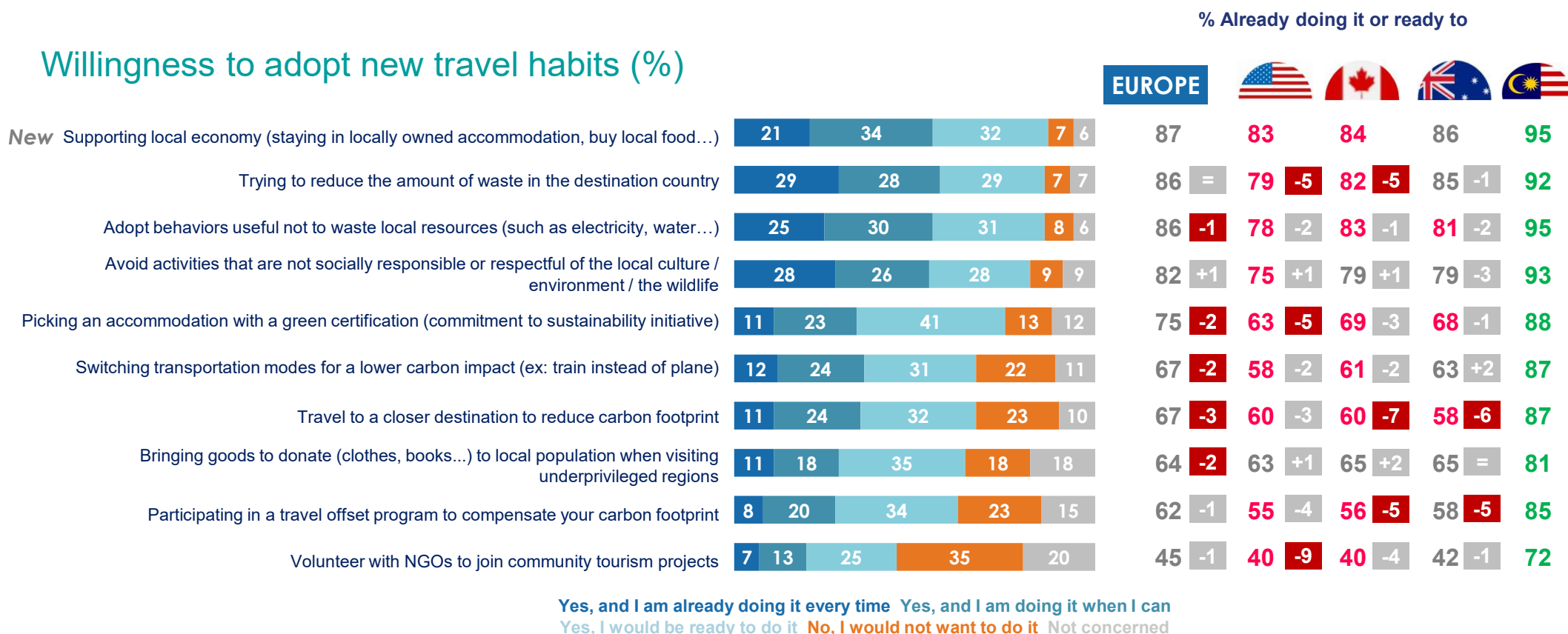
NEW TRAVEL PRACTICES

6

- Sustainable travel
- Workation

SUSTAINABLE TRAVEL HABITS ARE ALREADY INTEGRATED BY TRAVELERS, ESPECIALLY WHEN IT COMES TO SUPPORTING LOCAL ECONOMY, RESPECTING LOCAL CULTURES AND BE AWARE OF WASTE.












Willingness to adopt new travel habits (%)



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

ITALIAN, PORTUGUESE AND SPANISH ARE THE MOST EAGER TO ADOPT SUSTAINABLE TRAVEL HABITS.

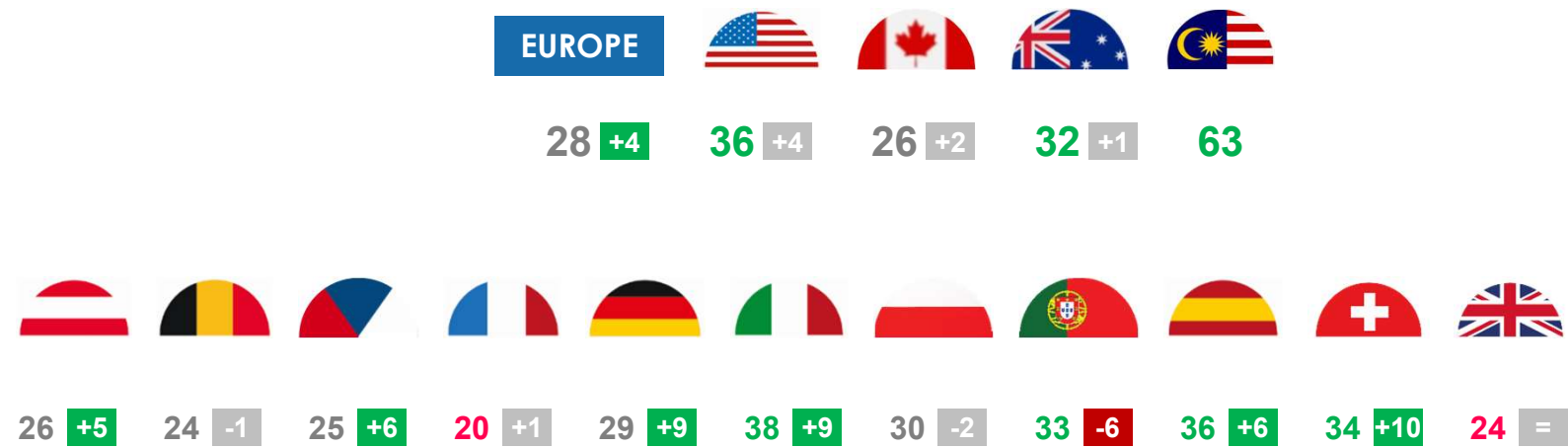
Willingness to adopt new travel habits (%) - Already doing it or ready to

											
New Supporting local economy (staying in locally owned accommodation, buy local food...)	86	82	84	86	85	92	86	93	90	86	86
Trying to reduce the amount of waste in the destination country	87 +3	84 +6	79 =	87 +1	86 +3	91 +2	84 -5	93 -1	88 -1	87 +4	83 -1
Adopt behaviors useful not to waste local resources (such as electricity, water...)	85 +1	83 +2	61 -1	89 -1	83 -1	92 -1	86 -1	94 -2	90 -2	85 +1	82 =
Avoid activities that are not socially responsible or respectful of the local culture / environment / the wildlife	79 +1	80 +4	76 +12	80 +1	76 =	89 =	81 +3	91 =	87 -1	80 +1	80 +1
Picking an accommodation with a green certification (commitment to sustainability initiative)	70 =	67 -2	62 -1	73 -2	70 =	86 =	75 -3	87 -3	81 -6	72 +2	68 -3
Switching transportation modes for a lower carbon impact (ex: train instead of plane)	58 -2	60 -1	56 -1	64 =	58 -3	82 +2	67 -1	76 -2	77 -3	64 +4	56 -11
Travel to a closer destination to reduce carbon footprint	55 -4	63 -1	57 +1	69 =	60 -3	80 -1	67 -4	77 -6	73 -5	64 +2	56 -9
Bringing goods to donate (clothes, books...) to local population when visiting underprivileged regions	55 -1	56 -4	56 =	67 =	56 +2	79 +3	68 -1	77 -4	69 -6	66 +4	51 -9
Participating in a travel offset program to compensate your carbon footprint	47 -2	49 =	43 +2	54 -1	52 +1	79 +3	71 -1	76 -3	72 -2	54 =	56 -5
Volunteer with NGOs to join community tourism projects	37 -3	35 -5	36 +2	36 -1	44 +3	58 +1	54 -2	57 -6	51 -2	45 +5	34 -5

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

WHILE HYBRID WORKING IS NOW DEEPLY IMPLANTED, WORKATION INTENTIONS CONTINUE TO GROW THIS YEAR : MORE THAN 1 ACTIVE EUROPEAN OUT OF 4 CONSIDERS DOING IT, AND 1 OUT OF 3 IN THE USA OR AUSTRALIA.

Workation intention among active people (%)







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

MORE THAN HALF OF WORKATION INTENDERS PLAN TO DO IT AT LEAST PARTLY FROM ABROAD.

★ *New question 2023*

Place for workation (%)

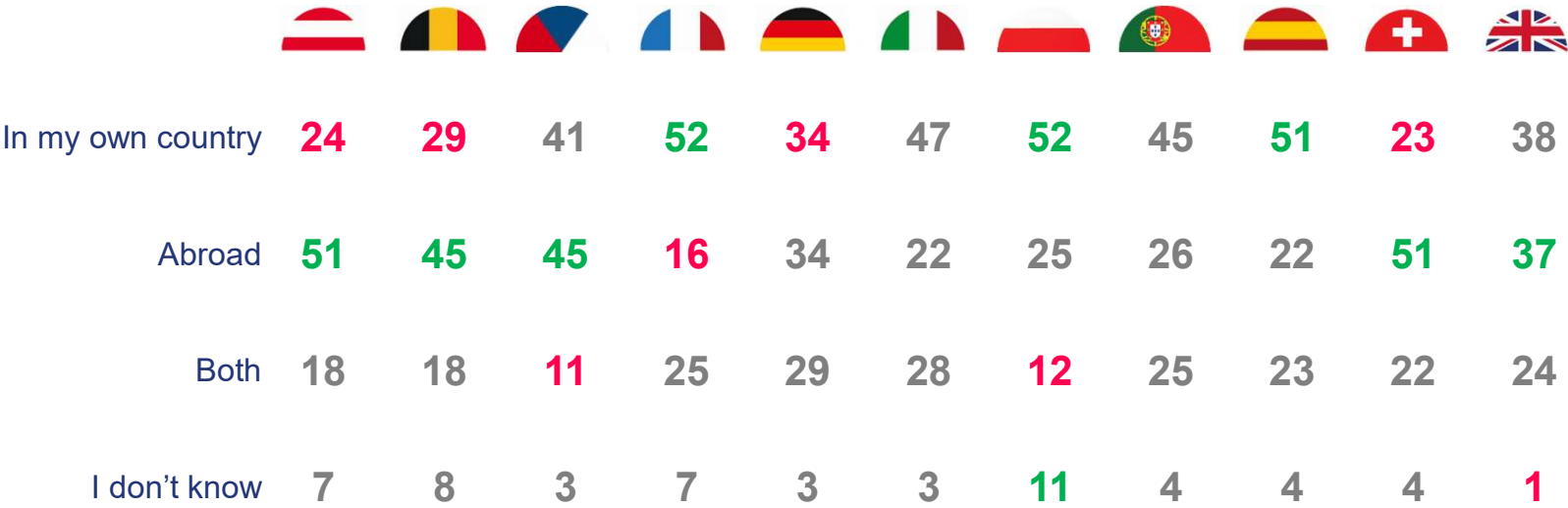
	EUROPE				
In my own country	43	56	52	48	51
Abroad	28	13	29	21	15
Both	24	23	14	25	31
I don't know	5	8	5	6	3

Where do you intend to spend your workation?

WORKERS FROM AUSTRIA, BELGIUM, CZECH REPUBLIC, SWITZERLAND AND THE UK ARE MORE COMFORTABLE WORKING FROM ABROAD

★ *New question 2023*

Place for workation (%)



Where do you intend to spend your workation?

WORKATION IS MAINLY USED AS A WAY TO EXTEND TIME ON HOLIDAY LOCATION : ARRIVING SOONER OR STAYING LONGER - TWO OPTIONS THAT ARE EQUALLY CONSIDERED. CHANGING INITIAL HOLIDAY PLANS IS LESS COMMON.

★ *New question 2023*

Organization for workation (%)




	EUROPE				
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	39	41	39	36	50
You will stay longer at your holiday location to work from there after the end of your holiday	37	32	33	34	36
You will change or postpone your initial plans of holidays : instead of taking holidays, you will work from a holiday location	28	27	28	33	23
I don't know	13	15	16	15	10

Among the following situation(s) which one(s) apply to the workation you plan to do this summer / between June and September?

IN SWITZERLAND, IT IS MORE COMMON TO CHANGE INITIAL PLANS AND COMPLETELY REPLACE VACATIONS WITH WORK.

★ New question 2023





Organization for workation (%)

											
You will arrive sooner at your holiday location to work from there, then you will be on holidays there	38	36	35	39	43	42	31	39	37	37	41
You will stay longer at your holiday location to work from there after the end of your holiday	42	36	26	33	38	41	28	29	39	37	41
You will change or postpone your initial plans of holidays : instead of taking holidays, you will work from a holiday location	19	31	29	29	35	25	21	18	28	36	28
I don't know	14	14	18	11	10	8	28	20	11	13	14

Among the following situation(s) which one(s) apply to the workation you plan to do this summer / between June and September?

WORKATION IS NOT RESERVED TO A SPECIFIC TYPE OF ACCOMMODATION : IT CAN HAPPEN IN RENTAL HOUSES, HOTELS OR RELATIVES / VACATION HOMES EQUALLY.

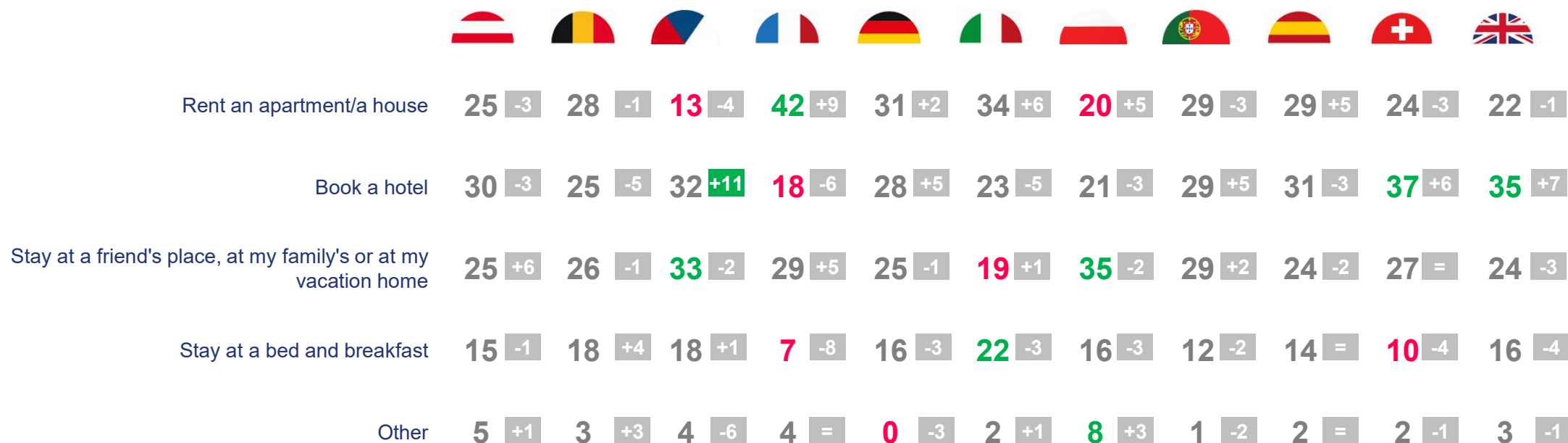
Preferred accommodation for workation (%)

	EUROPE				
Rent an apartment / a house	29 +3	22 +2	21 =	23 +6	20
Book a hotel	27 =	42 +5	29 -5	38 +3	45
Stay at a friend's place, at my family's or at my vacation home	26 =	25 +2	33 +9	23 -5	21
Stay at a bed and breakfast	15 -3	9 -9	13 -2	14 -3	13
Other	3 =	2 =	4 -2	2 -1	1

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

THE FRENCH ARE MORE LIKELY TO RENT AN APARTMENT FOR WORKATION INSTEAD OF WORKING FROM A HOTEL.

Preferred accommodation for workation (%)



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



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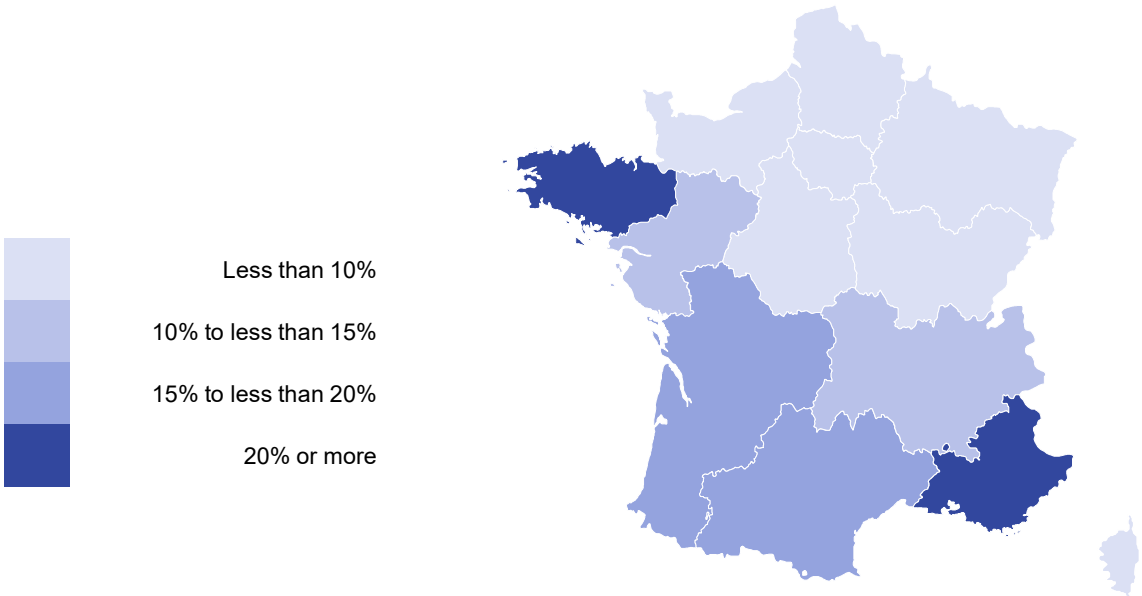


APPENDICES



PACA AND BRETAGNE ARE THE MOST ATTRACTIVE REGIONS FOR FRENCH HOLIDAYMAKERS WHO INTEND TO TRAVEL WITHIN THEIR OWN COUNTRY

Most attractive French regions



You have indicated that your travel destination will be France. In which region(s) will you be travelling? – France Only

WE'RE HERE TO HELP

Estelle CHANDEZE
Department Director
Corporate reputation
Estelle.Chandeze@ipsos.com

Melaine DURAND
Client Director
Corporate reputation
Melaine.Durand@ipsos.com

Jérémy BORROSSI
Research manager
Corporate reputation
Jeremy.HenryBorrossi@ipsos.com

This project has been designed according to Ipsos Quality standards.
It was reviewed and approved by: *Estelle Chandeze, Department Director*

OUR COMMITMENT



Professional codes, quality certification and data protection

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

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

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

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

<https://www.ipsos.com/en/privacy-data-protection>

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

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



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

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



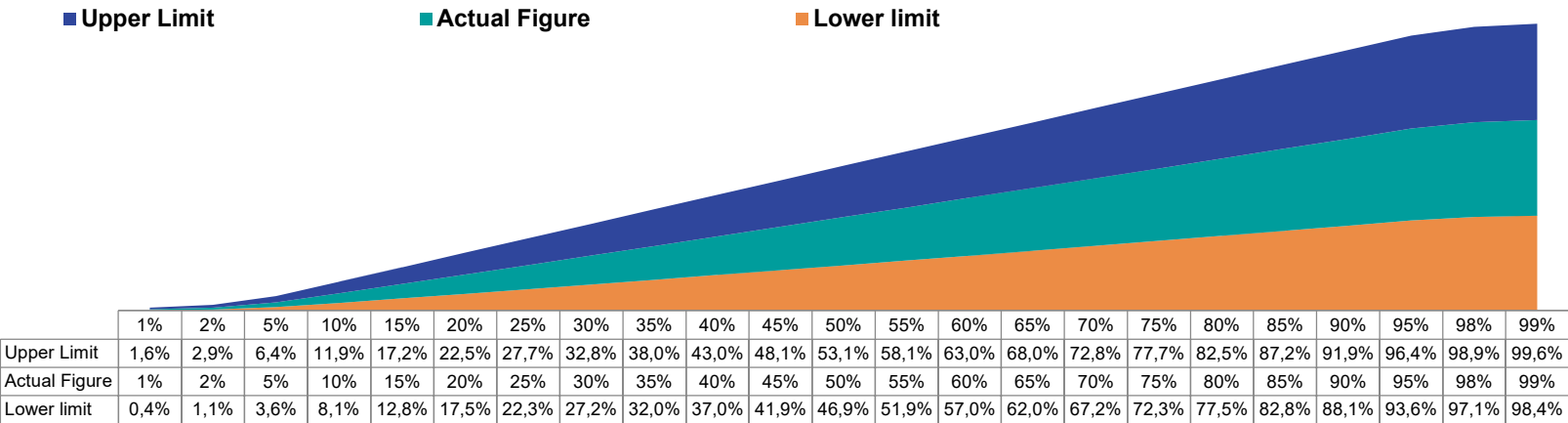


RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

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

The proportions observed are between :



SURVEY OVERVIEW

CAWI survey – Online panel



SAMPLE

- **Target** : Male/female National representative per country
- **Selection of the respondent** : participant selection using a quota or random method (Kish method, other random method), etc.
- **Sample representativeness** : criteria and sources : gender, age, social-economic category of individual/head of household, regions, market size



DATA COLLECTION

- **Fieldwork dates** : March 20th to April 7th
- **Sample achieved** : **15000** interviews
- **Data collection** : on line
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods:** monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- **Checking of IP and consistency of demographic data.**



DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, age, social-economic categories, region, market size

RELIABILITY OF RESULTS : SELF COMPLETION ONLINE SURVEYS IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

SURVEY OVERVIEW

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Coordination of coding and validation of code frame
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary



ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Scripting
- Sampling (IIS panel)



ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation
- Formatting the results

SURVEY MATERIAL

THE QUESTIONNAIRE



Questionnaire

ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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www.ipsos.com

GAME CHANGERS

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

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

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

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

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

THANK YOU

