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Global Travel Confidence Index



Wave 2: Summer/Winter Travel 2026

Ipsos

Allianz Partners

6 November 2026

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Methodology & Executive Summary



Background, Objectives and Methodology

Background

Allianz Partners have partnered with Ipsos to conduct the Global Travel Confidence Index (GTCI). Wave 1 of the study was conducted in April 2026 among adults aged 18+ across 10 key markets. This report presents findings from Wave 2, expanding the study to an additional five markets.

Key Objectives

The main objectives of the survey are to measure and examine:

- Consumer travel habits and attitudes around leisure travel, including anticipated spend and reasons for not traveling
- Consumer behaviours and attitudes towards travel insurance

Methodology

A survey of n=6005 adults from 5 countries were surveyed online:

- Canada (n=1001)
- Brazil (n=1001)
- Australia (n=1001)
- New Zealand (n=1001)
- Japan (n=2001)

The survey was fielded from September 25 to October 9, 2026.

Overall, the survey has a credibility interval of ± 1.5 per cent 19 times out of 20. For individual countries, the credibility interval is ±3.8 per cent for all countries excluding Japan, and ± 2.7 per cent for Japan.



Study Continuity

The 2026 Global Travel Confidence Index introduced a standardized global methodology across markets and waves.

As a result, year-on-year comparisons with prior country-level studies should be avoided due to differences in survey design, sample sources, questionnaire content and fieldwork timing.

Key Headlines



1. **Travel Demand Endures** — Travel intent remains strong across markets, led by New Zealand (64%) and Australia (58%)
2. **Cost Pressures Won't Stop Travel** — Most travelers are cutting back on non-essential spending rather than giving up vacation plans
3. **Brazil Leads Travel Enthusiasm** — Nearly 9 in 10 Brazilians (88%) view annual vacations as important and 86% say they desperately need a holiday.
4. **Risk Is Shaping Travel Decisions** — Up to 80% of Brazilians and roughly two-thirds of travelers across the five markets surveyed (61%-69%) now factor environmental risks and extreme weather events into destination choices.
5. **Peace of Mind Drives Insurance Demand** — 85% of travelers cite peace of mind as a key reason for purchasing travel insurance, with protection from disruptions and medical emergencies among the leading drivers.

Executive Summary (1/3)

Travel demand is resilient despite economic and global uncertainty

Travel continues to be a high priority across all five markets, with a majority planning to travel this season and most agreeing that taking an annual vacation is important. Many travelers are actively reducing discretionary spending elsewhere to preserve travel plans, demonstrating that vacations remain a protected category rather than a discretionary luxury. Brazil stands out for particularly strong travel enthusiasm, while Australia and New Zealand report the highest travel intentions and expected spend.

Travelers are navigating a growing number of risks, creating a strong rationale for insurance

Across markets, travelers report high levels of concern about rising travel costs, travel disruptions, safety issues, weather-related events, medical emergencies and geopolitical uncertainty. In parallel, many travelers say environmental risks and stricter border controls are influencing destination choices. Brazilian travelers consistently exhibit the highest concern levels, while Australians and New Zealanders are particularly attuned to weather and disruption risks.



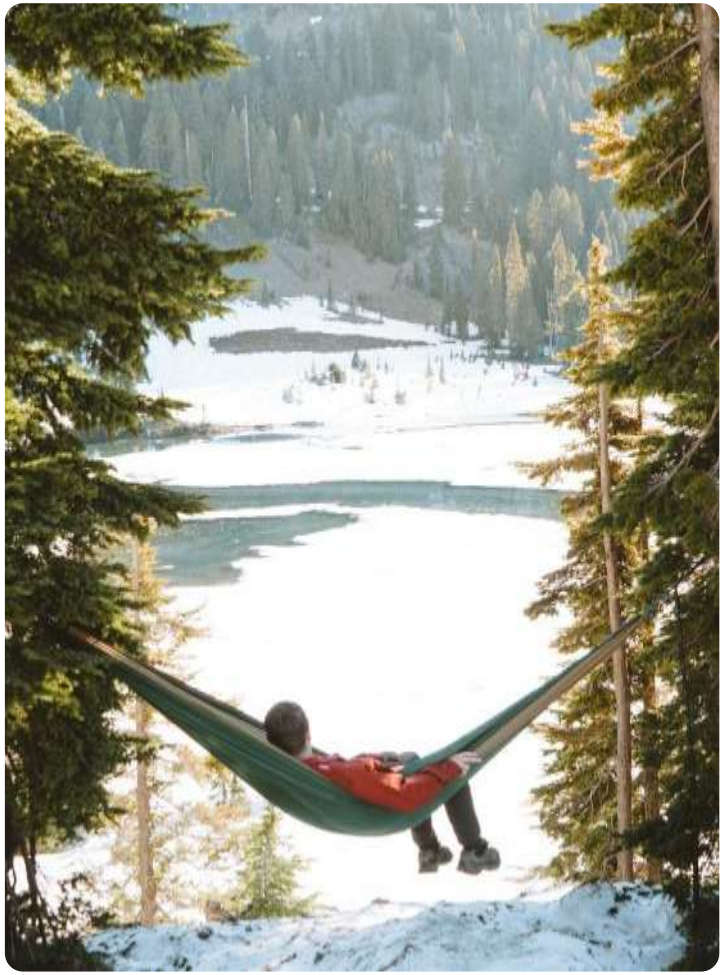
Executive Summary (2/3)

Travel insurance uptake is strongest in Canada and weakest in Japan

Travel insurance consideration is strongest in Canada, where nearly three-quarters already have or intend to obtain coverage. Japan sits at the other end of the spectrum, with lower purchase intent and a higher proportion of travelers planning to travel uninsured. Across all markets, insurance is most commonly considered during the trip-booking journey.

Peace of mind is the top driver of purchase

Travelers consistently cite peace of mind, protection against travel disruptions, and medical support abroad as the primary drivers of purchase. Administrative requirements, such as visas or entry requirements, along with loyalty benefits, play a much smaller role.



Executive Summary (3/3)

Affordability is the primary barrier to travel insurance purchase

Among travelers who do not purchase insurance, the most common reasons are a perceived lack of need, low perceived trip risk, and concerns about value relative to trip cost. When asked what would increase future purchase likelihood, affordability emerges as the clear leading lever across all five markets.



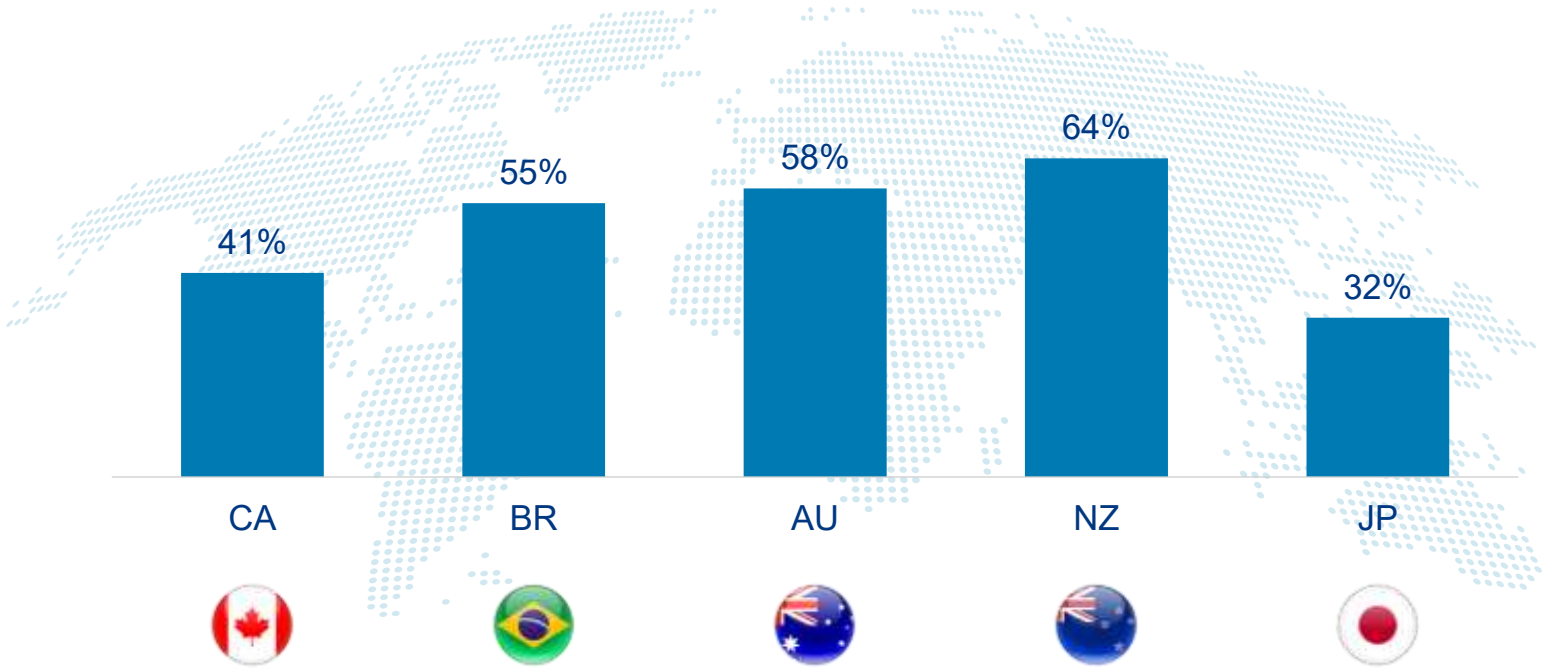
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Global Travel Plans



Seasonal travel intent is strong, though Canada and Japan lag behind Australia, New Zealand and Brazil

Plan to Travel for Vacation This Summer/Winter





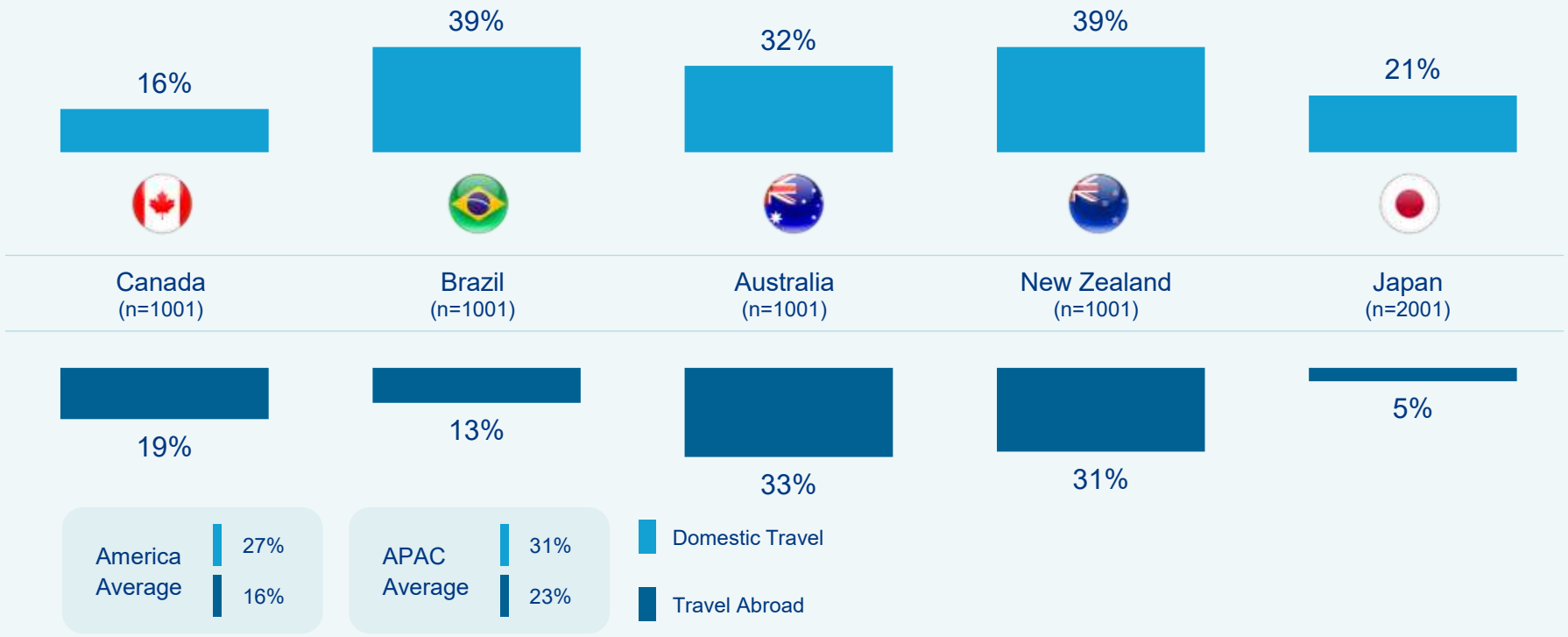
Q1. Are you planning to travel for (vacation/holiday) this season? If so, to which destinations?
Base: All respondents (n=6005); Canada (n=1001); Brazil (n=1001); Australia (n=1001); New Zealand (n=1001); Japan (n=2001)

Travelers tend to favour domestic getaways, while Australian and New Zealanders lead overseas travel plans

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Domestic and International Travel Patterns

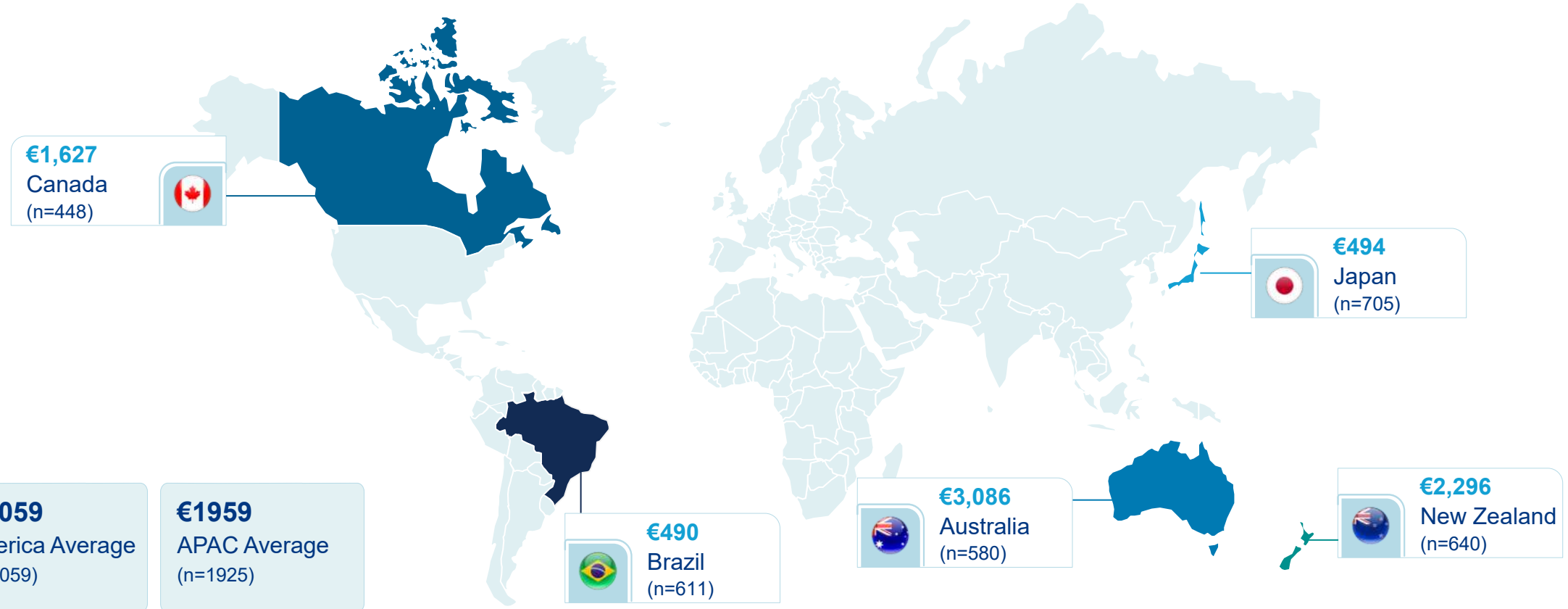




Q1. Are you planning to travel for (vacation/holiday) this season? If so, to which destinations?
Base: All respondents (n=6005); Canada (n=1001); Brazil (n=1001); Australia (n=1001); New Zealand (n=1001); Japan (n=2001)

Australian and New Zealander travelers plan to spend significantly more on travel than other markets

Anticipated Spend on Vacation/Holiday Per Person*



Q2. How much do you anticipate spending on (vacation/holiday) this season per person?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)
*Anticipated spend was captured in local currency and then converted to Euro for comparability.

Higher travel budgets in Canada, Australia and New Zealand contrast with lower planned spending in Japan and Brazil

Anticipated Spend on Vacation/Holiday Per Person



	Canada (n=448)	Brazil (n=611)	Australia (n=580)	New Zealand (n=640)	Japan (n=705)
	A	B	C	D	E
Under 500 Euro	24%	76% ACD	25%	35% AC	75% ACD
500 to 999 Euro	22% E	16%	20% E	20% E	14%
1,000 to 1,999 Euro	32% BDE	4%	27% BE	22% BE	7%
2,000 and over Euro	22% BE	4%	28% BDE	23% BE	5%
	€1,627	€490	€3,086	€2,296	€494

Q2. How much do you anticipate spending on (vacation/holiday) this season per person?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

Travel is a non-negotiable priority for most travelers, particularly in Brazil, despite financial pressures

Travelers' Personal Values and Desires – % Agree (1/2)



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Taking an annual vacation is important to me	76%	88% **ACD**	82% **A**	82%	84% **A**
I desperately need a (vacation/holiday) this year	72%	86% **ACDE**	79% **AE**	76% **E**	69%
I am reducing non-essential spending to afford travel	63%	77% **ACE**	70%	71% **AE**	65%
I now take environmental risks and extreme weather events into account when choosing a destination	65%	80% **ACDE**	69% **E**	67%	61%
I'll be scaling back my (vacation/holiday) plans this year	50%	66% **ACDE**	59% **AE**	57% **E**	46%

Q3. To what extend do you agree or disagree with the following?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

Travelers' priorities vary across markets, with Brazil leading on AI use and Canada most concerned about border controls

Travelers' Personal Values and Desires – % Agree (2/2)



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Stricter border controls in several countries will change my choice of destination	65% **CDE**	60% **D**	54%	50%	57% **D**
I feel vulnerable to cyber risks when traveling	47%	67% **ACDE**	60% **ADE**	48%	53% **D**
I have used or plan to use Artificial Intelligence to help me plan my (vacation/holiday)	41%	70% **ACDE**	44%	43%	47%
I am investing more in luxury travel experiences this year	33% **D**	44% **ACD**	35% **D**	27%	48% **ACD**
I prefer to include my pet(s) when I travel	29% **E**	51% **ACDE**	34% **DE**	28% **E**	23%

Q3. To what extend do you agree or disagree with the following?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

Event-driven and experiential travel resonates strongly across all markets

Likely or Already Planned Vacation Activities (1/2)



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Attend a ticketed concert or festival, performing arts event, etc.	45% **E**	60% **ACDE**	50% **E**	51% **E**	36%
Attend a ticketed sporting event	44% **DE**	54% **ACDE**	42% **E**	37% **E**	25%
Practice a sport or hobby requiring equipment (rental or owned) during my (vacation/holiday)	35%	51% **ACDE**	43% **AE**	40% **E**	28%
Travel for the main purpose of attending a ticketed event (sport, concert, performing arts event, etc.)	33%	48% **ACDE**	37%	40% **A**	35%
Staying at a spa/health retreat	36%	52% **ACDE**	38% **DE**	32%	30%

Q4. How likely is it that you do the following activities while traveling this season?
Base: Those who plan to travel and are likely or already planned the selected activities:
Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

Brazil leads the rise of flexible travel, remote work and digital nomadism

Likely or Already Planned Vacation Activities (2/2)



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Extend the length of my trip to combine work and leisure	30% **E**	55% **ACDE**	31% **E**	28% **E**	23%
Take a cruise, riverboat or expedition voyage	34% **E**	43% **ADE**	39% **DE**	29% **E**	22%
Work remotely away from home for a short period (a few weeks)	29% **E**	49% **ACDE**	35% **DE**	28% **E**	20%
Work remotely away from home for an extended period, at least several months (be a digital nomad)	27%	43% **ACDE**	27% **DE**	21%	22%

Q4. How likely is it that you do the following activities while traveling this season?
Base: Those who plan to travel and are likely or already planned the selected activities:
Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

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Challenges & Travel Deterrents



Cost is the primary barrier to travel across all markets

Barriers to Going on Vacation/Holiday this Season (1/2)



	Canada (n=553) A	Brazil (n=390) B	Australia (n=421) C	New Zealand (n=361) D	Japan (n=1296) E
I do not have/don't want to spend the money to travel	66% **E**	63% **E**	70% **E**	74% **ABE**	50%
I find travelling has become too expensive	30% **BE**	13%	31% **BE**	35% **BE**	21% **B**
I prefer to stay home for personal enjoyment or comfort	28% **BCE**	18%	21%	27% **BE**	20%
I don't have anyone to travel with	14% **C**	14% **C**	8%	13%	20% **ABCD**
I have personal obligations	12%	13%	18% **ADE**	13%	12% **B**
Winter/summer vacation is not important to me	12% **BE**	4%	14% **BE**	10% **B**	8%
Too many people travel during the vacation/holiday season	5%	3%	15% **AB**	12% **AB**	11% **AB**

Q5. Please select all the reasons that are preventing you from taking a (vacation/holiday) this season.
Base: Among those not planning to travel:
Total (n=3021); Canada (n=553); Brazil (n=390); Australia (n=421); New Zealand (n=361); Japan (n=1296)

ABCDE indicate significantly higher than other countries @95% confidence.

Practical considerations outweigh external risks as travel deterrents

Barriers to Going on Vacation/Holiday this Season (2/2)



	Canada (n=553) A	Brazil (n=390) B	Australia (n=421) C	New Zealand (n=361) D	Japan (n=1296) E
I don't want to take the time off from work	8% B	3%	9% B	10% BE	6%
I am concerned about extreme weather events	6% E	5%	5%	4%	3%
I am concerned about the risks of travel disruptions	8% BE	2%	5% BE	6% BE	2%
I am concerned about the geopolitical instability	10% BDE	2%	7% BDE	3% E	1%
I don't want to because planning a (vacation/holiday) is stressful or time-consuming	5%	2%	4%	4%	6% B
I want to limit my impact on the environment	3% BE	1%	3% E	2% E	1%
Travel advice/advisories has/have been making me nervous	2% E	2% E	2% E	1%	0%

Q5. Please select all the reasons that are preventing you from taking a (vacation/holiday) this season.
Base: Among those not planning to travel:
Total (n=3021); Canada (n=553); Brazil (n=390); Australia (n=421); New Zealand (n=361); Japan (n=1296)

ABCDE indicate significantly higher than other countries @95% confidence.

Travelers face a broad range of concerns, led by cost and financial pressures

Concerns Around Travel (1/2) – Very/Somewhat Concerned



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Rising travel costs	75%	78%	81% AE	82% AE	76%
Personal financial status	58%	66% AE	65% E	67% BE	58%
Safety and security	61% DE	74% ACDE	65% DE	52%	51%
Extreme weather risks	55%	67% ACDE	59%	56%	59%
Global geopolitical issues	61% E	63% DE	64% DE	56% E	45%
Travel delays and cancellations	62% DE	64% DE	59% D	53%	53%
Health issues while traveling	55%	63% ADE	60% DE	52%	50%

Q6. Regarding your seasonal (vacation/holiday), how concerned are you about each of the following?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

Brazilian travelers exhibit the highest travel concerns across financial, health and climate risks

Concerns Around Travel (2/2) – Very/Somewhat Concerned



	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
Public health	54% D	70% ACDE	55%	49%	53%
Climate crisis	48%	72% ACDE	52%	50%	57% AD
Medical emergencies	51% E	65% ACDE	58% DE	50% E	42%
Lost or delayed luggage	54% E	64% ACDE	53%	47%	47%
Personal obligations	51%	61% ACDE	50%	45%	46%
Lost travel documents	45% E	61% ACDE	51% DE	41% E	33%
Device repair/replacement	40%	52% ACDE	41%	36%	36%

Q6. Regarding your seasonal (vacation/holiday), how concerned are you about each of the following?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

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Travel Insurance
Purchase



Canadian travelers are most likely to have travel insurance, while Japanese travelers are most likely to travel uninsured

Likelihood to Purchase Travel Insurance for Vacation/Holiday



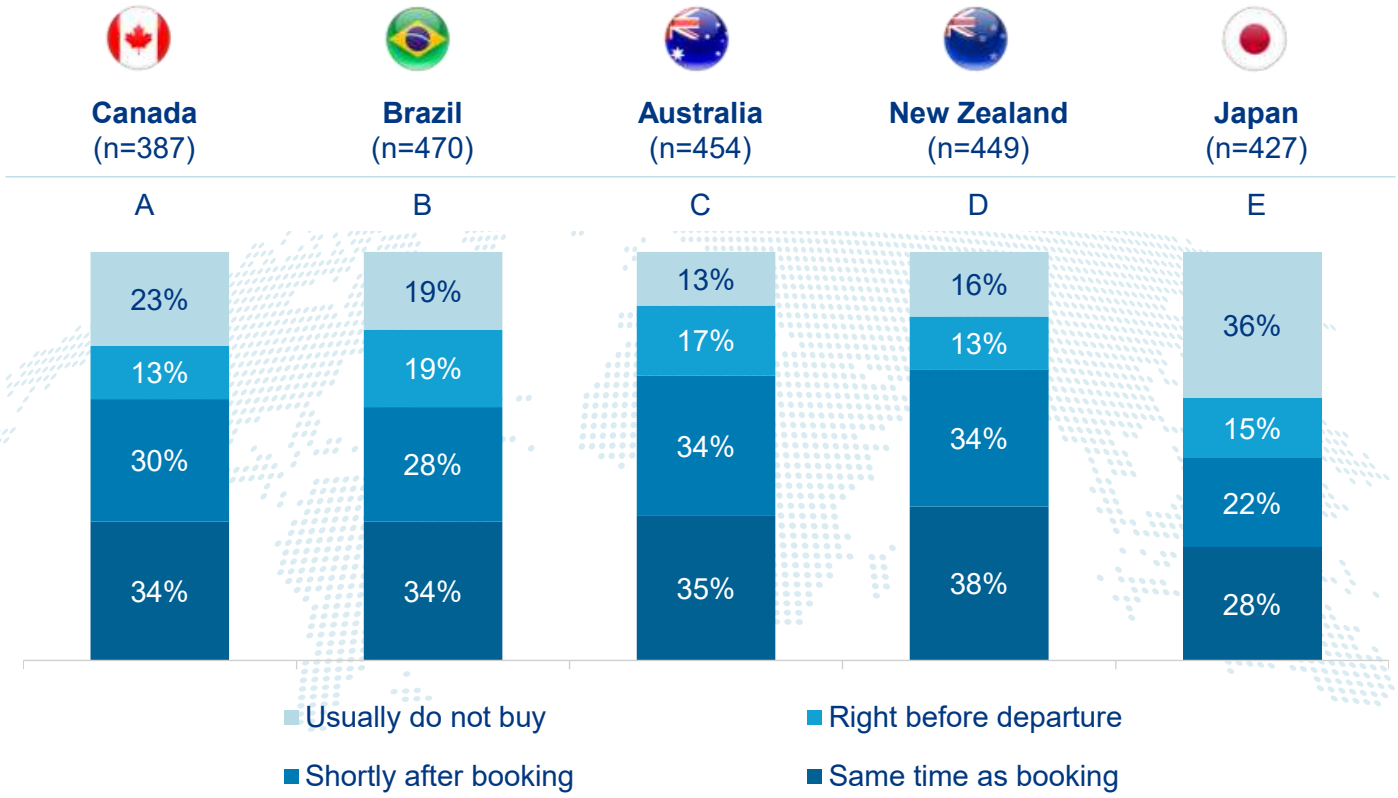
	Canada (n=448) A	Brazil (n=611) B	Australia (n=580) C	New Zealand (n=640) D	Japan (n=705) E
NET (Have/likely to get insurance)	73% **BCDE**	59% **E**	63% **E**	59% **E**	42%
I have already purchased a single policy for this season (vacation/holiday)	10% **BE**	6%	10% **BE**	9% **BE**	5%
I have an annual policy that covers this season (vacation/holiday)	17% **BCDE**	5%	7%	7%	5%
I am covered already by my credit card or bank account	19% **BC**	11%	12%	14%	19% **BCD**
Very likely	18% **E**	25% **ADE**	24% **ADE**	19% **E**	7%
Somewhat likely	8%	13% **E**	10%	9%	7%
Not sure	13%	17%	16% **D**	12%	17% **D**
I will not purchase travel insurance this season	15%	24% **A**	21% **A**	29% **AC**	40% **ABCD**

Q7. Regarding your travel plans this season, how likely are you to purchase travel insurance for your (vacation/holiday)?
Base: Those who plan to travel: Total (n=2984); Canada (n=448); Brazil (n=611); Australia (n=580); New Zealand (n=640); Japan (n=705)

ABCDE indicate significantly higher than other countries @95% confidence.

Travel insurance is most commonly purchased during the trip-booking journey, while Japanese travelers are most likely to opt out of coverage

When Deciding to Purchase Travel Insurance





Q8. When do you typically decide to purchase travel insurance? Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Peace of mind and protection from disruptions are the top drivers of insurance purchase across the markets

Reasons for Purchasing Travel Insurance – % Important



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Peace of mind/general security	83%	86% E	87% E	89% AE	81%
For unforeseen events or disruptions while travelling	80%	86% E	88% AE	90% AE	80%
For medical assistance and repatriation	83% E	83% E	87% E	86% E	67%
For reimbursement of medical costs abroad	84% E	84% E	86% E	83% E	73%
For reimbursement in case I must cancel my trip	77%	80% E	84% AE	82% E	71%
For possible baggage issues	69%	82% AE	82% AE	83% AE	74%
Requirement (e.g., Visa, business travel, airline tour, etc.)	68%	78% ADE	75% ADE	68%	69%
Someone else told me to/ organised it for me	56%	74% ACDE	58% D	50%	53%

Q9. How important are each of the following reasons for purchasing travel insurance for your summer [vacation/holiday]?
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Coverage, support and claims experience are the leading drivers of provider choice

Top Features Valued Most in a Travel Insurance Provider (1/2)



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Coverage options and flexibility	54%	47%	59% **B**	59% **B**	62% **AB**
Contact center available 24/7	48%	56% **CD**	46%	45%	60% **ACD**
Claims experience: ease and speed	47% **BE**	38%	49% **BE**	53% **BE**	37%
Emergency assistance coordination	43% **BE**	28%	41% **BE**	42% **BE**	30%
Trusted medical network	32%	44% **AD**	39% **AD**	31%	39% **D**

Q10. What are the top three features you value most in a travel insurance provider?
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Core protection benefits outweigh digital features, though digital experience matters more in Brazil

Top Features Valued Most in a Travel Insurance Provider (2/2)



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Proactive claims (automatic insurance payouts triggered by predefined events)	25%	23%	23%	26%	21%
Self-service portal	19%	20%	19%	18%	23%
Digital user experience	17% **E**	25% **ACDE**	15% **E**	15% **E**	9%
Documentation ease	16% **C**	20% **CD**	10%	12%	20% **CD**

Q10. What are the top three features you value most in a travel insurance provider?
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Direct purchase channels dominate particularly in Australia and New Zealand, and agencies or travel sites are more popular in Japan compared to other markets

Where Travel Insurance is Purchased Most Often



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Directly from an insurer	30%	27%	38% **ABE**	37% **ABE**	25%
Through an airline	5%	10% **AE**	13% **AE**	10% **AE**	5%
Through a travel agency/tour operator	10%	16% **ACD**	10%	9%	15% **ACD**
Through an online travel site	10%	13% **CD**	8%	8%	19% **ABCD**
Covered through my credit card or bank	21% **BC**	11%	11%	18% **BC**	21% **BC**
Through my bank	9% **E**	8% **E**	6% **E**	8% **E**	3%
From an insurance agent/broker	9% **CDE**	6%	5%	4%	3%
Through a hotel website	1%	3% **D**	2%	1%	3% **AD**
From an insurance comparison website	2%	2%	6%	2% **ABD**	4% **D**
Other	3%	3%	2%	2%	2%

Q11. Where do you most often purchase travel insurance?
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Perceived low risk and limited trip value are the main reasons travelers skip insurance

Reasons Will Not Purchase Travel Insurance (1/2)



	Canada (n=61)*	Brazil (n=141)	Australia (n=126)	New Zealand (n=191)	Japan (n=278)
	A	B	C	D	E
The risk of something happening is too low	50% E	32%	40%	38%	33%
The cost of my trip is not worth insuring	24%	19%	29% E	29% E	18%
It is too expensive for what it is	40% DE	23%	28% E	24% E	15%
The length of my trip is too short	28%	18%	20%	23%	27%
I'd rather save the money for the trip itself	22%	19%	16%	21%	17%
I believe in personal responsibility	13%	23% D	18% D	10%	15%

Q12. Why are you not planning on purchasing any travel insurance for your [vacation/holiday] this season? Base: Among those who plan to travel without insurance: Total (n=797); Canada (n=61); Brazil (n=141); Australia (n=126); New Zealand (n=191); Japan (n=278)
* Indicates small base (<100)

ABCDE indicate significantly higher than other countries @95% confidence.

Trust and complexity play a minor role compared with perceptions of limited need

Reasons Will Not Purchase Travel Insurance (2/2)



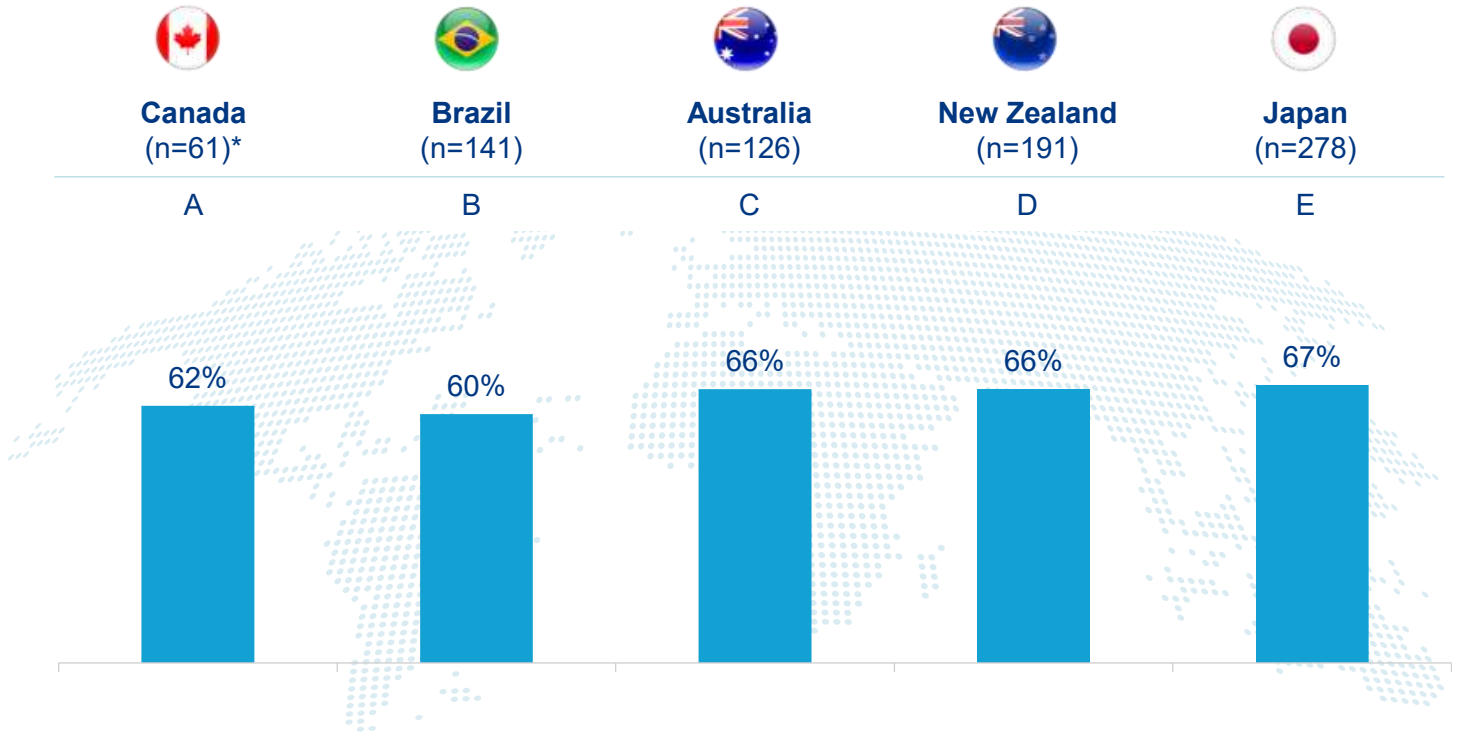
	Canada (n=61)* A	Brazil (n=141) B	Australia (n=126) C	New Zealand (n=191) D	Japan (n=278) E
I think I am already sufficiently covered by my health insurance	13%	9%	14%	8%	12%
My trip bookings are flexible enough	12%	9%	7%	10%	6%
I don't trust insurers to pay out my claims	14% **E**	7%	5%	6%	3%
Travel insurance seems too complicated to understand	0%	8%	10% **AD**	4%	6%
The coverage terms are too limited with exclusions and conditions	4%	5%	8% **D**	3%	4%
Other	5%	1%	11% **B**	19% **ABE**	7% **B**

Q12. Why are you not planning on purchasing any travel insurance for your [vacation/holiday] this season? Base: Among those who plan to travel without insurance: Total (n=797); Canada (n=61); Brazil (n=141); Australia (n=126); New Zealand (n=191); Japan (n=278)
* Indicates small base (<100)

ABCDE indicate significantly higher than other countries @95% confidence.

Affordability is the clear lever for converting travel insurance non-buyers across markets

What Would Make Purchase of Travel Insurance More Likely in the Future – Affordability





Q13. What would make you more likely to purchase travel insurance in the future? Base: Among those who plan to travel without insurance:
Total (n=797); Canada (n=61); Brazil (n=141); Australia (n=126); New Zealand (n=191); Japan (n=278)
* Indicates small base (<100)

ABCDE indicate significantly higher than other countries @95% confidence.

Coverage flexibility and convenience are key secondary drivers of future purchase consideration

What Would Make Purchase of Travel Insurance More Likely in the Future – Other Factors



	Canada (n=61)*	Brazil (n=141)	Australia (n=126)	New Zealand (n=191)	Japan (n=278)
	A	B	C	D	E
If bundled with travel booking	25%	24%	25%	24%	18%
More flexible coverage options	27%	17%	34% ABD	19%	21%
Ability to earn loyalty points or miles	11%	23%	17%	16%	18%
Easier/faster claims process	16%	13%	17%	14%	13%
Ability to pay with loyalty points or miles	10%	22% DE	15%	8%	12%
Access to live customer support	11% E	18% CDE	8% E	8% E	3%

Q13. What would make you more likely to purchase travel insurance in the future? Base: Among those who plan to travel without insurance:
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Immediate support and digital claims functions are the most valued travel insurance app features

Expected Mobile App Features for Travel Insurance (1/2)



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Access 24/7 customer support and emergency assistance services	58% BE	48% E	64% BE	66% ABE	39%
View and manage insurance policy	41% E	34%	43% BE	50% ABCE	28%
Start claims digitally and auto handling of potential claims/damages	41% BE	26%	40% BE	50% ABCE	27%
24/7 real-time medical interaction	38% BE	40% E	40% BE	41% BE	22%
Storing travel documents	26%	32% E	33% AE	34% AE	21%
Travel alerts/safety advice	28% E	23%	36% ABE	36% ABE	18%
Cashless hospital access abroad	28% E	21% E	33% BE	39% ABE	15%

Q14. Which features would you expect or value in a mobile app provided by your travel insurer? Please select all that apply.
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

Practical utility matters most in desired travel insurance app features, while Japanese travelers are least likely to use an app for insurance

Expected Mobile App Features for Travel Insurance (2/2)



	Canada (n=387) A	Brazil (n=470) B	Australia (n=454) C	New Zealand (n=449) D	Japan (n=427) E
Trusted hospital finder	27% E	25% E	31% BE	34% BE	18%
Proactive benefits for travel disruption	24%	24% E	28% AE	34% ABE	17%
Cyber protection	17%	19%	27% ABE	27% ABE	17%
Digital wallet	17%	26% AE	28% ADE	22% E	12%
e-Sim	15%	24% AE	24% AE	25% AE	11%
Other	0%	0%	0%	0%	0%
I wouldn't use an app	9% B	3%	9% B	6% B	18% ABCD

Q14. Which features would you expect or value in a mobile app provided by your travel insurer? Please select all that apply.
Base: Among those who plan to travel with insurance: Total (n=2187); Canada (n=387); Brazil (n=470); Australia (n=454); New Zealand (n=449); Japan (n=427)

ABCDE indicate significantly higher than other countries @95% confidence.

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