Summer holiday plans among Europeans, Americans and Asians

IPSOS/EUROP ASSISTANCE SURVEY
18TH EDITION
SCOPE OF THE 2018 SURVEY

American scope

European scope

Asian scope

14 COUNTRIES
16,000 INTERVIEWS
THE 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 27 March and 19 April 2018

Method of data collection
Online survey in the 14 countries
AUSTRIA

HOLIDAY PLANS

HOLIDAY PLANS 66% (=)
Vs Europe 64% (+1pt)

BUDGET €2,645 (+9%)
Vs Europe €1,957 (-2%)

HOLIDAYS IN THEIR OWN COUNTRY
30% (+2pts)

PREFERRED FOREIGN DESTINATIONS
Italy 29% (+4pts)
Croatia 23% (+4pts)
Germany 11% (+1pt)

ACCOMMODATION

ACCOMMODATION
Hotels 61% (-1pt)
Seasonal rentals 26% (+2pts)
Bed & Breakfast 17% (+2pts)

Check online reviews when choosing accommodation
27% (-2pts)

Posting a review online on an hotel
59% (=)

DREAM HOLIDAYS

Favorite cities to visit
New York, Paris, London

Favorite sports competition to attend
2018 Grand Prix Automobile de Monaco

Most romantic country to visit
France

Most exotic country to visit
Thailand

(+XX / -XX) : Evolution vs 2017
CONTENTS

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2. FAVOURITE DESTINATIONS AND CHOICE CRITERIA P.13
3. ACTIVITIES OF HOLIDAYMAKERS P.24
4. HOLIDAY ACCOMODATION P.30
5. CITIES OF DREAMS, DREAMS OF CITIES P.38
6. SPORTS COMPETITIONS TO TRAVEL TO P.45
7. TRAVELLING THE WORLD: A COLLECTIVE IMAGINATION P.51

GAME CHANGERS
1. SUMMER HOLIDAY PLANS
SUMMER HOLIDAY PLANS ARE QUITE STABLE IN 2018 AMONG AMERICANS AND EUROPEANS, AND ALMOST AT THE SAME LEVEL FOR CHINA AND INDIA

SUMMER HOLIDAY PLANS

USA 68% (+2 versus 2017)
BRAZIL 68% (+2 versus 2017)

EUROPE 64% (+1 versus 2017)

CHINA 67%
INDIA 64%
HOLIDAY PLANS: STABLE OR INCREASING IN ALL EUROPEAN COUNTRIES IN 2018

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (%)

FRANCE
AUSTRIA
SWITZERLAND
UNITED KINGDOM
GERMANY
BELGIUM
ITALY
SPAIN
POLAND
PORTUGAL

GAME CHANGERS
**BRAZILIANS ANTICIPATE THE MOST THEIR HOLIDAYS, CHINESE PEOPLE THE LEAST.**

**IN EUROPE, NORTHERN COUNTRIES ANTICIPATE MORE THAN SOUTHERN COUNTRIES.**

**ANTICIPATION OF BOOKING/PAYMENT FOR A TRIP**

<table>
<thead>
<tr>
<th>Country</th>
<th>More Than 4 Months in Advance</th>
<th>Less Than 4 Months in Advance</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Germany</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Belgium</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Italy</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Spain</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Austria</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>Portugal</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>France</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>Spain</td>
<td>33%</td>
<td>67%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>More Than 4 Months in Advance</th>
<th>Less Than 4 Months in Advance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>United States</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>India</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>China</td>
<td>19%</td>
<td>81%</td>
</tr>
</tbody>
</table>

© 2017 Ipsos
THE AVERAGE BUDGET IS OVERALL STABLE IN EUROPE AND THE USA VS 2017, HOWEVER IT IS INCREASING IN BRAZIL

SUMMER HOLIDAY BUDGET

EUROPE

€1,957 -2% vs 2017

HOLIDAY BUDGET IN THE EURO ZONE
(Excluding United Kingdom, Switzerland and Poland)

€2,004 +1% VS 2017

USA

$ 2,643 -1%

(€2,163)

BRAZIL

R$ 5,209 +18%

(€1,238)

CHINA

¥ 15,707

(€2,035)

INDIA

₹ 181,626

(€2,234)

Exchange rate applied

1 GBP = €1.14
1 PLN = €0.24
1 USD = €0.82
1 INR = €0.012
1 CHF = €0.84
1 BRL = €0.24
1 CNY = €0.13
In Europe most holiday budgets are stable, except for the UK, Switzerland, Austria and Belgium - all increasing.

**Summer Holiday Budget**

<table>
<thead>
<tr>
<th>Country</th>
<th>Budget</th>
<th>Change</th>
<th>Exchange Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>CHF 3,235</td>
<td>+9%</td>
<td>1 GBP = €1.14</td>
</tr>
<tr>
<td></td>
<td>(€2,710)</td>
<td></td>
<td>1 PLN = €0.24</td>
</tr>
<tr>
<td>Austria</td>
<td>€2,645</td>
<td>+9%</td>
<td>1 USD = €0.82</td>
</tr>
<tr>
<td>Germany</td>
<td>€2,376</td>
<td>+3%</td>
<td>1 INR = €0.012</td>
</tr>
<tr>
<td>Belgium</td>
<td>€2,318</td>
<td>+6%</td>
<td>1 CHF = €0.84</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>£1,955</td>
<td>+23%</td>
<td>1 BRL = €0.24</td>
</tr>
<tr>
<td>France</td>
<td>€1,993</td>
<td>+1%</td>
<td>1 CNY = €0.13</td>
</tr>
<tr>
<td>Italy</td>
<td>€1,776</td>
<td>+2%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>€1,658</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>€1,370</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>zł 4,324</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Exchange rate applied

Game Changers
EXCEPT FOR FRANCE, SWITZERLAND AND BRAZIL, THE SUMMER HOLIDAY DURATION REMAINS BELOW 2 WEEKS AFTER A GREAT DECREASE LAST YEAR

**Weeks on average**

**EUROPE: 1.8 week on average (=)**

- France: 2.0 (−0.1)
- Switzerland: 2.0
- Spain: 1.9 (+0.1)
- Germany: 1.9
- Belgium: 1.9 (+0.1)
- Poland: 1.9
- Italy: 1.8 (+0.1)
- Austria: 1.7
- Portugal: 1.7
- United Kingdom: 1.6 (−0.2)

**GAME CHANGERS**

- Brazil: 2.2
- United States: 1.5 (+0.1)
- India: 1.3
- China: 1.3
2. FAVORITE DESTINATIONS AND CHOICE CRITERIA
HOLIDAYS IN ONE'S OWN COUNTRY CONTINUE TO DOMINATE, BUT DECREASINGLY IN FRANCE

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER

- **U.S.** 46% (+5)
- **Brazil** 33% (-1)
- **Portugal** 45%
- **Spain** 56% (+4)
- **U.K.** 26% (-5)
- **Belgium** 16% (=)
- **Germany** 27% (-3)
- **Poland** 45% (=)
- **France** 57% (-6)
- **Switzerland** 20% (=)
- **Austria** 30% (+2)
- **Italy** 52% (-4)
- **UK** 26% (-5)
- **Belgium** 16% (=)
- **Germany** 27% (-3)
- **Poland** 45% (=)
- **France** 57% (-6)
- **Switzerland** 20% (=)
- **Austria** 30% (+2)
- **Italy** 52% (-4)
- **U.K.** 26% (-5)
- **Belgium** 16% (=)
- **Germany** 27% (-3)
- **Poland** 45% (=)
- **France** 57% (-6)
- **Switzerland** 20% (=)
- **Austria** 30% (+2)
- **Italy** 52% (-4)
- **U.S.** 46% (+5)
- **Brazil** 33% (-1)
- **Portugal** 45%
SPAIN, FRANCE AND ITALY ARE EUROPEANS’ TOP 3 FAVORITE DESTINATION

FOREIGN DESTINATIONS PLANNED THIS SUMMER
THE SEASIDE IS STILL THE MOST ATTRACTIVE DESTINATION FOR THE EUROPEANS

SUMMER HOLIDAY PREFERENCES

EUROPE

61%  57%  65%  64%  70%  57%  67%  62%  59%  58%
THIS YEAR, ITALY SAW A RENEWED INTEREST IN TOURING TO DISCOVER NEW PLACES

SUMMER HOLIDAY PREFERENCES

<table>
<thead>
<tr>
<th></th>
<th>City</th>
<th>Countryside</th>
<th>Mountains</th>
<th>Countryside</th>
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</thead>
<tbody>
<tr>
<td>THIS YEAR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>15%</td>
<td>18%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>UK</td>
<td>29%</td>
<td>17%</td>
<td>23%</td>
<td>17%</td>
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<td>Germany</td>
<td>40%</td>
<td>23%</td>
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<td>20%</td>
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<td>25%</td>
<td>16%</td>
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<tr>
<td>Austria</td>
<td>25%</td>
<td>19%</td>
<td>19%</td>
<td>25%</td>
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<td>Sweden</td>
<td>20%</td>
<td>34%</td>
<td>14%</td>
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<tr>
<td>Portugal</td>
<td>34%</td>
<td>14%</td>
<td>25%</td>
<td></td>
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</tbody>
</table>

SUMMER HOLIDAY PREFERENCES

<table>
<thead>
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<th>City</th>
<th>Countryside</th>
<th>Mountains</th>
<th>Countryside</th>
</tr>
</thead>
<tbody>
<tr>
<td>THIS YEAR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>23%</td>
<td>19%</td>
<td>11%</td>
<td>22% +5</td>
</tr>
<tr>
<td>UK</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>22%</td>
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</tr>
<tr>
<td>Spain</td>
<td>24%</td>
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<tr>
<td>Switzerland</td>
<td>23%</td>
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<td>Austria</td>
<td>20%</td>
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<tr>
<td>Sweden</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TOURING IS ALSO VERY APPRECIATED AMONG THE NON-EUROPEAN COUNTRIES. IN THE U.S. AND BRAZIL, URBAN DESTINATIONS ARE ALMOST AS WELL LIKED AS THE SEASIDE.

HOLIDAY PREFERENCES FOR JUNE TO SEPTEMBER

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seaside</td>
<td>43%</td>
<td>50%</td>
<td>48%</td>
<td>68%</td>
</tr>
<tr>
<td>City</td>
<td>43%</td>
<td>44%</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Countryside</td>
<td>28%</td>
<td>23%</td>
<td>53%</td>
<td>28%</td>
</tr>
<tr>
<td>Mountains</td>
<td>24%</td>
<td>31%</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>Tour</td>
<td>24%</td>
<td>40%</td>
<td>42%</td>
<td>47%</td>
</tr>
</tbody>
</table>

TOURING IS ALSO VERY APPRECIATED AMONG THE NON-EUROPEAN COUNTRIES. IN THE U.S. AND BRAZIL, URBAN DESTINATIONS ARE ALMOST AS WELL LIKED AS THE SEASIDE.
EUROPEANS TEND TO RETURN TO DESTINATIONS THEY ALREADY VISITED. THE WEATHER AND THE ACTIVITIES AVAILABLE ARE ALSO IMPORTANT FOR THEM.

REASON THAT MOTIVATED THE CHOICE OF THE DESTINATION

- Already been there: 29%, 38%, 42%, 22%, 29%, 41%, 44%, 40%, 27%, 26%
- Activities: 24%, 23%, 27%, 22%, 19%, 27%, 24%, 23%, 18%, 23%
- Weather: 22%, 16%, 14%, 21%, 18%, 20%, 19%, 21%, 18%, 21%
- Has friends there: 24%, 23%, 23%, 27%, 22%, 19%, 27%, 24%, 23%, 18%
- Good deal: 22%, 16%, 14%, 21%, 18%, 20%, 19%, 21%, 18%, 21%
VISITING FRIENDS AND FAMILY IS A MAJOR MOTIVATION FOR THE AMERICANS. ASIAN HOLIDAYMAKERS GIVE IMPORTANCE TO OTHERS’ RECOMMENDATIONS.

REASON THAT MOTIVATED THE CHOSE OF THE DESTINATION

- Already been there:
  - Americans: 27%
  - Asians: 36%

- Activities:
  - Americans: 22%
  - Asians: 21%

- Weather:
  - Americans: 15%
  - Asians: 21%

- Has friends there:
  - Americans: 22%
  - Asians: 21%

- Recommendation:
  - Americans: 21%
  - Asians: 25%

GAME CHANGERS
IN TERMS OF RISKS, ASIAN HOLIDAYMAKERS ARE MORE ATTENTIVE TO INSECURITY (ATTACKS, HEALTH, NATURAL DISASTERS,…) WHEN CHOOSING THEIR DESTINATION

FACTORS THAT PLAY AN ‘ESSENTIAL’ ROLE IN CHOOSING A DESTINATION

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
<th>RANK 2017</th>
<th>RANK VS 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget you intend to allocate</td>
<td>52%</td>
<td>= 2</td>
<td>1</td>
</tr>
<tr>
<td>Climate</td>
<td>48%</td>
<td>+1 3</td>
<td>10</td>
</tr>
<tr>
<td>Risk of an attack</td>
<td>42%</td>
<td>-1 4</td>
<td>3</td>
</tr>
<tr>
<td>Opportunities for leisure or cultural activities</td>
<td>42%</td>
<td>+1 1</td>
<td>4</td>
</tr>
<tr>
<td>Health risks</td>
<td>37%</td>
<td>+1 7</td>
<td>2</td>
</tr>
<tr>
<td>Risk of personal attacks (theft, assault, etc.)</td>
<td>36%</td>
<td>-2 5</td>
<td>5</td>
</tr>
<tr>
<td>Quality of on-site tourist infrastructures</td>
<td>33%</td>
<td>+3 8</td>
<td>7</td>
</tr>
<tr>
<td>Risk of infection with the Zika virus</td>
<td>32%</td>
<td>= 12</td>
<td>6</td>
</tr>
</tbody>
</table>

RANK 2018

AND ESPECIALLY THE CHINESE

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>Europe</th>
<th>Rank vs 2018</th>
<th>Rank 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Political situation in the destination country</td>
<td>30%</td>
<td>-2</td>
<td>11</td>
</tr>
<tr>
<td>Travel time to the holiday location</td>
<td>29%</td>
<td>+2</td>
<td>6</td>
</tr>
<tr>
<td>Risk of social unrest</td>
<td>28%</td>
<td>-2</td>
<td>10</td>
</tr>
<tr>
<td>Risk of natural disaster</td>
<td>27%</td>
<td>-1</td>
<td>13</td>
</tr>
<tr>
<td>Ability to speak the language of the destination country</td>
<td>19%</td>
<td>+1</td>
<td>9</td>
</tr>
<tr>
<td>Economic situation in the destination country</td>
<td>16%</td>
<td>-1</td>
<td>14</td>
</tr>
<tr>
<td>Quality of internet access</td>
<td>13%</td>
<td>+1</td>
<td>15</td>
</tr>
<tr>
<td>Exchange rate of the currency in the destination country</td>
<td>13%</td>
<td>-1</td>
<td>16</td>
</tr>
</tbody>
</table>

RANK VS 2018:
- 2
+2
-2
-1
+1
-1
-1
+1
-1

RANK 2018:
9
4
4
6
16
14
13
15
16
15
THE POLITICAL SITUATION IN THE UK (BREXIT) AND THE U.S (TRAVEL BAN) MAY HAVE AN IMPACT ON THE CONSIDERATION TO VISIT, ESPECIALLY AMONG THE NON-EUROPEANS

WOULD RECONSIDER VISITING THE UK

- Spain: 56%
- Portugal: 54%
- India: 59%
- Brazil: 62%
- China: 78%

WOULD RECONSIDER VISITING THE US

- Spain: 51%
- Portugal: 56%
- India: 60%
- Brazil: 81%

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3. ACTIVITIES OF HOLIDAYMAKERS
THIS YEAR AGAIN, EUROPEANS PLAN TO SPEND QUALITY FAMILY TIME AND TO ENJOY A RELAXING SUMMER HOLIDAY.

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

- **54%** Relax, have peace of mind
- **44%** Come together as a family, with your spouse or with friends
- **43%** Discover new cultures, enjoy a total change of scenery
- **15%** Enjoy your home
- **11%** Take time to read, learn new things
- **10%** Make new friendly or romantic acquaintances
- **10%** Play sports (rambling, mountain climbing, etc.)
CHINESE ARE DISTINCTIVE FOR HAVING A MORE ACTIVE APPROACH TO THEIR HOLIDAYS

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

- Come together as a family, with your spouse or with friends
  - China: 28%
  - Brazil: 42%
  - India: 45%
  - United States: 48%

- Relax, have peace of mind
  - China: 25%
  - Brazil: 43%
  - India: 28%
  - United States: 39%

- Discover new cultures, enjoy a total change of scenery
  - China: 39%
  - Brazil: 33%
  - India: 42%
  - United States: 45%

- Enjoy your home
  - China: 23%
  - Brazil: 20%
  - India: 25%
  - United States: 17%

- Take time to read, learn new things
  - China: 31%
  - Brazil: 18%
  - India: 19%
  - United States: 12%

- Make new friendly or romantic acquaintances
  - China: 14%
  - Brazil: 17%
  - India: 14%
  - United States: 10%

- Play sports (rambling, mountain climbing, etc.)
  - China: 30%
  - Brazil: 14%
  - India: 9%
  - United States: 12%
MOST OF THE EUROPEANS WILL COMPLETELY DISCONNECT FROM WORK DURING THEIR HOLIDAYS

Concerning your work, do you think that during your holidays…?

Among those concerned

66% -2
You will completely unplug from your job

20% =
You will still check your emails, but will not necessarily respond to them

10% +1
You will answer emails and/or calls

4% =
You will continue to work, even if only from time to time
WHEN ON HOLIDAYS, NON-EUROPEANS ARE MORE CONNECTED TO THEIR WORK THAN EUROPEANS, EXCEPT FOR THE BRAZILIANS

Among the people concerned

WILL COMPLETELY UNPLUG FROM YOUR JOB

71% 70% 68% 66% 64% 64% 61% 59% 59% 58%

66% 55% 40% 40%
NON-EUROPEANS ARE ALSO MORE CONNECTED TO SOCIAL NETWORKS DURING THEIR HOLIDAYS. IT IS PARTICULARLY THE CASE FOR THE ASIAN HOLIDAYMAKERS

Among the people concerned

WILL USE GENERAL SOCIAL NETWORKS LESS THAN USUAL

General social networks

- **56%**
- **41%**
- **40%**
- **38%**
- **31%**

Photo-sharing social networks

- **54%**
- **38%**
- **33%**
- **33%**
- **22%**

**GAME CHANGERS**
4. HOLIDAY ACCOMODATION: MILLENIALS MORE INTO NEW WAYS TO TRAVEL
HOTELS REMAIN THE PREFERRED ACCOMMODATION FOR THE MAJORITY OF EUROPEANS HOLIDAYMAKERS FOR SUMMER HOLIDAYS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

- **Hotel**: 48%
- **Rental of a house or apartment**: 32%
- **Free of charge with at friends’/family’s houses or in your holiday home**: 21%
- **A bed & breakfast**: 16%
- **Camping**: 11%
- **Boat (e.g. cruise)**: 6%
- **A motor home, camping trailer or mobile home**: 4%
FRANCE REMAINS AN OUTLIER WITH THE MAJORITY OF HOLIDAYMAKERS OPTING FOR SEASONAL RENTALS WHILE THE REST OF EUROPEANS PREFER HOTELS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

<table>
<thead>
<tr>
<th>Country</th>
<th>Seasonal Rentals</th>
<th>Hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>Italy</td>
<td>47%</td>
<td>32%</td>
</tr>
<tr>
<td>Germany</td>
<td>54%</td>
<td>32%</td>
</tr>
<tr>
<td>Austria</td>
<td>61%</td>
<td>26%</td>
</tr>
<tr>
<td>Poland</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>Belgium</td>
<td>53%</td>
<td>32%</td>
</tr>
<tr>
<td>Spain</td>
<td>55%</td>
<td>35%</td>
</tr>
<tr>
<td>Portugal</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>56%</td>
<td></td>
</tr>
</tbody>
</table>
INDIANS ARE MORE KEEN ON CRUISES THAN THE REST OF THE OTHER COUNTRIES

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

- Brazil: 61% Hotel, 36% House, 21% Key
- USA: 55% Hotel, 30% House, 19% Key
- India: 64% Hotel, 30% House, 27% Key
- China: 69% Hotel, 40% House, 34% Key
All over the world, millennials are more interested in new holiday housing practices than the general population

Interest in each of the practices

<table>
<thead>
<tr>
<th>Practice</th>
<th>General Population</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rental of a private individual’s house or apartment</td>
<td>46% / 59%</td>
<td>38% / 59%</td>
</tr>
<tr>
<td>Rental of a room in a private home</td>
<td>24% / 34%</td>
<td>20% / 37%</td>
</tr>
<tr>
<td>Free home exchange between individuals</td>
<td>13% / 20%</td>
<td>16% / 29%</td>
</tr>
</tbody>
</table>

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MILLENIALS ARE ALSO MORE LIKELY TO HAVE ALREADY TESTED NEW KINDS OF ACTIVITIES WHEN TRAVELLING

When travelling, have you ever:

Done at least one of the following kinds of activities:
- Been camping in the wilderness
- Stayed at a local’s home
- Stayed in a cabin in the middle of nature
- Home exchange between individuals
- Hosted travellers in your home
- Eco-tourism
- Socially responsible tourism
- Travelled around the world

<table>
<thead>
<tr>
<th>General Population</th>
<th>53%</th>
<th>67%</th>
<th>70%</th>
<th>70%</th>
<th>74%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>59%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>America</td>
<td></td>
<td>83%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td></td>
<td></td>
<td></td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>77%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Millennials</th>
<th>53%</th>
<th>67%</th>
<th>70%</th>
<th>70%</th>
<th>74%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>59%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>America</td>
<td></td>
<td>83%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td></td>
<td></td>
<td></td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>77%</td>
</tr>
</tbody>
</table>
MILLENIALS MORE LIKELY TO POST A REVIEW OF SERVICES AFTER THEIR HOLIDAY THAN THE GENERAL POPULATION

Has posted a review of these services after the holiday

<table>
<thead>
<tr>
<th>Service</th>
<th>General Population</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>A hotel</td>
<td>70%</td>
<td>76%</td>
</tr>
<tr>
<td>A rental</td>
<td>75%</td>
<td>82%</td>
</tr>
<tr>
<td>A tourist attraction</td>
<td>83%</td>
<td>87%</td>
</tr>
<tr>
<td>A restaurant</td>
<td>92%</td>
<td>95%</td>
</tr>
<tr>
<td>An airline</td>
<td>93%</td>
<td>96%</td>
</tr>
</tbody>
</table>
# ONLINE REVIEWS: 3RD DECISION-MAKING FACTOR IN ACCOMMODATION, AND EVEN SECOND IN CHINA

<table>
<thead>
<tr>
<th>#1</th>
<th>Value for money 67%</th>
<th>Location 63%</th>
<th>Value for money 55%</th>
<th>Value for money 60%</th>
<th>Value for money 59%</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Location 52%</td>
<td>Value for money 57%</td>
<td>Location 46%</td>
<td>Location 48%</td>
<td>ONLINE REVIEWS 51%</td>
</tr>
<tr>
<td>#3</td>
<td>ONLINE REVIEWS 30%</td>
<td>ONLINE REVIEWS 33%</td>
<td>Promotional offers 34%</td>
<td>ONLINE REVIEWS 39%</td>
<td>Services 35%</td>
</tr>
</tbody>
</table>
5. CITIES OF DREAMS, DREAMS OF CITIES
A shared fascination among Europeans and Americans with cities

Cities that Europeans would like to visit at least once in their life:
- **New York**: 25%
- **Paris**: 16%
- **Rome**: 15%
- **London**: 12%

Cities that Americans would like to visit at least once in their life:
- **New York**: 19%
- **Paris**: 15%
- **Rome**: 10%
- **London**: 19%
PARIS ENJOYS THE STRONGEST POWER OF ATTRACTION FOR THE BRAZILIANS, WHO ALSO DREAM OF VISITING SEVERAL CITIES OF THEIR OWN COUNTRY

CITIES THAT BRAZILIANS WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

- **PARIS**: 16%
- **NEW YORK**: 10%
- **LONDON**: 9%
- **RIO DE JANEIRO**: 9%
- **FERNANDO DE NORONHA**: 8%
- **FORTALEZA**: 7%
INDIANS ARE ALSO STRONGLY ATTRACTED BY PARIS

CITIES THAT INDIANS WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

- **PARIS**: 17%
- **LONDON**: 14%
- **NEW YORK**: 13%
- **NEW DELHI**: 7%
- **MUMBAI**: 6%
IN CHINA, PARIS ENJOYS THE STRONGEST POWER OF ATTRACTION FOR CHINESE PEOPLE, WHO ALSO DREAM OF VISITING THEIR CAPITAL.

CITIES THAT CHINESE PEOPLE WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE:

- **PARIS**: 15%
- **BEIJING**: 14%
- **NEW YORK**: 9%
- **LONDON**: 8%
- **TOKYO**: 7%
- **SHANGHAI**: 7%
TOP CITIES THAT PEOPLE DREAM OF VISITING IN EACH COUNTRY

as %

New York 24
New York 26
New York 25
New York 29
New York 27
New York 25
New York 23
New York 21
Paris 27
New York 24

Rome 13
Rome 16
Paris 17
Paris 21
Paris 20
Rome 15
Paris 19
Paris 12
Rome 22
Paris 20

London 9
Sydney 15
Rome 16
Rome 18
London 16
Barcelona 10
London 15
Tokyo 10
New York 17
London 16

Sydney 9
Tokyo 13
London 16
London 15
Tokyo 16
Paris 9
Rome 14
Tokyo 10
Rome 13

Tokyo 9
Paris 13
Sydney 9
Tokyo 12
Rome 7
London 8
Sydney 10
Rome 9
London 9
Rio de Janeiro 12

Venice 8
Barcelona 8
Tokyo 9
Sydney 7
Sydney 7
Tokyo 7
Barcelona 8
Sydney 9
Barcelona 9
Venice 11

Barcelona 5
Venice 7
Vienna 7
Berlin 6
Moscow 7
Prague 7
Tokyo 7
Vienna 7
Sydney 7
Tokyo 10

Los Angeles 5
Barcelona 6
Venice 5
Madrid 6
Sydney 6
Berlin 6
Berlin 6
Cracow 6
Sydney 10

Moscow 5
Barcelona 5
Venice 6
Moscow 6
Moscow 6
Moscow 5
Moscow 5

Rio de Janeiro 5
Amsterdam 5
Vienna 5
Los Angeles 5
Stockholm 6
Prague 5
Beijing 5

Berlin 5
Prague 5
Berlin 5
Rio de Janeiro 5
Barcelona 5
Madrid 5

Stockholm 5
Los Angeles 5
Amsterdam 5

*Cities mentioned by at least 5% of respondents
# TOP 15 CITIES THAT PEOPLE DREAM OF VISITING IN EACH COUNTRY

as %

<table>
<thead>
<tr>
<th>Country</th>
<th>Paris</th>
<th>London</th>
<th>New York</th>
<th>Rome</th>
<th>Sydney</th>
<th>Las Vegas</th>
<th>Tokyo</th>
<th>Dublin</th>
<th>San Francisco</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>19</td>
<td>19</td>
<td>15</td>
<td>10</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Cities mentioned by at least 5% of respondents*
6. SPORTS COMPETITIONS TO TRAVEL TO
THE OLYMPIC GAMES AND SOCCER COMPETITIONS AS THE MOST ATTRACTIVE INTERNATIONAL SPORTS EVENTS TO ATTEND

#1
- TOKYO 2020
- TOKYO 2020
- FIFA WORLD CUP RUSSIA 2018
- FIFA WORLD CUP RUSSIA 2018
- TOKYO 2020

#2
- UEFA EURO2020
- SUPER BOWL
- TOKYO 2020
- TOKYO 2020
- FIBA BASKETBALL WORLD CUP CHINA 2019

#3
- MONACO GRANDPRIX
- FIFA WORLD CUP RUSSIA 2018
- US OPEN
- TOUR DE FRANCE
- WIMBLEDON
- EURO2020
- FIFA WORLD CUP RUSSIA 2018
BUT COMPETITIONS TAKING PLACE LOCALLY ARE ALSO HIGHLY RANKED

<table>
<thead>
<tr>
<th>#1</th>
<th>#2</th>
<th>#3</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 2020</td>
<td>UEFA EURO 2020</td>
<td>US Open</td>
</tr>
<tr>
<td>FIFA World Cup Russia 2018</td>
<td>Super Bowl</td>
<td>le Tour de France</td>
</tr>
<tr>
<td>FIFA World Cup Russia 2018</td>
<td>Tokyo 2020</td>
<td>Champions League</td>
</tr>
<tr>
<td>FIFA World Cup Russia 2018</td>
<td>Tokyo 2020</td>
<td>US Open</td>
</tr>
</tbody>
</table>
FRANCE AND THE UK ALSO FAVOR COMPETITIONS TAKING PLACE LOCALLY

#1
- The 2020 Summer Olympic Games in Tokyo
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 Grand Prix Automobile de Monaco
- The 2020 European Football Championship
- The 2020 Summer Olympic Games in Tokyo
- The 2020 Summer Olympic Games in Tokyo
- The 2020 European Football Championship
- The 2020 European Football Championship
- The 2020 European Football Championship
- The 2020 European Football Championship

#2
- Roland Garros in Paris
- The 2020 Summer Olympic Games in Tokyo
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 Grand Prix Automobile de Monaco
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2020 Summer Olympic Games in Tokyo

#3
- The 2018 Grand Prix Automobile de Monaco
- The 2018 Grand Prix Automobile de Monaco
- The 2020 Summer Olympic Games in Tokyo
- The 2018 Grand Prix Automobile de Monaco
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2018 FIFA Soccer World Cup in Russia
- The 2020 Summer Olympic Games in Tokyo

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Looking specifically at the Grand Slam, the same local preference applies.

<table>
<thead>
<tr>
<th>Average Rank of Interest</th>
<th>Europe</th>
<th>USA</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>#5</td>
<td>#6</td>
<td>#11</td>
<td>#3</td>
<td>#6</td>
<td>#7</td>
</tr>
<tr>
<td>#7</td>
<td>#10</td>
<td>#7</td>
<td>#8</td>
<td>#5</td>
<td>#8</td>
</tr>
<tr>
<td>#10</td>
<td>#3</td>
<td>#8</td>
<td>#5</td>
<td>#8</td>
<td>#7</td>
</tr>
<tr>
<td>#9</td>
<td>#5</td>
<td>#10</td>
<td>#4</td>
<td>#7</td>
<td></td>
</tr>
</tbody>
</table>
IN EUROPE, THE EUROPEAN FOOTBALL CHAMPIONSHIP OF 2020 IS SHORTLY AHEAD OF THE FIFA WORLD CUP OF 2018 IN TERMS OF INTEREST AS A TRAVEL DESTINATION

INTEREST TO TRAVEL TO ATTEND THE COMPETITION

(%)
7. TRAVELLING THE WORLD: A COLLECTIVE IMAGINATION
THAILAND IS CONSIDERED AS THE MOST EXOTIC COUNTRY AND SOUTH AFRICA THE WILDEST

<table>
<thead>
<tr>
<th>Country</th>
<th>Cheapest to Visit</th>
<th>Most Exotic</th>
<th>Wildest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>10%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>28%</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>Brazil</td>
<td>19%</td>
<td>13%</td>
<td>50%</td>
</tr>
<tr>
<td>India</td>
<td>20%</td>
<td>11%</td>
<td>24%</td>
</tr>
<tr>
<td>China</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thailand</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>–</td>
<td></td>
<td>–</td>
</tr>
<tr>
<td>South Africa</td>
<td>–</td>
<td></td>
<td>–</td>
</tr>
<tr>
<td>USA</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FRANCE IS CONSIDERED AS THE MOST ROMANTIC COUNTRY FOR THE NON-EUROPEANS, BUT FOR THE OTHER CRITERIA, EACH NATIONALITY CHOOSES ITS OWN COUNTRY

<table>
<thead>
<tr>
<th>Most welcoming</th>
<th>Spain – 15%</th>
<th>USA 21%</th>
<th>Brazil 52%</th>
<th>India 26%</th>
<th>China 35%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy – 13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most romantic</th>
<th>Italy 39%</th>
<th>France 48%</th>
<th>France 49%</th>
<th>France – 21%</th>
<th>Switzerland – 18%</th>
<th>France 64%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most relaxing</th>
<th>Spain – 11%</th>
<th>USA 17%</th>
<th>Brazil 19%</th>
<th>India 17%</th>
<th>China 21%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy – 8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ITALY IS CONSIDERED AS THE MOST GASTRONOMIC COUNTRY FOR THE EUROPEANS AND THE NORTH AMERICANS. THE OTHER NATIONALITIES CHOOSE THEIR OWN COUNTRY ON MOST CRITERIA

<table>
<thead>
<tr>
<th>Country</th>
<th>Culturally rich</th>
<th>Best food</th>
<th>Most historical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>Italy 22%</td>
<td>Italy 31%</td>
<td>Italy 28%</td>
</tr>
<tr>
<td></td>
<td>Italy 18%</td>
<td>Italy 30%</td>
<td>Italy 18%</td>
</tr>
<tr>
<td></td>
<td>Brazil 19%</td>
<td>Brazil 41%</td>
<td>Italian 14%</td>
</tr>
<tr>
<td></td>
<td>India 35%</td>
<td>India 46%</td>
<td>Greece 13%</td>
</tr>
<tr>
<td></td>
<td>China 62%</td>
<td>China 59%</td>
<td>Egyptian 13%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Italy</th>
<th>Brazil</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>Italy</td>
<td>Brazil</td>
<td>India</td>
<td>China</td>
</tr>
<tr>
<td></td>
<td>31%</td>
<td>19%</td>
<td>35%</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>30%</td>
<td>41%</td>
<td>46%</td>
<td>59%</td>
</tr>
<tr>
<td></td>
<td>28%</td>
<td>14%</td>
<td>28%</td>
<td>64%</td>
</tr>
</tbody>
</table>

**GAME CHANGERS**