

EY Future Travel Behaviors Observatory

Travel insights and future
expectations

2024 edition



Now in its fourth edition, the EY Future Travel Behaviors Observatory has garnered insights from over 5,000 contributors across Italy, France, Germany, the United Kingdom, and Spain.

Our analytical approach combines explicit questions with implicit psychological tests. This allows us to probe the unconscious motivations that influence travel choices.

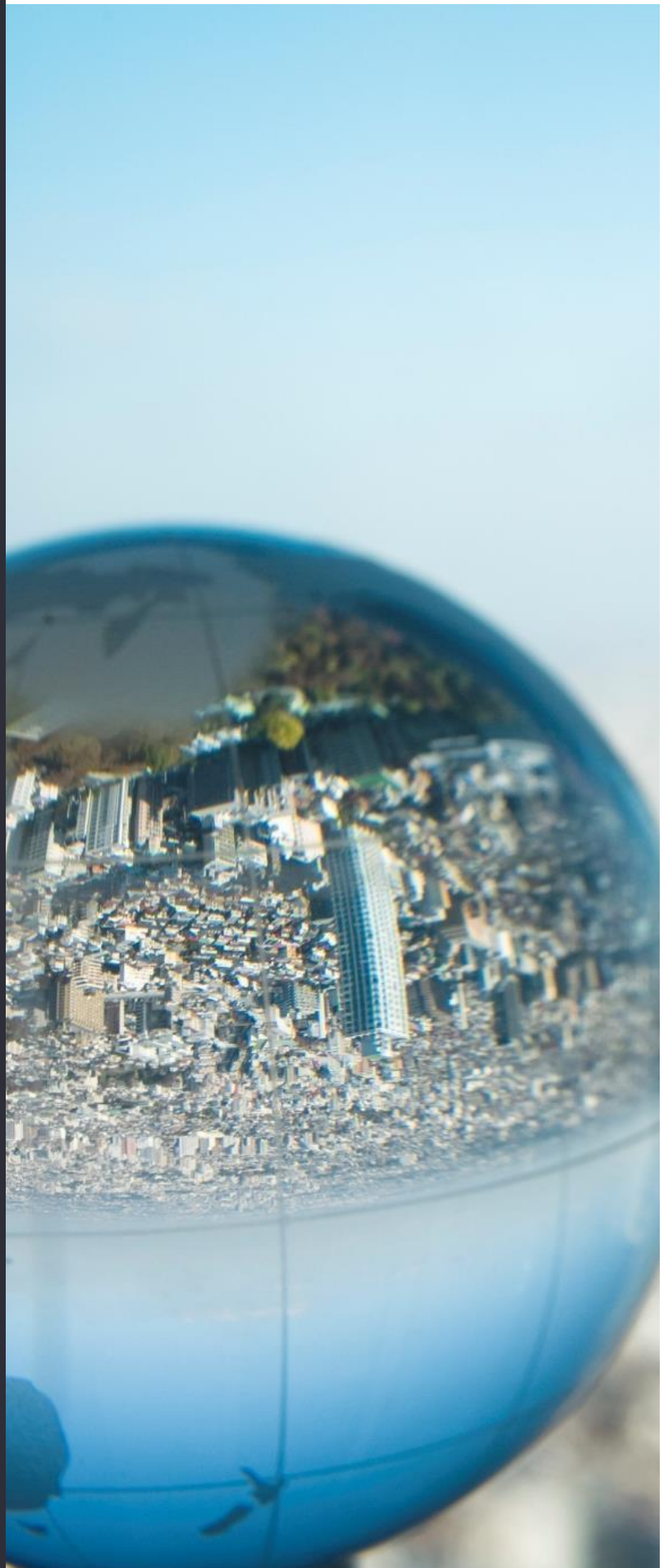
In addition to studying travel habits and future behaviors, the analysis detects differences in travel choices and preferred destinations among travelers from different countries.

The Observatory provides an analysis of travel intentions (greater or lesser propensity than in the past, modes of transport and preferred destinations), factors influencing choices, desired free and paid ancillary services, inclination to make sustainable choices.

Some themes that emerged significantly in 2023 have also been analyzed this year: the influence of inflation on travel intentions, the emerging trend to combine leisure and business, and the travel behaviors and intentions of younger generations.

In addition, the present edition of the Observatory includes new dimensions of analysis, such as the use of digital tools in the inspiration and planning phases of travel, the propensity to use artificial intelligence (AI) tools, and behaviors related to routine short-distance journeys.

On some topics, participants were asked to provide free-text responses, which were analyzed with the help of generative AI (GenAI) tools.





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Main findings

1

Now in its fourth edition, the EY Future Travel Behaviors Observatory has garnered insights from over 5,000 contributors across Italy, France, Germany, the United Kingdom, and Spain.

Travel: the growth trend continues

In continuity with 2023, there is an increase in travel intentions in 2024, with Spain and Italy emerging as the most coveted destinations for European travelers. Nine out of ten travelers plan at least one leisure trip this year.

The desire to visit distant destinations is also growing: 28% would like to make at least one trip outside of Europe.

Business travel is also seeing a recovery. European intentions are in line with estimates, predicting a return to pre-pandemic levels in 2024. The share of those traveling for business rose from 26% to 34%, and 20% of business travelers will increase their trips.

In 2023, travel grew across all modes of transport. In particular, the share of those who traveled for leisure by plane increased from 54% to 62%, and those who traveled by train from 38% to 47%.

The new trend: combining leisure and business

There is growing interest in combining leisure and business in the same trip. Around 12% intend to do so in 2024, twice as many as in 2023. Almost one in two travelers are interested in combining leisure and business in the future. The share is even higher among the younger generations: 63% among Millennials and 71% among Gen Z. All the various ways of mixing business and leisure are of interest: workation (working remotely from a leisure location for a limited period of time), bleisure (extending your business trip with a few days of leisure), team bonding (traveling with your work group to strengthen cohesion) and digital nomadism (working remotely around the world, thanks to technology).

The shadow of inflation

Around 65% of respondents expressed caution with regard to rising travel costs and do not exclude having to make some sacrifices to meet their travel goals. And 19% declared that their passion for travel outweighs their concern about costs and are ready to limit other expenses if necessary.

Traveling with AI: many expectations and some fears

A strong interest in using AI has emerged among travelers. Five out of ten travelers would use an AI virtual assistant to plan their trips and 13% of Millennials and Gen Z have already used an AI-based chatbot (such as ChatGPT) at least once to get ideas or plan their trips. Participants were asked how they would describe a future in which they interact with AI to plan and manage their trips. Of those who would personally use AI, 26% emphasized the usefulness of such a scenario, 19% mentioned the convenience and simplification, and 18% the innovative aspects, while 14% of respondents mainly expressed interest and curiosity. Among those who currently rule out using AI personally, 23% expressed fear and 9% scepticism and uncertainty.



Green travel choices: more information and offers needed

How much does sustainability influence travelers' choices? About 50% said they value environmental impact in their travel choices.

Only 30% said they have never considered sustainability in their travel choices. The majority of respondents declared a willingness to pay an extra charge to offset the CO₂ emissions of their journey. Implicit Association Test (IAT) also indicates that two-thirds of the participants have an implicit attitude of inclination toward environmental issues. But when asked which factors most influence travel choices, the prevailing answers were still price, comfort, and total time: sustainability is indicated by only 20% of participants. Similar to the 2023 report, 15% of respondents indicated that information about sustainable travel options is one of the top four air travel-related services that could influence their choice.

What could encourage travelers to make more eco-sustainable choices? The question was directly asked to the participants in the study. Around 37% provided answers related to the expectation of more eco-friendly information and offers from industry operators. About 27% of answers mentioned economic incentives and 15% pointed to the adoption of sustainable processes and materials (energy from renewable sources and reduction of plastic) by travel providers. Finally, 13% of participants mentioned greater transparency and 8% the use of technology and innovation for sustainability.

The future of travel according to the new generation

The behaviors and intentions of Generation Z provide valuable clues as to how travel will evolve in the future.

Around 71% of Gen Z were interested in combining leisure and business (+27% compared with the overall sample). They are more inspired by social media (51%) films and TV series (23%) than other generations to decide and plan their trips.

Gen Z are much more open to the idea of using an AI-based virtual assistant to plan trips (59% against the 45% average). More than anyone else, they expect services similar to those of main commercial digital platforms, such as one-click buying (44%, +13% compared with the overall sample) and access to premium services through a subscription fee (27%, +10% compared with the overall sample).

Gen Z also pay greater attention to the sustainability of travel and they are more willing than other generations to pay a premium to offset carbon emissions. They claim, more than everyone else, to have made past travel choices thinking about sustainability, and they are the most interested in information on sustainable travel options and guarantees on the effective sustainability of travel offers.



Recurring behaviors and new features among traveler profiles

The study identified eight traveler profiles, which in part confirm the trends of the previous edition: the Hypertravelers travel a lot for leisure and business and expect personalised experiences, the Serial vacationers plan frequent vacations to have fun and spend time with family and friends. On the opposite side, there are the Reluctant travelers, who don't particularly enjoy traveling, and the Inflation Concerned, whose choices are influenced by concern for their purchasing power. The Environment Concerned segment, especially attentive to the environmental impact of their trips, is also confirmed.

In the digital age, emerging profiles are characterized by their relationships with technology. The Tech-Suspicious Seniors are baby boomers and GenX reluctant to use virtual assistants and other digital tools when they travel. The AI Dislikers are predominantly Millennials who, while being digital natives, do not trust AI. While the Techno-Travelers are Gen Z and Millennials comfortable using digital tools to travel and very interested in AI.

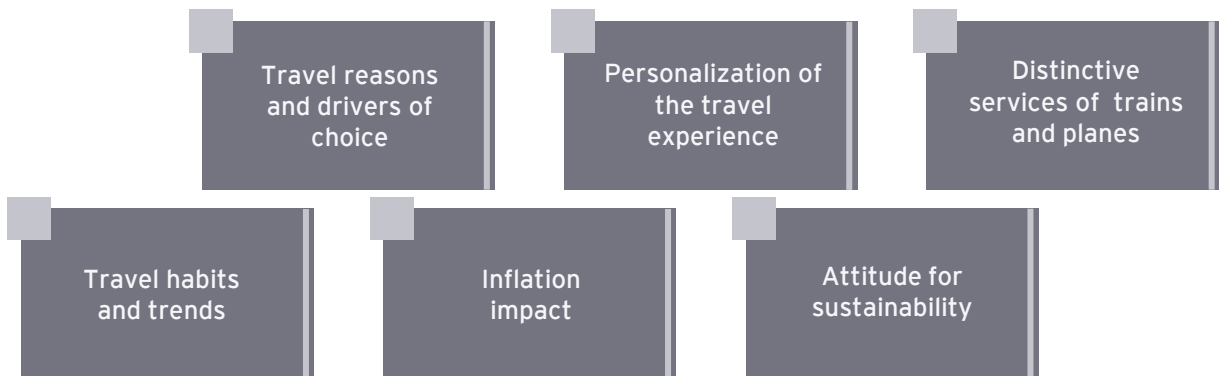
2



This section reports the main findings on:

- 1 Current and future behaviors of travelers and the factors influencing travel choices

Factors analyzed in leisure and business travel



More than 5,000 participants from five European countries responded to questions regarding **travels of at least 100 kms for leisure or business**, carried out in either one day or involving accommodation for one or multiple nights.

The **main factors influencing travelers** were analyzed, such as inflation, the customization of the travel experience, environmental impact, and the propensity of travelers to combine business and leisure in various forms. Additionally, the trend in finding inspiration or in planning trips using digital tools, such as social media, websites, films and TV series, was examined.

- 2 Frequency and modes of transport for routine short-distance journeys. Participants responded to questions about their daily short trips for business, study, or other reasons (distance less than 100 kms), and about factors that could encourage sustainable mobility.

Factors analyzed in short-distance journeys



Travel behaviors and future intentions

2

Leisure travel: Travel intentions 2023-2024

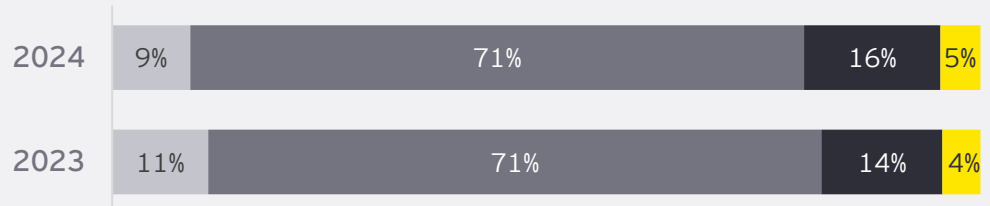
The intentions reported by the Observatory indicate a **growth in leisure trips in 2024**, mirroring those that emerged in 2023.

The share of people who **do not plan to make any trips** saw a decrease by 2 percentage points (pp), to 9%.

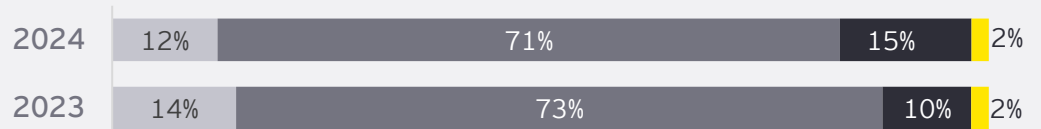
Travel frequency

No travel
 From 1 to 4
 From 5 to 10
 Over 10

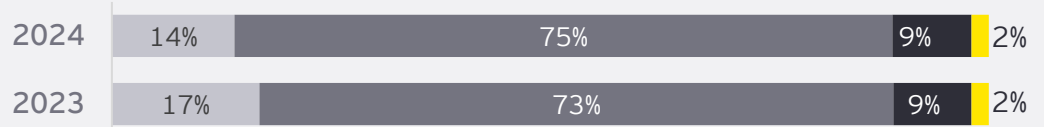
All



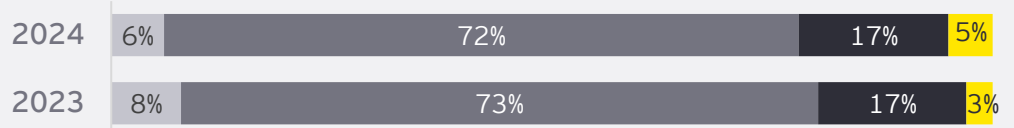
France



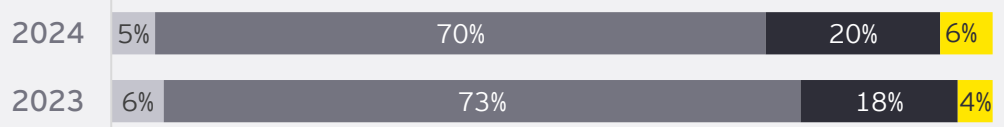
Germany



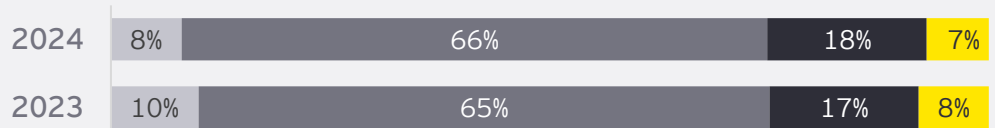
Italy



Spain



UK



Note: The five countries displayed have been ordered in alphabetical order in English.

Note: the data shown for 2023 represents travel forecasts as measured by the EY Future Travel Behaviors 2023 Observatory.

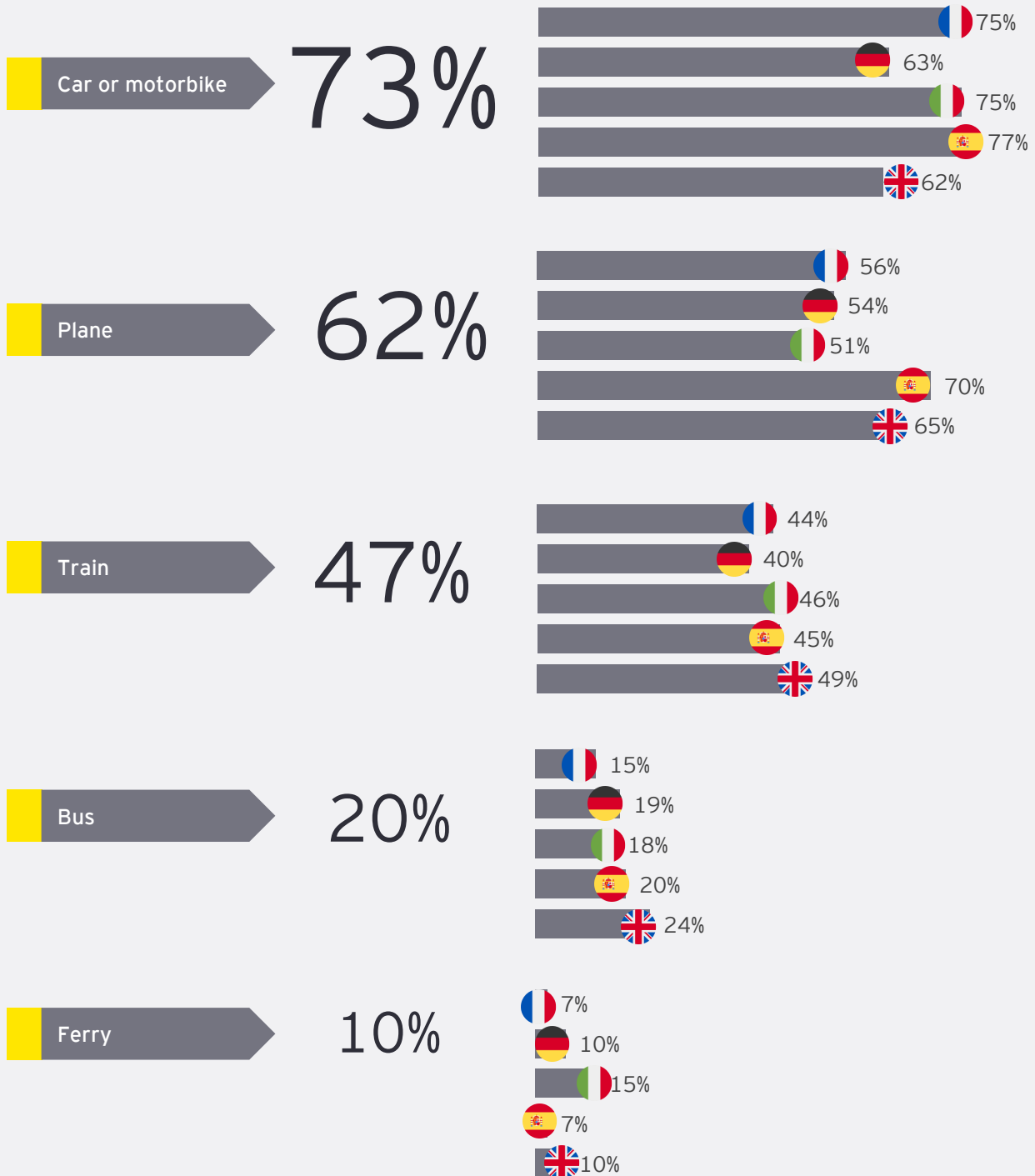
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Leisure travel: Modes of transportation

Cars and motorbikes are the modes of transportation used for leisure by most travelers in all five countries. There is a significant growth in the usage of trains and planes and a return to public transport usage. The plane is the second most common mode of travel, showing a substantial increase compared with 2022, +8 pp, and is used by a majority of 70% travelers in Spain. Germany shows the most significant increase, going from 47% to 54% in 2023. Train usage has grown, particularly in Spain and the UK, with an increase of 9 pp.

Main modes of transportation chosen

% calculated on 2023 leisure travelers



2

Leisure travel:**What are the key drivers influencing the choice of transportation mode for leisure travel?**

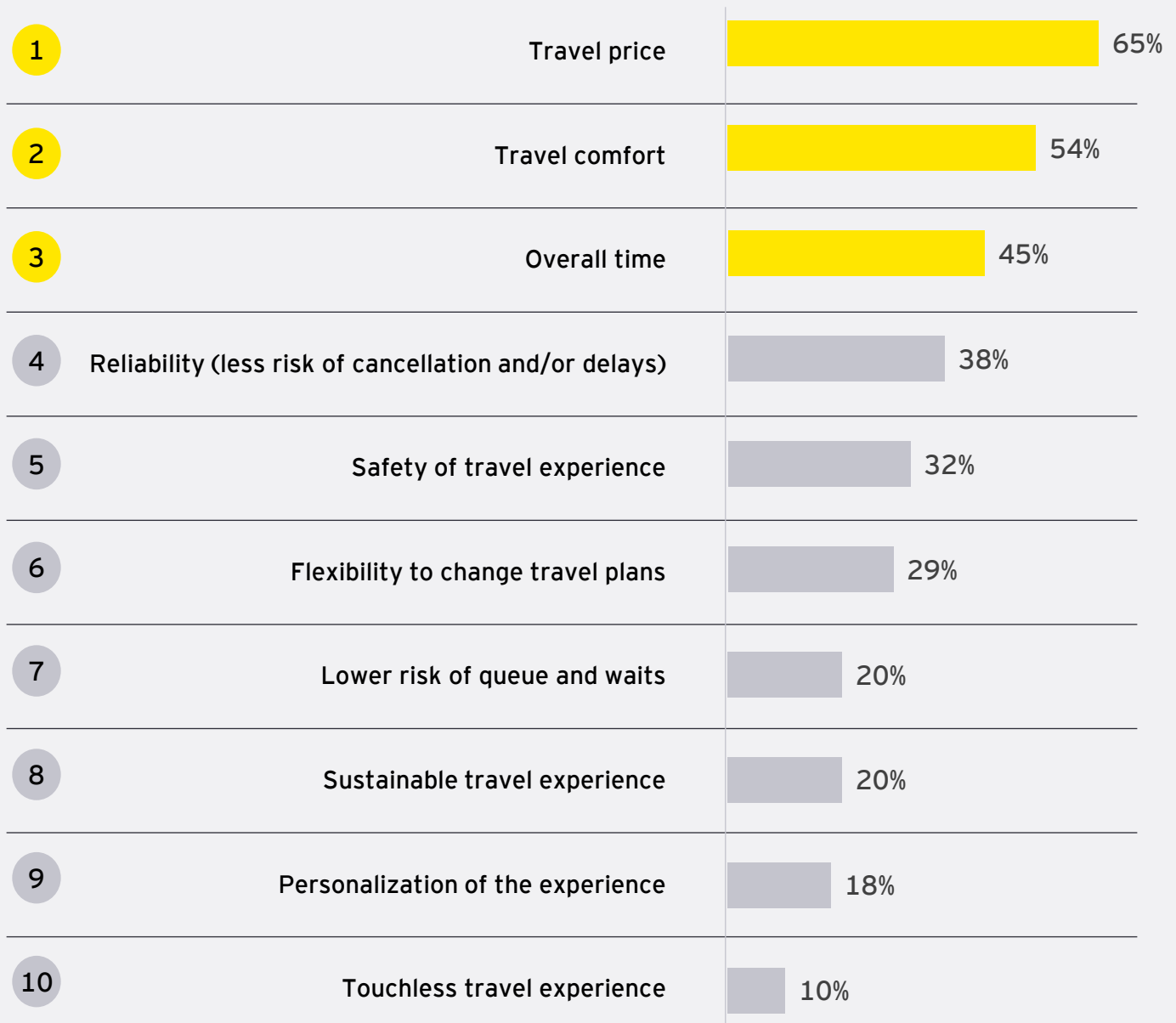
For two-thirds of travelers, price is the most important factor influencing leisure travel choices. Travel comfort follows in second place at 54%.

The **total time** spent traveling is a particularly important factor for Spaniards (55%) and less so for Italians (39%).

Travelers from the UK are more influenced by the **reliability of transportation** (48%), especially when compared with Italians and Spaniards (both 31%).

Leisure

Think about when you have to decide the means of transport for your leisure trips. What are the factors that most influence your choice?



2

Business travel:

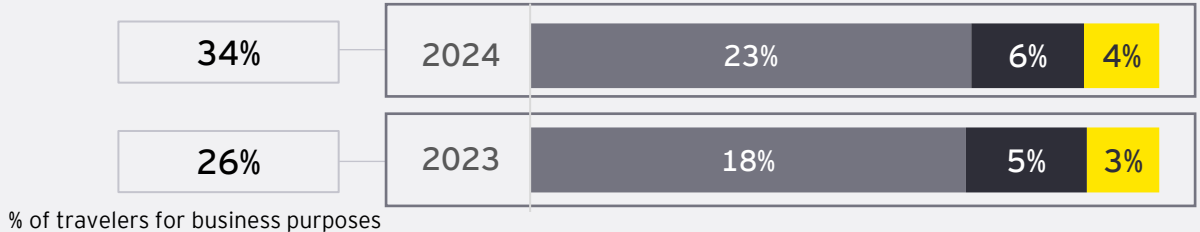
2023-2024 travel intentions and modes of transportation

Intentions for business trips have risen significantly since last year. In 2023, one in four people were expected to take business trips. This year, one in three people say they travel for business.

Travel frequency

From 1 to 4 From 5 to 10 Over 10

All

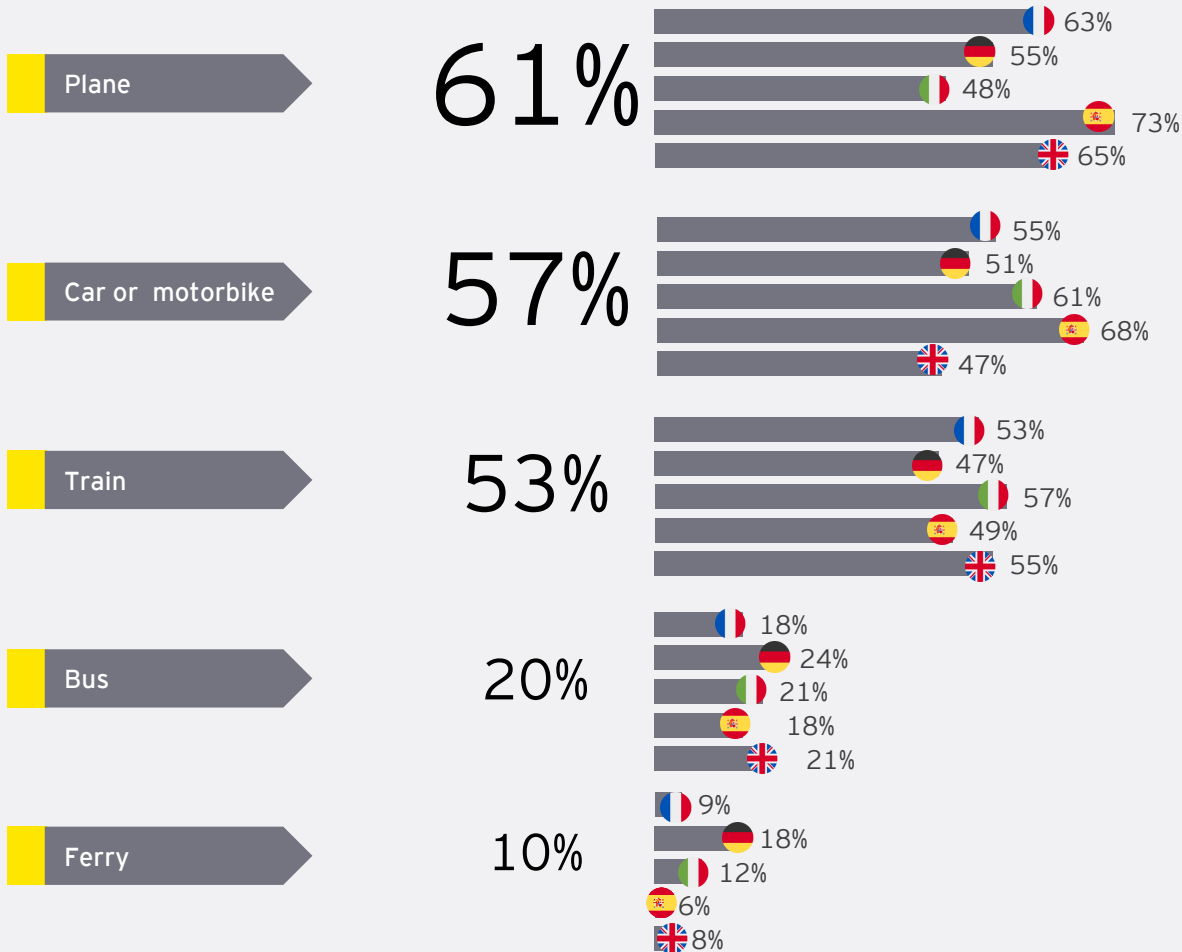


% of travelers for business purposes

The airplane continues to be the most used mode of transportation for business reasons. Spanish travelers (73%) have increased its use by a good 13 pp. The UK remains the second country for airplane usage, with trains used more for business than for leisure. In Italy, for business travel, the train is used more than the airplane, while the UK is the only country where the train is used more than the car for business travel.

Main modes of transportation chosen

% calculated on 2023 business travelers



Note: The data shown for 2023 represents travel forecasts as measured by the EY Future Travel Behaviors 2023 Observatory.

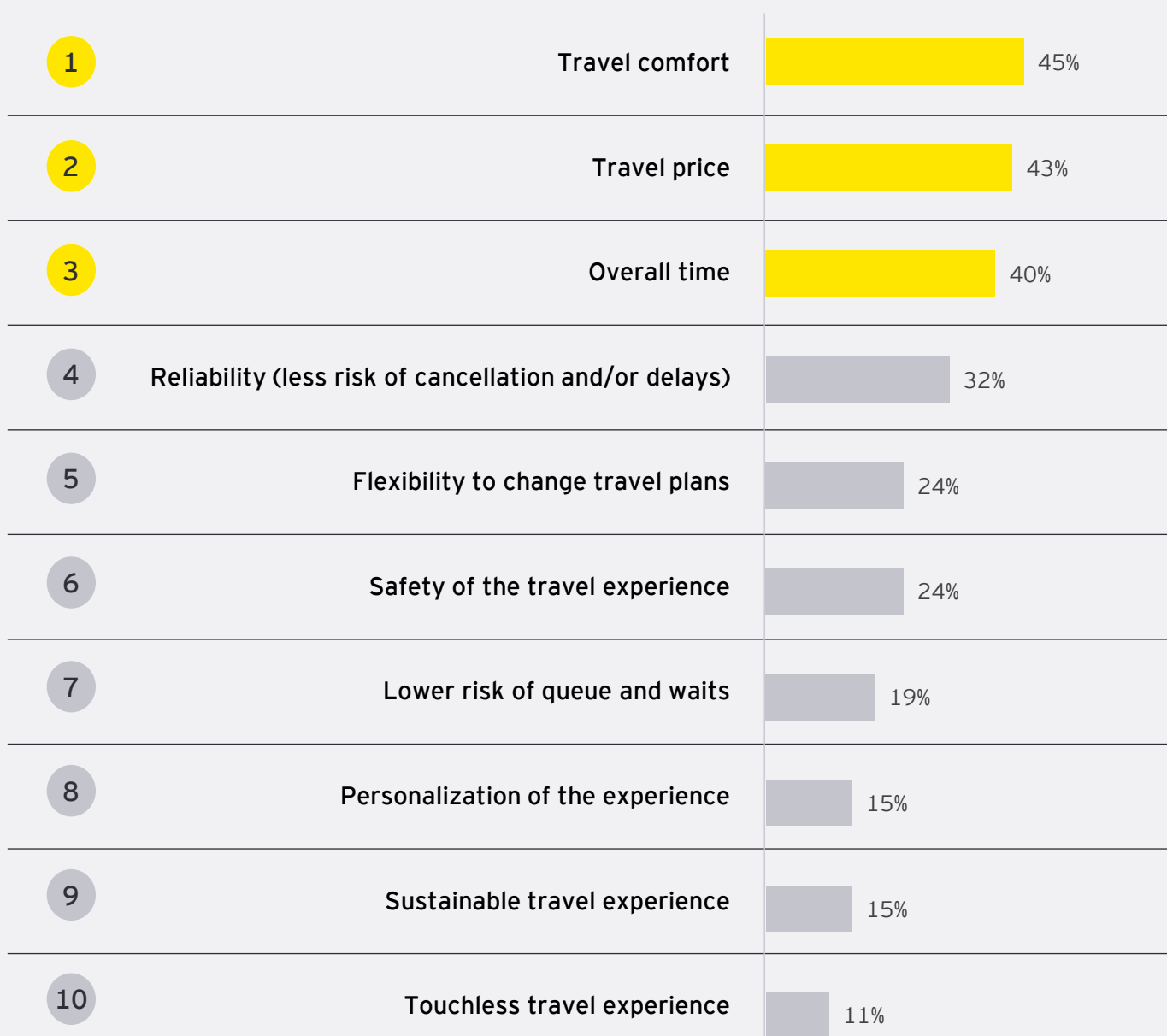
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Business travel:**What are the key drivers influencing the choice of transportation mode for business travel?**

On business trips, travel comfort significantly determines the selection of a transportation mode. Although considered less important compared with leisure travel, **price** remains among the top three factors, followed by the **overall time** of the trip. Price is considered particularly important by French travelers (51% vs 43% average) and safety by Germans (30% vs 24%).

Business

Think about when you need to decide the means of transport for your business trips. What are the factors that most influence your choice?

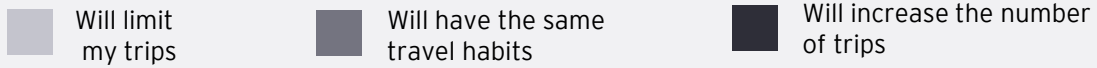


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How travel attitudes are expected to change in 2024

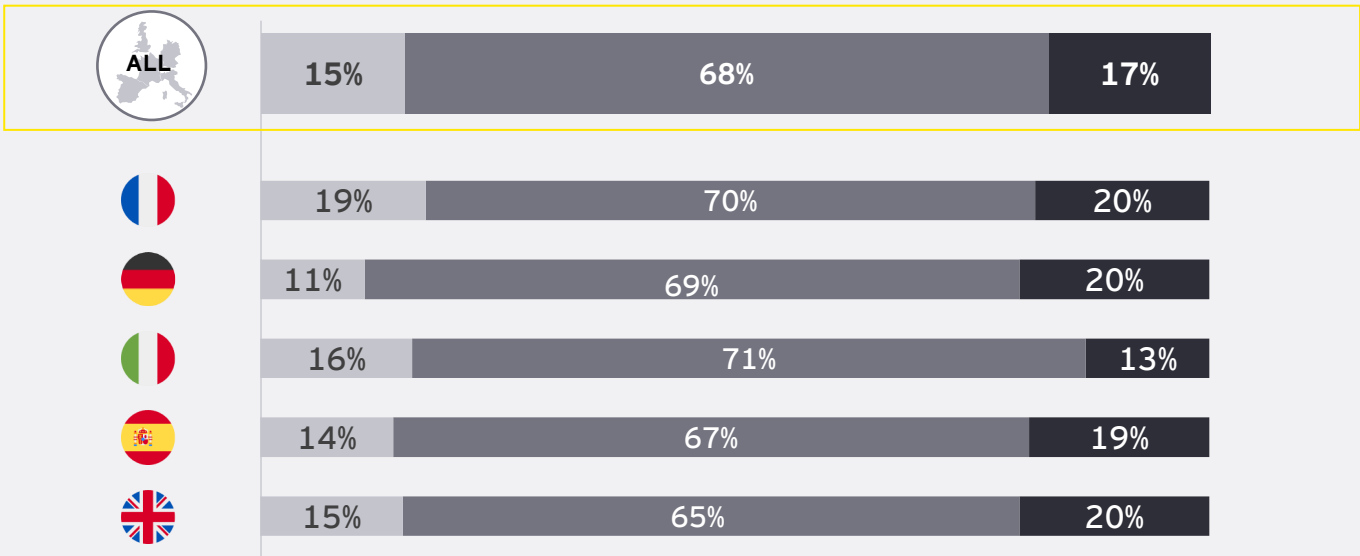
The results indicate that in 2024, the majority of travelers will travel with the same frequency as in 2023. The number of travelers intending to limit trips is decreasing. An increase in business trips is expected, significantly driven by France, Germany, and the UK. Also, the number of those who will increase their business trips is higher than those who will reduce them. This trend is particularly relevant in Germany.

Travel attitudes in 2024 compared with 2023



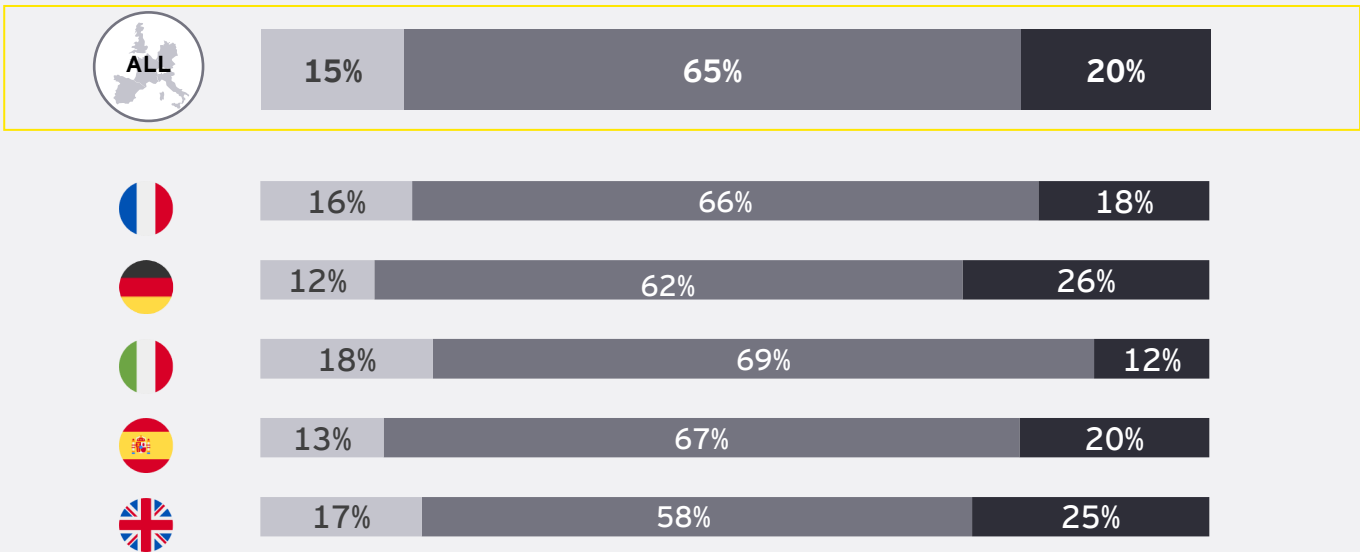
Leisure

% calculated on 2024 leisure travelers



Business

% calculated on 2024 business travelers



2

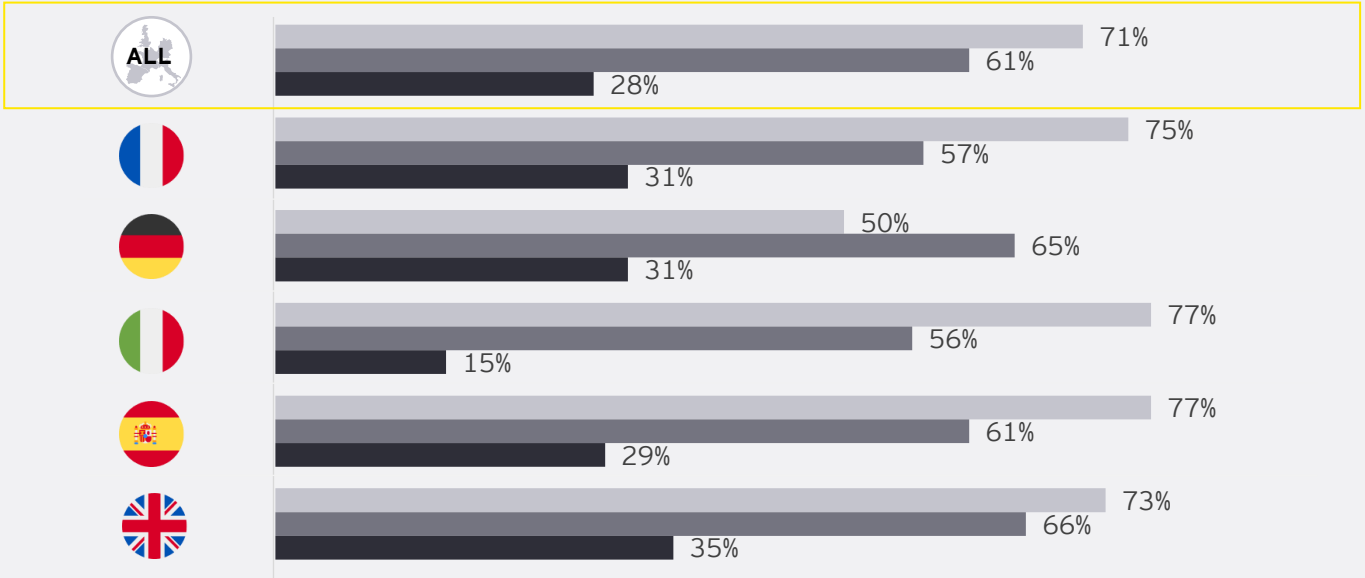
Leisure travel:

Destinations

In 2024, what will the main destinations for leisure trips be?

Seven out of ten people will travel within their country of residence. The Germans are the only ones who intend to travel more abroad than inside their own country. Projections from our survey indicate that potentially over 50 million travelers from the analyzed countries consider Spain as their favorite foreign travel destination in Europe, followed by Italy (41 million) and France (36 million). Moreover, there is a rising interest in traveling outside the European borders.

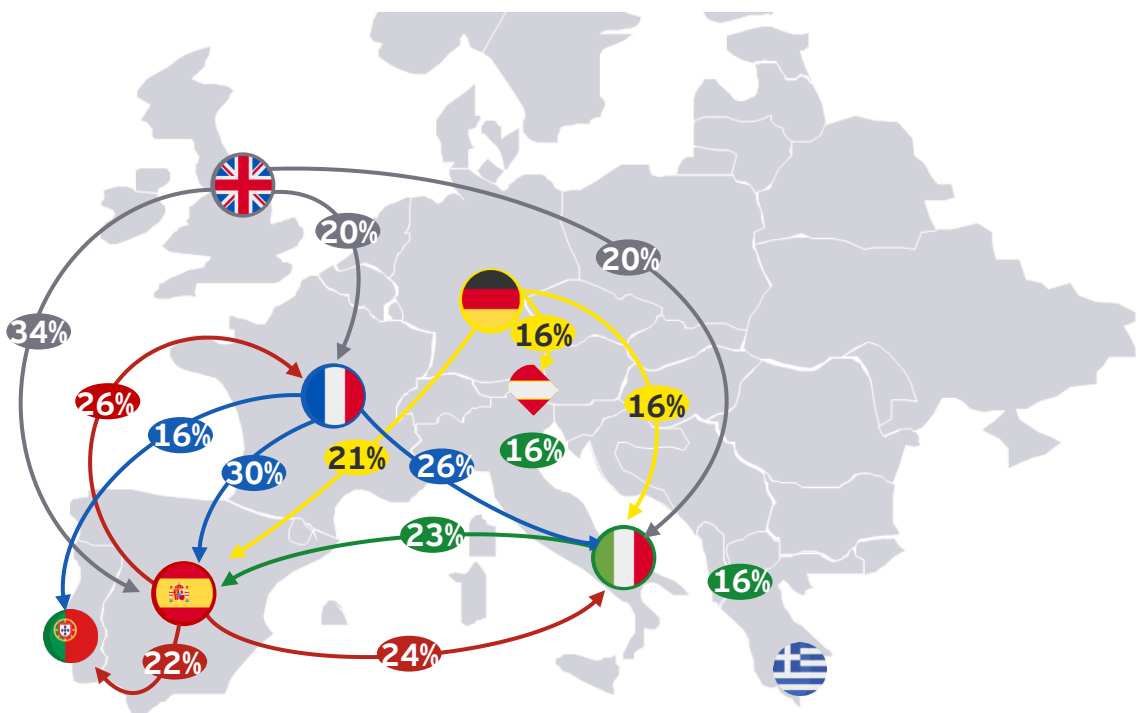
In my country of residence
 Abroad, Europe
 Abroad, outside Europe



Where are you thinking of traveling in 2024?

Top three destinations in Europe by country

% calculated on 2024 business travelers



2

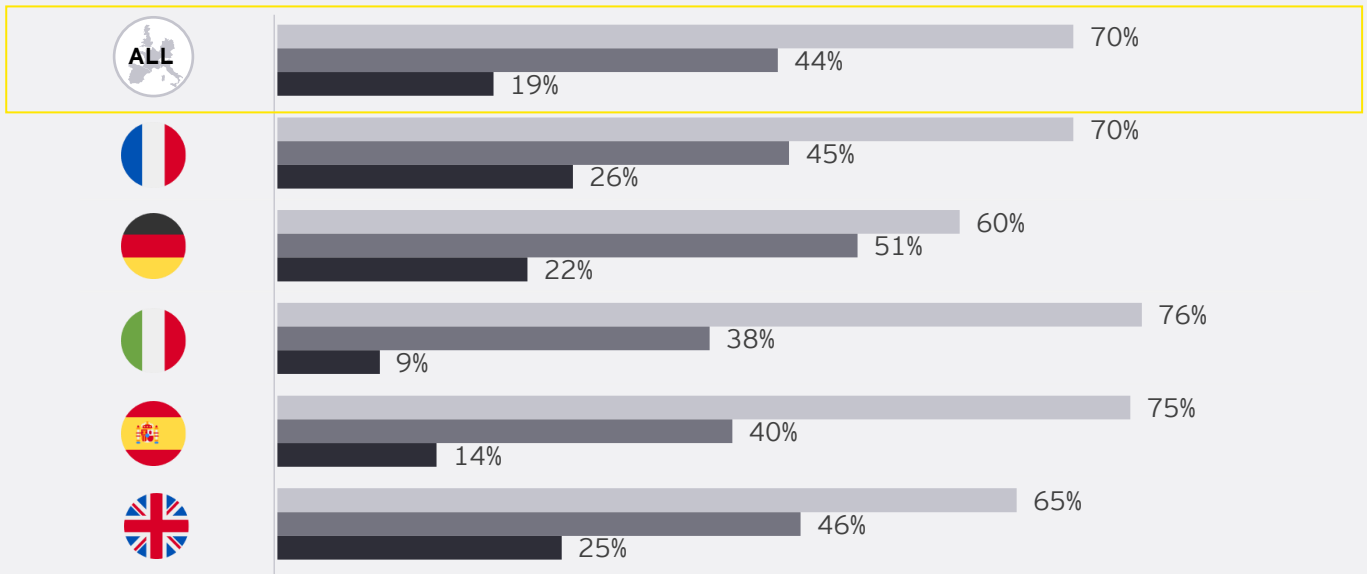
Business travel:

Destinations

In 2024, what will the main destinations for business trips be?

The survey reveals that most of those who travel for business will remain within national borders. In the UK, there is a significant drop in interest in traveling abroad compared with 2023. Predictions from our survey indicate that **13 million** travelers from the countries analyzed consider Germany as a potential destination for their business trips abroad, the first in Europe, followed by France and the UK.

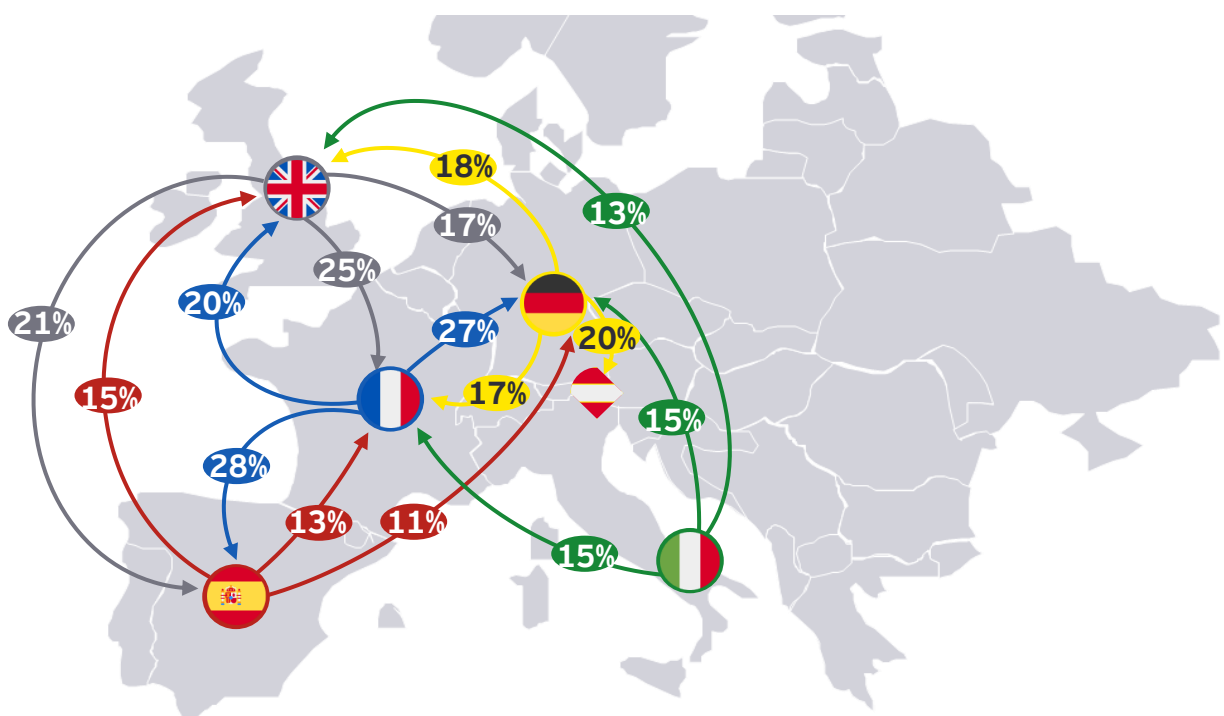
In my country of residence
 Abroad, Europe
 Abroad, outside Europe



Where are you expecting to travel for business in 2024?

Top three destinations in Europe by country

% calculated on 2024 business travelers



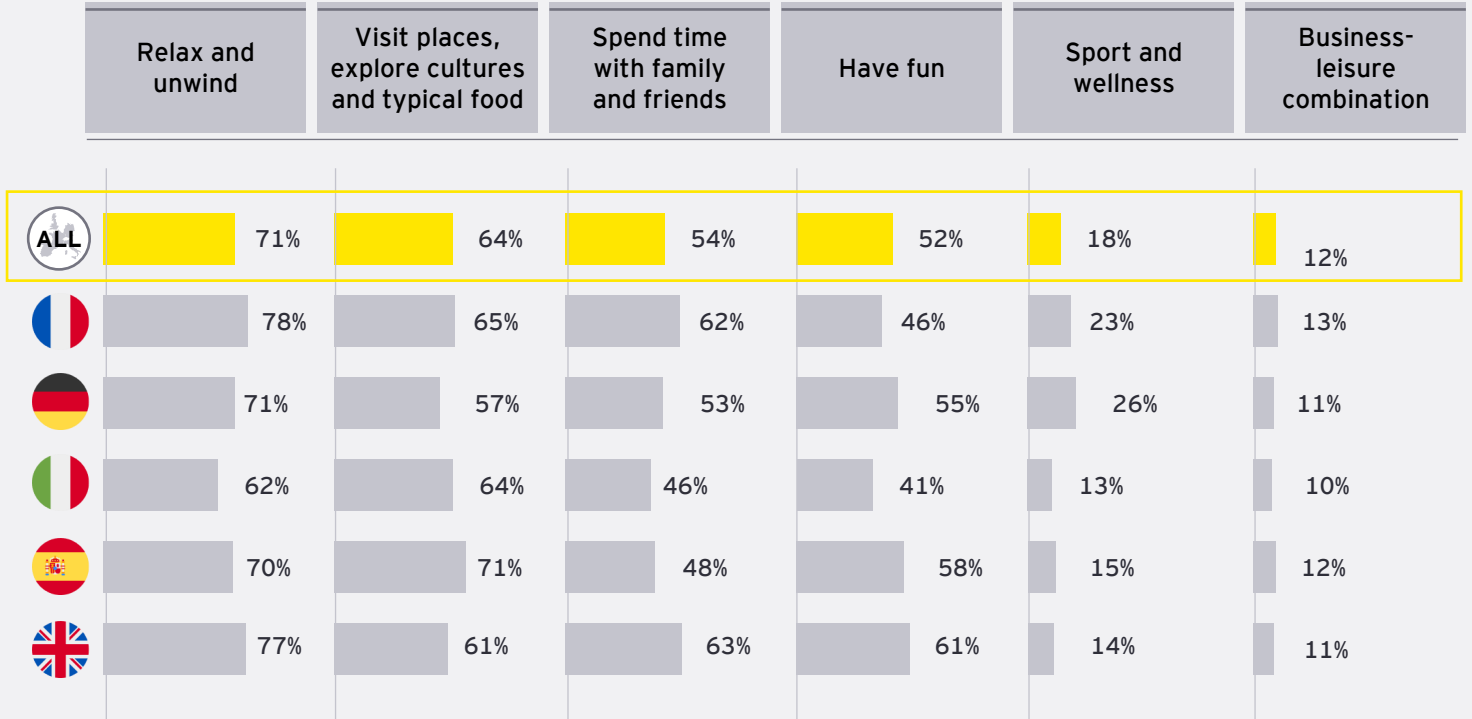
2

Leisure travel:

Reasons for traveling

What will be the motivations for leisure trips in 2024?

In 2024, vacationers will travel mainly to relax (71%), visit different places and explore cultures (64%) and spend time with family and friends (54%). The combination of business and leisure concerns 12% of travelers, a percentage that has doubled compared to last year, confirming an emerging and growing trend.



% calculated on 2024 leisure travelers



2

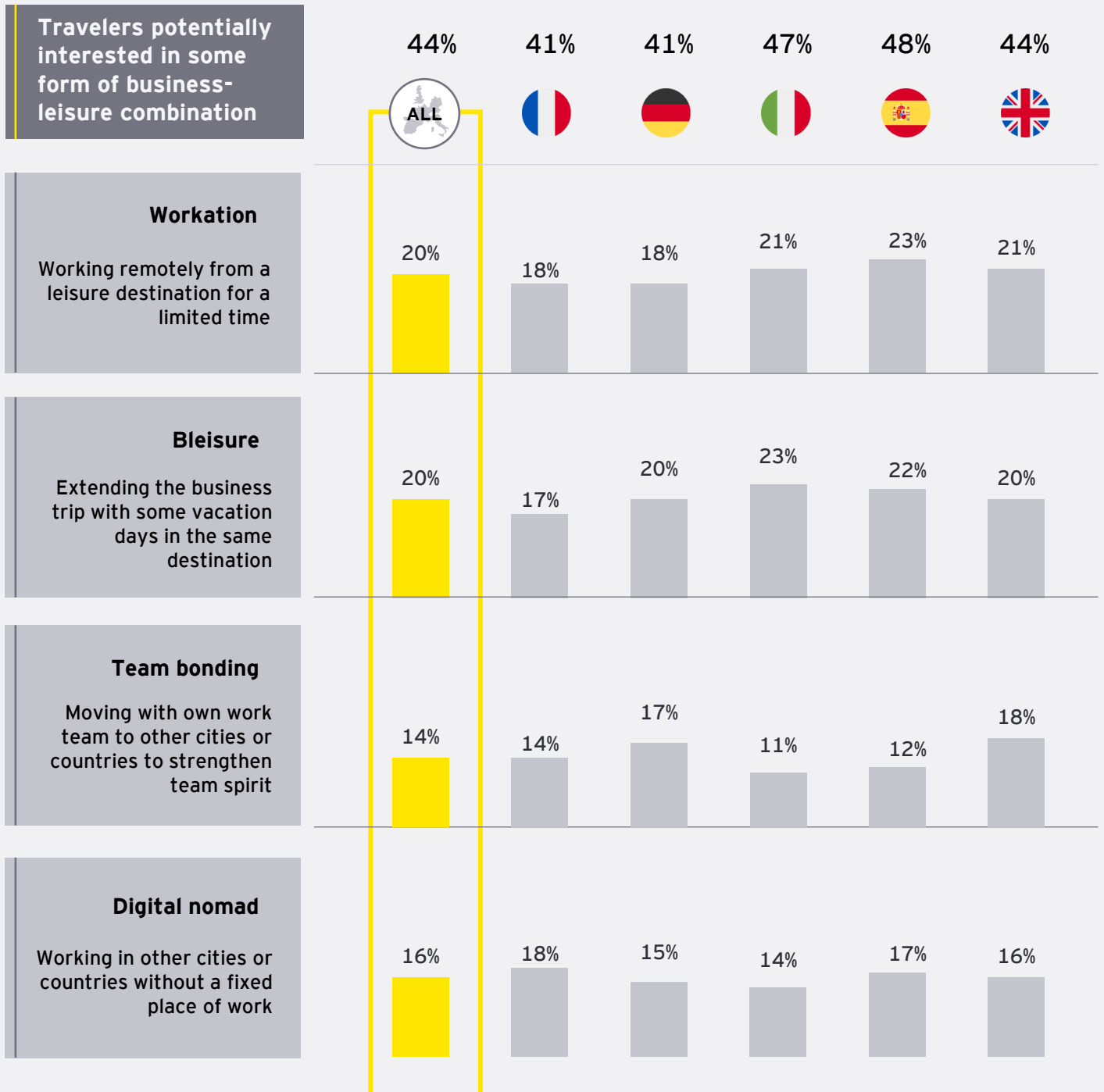
Business-leisure combinations:

Emerging travel habits

How will travelers combine business with leisure trips?

Not only is there an increase in travelers who will combine business and leisure in the same trip during 2024, but also there is a growing interest in adopting this choice in future.

In particular, **workation** (working remotely from a vacation location for a limited period of time) and **bleisure** (extending the business trip with a few vacation days in the same destination) are the two most attractive motivations for all countries.

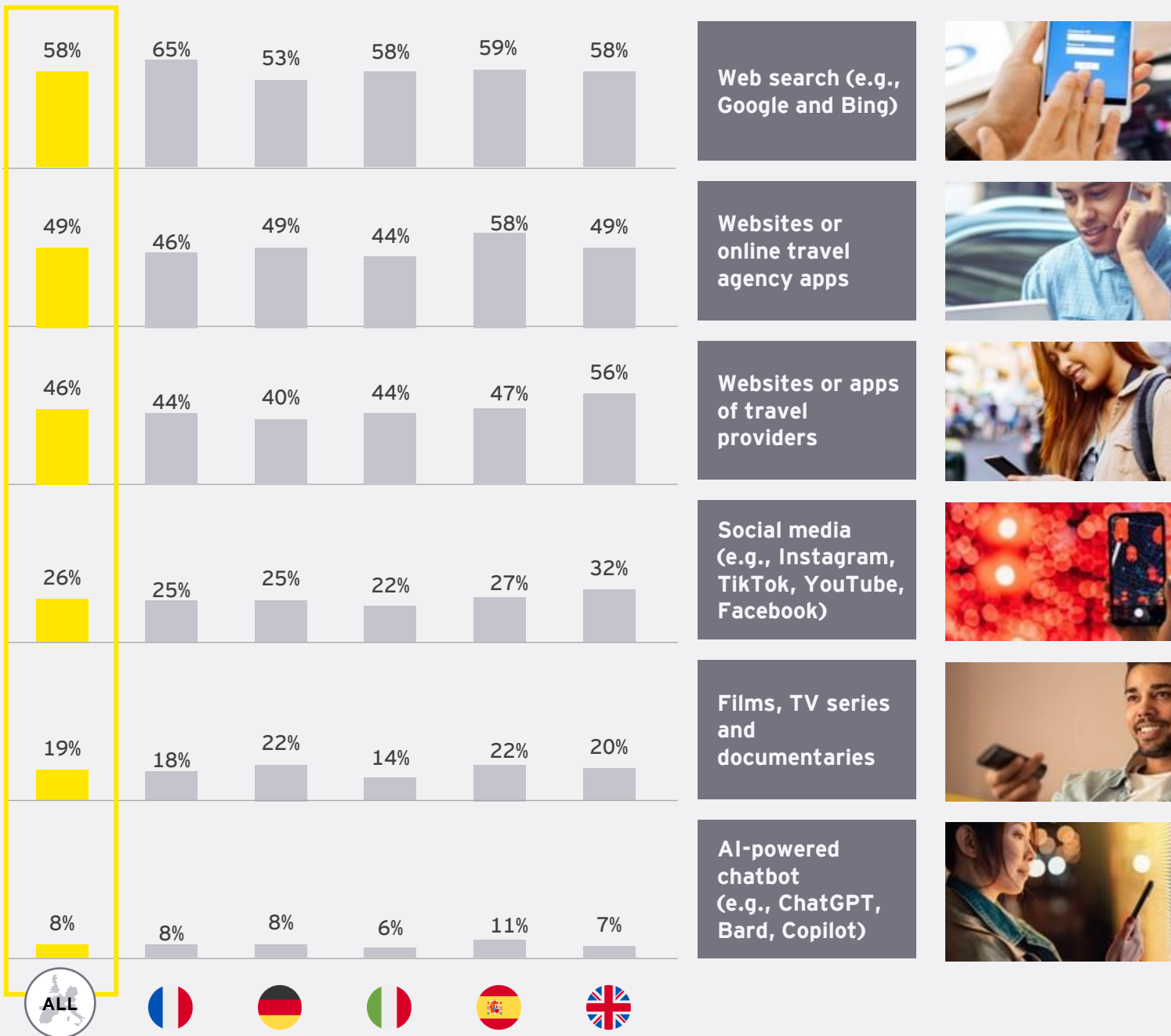


2

Which digital tools have you used or inspired you to plan your trips in 2023?

To plan or find inspiration for their trips, a majority of travelers use **search engines**. Other digital tools that are most commonly used include websites or apps of online travel agencies and travel providers.

Around 8% of the sample respondents have used AI tools. Social media, movies, TV series and documentaries significantly inspire travel choices. Travelers from the UK mention social media more than others.

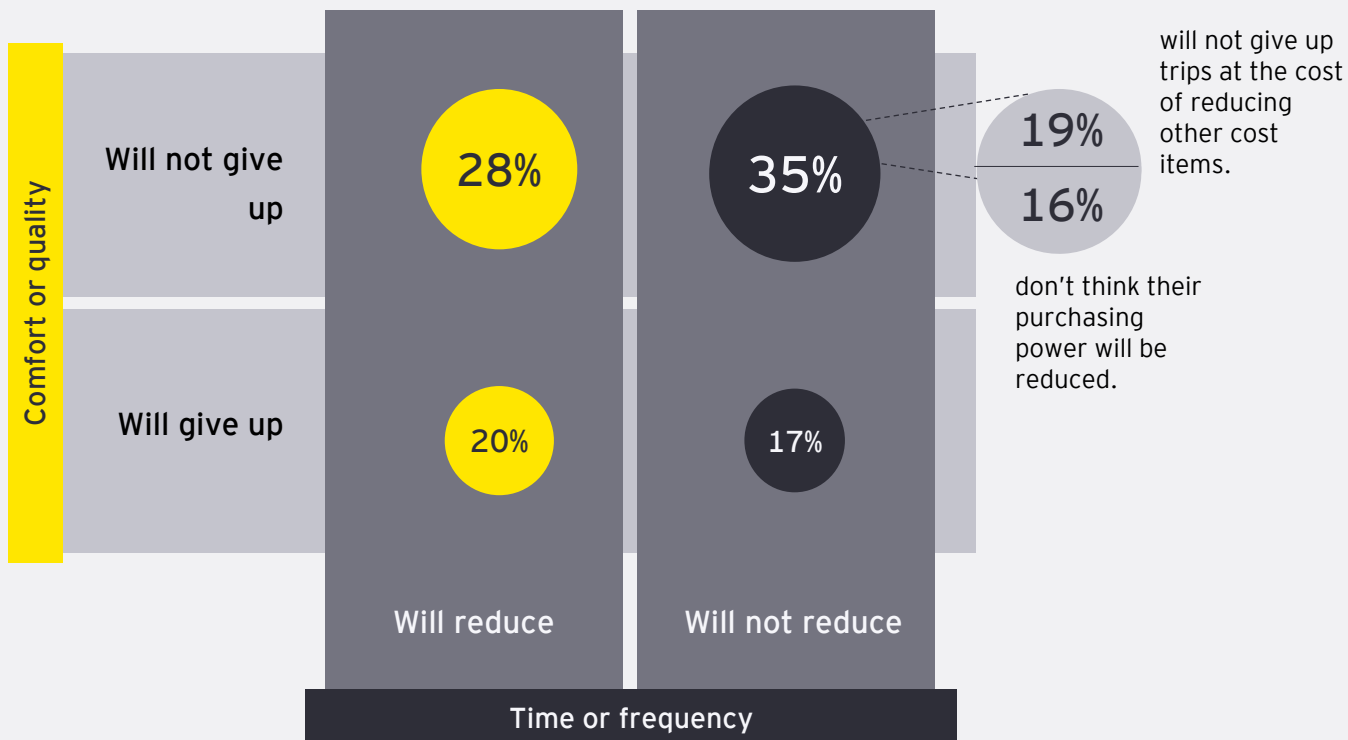


2

How will price inflation impact travel habits?

The current international framework presents elements of uncertainty, including volatile energy prices and persistent inflation. We investigated the effect of a possible decrease in purchasing power on travel. The results are consistent with those of a similar survey conducted in 2023. **Two out of three people may change their travel habits as a result of a reduction in purchasing power.** Our study showed that it is generally considered preferable to reduce the duration and frequency of trips rather than giving up Comfort or quality.

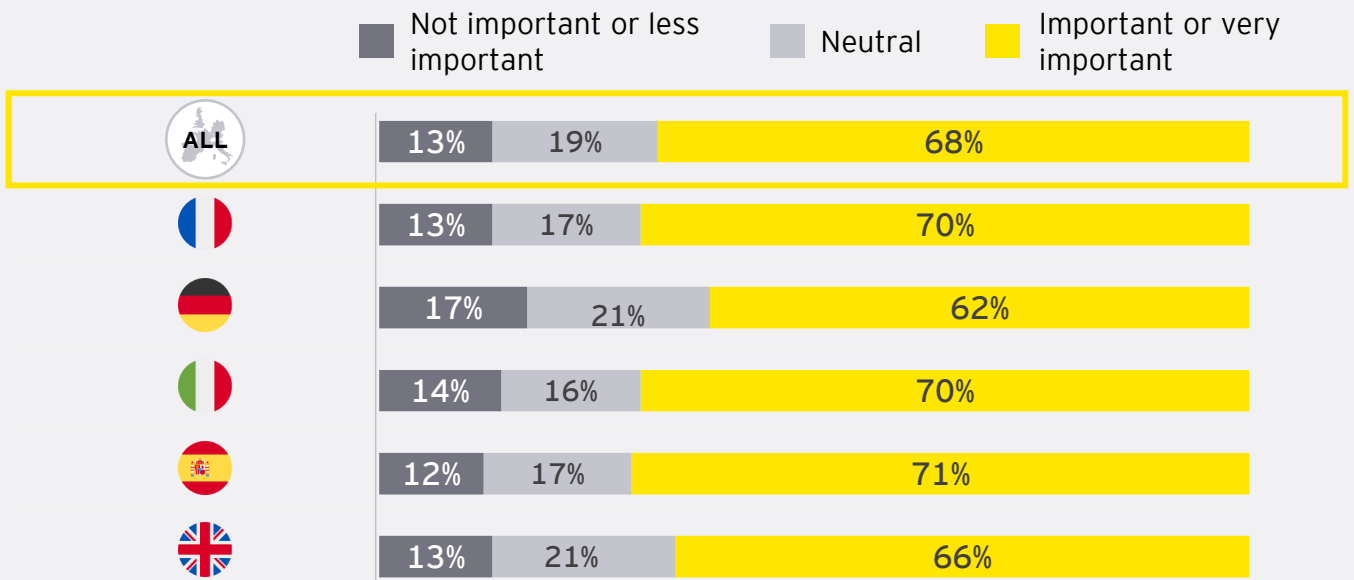
However, **one in five will not give up traveling**, even if it means reducing other expenditure items.



2

How important is the personalization of the travel experience?

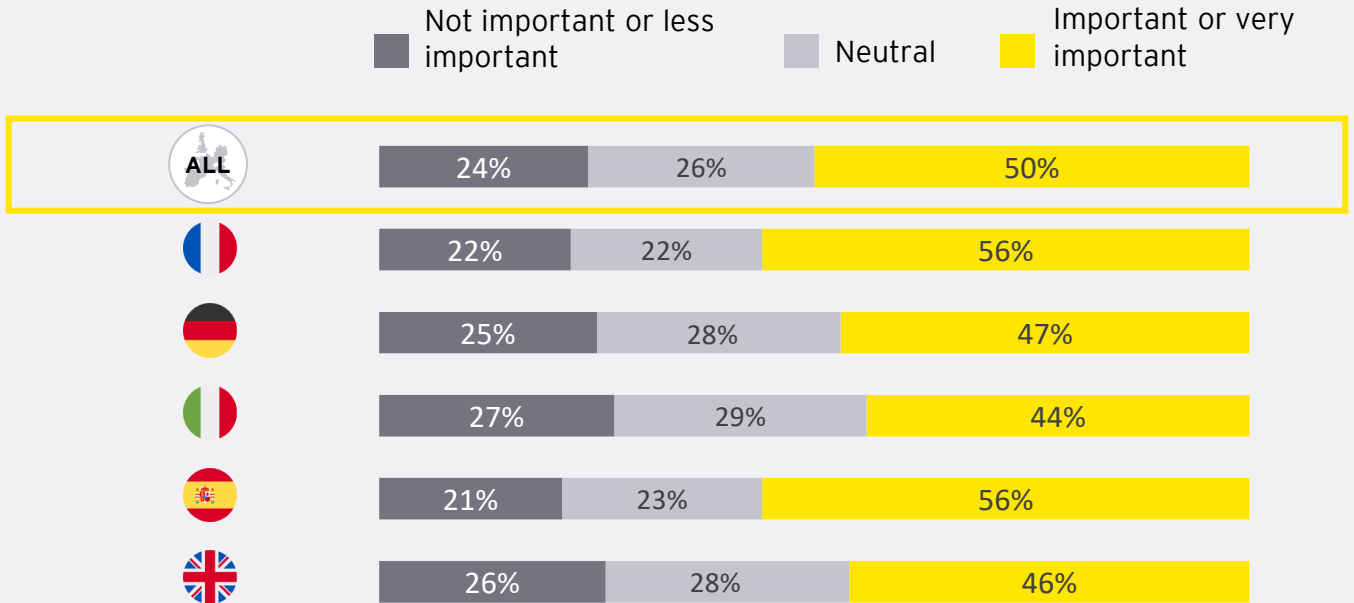
When planning their trip and choosing modes of transportation, two out of three participants consider a personalized experience as important based on their individual needs.



2

How important is environment impact in driving travel choices?

A number of studies have highlighted the potential say-do gap in environmental travel attitudes, with explicit questions being susceptible to response biases such as social desirability. We investigated this aspect from different angles, as described below. When asked explicitly, **nearly one out of two participants consider the environmental impact as an important or very important factor in their travel choices.** This trend is particularly prevalent in France and Spain and is on the rise compared with last year.

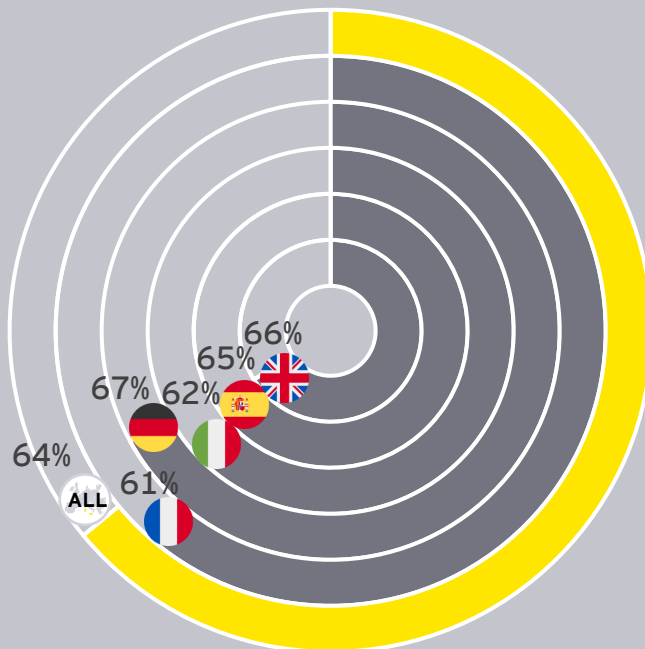


2

Implicit attitude toward environmental issues

Neuroscientific tests (IAT) conducted have indicated an implicit **attitude of inclination toward nature and environmental issues** is prevalent in all countries. This attitude concerns almost **two out of three** travelers.

Implicit attitude of concern toward environmental issues



Probing actual behaviors and intentions

When asked about the main factors influencing travel choices, participants had to balance environmental impact with other drivers. A **sustainable travel experience** was indicated as a main factor by 20% of respondents for leisure travel and by 15% for business travel.

15-20%

When asked about their actual past behaviors, **only one third of participants said they never made travel choices with sustainability in mind.**

70%

Around 58% of respondents did not rule out being **willing to pay an extra cost to offset their flights' carbon emissions.**

58%

About one out of eight respondents indicated **that information about sustainable travel options is among the top four services** in air travel that could be decisive in influencing their choices.

15%

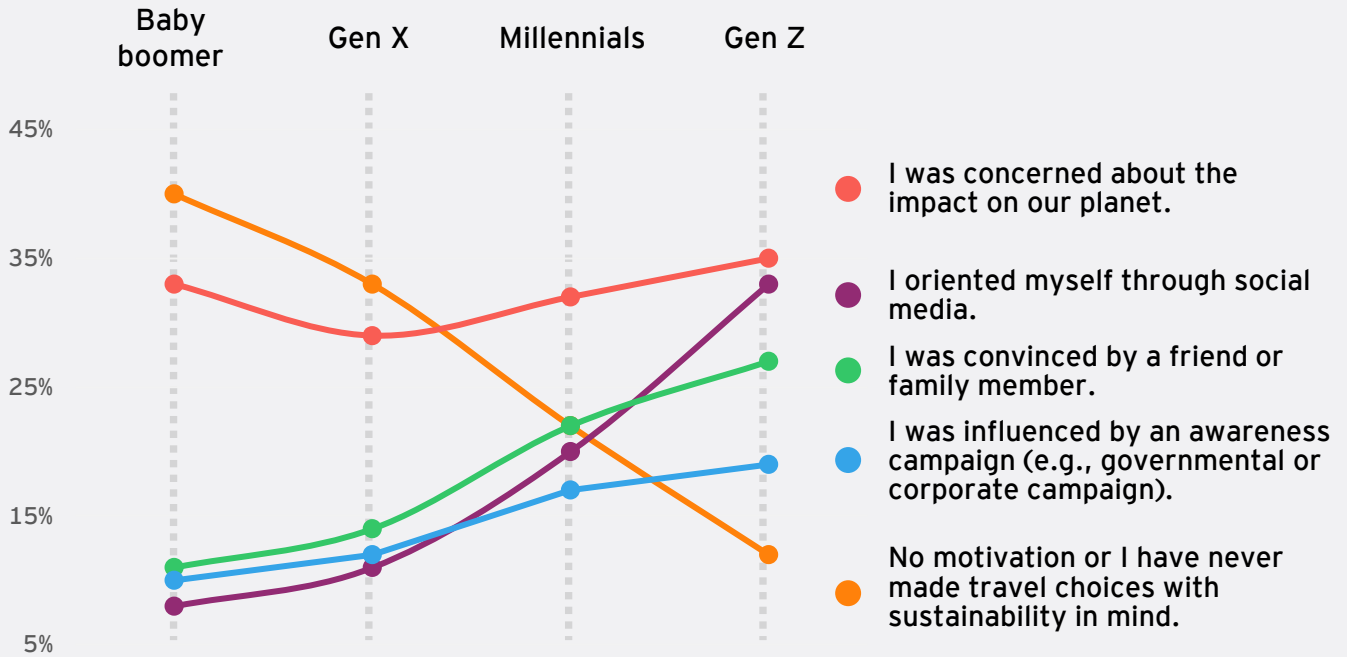
What can be inferred from the above results? Environmental impact is a **factor that potentially influences the choices of many travelers.** Actual behaviors clearly depend on the influence of competing *drivers*, but also on the **availability of information and commercial offerings** on sustainable travel options.

2

What are the reasons behind sustainable travel choices?

Survey has explored the motivations behind travel choices made with sustainability in mind, examining how different generations relate to such choices.

Younger generations are generally more inclined to make sustainable travel choices, driven by concern for environmental impact and guided by social media, whose influence on Gen Z is increasing compared with last year. This has surpassed the influence of awareness campaigns.



2

What should the transport and travel industry do to help you make more sustainable and eco-friendly travel choices ?

With the help of GenAI, the answers were grouped into five clusters, excluding about 30% of the sample who did not express an opinion. The percentages reported are relative to those who expressed an opinion. For each cluster, some examples of suggestions provided by the answers were reported. From these findings, the demand for more information and options, and better offerings clearly emerges.

Travelers' expectations about eco-sustainability

More eco-friendly information and offerings

37%

- ▶ Increase information on sustainable travel options.
- ▶ Advertise them more.
- ▶ Inform about options.
- ▶ Offer alternatives.
- ▶ Provide as much information as possible.
- ▶ Advise on how to reduce my carbon footprint.
- ▶ Indicate clearly the energy footprint of each route.
- ▶ Make concrete proposals.
- ▶ Provide clear and comparable information.
- ▶ Provide practical options for sustainable travel.

Technology and innovation for sustainability

8%

- ▶ Invest in research and development to identify innovative and less polluting solutions.
- ▶ Use low polluting technologies.

Sustainable processes and materials

15%

- ▶ Reduce the use of fossil fuels.
- ▶ Use sustainable materials.
- ▶ Minimize waste.
- ▶ Plant trees to offset carbon emissions.
- ▶ Minimize plastic use.
- ▶ Improve engine performance.
- ▶ Reduce consumption.

More transparency

14%

- ▶ Facilitate access to information.
- ▶ Increase transparency of information on the environmental impact of travel options.
- ▶ Include environmental impact information in the booking phase.
- ▶ Add awareness campaigns inside trains and airplanes.

Economic incentives for eco-friendly choices

27%

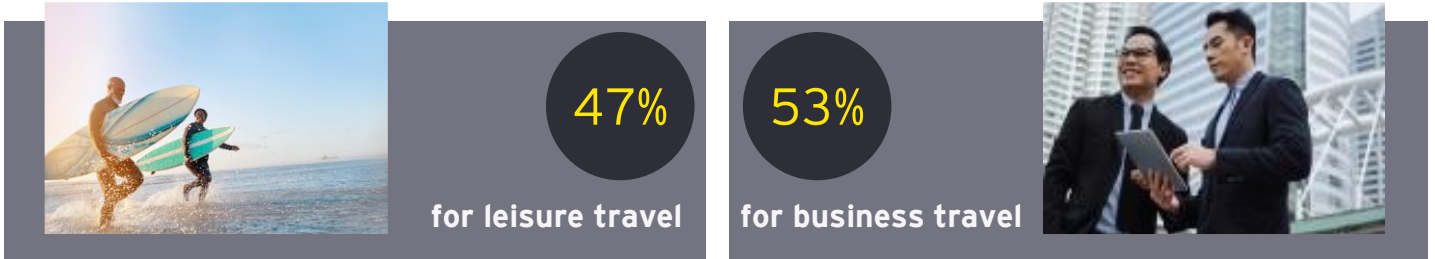
- ▶ Introduce incentive systems to reward more sustainable travel choices.
- ▶ Promote zero-impact travel options.
- ▶ Offer cheaper rates for the most sustainable solutions.
- ▶ Do not provide additional costs for trips with less environmental impact.
- ▶ Provide cheaper options.
- ▶ Make the price no more expensive than the alternative.



2

Train travel habits

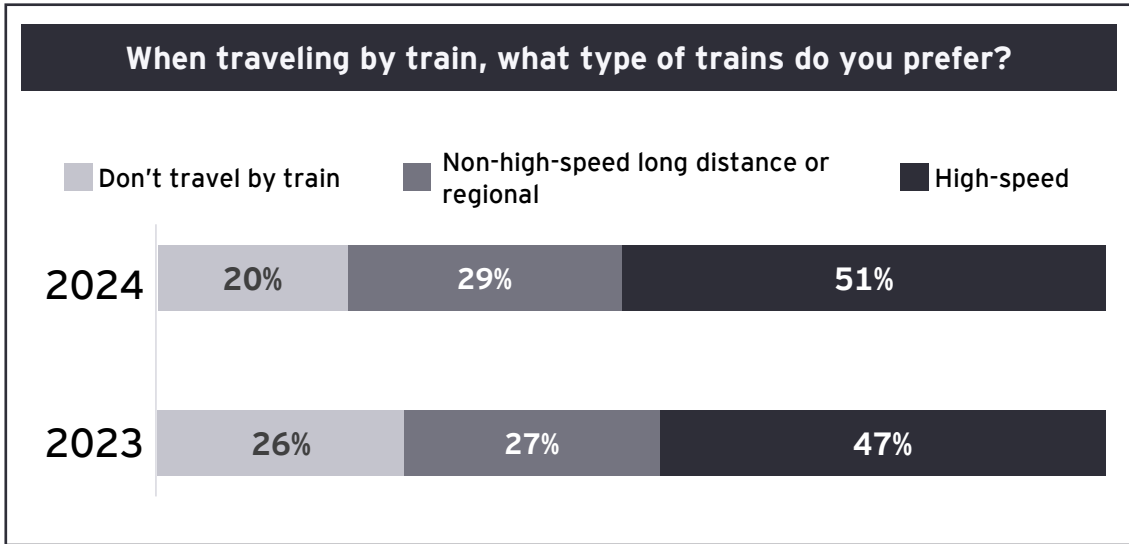
Trains are the third most used mode of transport by travelers, both for leisure (47%) and for business trips (53%).



% calculated on 2023 leisure travelers

% calculated on 2023 business travelers

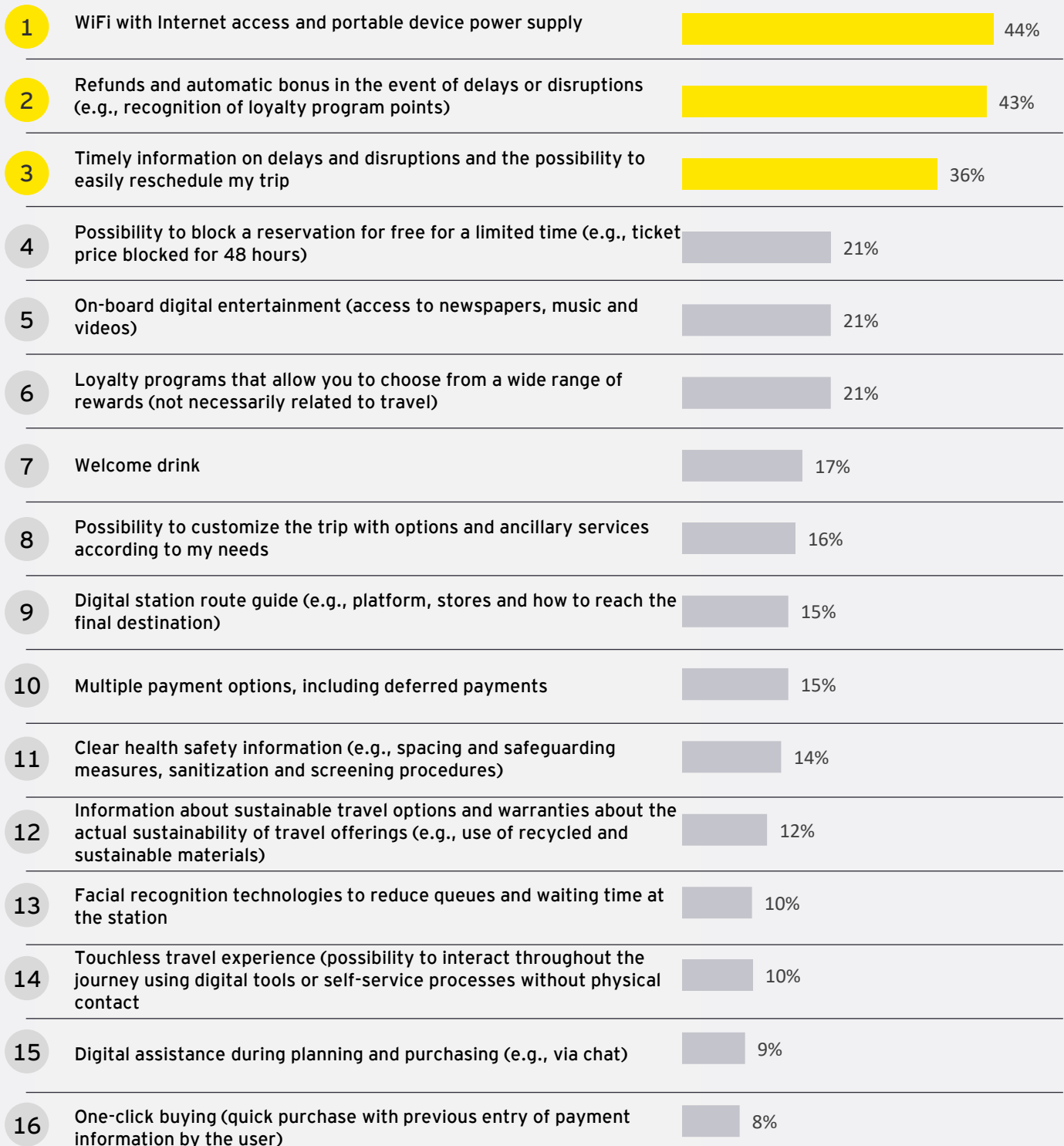
Results suggest an increase in the number of people traveling by train in 2024. It also shows that the preference for high-speed trains is slightly increasing.



2

What are the most requested free services for train travel?

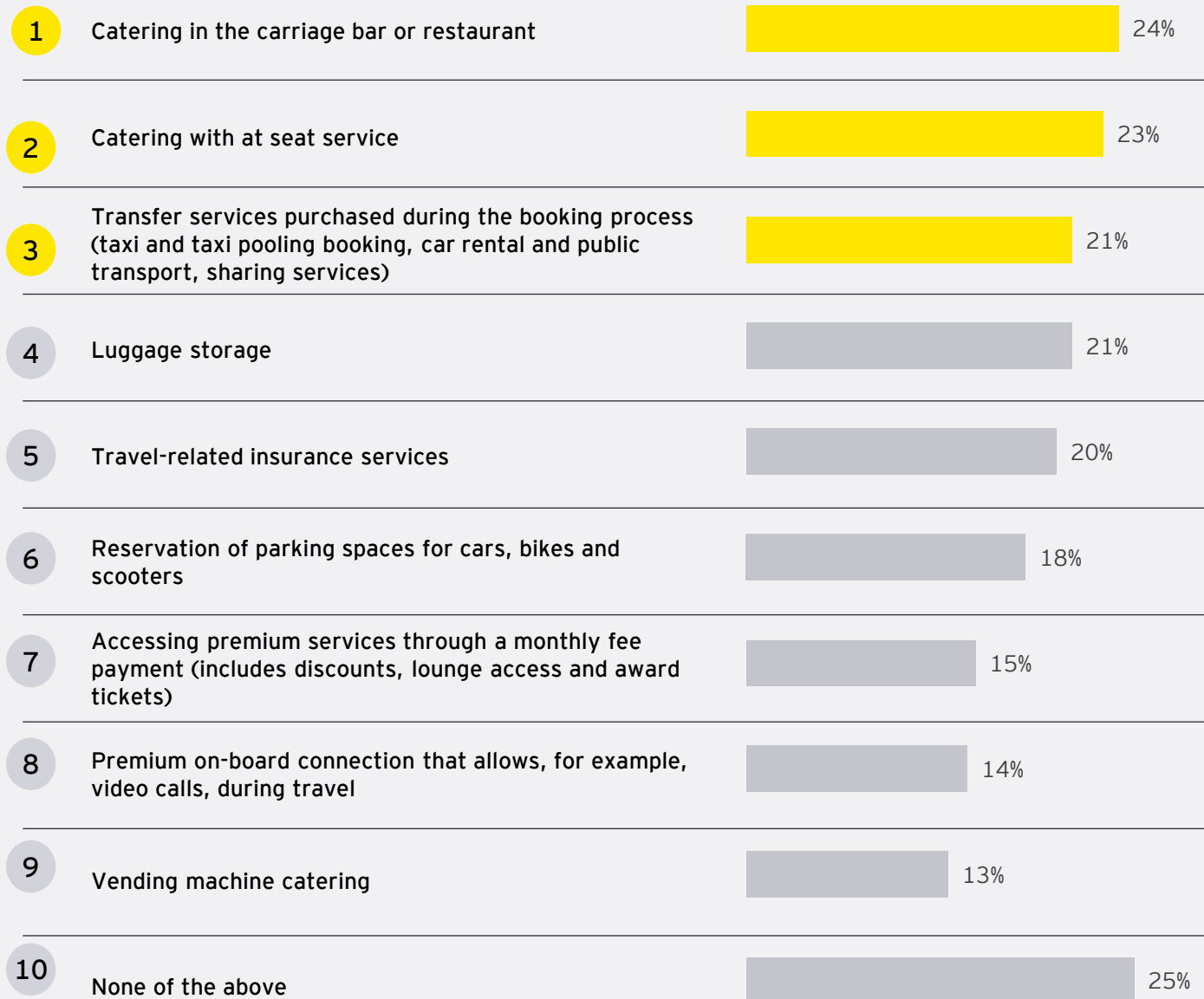
Participants were asked to indicate the four main services that could be decisive in choosing trains as a mode of transport. The main free services requested for train travel are the availability of Wi-Fi with Internet access and portable device power supply (44%), and the management of delays and disruptions (43% would like automatic refunds and bonuses and 36% would like to receive timely information about these).



2

What are the ancillary services that travelers would purchase in addition to the cost of the train ticket?

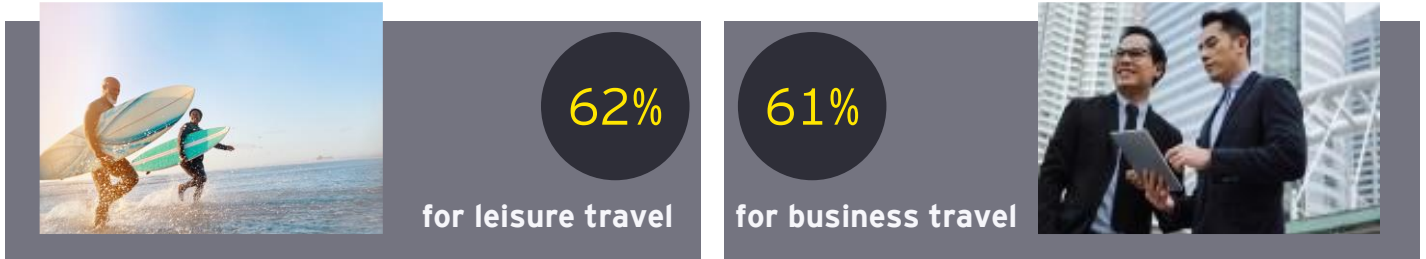
Participants were asked to indicate the three main services that could be decisive in choosing the train as a mode of transport. Three out of four people were willing to purchase additional services at a higher price or in addition to the cost of the train ticket. There was a relevant interest toward catering (47%), both with at seat services and in the carriage bar or restaurant. The other preferred services are related to solutions that simplify the door-to-door travel experience, such as the **possibility of buying transfer services during the booking process (21%) and luggage storage (21%)**. Insurance services are also among the most popular (20%).



2

Air travel use and sensitivity to environmental impact

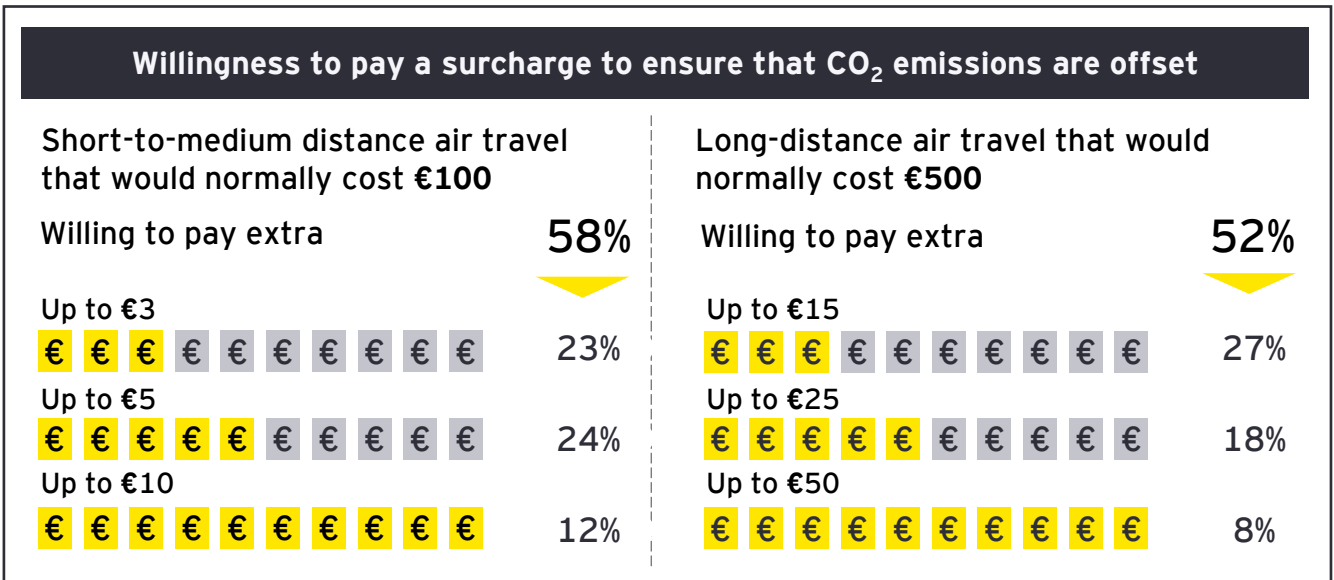
Planes are the second most used mode of transportation by travelers (62%) and the usage rose to first place when considering business trips (61%).



% calculated on 2023 leisure travelers

% calculated on 2023 business travelers

Moreover, we investigated the willingness to pay a surcharge in order to ensure the offsetting of CO₂ emissions. More than 50% of the sample were willing to pay to offset emissions from their trips, both for short and long trips.

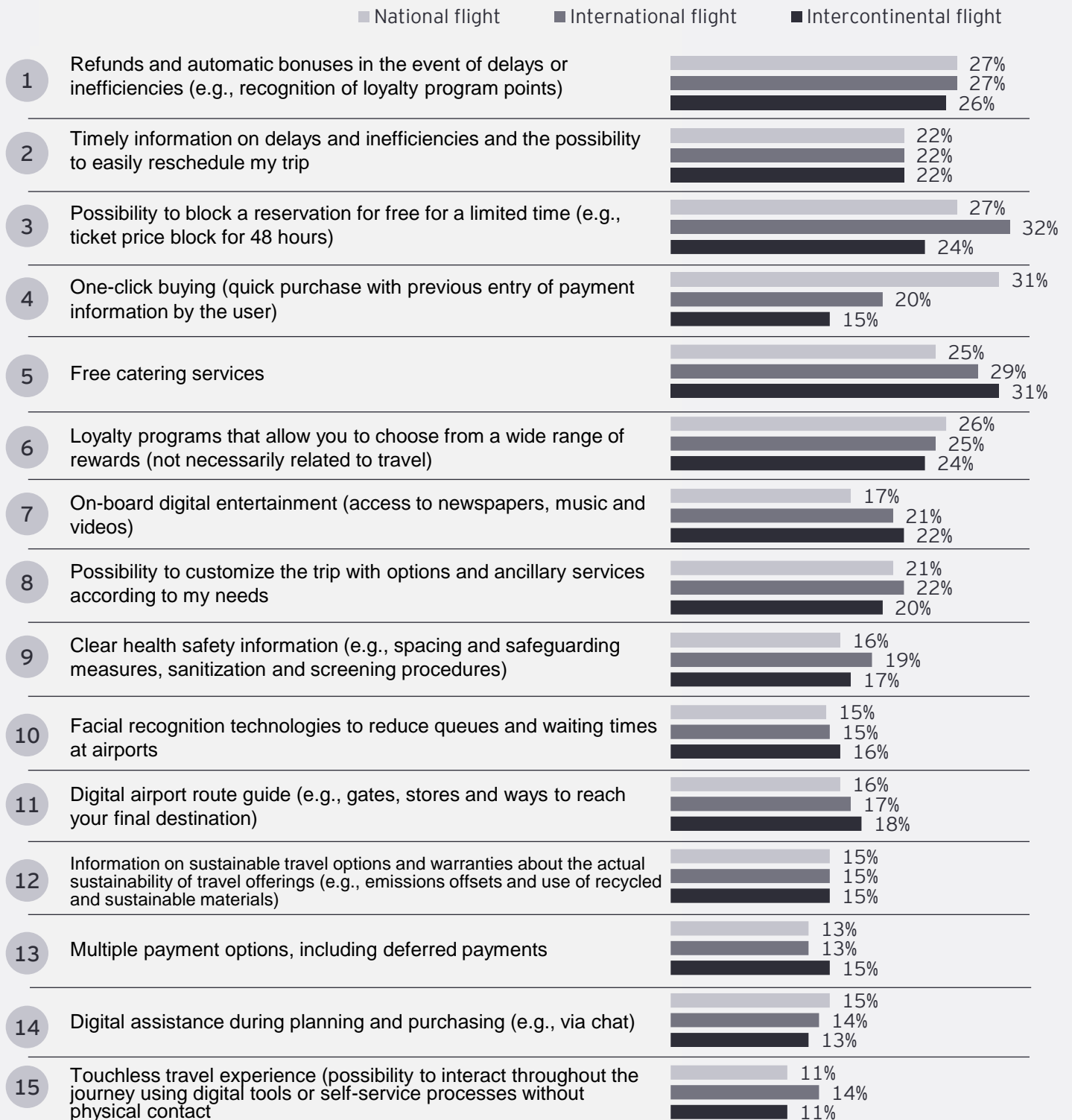


2

What are the most requested free services for air travel?

Participants were asked to indicate the four main services that could be decisive in choosing their mode of transportation. Just as with train travel, **services linked to the management of delays and cancellations** (refunds or bonuses and timely information) are preferred by the majority of travelers on all types of routes.

Travelers who **make national trips** are more attracted by the possibility of **one-click buying** (31%).

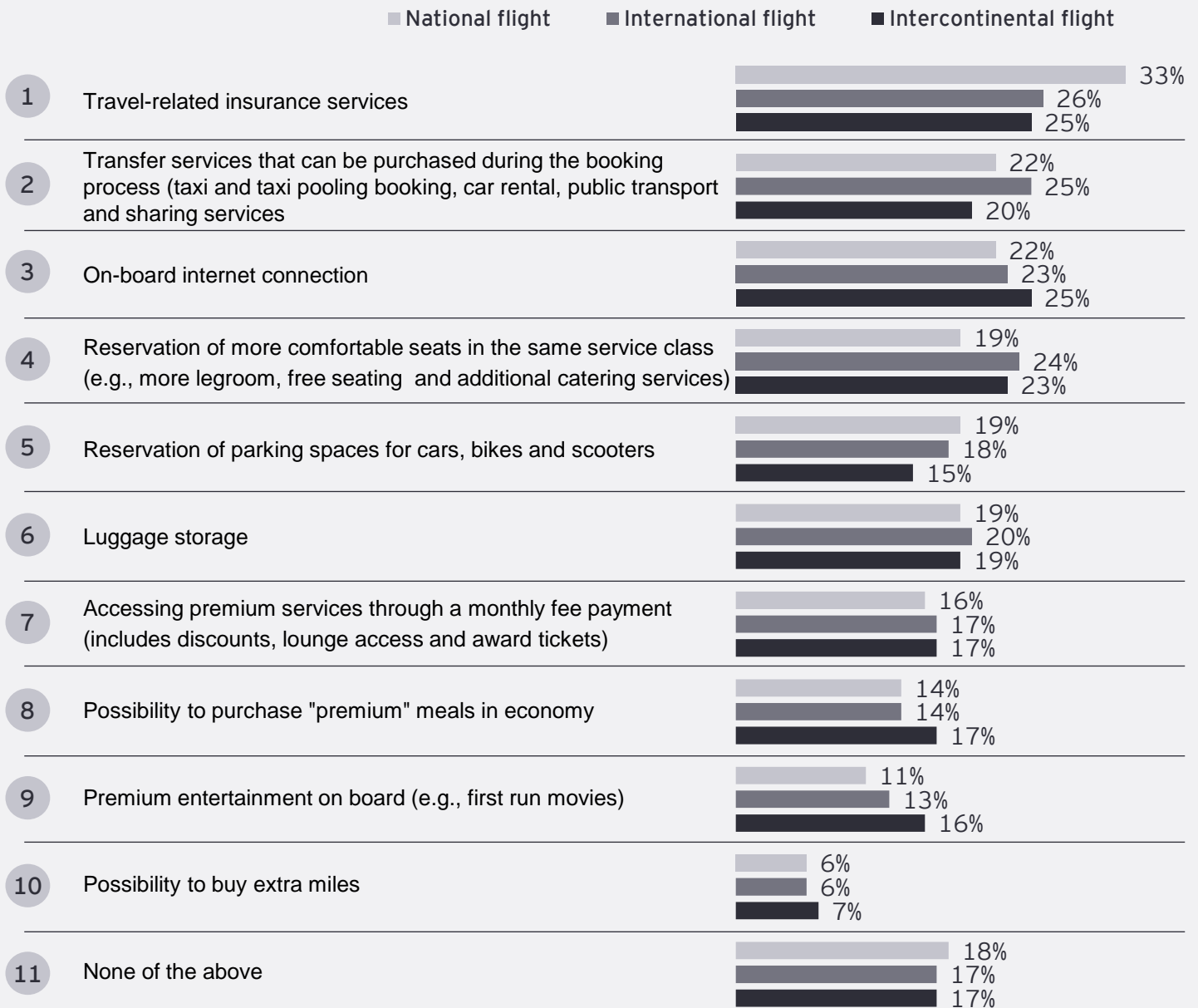


2

What are the ancillary services that travelers would purchase in addition to the cost of the flight?

Participants were asked to indicate the three main services that could be decisive in choosing their mode of transportation. **More than 80%** of the sample were willing to purchase ancillary services at a higher price or in addition to the cost of the plane ticket. There is a marked interest toward **travel-related insurance services** (around 25%), and the possibility of **buying transfer services during the booking process** (around 21%).

The other preferred services are experience-enhancing solutions, such as **on-board internet connection** (about one out of four), the **reservation of more comfortable seats** (23% for intercontinental flights), and useful, practical solutions such as **luggage storage** (about 17%).

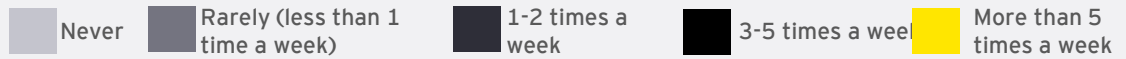


2

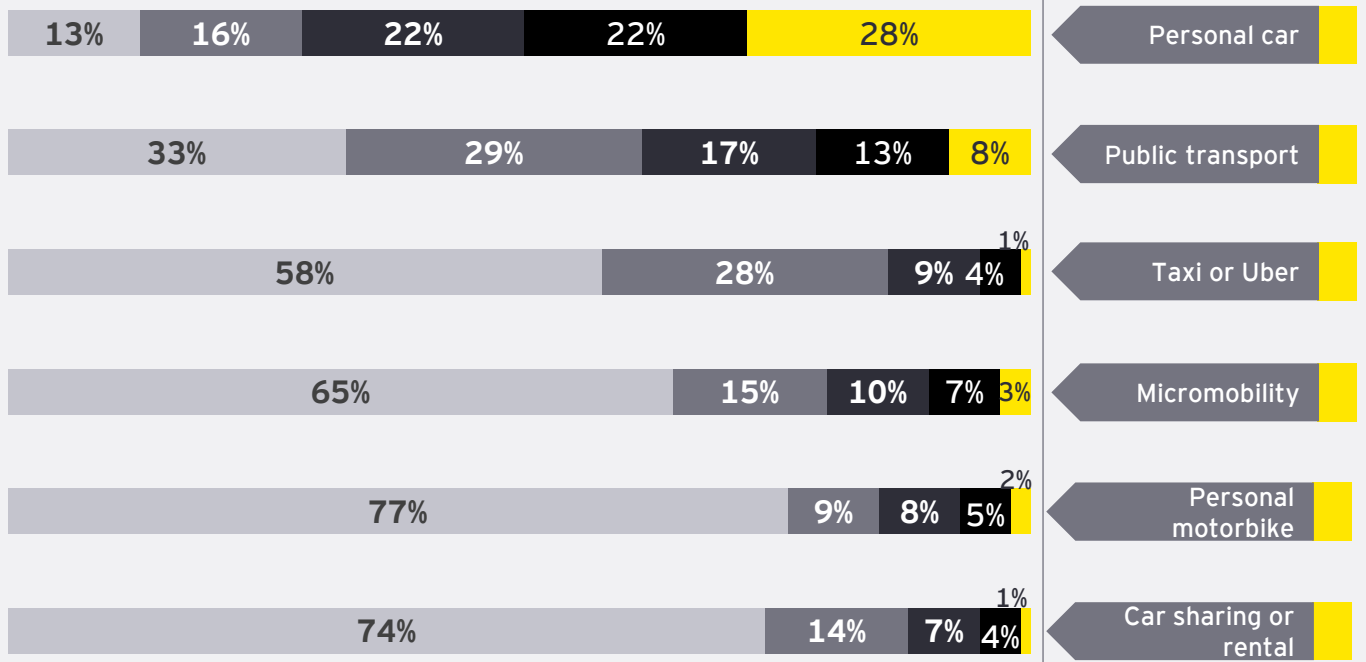
Routine travel: trends in short-distance mobility

We investigated how frequently the main modes of transportation are used for routine short journeys (less than 100 kms). The private car ranks first, followed by public transport. One in five people use micromobility (bikes and scooters) at least once a week.

Travel frequency



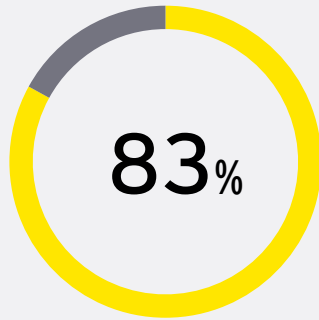
Main modes of transportation chosen



2

Routine travel: impact of digital mobility services

The sample respondents were asked to indicate if and how often they use their smartphone to get information on their itineraries. Four out of five people use their smartphone and one in three do it regularly.



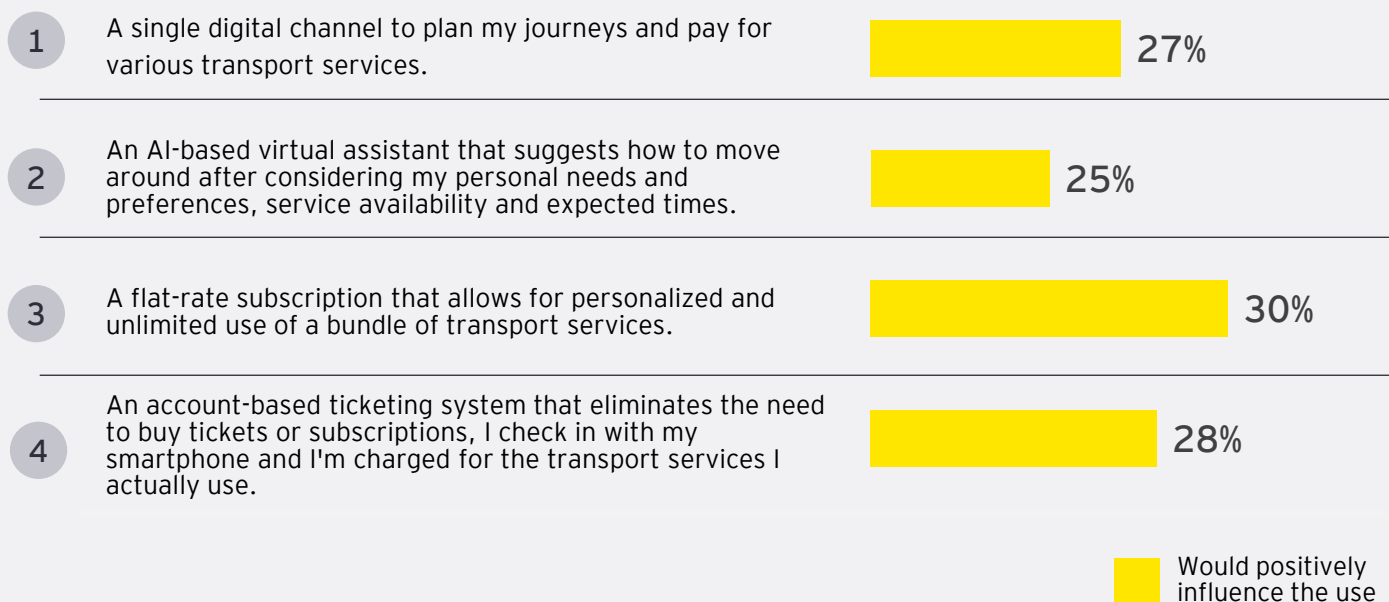
of respondents occasionally or regularly use a smartphone to get route information.

Only 17% of respondents never use it.

Influence of digital mobility services on respondent habits

We investigated the influence that the availability of mobility services would have on the propensity to use public transport and micromobility. The possibility to have such services available would produce a tangible effect on sustainable mobility choices. Mobility-as-a-Service (MaaS) services that provide the possibility to use a bundle of transport services in a personalized and unlimited way through flat-rate subscription are the most attractive.

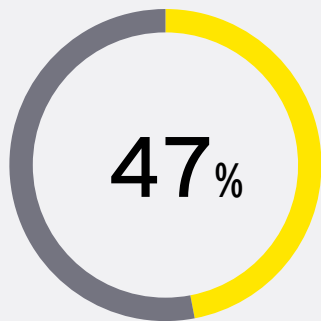
For your usual short trips, how would the following solutions influence the propensity to use public transport and micromobility?



3

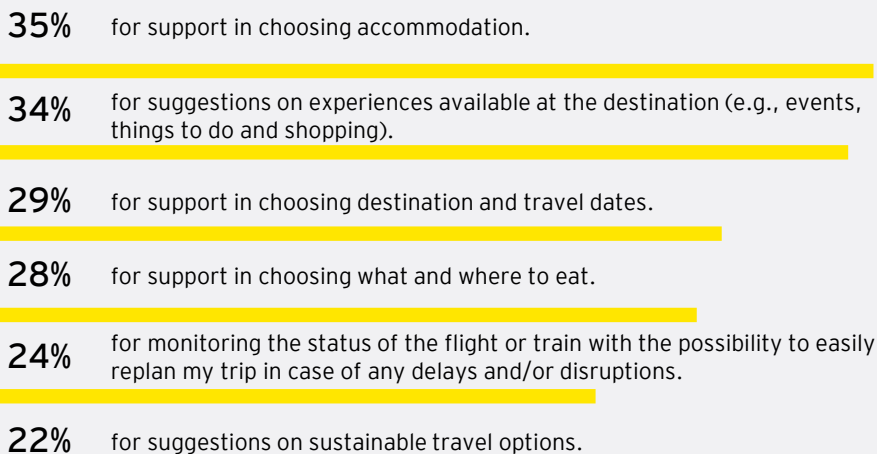


AI promises to transform the traveler's experience. It can offer ideas and suggestions, simplify planning and booking, and provide real-time assistance, creating a more personalized travel experience. Results show that travelers are particularly interested in using AI for choosing accommodation and for receiving suggestions on available experiences at destinations such as events, things to do and shopping.



of travelers would use an AI-powered virtual assistant to plan a trip.

For which purposes would you use an AI-powered virtual assistant?

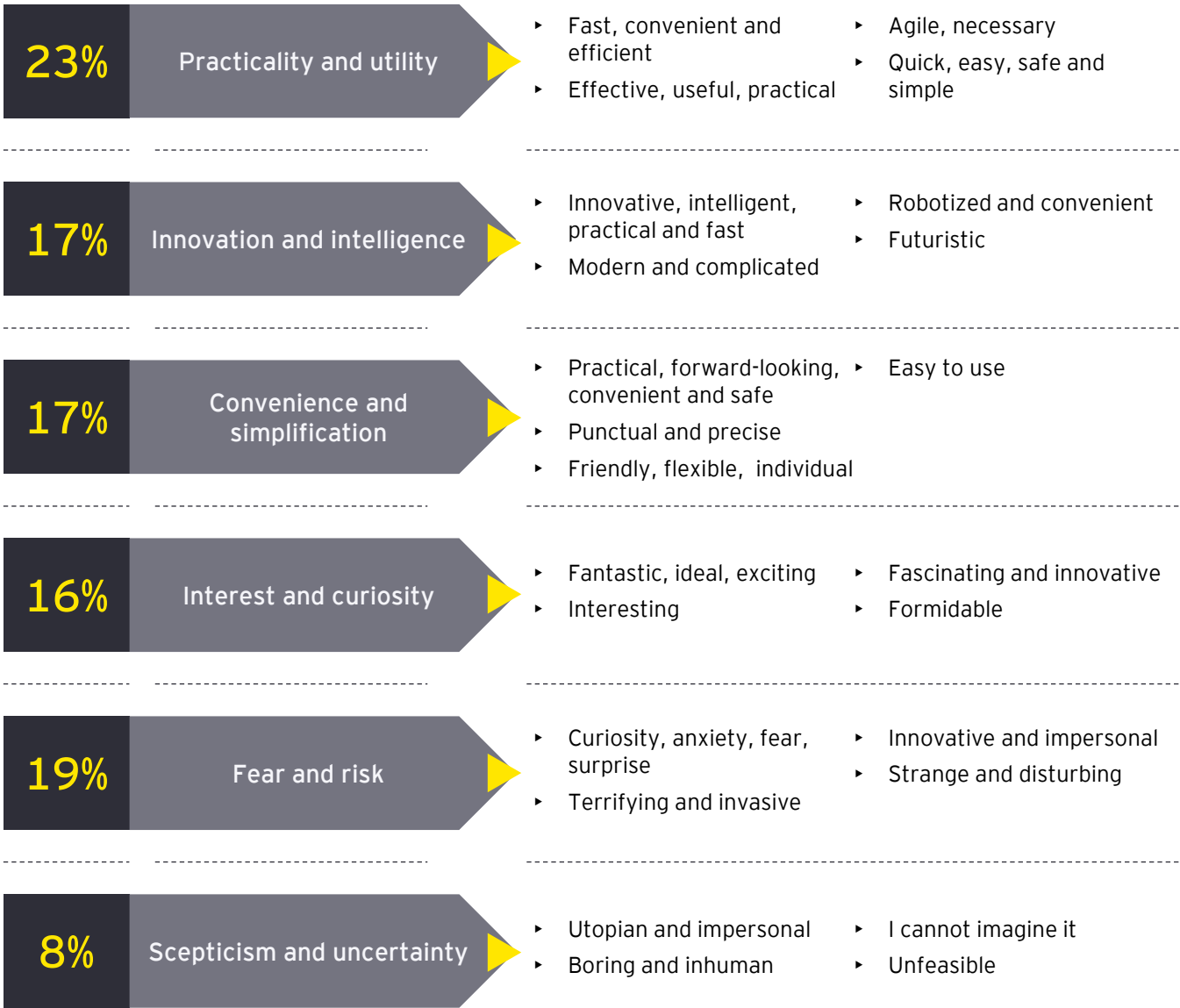


The impact of AI on travelers

3

How consumers perceive a future is in which AI is part of the traveler's experience

Participants were asked to think about a future in which travelers interact with AI tools to plan and manage their trips. Which adjectives would they use to describe such interactions? The answers were grouped into six clusters, based on the prevailing sentiments. For each cluster, some example of responses have been reported.

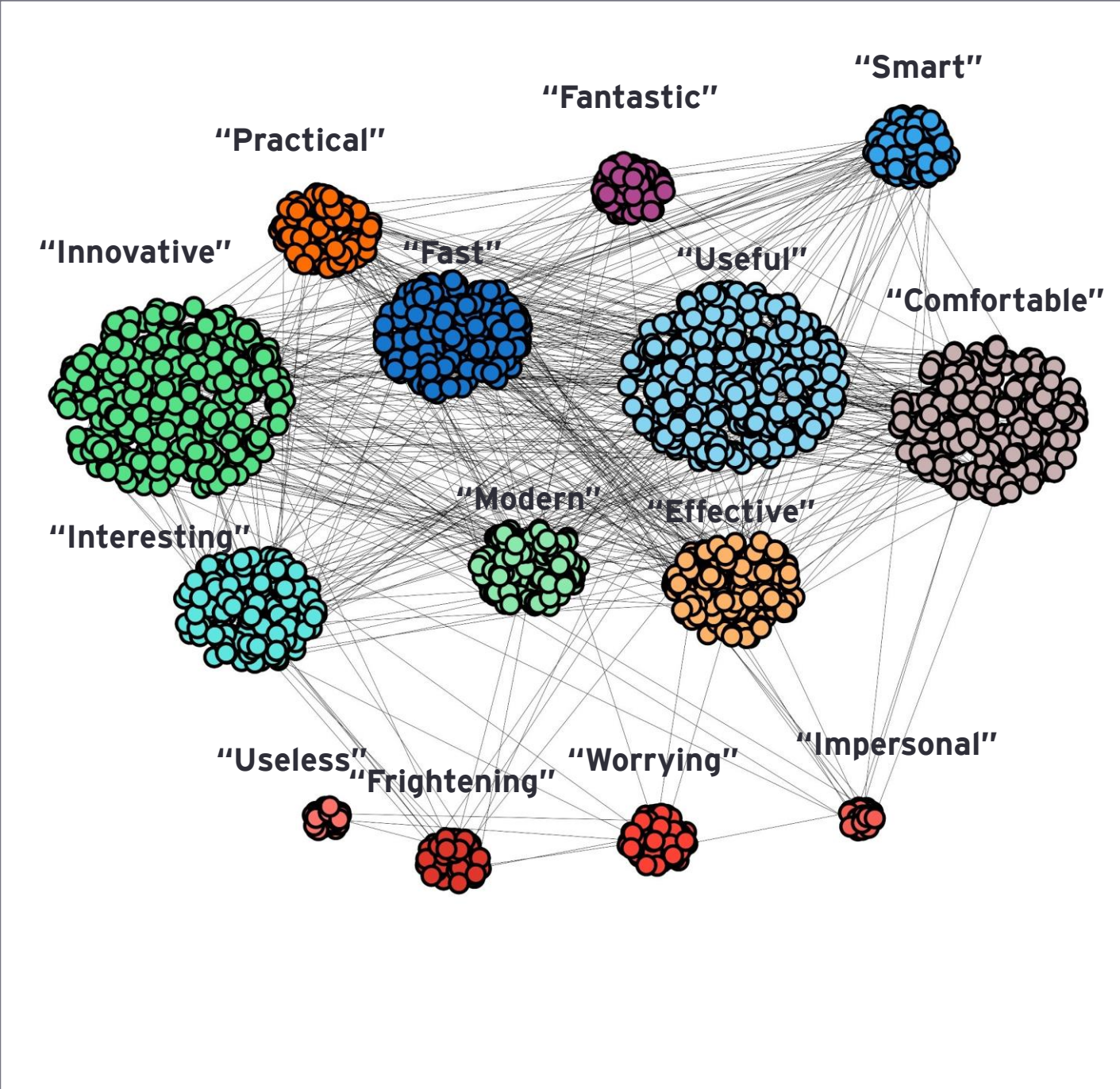


Note: The classification of the answers was carried out with the help of GenAI tools. Approximately 20% of the participants, who preferred not to express an opinion, were not considered in the counts.

3

How consumers perceive a future is in which AI is part of the traveler's experience

Some adjectives kept repeating in the participants' responses when they think about a future in which travelers interact with AI to plan and manage their trips. Innovative (and its synonyms) is the most used adjective, often associated with modern or useful. In some cases, the responses associate adjectives with different valences, such as scary, interesting and fantastic, indicating an ambivalent perception of AI.

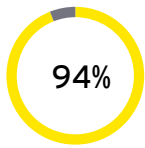


In the graph, the bubbles represent mentions of the adjective and the connections between bubbles represent answers where both adjectives are mentioned.

4

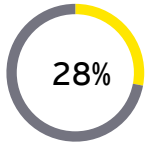
We analyzed the distinctive aspects of behaviors, preferences and **factors** that influence the choices of **Generation Z**. The comparison with other generations can provide valuable indications on **future travel trends**.

Leisure and business travel



of respondents made at least one leisure trip in 2023.

Gen Z are much more interested than other generations in combining leisure and business.



of respondents will increase the number of leisure trips in 2024.

There are increasingly blurred boundaries between leisure and business travel, thanks to the growing interest in combining the two purposes in the same trip.

Interest in travel that combines leisure and business

44%

71%

Short-distance journeys



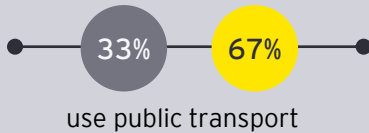
Gen Z



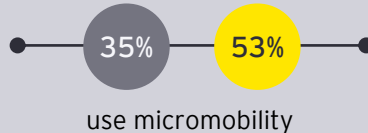
All



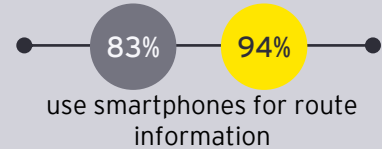
Gen Z use public transport more than the overall sample for their usual trips.



Gen Z takes advantage of micromobility (bicycles and scooters) more than the overall sample for short trips.



Gen Z use their smartphones more than the overall sample to get route information.



The next generation of travelers

4

Understanding Gen Z is key for the future of travel

The analysis of answers provided by Gen Z highlights some emerging trends on the tools used in the inspiration and planning phases of travel.

Digital tools for travel planning

● Gen Z ● All

Gen Z's answers to the question on the digital tools they used, or that inspired them to plan their trips reveal the growing role of social media and multimedia content.

Social media (e.g., Instagram, TikTok, YouTube and Facebook)



Films, TV series and documentaries

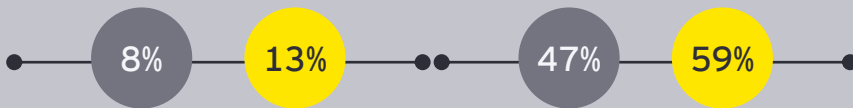


Use of AI

● Gen Z ● All

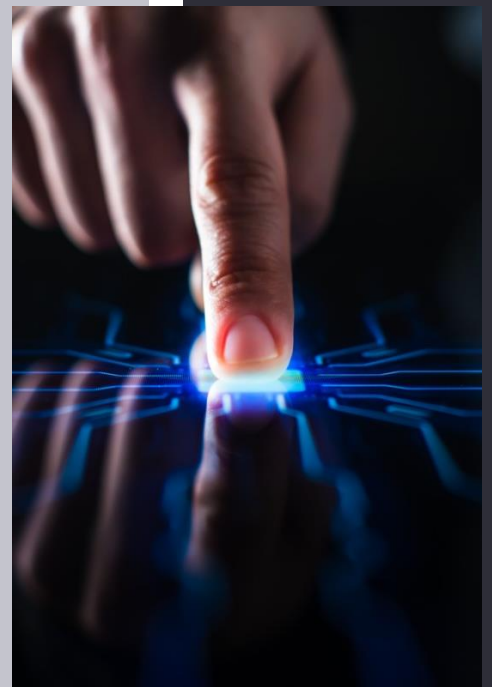
Have already used an AI-based chatbot (such as ChatGPT) at least once to plan a trip

Interested in using an AI-powered virtual assistant to plan a trip in the future



Gen Z who would use AI:

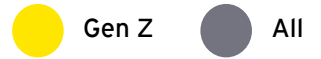
- 43% for support in choosing destination and travel dates.
- 41% for suggestions on experiences available at the destination.
- 38% for support in choosing what and where to eat.



4

Understanding Gen Z is key for the future of travel

Key emerging travel trends can be derived from the responses of Gen Z subjects.



Free and ancillary services

Among the main free services relevant in influencing the choice of transport mode, one-click buying is indicated by nearly one out of two Gen Z respondents.



Propensity to compare the booking experiences offered by travel providers with that of best-of-breed digital retailers

They are more interested in having access to premium services by paying a subscription fee.



Appeal of subscription commercial models, such as Netflix or Spotify

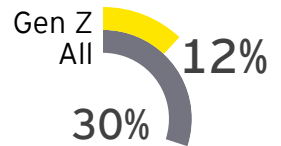
Among the main additional paid services that Gen Z prefers are travel insurance services.



Need for insurance services to ensure maximum flexibility in the event of schedule changes

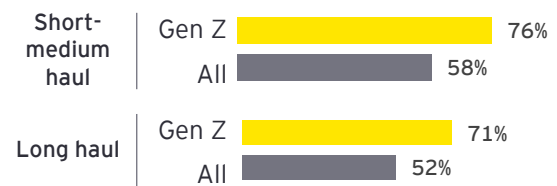
Sustainable travel intentions

Only one out of ten respondents have never made travel choices with sustainability in mind.



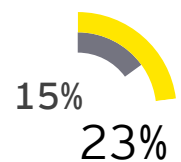
Growing sensibility on sustainable travel

Gen Z are more willing to pay a surcharge to offset carbon emissions.



Interest in sustainability-oriented commercial offerings

When making travel choices, Gen Z are more interested in information about sustainable travel options and warranties about the actual sustainability of travel offerings.



Demand of better information on sustainable travel options

5



To identify traveler profiles, we segmented the sample into eight clusters, based on demographic, behavioral and psychological characteristics. ⁽¹⁾



15%

Tech-Suspicious seniors

Baby-boomers and GenX reluctant to use virtual assistants and other digital tools when traveling.



15%

Inflation concerned

Their travel choices are influenced by the concern that inflation will limit their purchasing power.



15%

AI dislikers

Predominantly Millennials who are not interested in AI and mobility-related digital services.



15%

Environment concerned

They are willing to support environmental initiatives and pay additional costs to offset emissions caused by their travel.



14%

Techno travelers

Gen Z and Millennials comfortable using digital tools for travelling and very interested in AI.



10%

Serial vacationers

They look forward to the next leisure trip for having fun and spending time with their family and friends.



9%

Reluctant travelers

They do not particularly appreciate the current travel experience and limit their trips.



7%

Hypertravelers

They travel for living and live for traveling, proud of doing so in a sustainable way.

1. To determine the profiles, k-means clustering was performed on 12 dimensions. Feature data were normalized beforehand by scaling to unit variance.

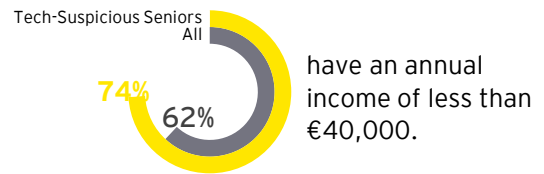
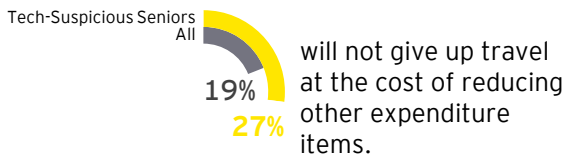
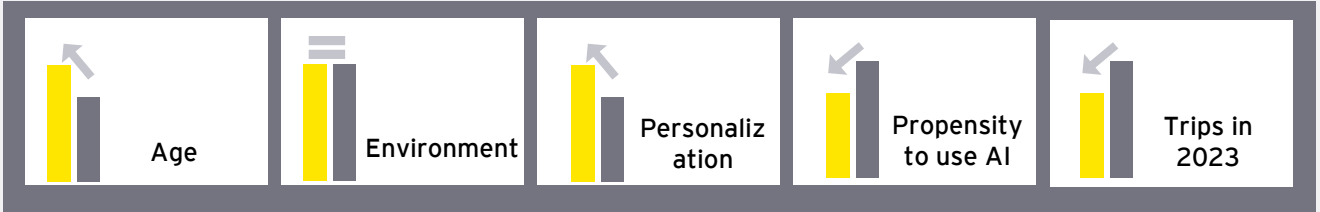
Travelers' profiles

5

Tech-Suspicious seniors

Cluster
Entire sample

Tech-Suspicious Seniors are baby boomers and Gen X who show **disinterest in and distrust digital technologies for travel**. Only 2% of them would rely on an AI-powered virtual assistant to plan a trip. These seniors travel slightly less than the overall sample and typically have an annual income under €40,000. Despite rising prices, they continue to travel, opting to cut back on other expenses instead.



When making travel choices, they are the most sensitive to:



Timely information on delays and disruptions and the possibility to easily reschedule their trips

Free catering service for intercontinental flights

When making travel choices, they are the least sensitive to:



Touchless travel experience

Loyalty programs

Digital assistance during planning and purchasing for trains and planes

Personalization of business travel experience

Digital airport and station route guide

Overall time of leisure travel

Facial recognition technologies to reduce queues and waiting time at airports and stations

One-click buying

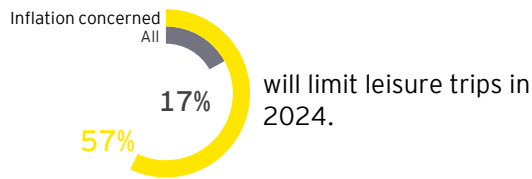
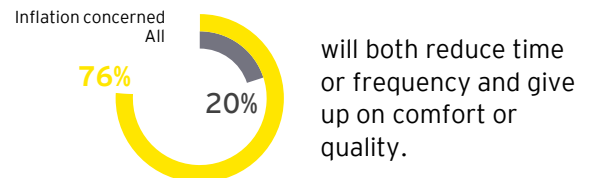
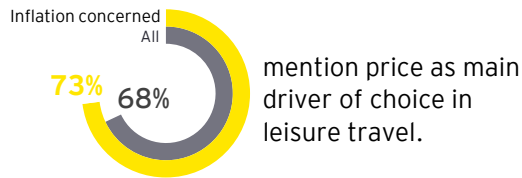
5

Inflation concerned

Cluster
Entire sample

The concern that **inflation** will impact this cluster's spending power **strongly influences** their travel choices. Their annual income is relatively low and almost 60% will reduce leisure trips in 2024 vs 2023, especially air travel.

Three out of four are ready to reduce their time or frequency of trips and give up comfort or quality.



When making travel choices, they are the most sensitive to:



Price

Multiple payment options, including deferred payments

Refunds and automatic bonus in the event of delays or disruptions

Lower risk of queue and waits

When making travel choices, they are the least sensitive to:



Loyalty programs

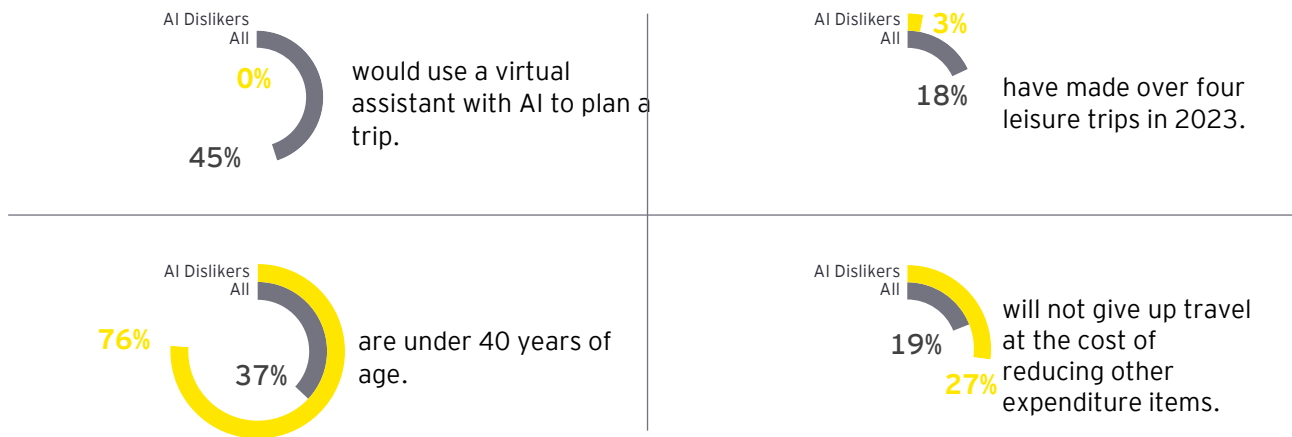
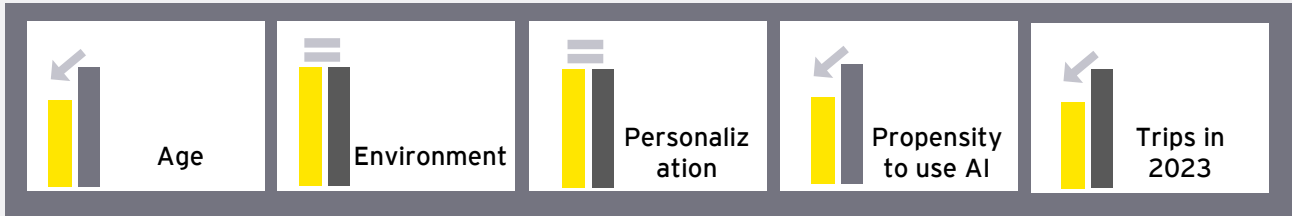
One-click buying

5

AI dislikers

Cluster
Entire sample

AI Dislikers are mainly Gen Z and Millennials who, despite being digital natives, are **not attracted by AI-based technologies** for their travel. They travel less than the overall sample, but are still not willing to give up travel, even at the cost of reducing other expenses.



When making travel choices, they are the most sensitive to:



Price for business trips

Luggage storage, when traveling on intercontinental flights

Information about sustainable travel options when traveling on national flights

When making travel choices, they are the least sensitive to:



Reliability (less risk of cancellations and/or delays)

On-board digital entertainment, when traveling on international flights

Overall travel time

Facial recognition technologies to reduce queues and waiting time at the airport for intercontinental flights

Safety of leisure travel experience

Free catering service for intercontinental flights

Timely information on delays and disruptions

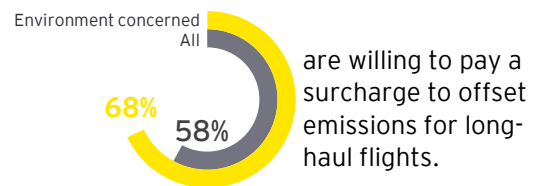
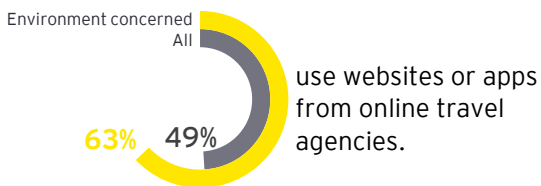
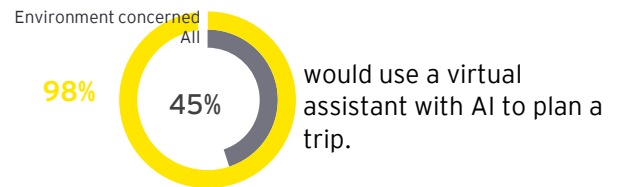
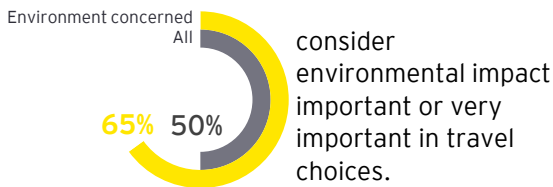
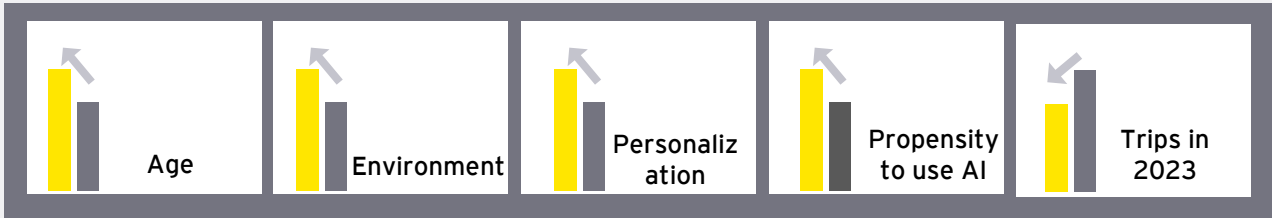
Refunds and automatic bonus in the event of delays or disruptions for intercontinental flights

5

Environment concerned

Cluster
Entire sample

Concerns about the environment strongly influence their travel behavior. They display the highest implicit attitude of concern toward environmental issues. More than any other cluster, they believe that the transport and travel industry should provide more eco-friendly information and offers. They are also very open to using AI-based travel tools in the future.



When making travel choices, they are the most sensitive to:



Health safety (e.g., cleaning and no crowding) and clear health safety information of the train travel

When flying, travel-related insurance services and timely information on delays and disruptions of intercontinental flights, with the possibility to easily reschedule the trip

When traveling on national and international flights, transfer services and digital airport route guides

Business travel comfort and reservation of more comfortable seats in the same service class

Lower risk of queue and waits

When making travel choices, they are the least sensitive to:



Welcome drink on the train

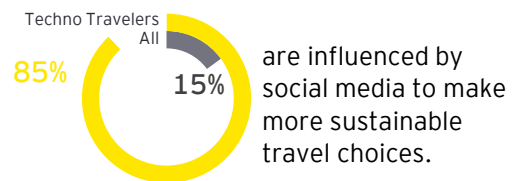
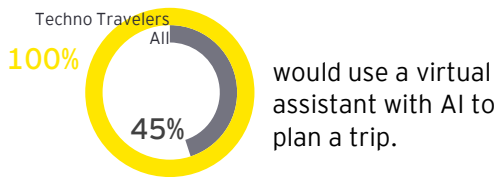
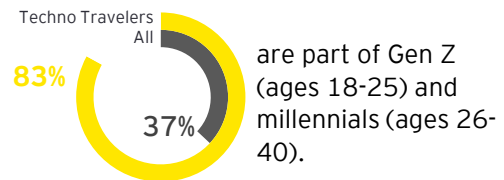
When flying, multiple payment options, including deferred payments

5

Techno travelers

Cluster
Entire sample

Techno Travelers are those who are comfortable with using digital technologies to plan and manage their trips. They perceive AI as a useful tool for the travel experience and as one that promotes convenience. They are predominantly part of the Millennials and Generation Z who have grown up with technology at their fingertips and are particularly attentive to trends and shared experiences on social media.



When making travel choices, they are the most sensitive to:



Lower risk of queue and waits for leisure trips

Digital airport route guide

One-click buying

On-board internet connection

Touchless travel experience

When traveling by train, premium on-board connection that allows video calls during travel, loyalty programs, multiple payment options, catering service, possibility to block a reservation for free and luggage storage

Digital assistance during planning and purchasing

When making travel choices, they are the least sensitive to:



Refunds and automatic bonus in the event of train delays

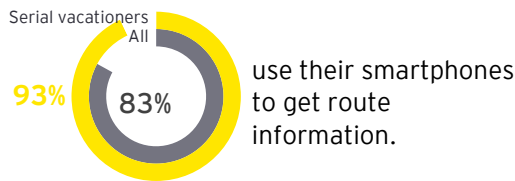
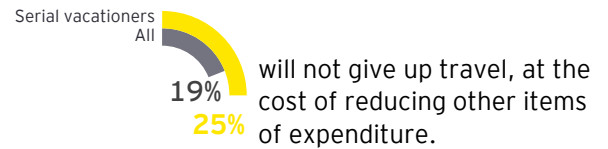
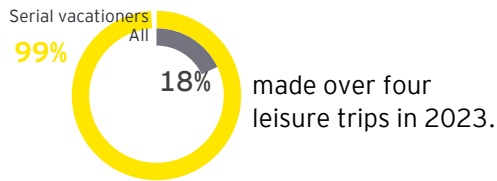
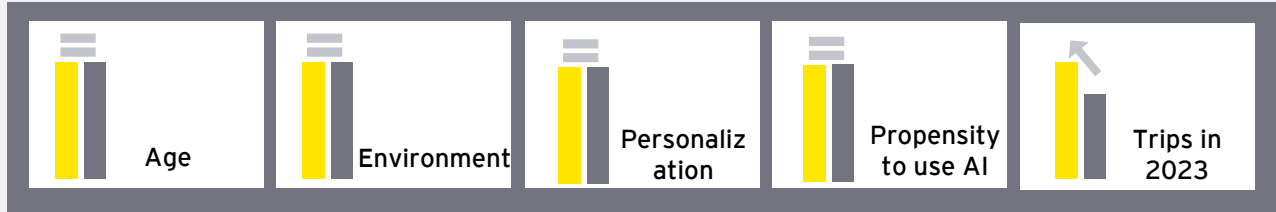
Clear health safety information (e.g., spacing and safeguarding measures, and sanitization and screening procedures)

5

Serial vacationers

Cluster
Entire sample

This cluster does the most leisure trips: one in three of them plan over 10 leisure trips in 2024 and one in five will increase leisure trips in 2024 vs 2023. Four out of five will travel to relax or to explore new places, cultures and try local food. Their income is average, however, 25% will not give up traveling, even if it means reducing other expenditure items, in case of a reduction in purchasing power.



When making travel choices, they are the most sensitive to:



Timely information on delays and disruptions and flexibility to change leisure travel plans

Loyalty programs

Free catering service for intercontinental flights

Refunds and automatic bonus in the event of train or flight delays

Comfort when traveling, both for leisure and business

When flying, on-board digital entertainment

When making travel choices, they are the least sensitive to:



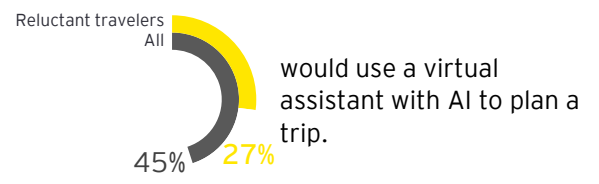
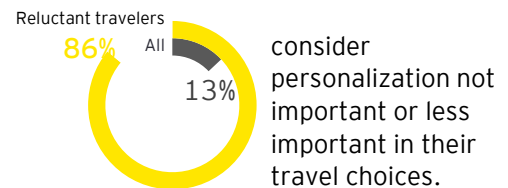
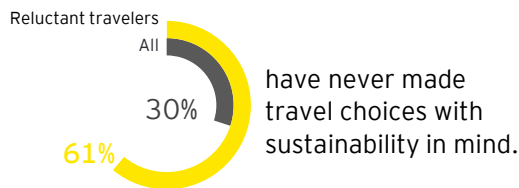
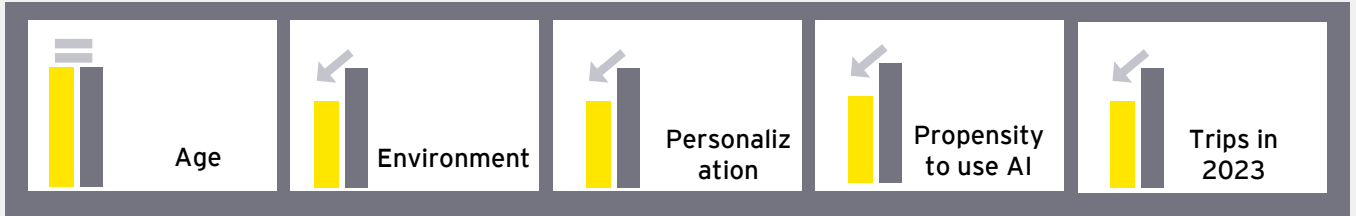
Digital airport route guides

5

Reluctant travelers

Cluster
Entire sample

Their income is not the lowest, being only marginally below the average and their concerns regarding inflation is moderate. Nevertheless, **this cluster travels less than other profiles**. They have less motivation than others to travel to explore new places, culture and food, be with family and friends, have fun or relax. They are the least sensitive to environmental sustainability and about personalizing their travel experience.



When making travel choices, they are the most sensitive to:



Price

Welcome drink on the train

When making travel choices, they are the least sensitive to:



Travel comfort

Flexibility to change travel plans

Digital assistance during planning and purchasing

Safety of the travel experience

Information about sustainable travel options

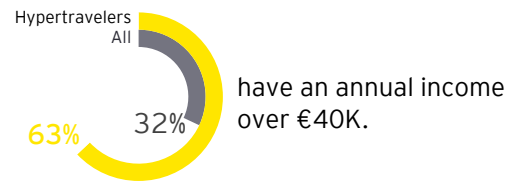
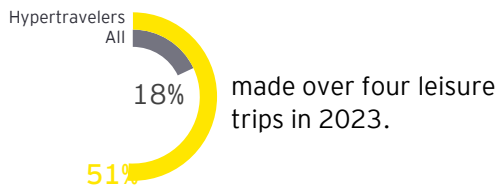
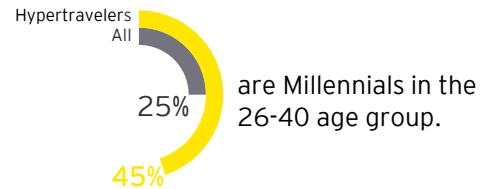
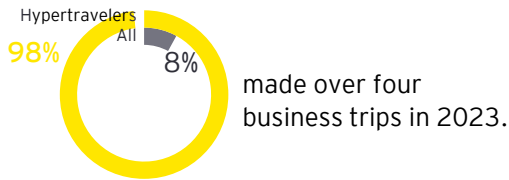
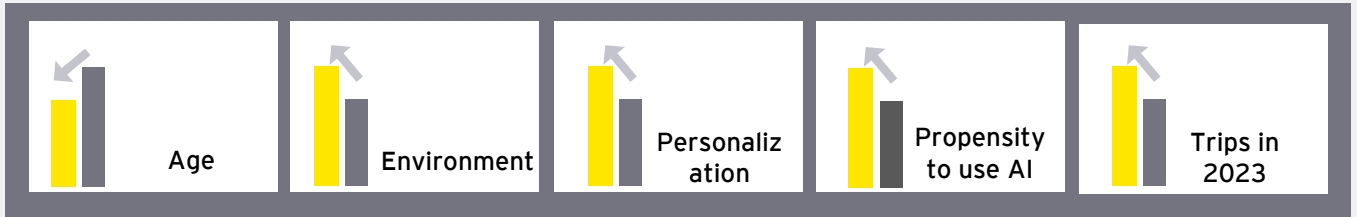
Possibility to customize the trip with options and ancillary services according to my needs

5

Hypertravelers

Cluster
Entire sample

This cluster is the top-value segment, with an annual income higher than average. One in two of them do over 10 business trips per year, while about 60% plan more than five leisure trips in 2024. About 40% will increase business trips in 2024, and as many as 42% will increase business trips by train. More than any other cluster, they consider a sustainable travel experience to be a factor that influences their travel choices, and they express curiosity and interest in AI as a tool supporting their travel experience. Their environmental attitude is especially influenced by awareness campaigns. In 2024, 35% will travel for sports and wellness and 33% will combine leisure and business. In future, 52% plan to make bleisure trips.



When making travel choices, they are the most sensitive to:



Flexibility to change travel plans

Sustainable travel experience

Personalization of the travel experience

When traveling by train, information about sustainable travel options, digital assistance during planning and purchasing (e.g., via chat) and access to premium subscription services

Touchless travel experience

When traveling for business, reliability and flexibility to change travel plans

When flying, reservation of more comfortable seats in the same service class

When making travel choices, they are the least sensitive to:



Wi-Fi with Internet access and portable device power supply

Digital rail station route guide

6



This section provides **specific insights into each of the five countries** surveyed, organized according to the **four areas of analysis** represented below. It also compares the country data with that of the overall sample, highlighting noteworthy **deviations**.

Travel habits and main destinations

Drivers and influences in travel choices

Rail and air travel preferences

Frequency and modalities for routine short-distance journeys



Travel attitudes by country

6

Focus France: travel habits and main destinations

In line with the general trend, the percentage of French travelers intending to travel for business in 2024 is seeing an increase. They use the bus less than other countries and their favorite destinations abroad are Spain and Italy.



Leisure travel

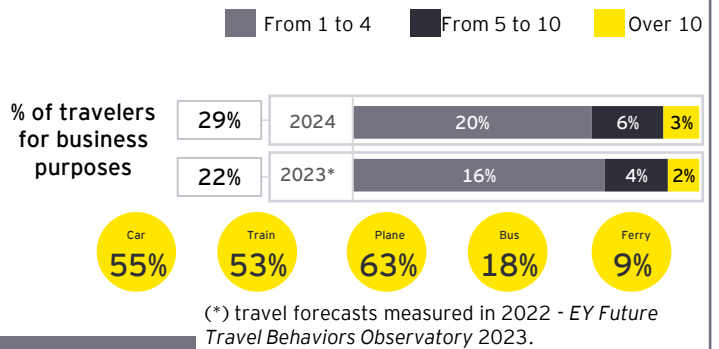
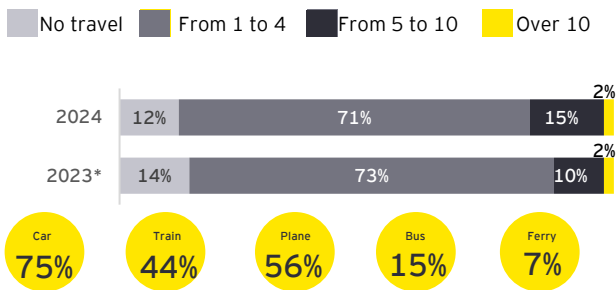


Business travel

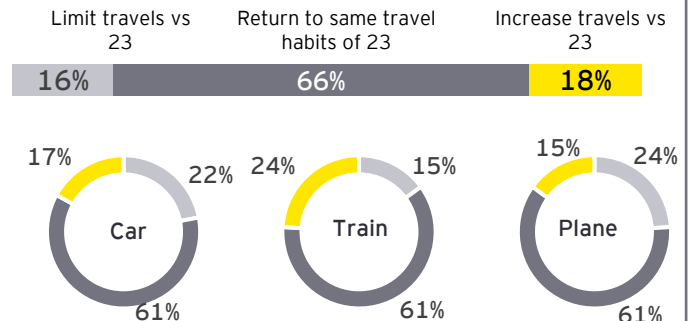
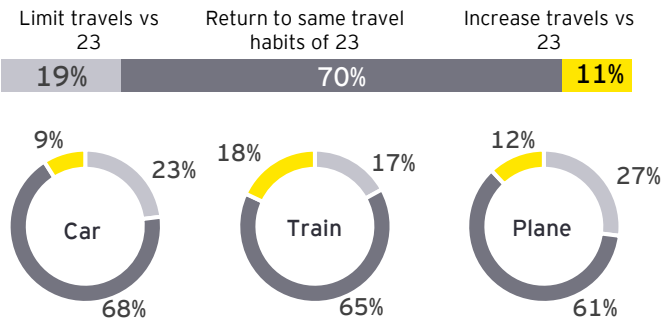
% calculated on leisure travelers

% calculated on business travelers

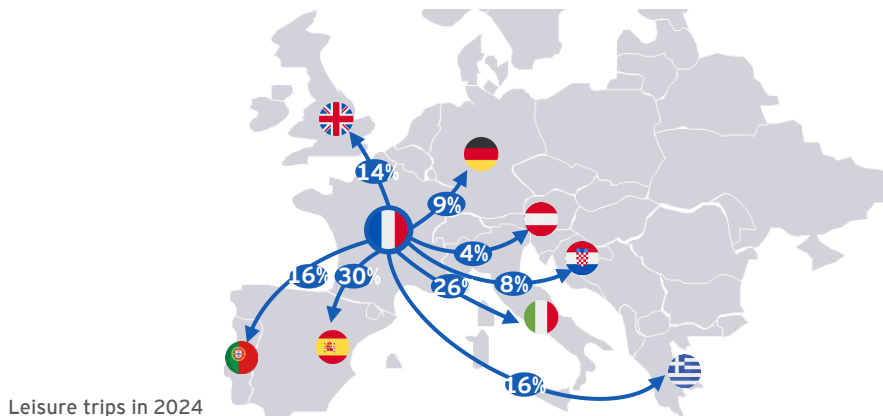
Frequency and modes of travel



Intentions for 2024



Where are you thinking of traveling in 2024? Main destinations in Europe

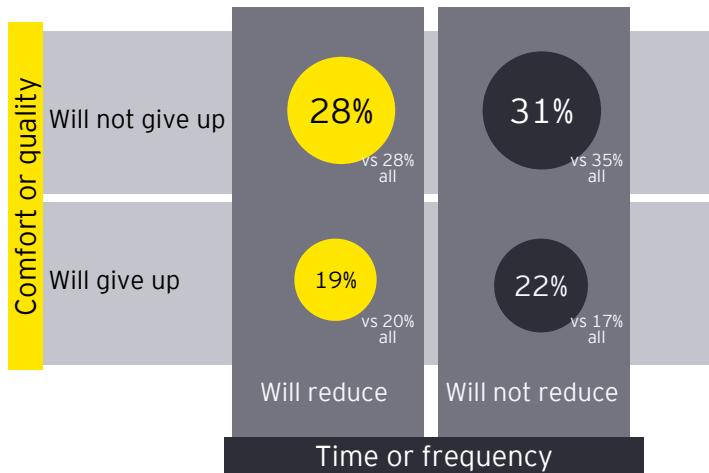


6

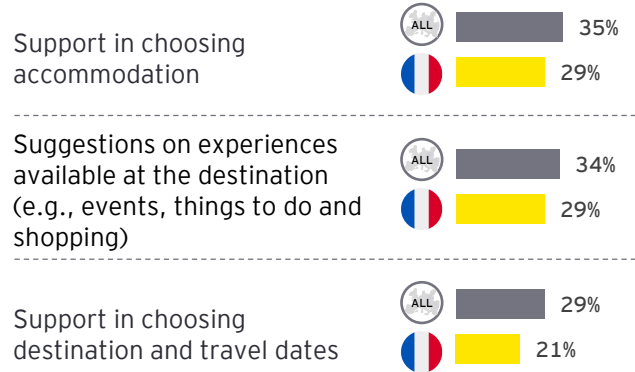
Focus France: Influences in travel choices

French travelers explicitly place a higher importance on a personalized experience and the environmental impact of the vehicle compared to the overall sample. Yet, their implicit inclination toward environmental issues is the lowest among the countries surveyed, even if by only a few percentage points.

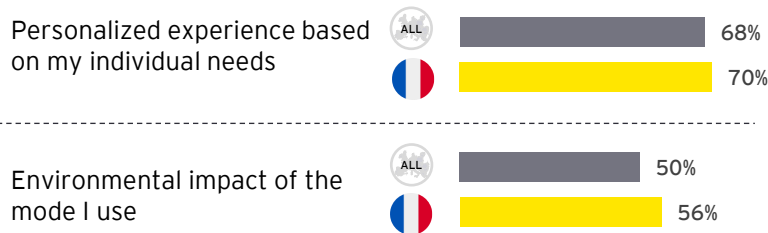
Impact of price inflation on consumer travel habits



AI: main purposes of use



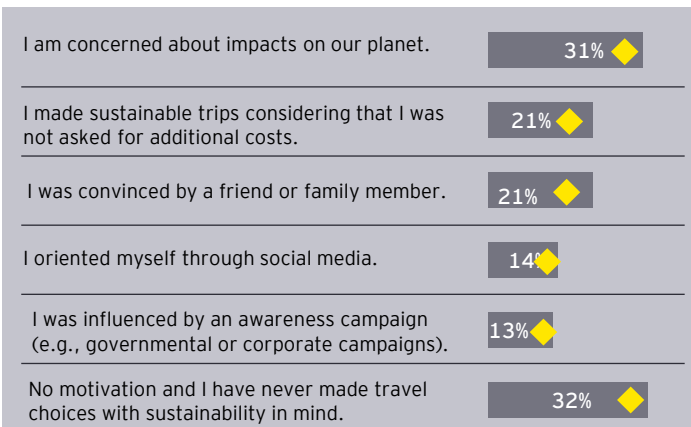
Importance given to factors of choice



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



◆ All

Implicit attitudes

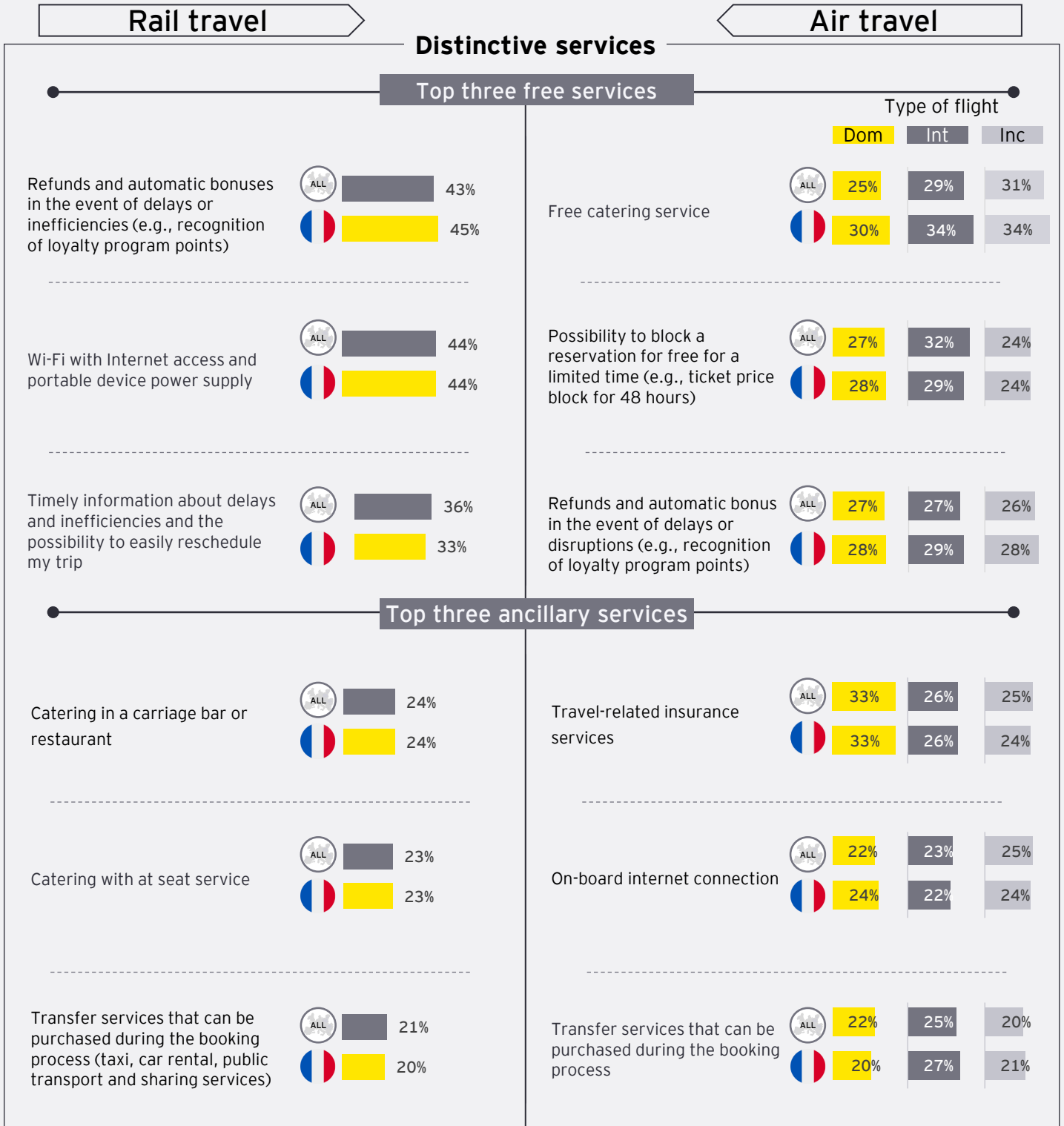
Concern for environmental issues



6

Focus France: distinctive services required for rail and air travel

In line with the general trend, the free services preferred for train travel by French travelers are related to delay and disruption management. Catering, which ranks first among free services for air travel, is also particularly relevant among paid services.



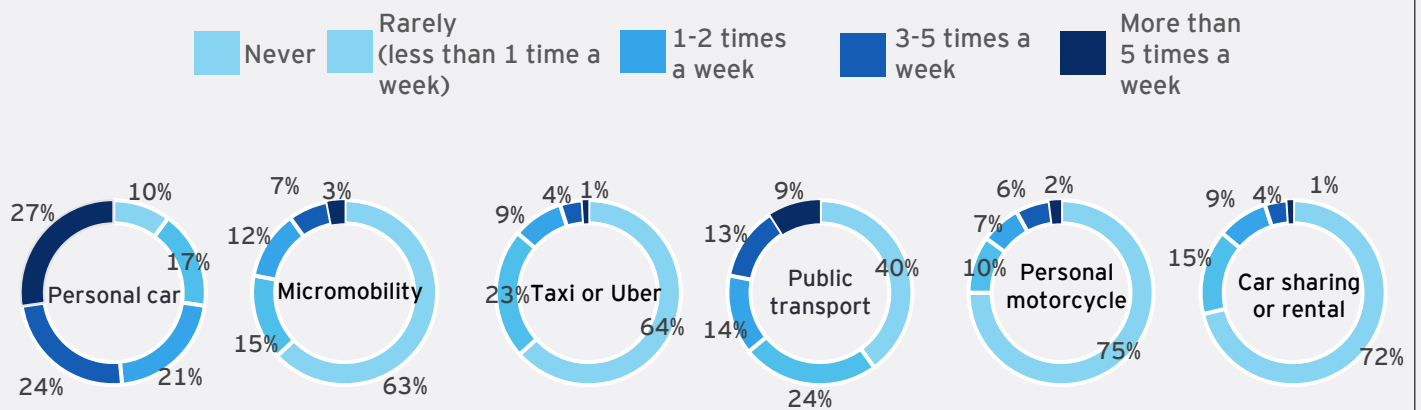
6

Focus France: trends in short-distance mobility

For French individuals, the use of public transport and micromobility is slightly less influenced by the availability of potential solutions that could simplify the travel experience than average.

Usual short journeys

Frequency and modes

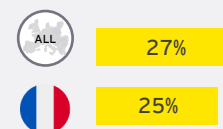


Propensity to use public transport and micromobility

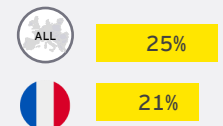
Positively influence the use

Potential solutions that would influence use

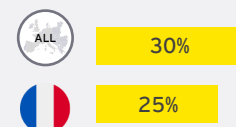
A single digital channel to plan my journeys and pay for various transport services.



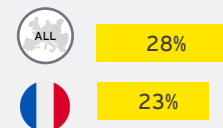
An AI-based virtual assistant that suggests how to move around considering my personal needs and preferences, service availability and expected times.



A flat-rate subscription that allows for personalized and unlimited use of a bundle of transport services.



An account-based ticketing system that eliminates the need to buy tickets or subscriptions, I check in with my smartphone and I'm charged for the transport services I actually use.



6

Focus Germany: travel habits and main destinations

The frequency of leisure travel is expected to slightly increase for Germans. More significant, however, is the expected increase in business trips. Cars are used less frequently than in other countries, and their favorite destinations abroad are Spain and Italy.



Leisure travel

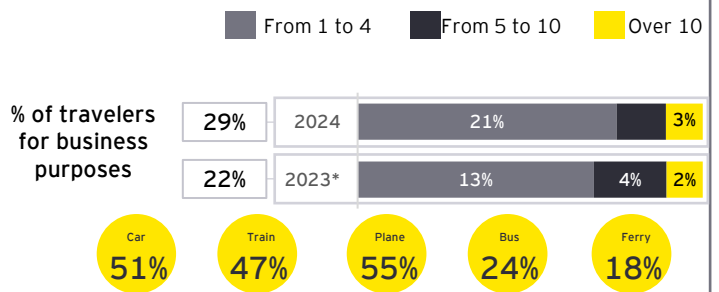
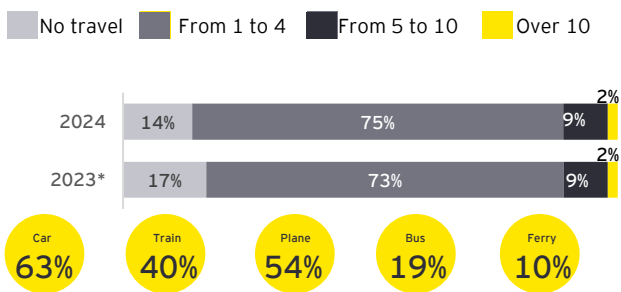


Business travel

% calculated on leisure travelers

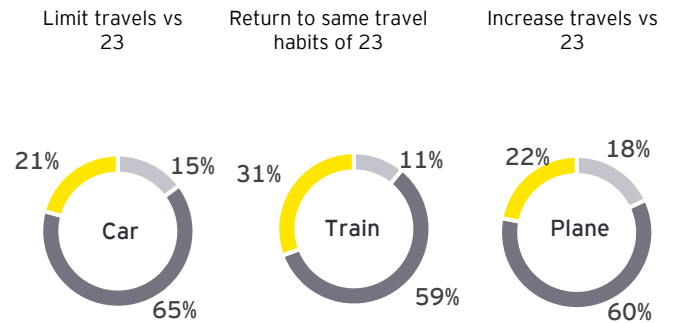
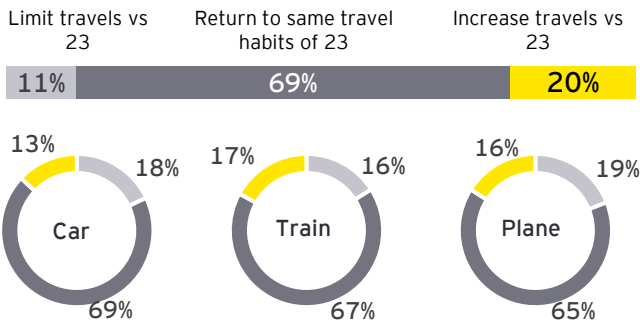
% calculated on business travelers

Frequency and modes of travel

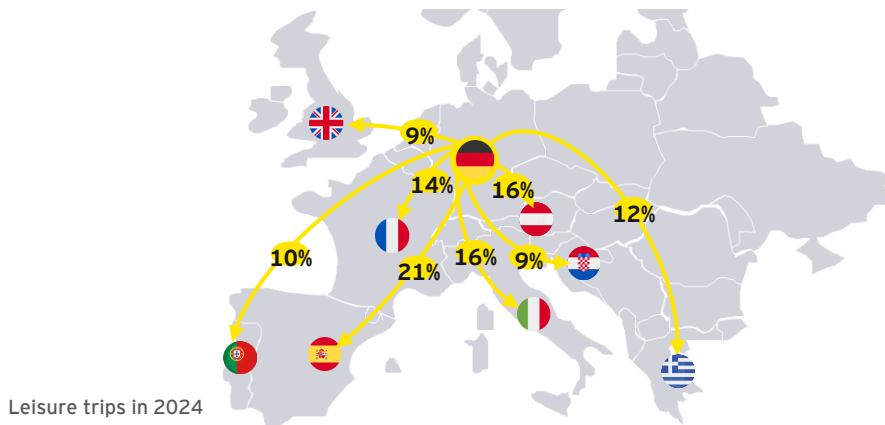


(*) travel forecasts measured in 2022 - EY Future Travel Behaviors Observatory 2023.

Intentions for 2024



Where are you thinking of traveling in 2024? Main destinations in Europe

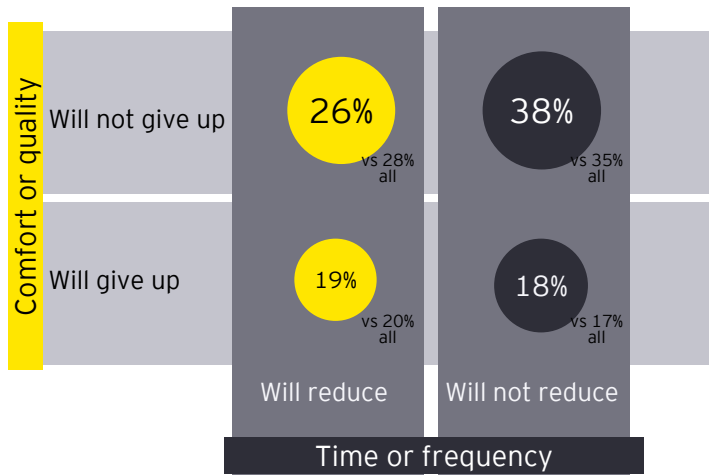


6

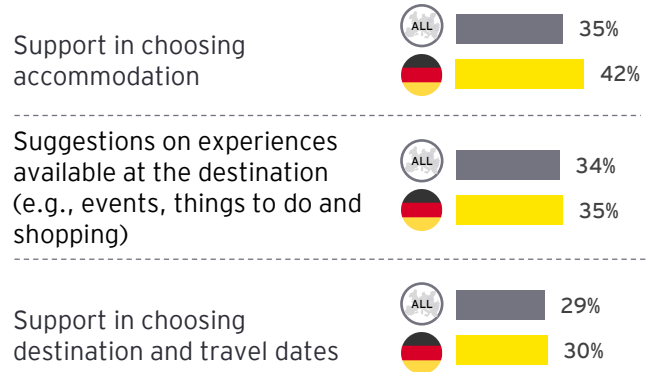
Focus Germany: Influences in travel choices

German travelers show an interest in using AI, particularly for choosing accommodation, which is above average. A slightly lower importance is attached to the personalized experience and environmental impact of the medium. They are incentivized in sustainable choices by the absence of additional costs.

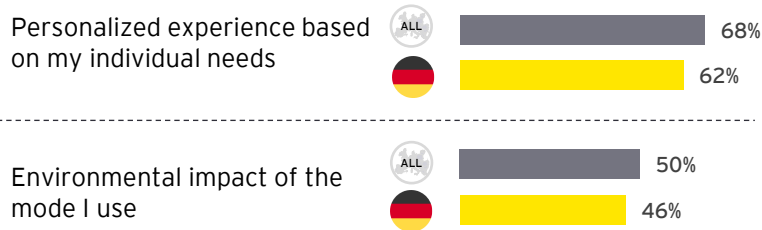
Impact of price inflation on consumer travel habits



AI: main purposes of use



Importance given to factors of choice



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



Implicit attitudes

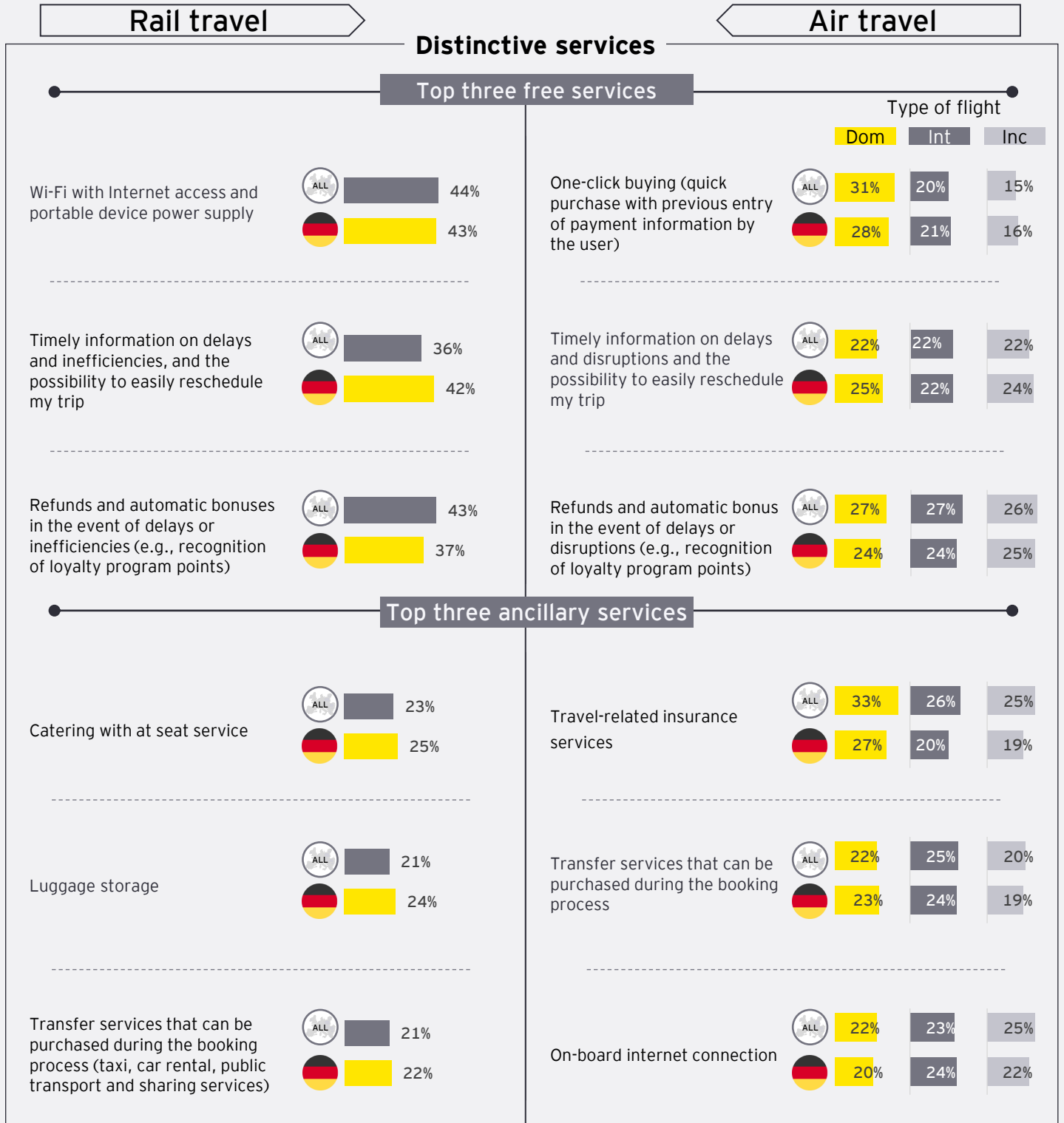
Concern for environmental issues



6

Focus Germany: distinctive services required for rail and air travel

The free services preferred by German travelers are Wi-Fi on the train and quick purchase of airline tickets, as well as services related to delay and disruption management. Paid services, facilitating a door-to-door experience, are among the most attractive, both for train and air.



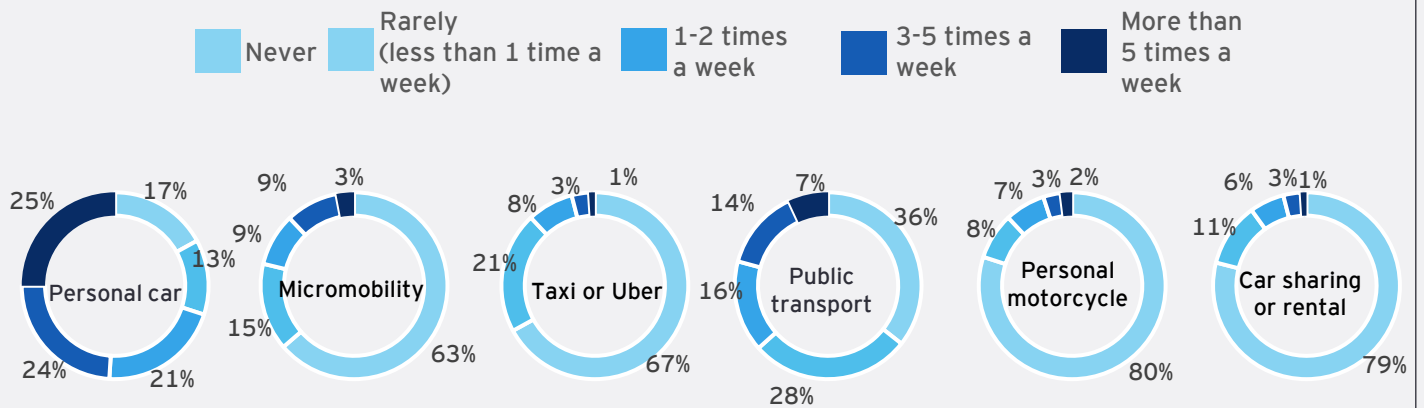
6

Focus Germany: trends in short-distance mobility

For German individuals, the use of public transport and micromobility would be moderately affected by the availability of potential travel-simplifying solutions. This impact is slightly less than the average observed effect.

Usual short journeys

Frequency and modes

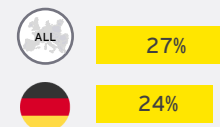


Propensity to use public transport and micromobility

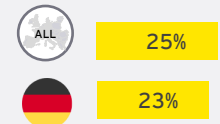
Positively influence the use

Potential solutions that would influence use

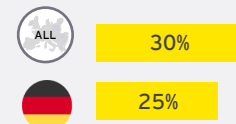
A single digital channel to plan my journeys and pay for various transport services.



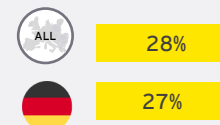
An AI-based virtual assistant that suggests how to move around considering my personal needs and preferences, service availability and expected times.



A flat-rate subscription that allows for personalized and unlimited use of a bundle of transport services.



An account-based ticketing system that eliminates the need to buy tickets or subscriptions, I check in with my smartphone and I'm charged for the transport services I actually use.



6

Focus Italy: travel habits and main destinations

In line with the general trend, in 2024, Italian travelers are expected to do more business trips than leisure trips. Cars and trains are particularly popular modes of transport, and the preferred destinations abroad are Spain, France and Greece.



Leisure travel



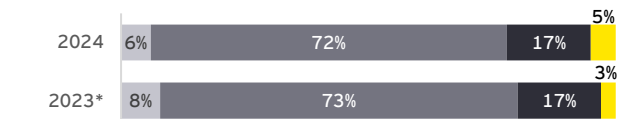
Business travel

% calculated on leisure travelers

% calculated on business travelers

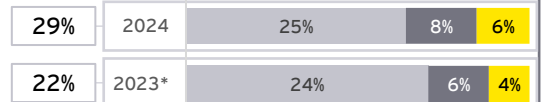
Frequency and modes of travel

Legend: No travel (light grey), From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



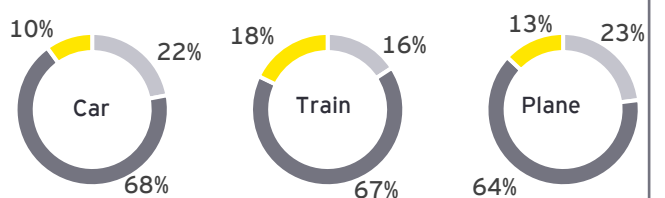
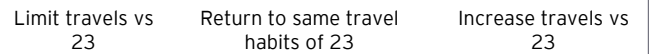
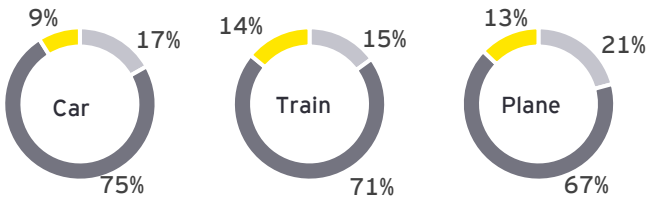
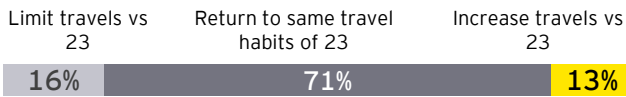
Legend: From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)

% of travelers for business purposes

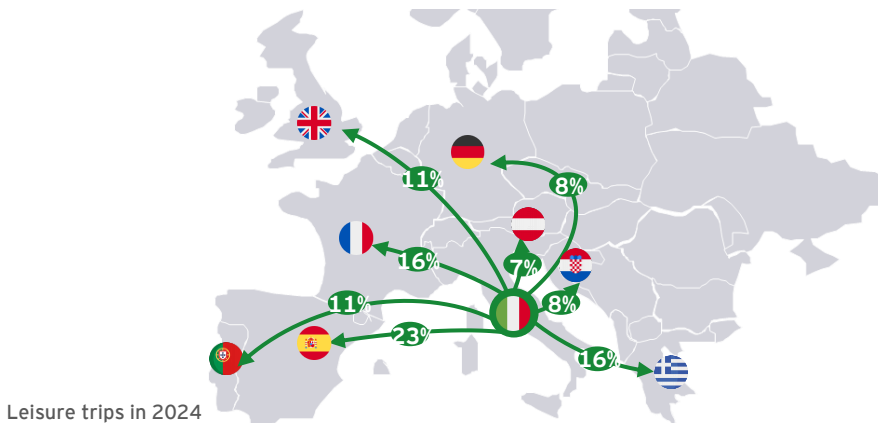


(*) travel forecasts measured in 2022 - EY Future Travel Behaviors Observatory 2023.

Intentions for 2024



Where are you thinking of traveling in 2024? Main destinations in Europe

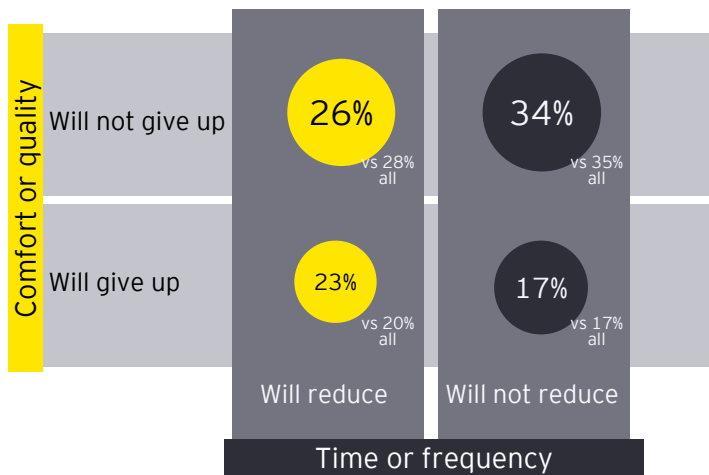


6

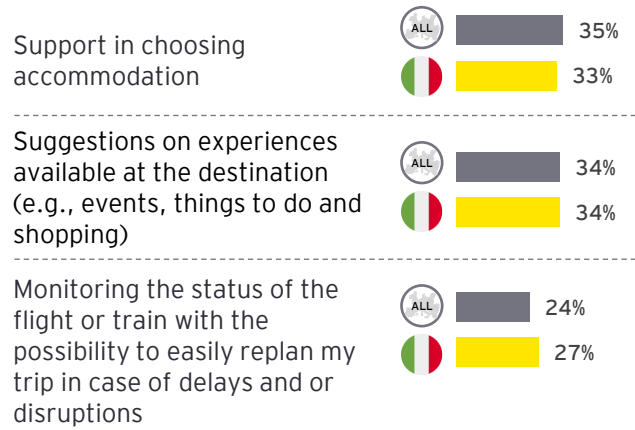
Focus Italy: Influences in travel choices

The explicit intentions of Italian travelers are generally in line with the average. They attach importance to personalized travel experiences.

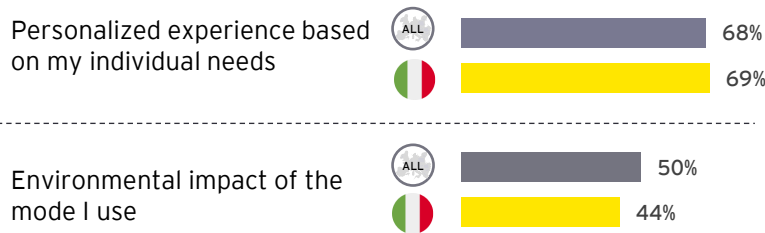
Impact of price inflation on consumer travel habits



AI: main purposes of use



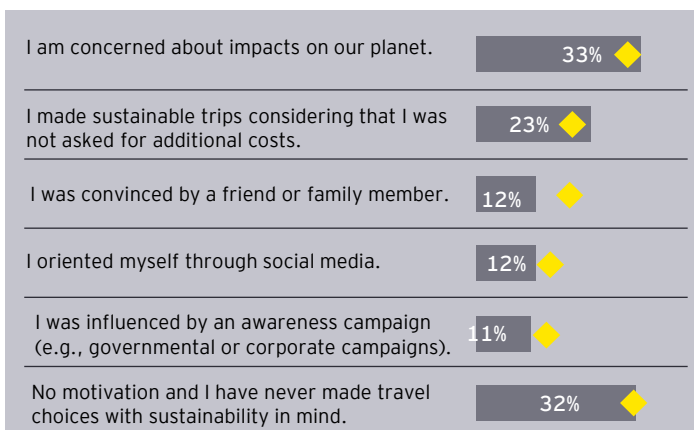
Importance given to factors of choice



Attitude toward sustainable travel

Explicit intentions

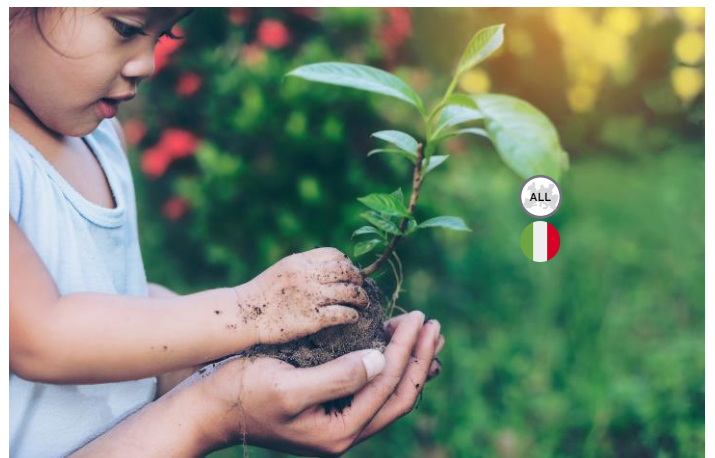
Reasons behind sustainable travel choices



◆ All

Implicit attitudes

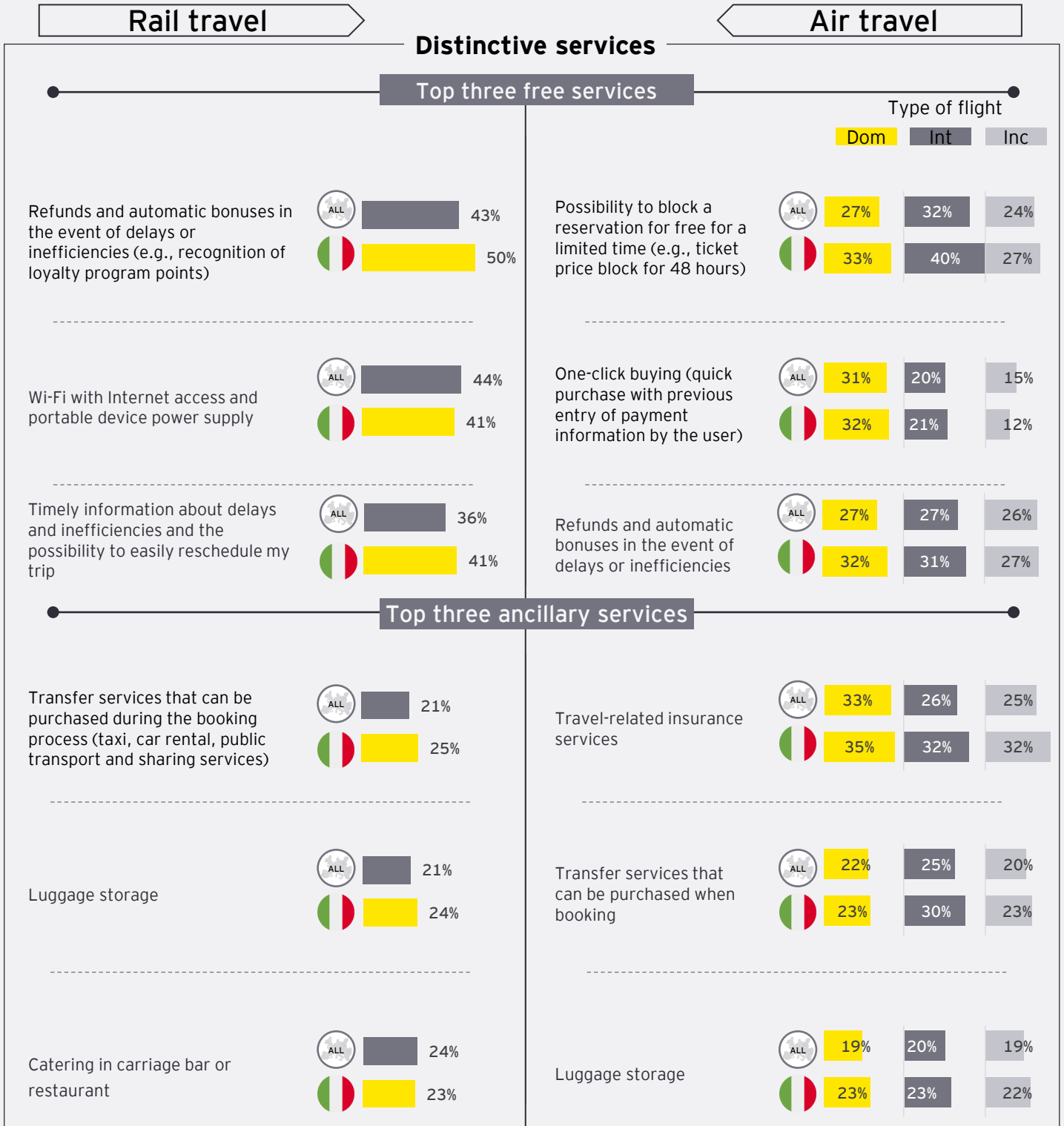
Concern for environmental issues



6

Focus Italy: distinctive services required for rail and air travel

In line with the general trend, the free services preferred by Italian travelers are related to delay and disruption management, both for train and air travel. Transfer services (for train travel) and travel insurance (for air travel) are the main ancillary services.



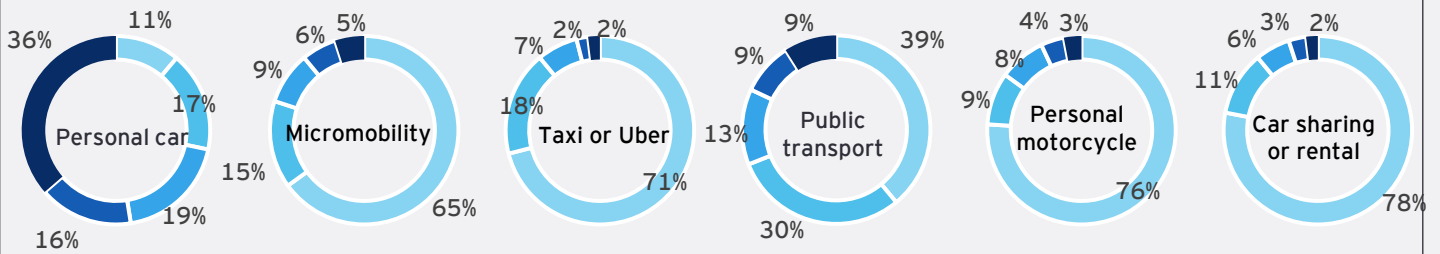
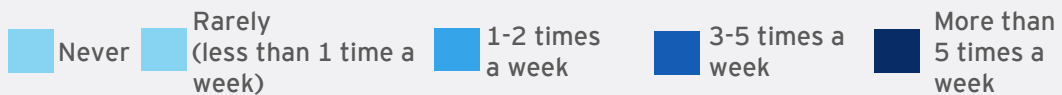
6

Focus Italy: trends in short-distance mobility

The use of public transport and micromobility for Italian subjects would be affected more than average by the availability of digital services that simplify the travel experience.

Usual short journeys

Frequency and modes

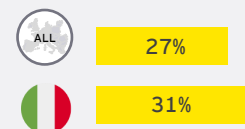


Propensity to use public transport and micromobility

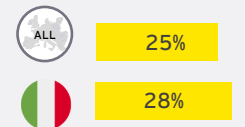
Positively influence the use

Potential solutions that would influence use

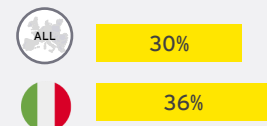
A single digital channel to plan my journeys and pay for various transport services.



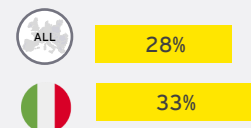
An AI-based virtual assistant that suggests how to move around considering my personal needs and preferences, service availability and expected times.



A flat-rate subscription that allows for personalized and unlimited use of a bundle of transport services.



An account-based ticketing system that eliminates the need to buy tickets or subscriptions, I check in with my smartphone and I'm charged for the transport services I actually use.



6

Focus Spain: travel habits and main destinations

Spanish travelers expect the frequency of their leisure trips to remain stable, while business trips are expected to increase. Cars and planes are particularly popular modes of transport and the preferred destinations abroad are Italy, France and Portugal.



Leisure travel



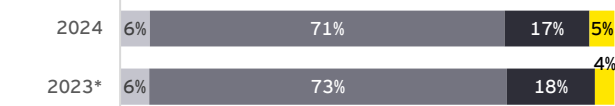
Business travel

% calculated on leisure travelers

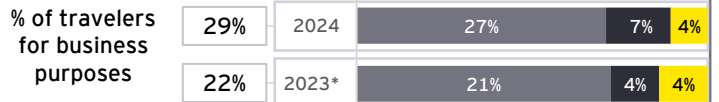
% calculated on business travelers

Frequency and modes of travel

Legend: No travel (light grey), From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



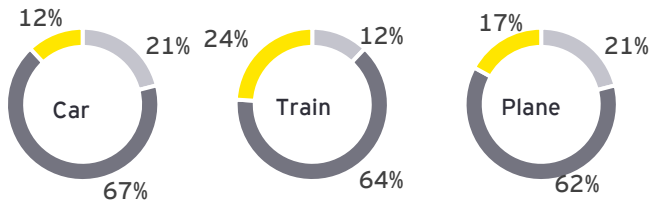
Legend: From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



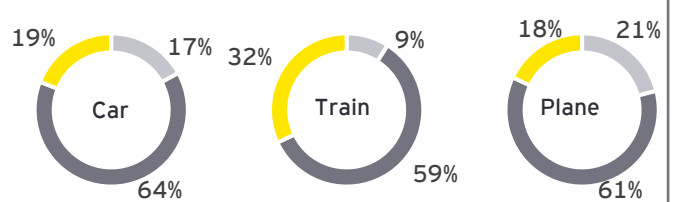
(*) travel forecasts measured in 2022 - EY Future Travel Behaviors Observatory 2023.

Intentions for 2024

Limit travels vs 23: 14% | Return to same travel habits of 23: 67% | Increase travels vs 23: 19%



Limit travels vs 23: 19% | Return to same travel habits of 23: 32% | Increase travels vs 23: 9%



Where are you thinking of traveling in 2024? Main destinations in Europe

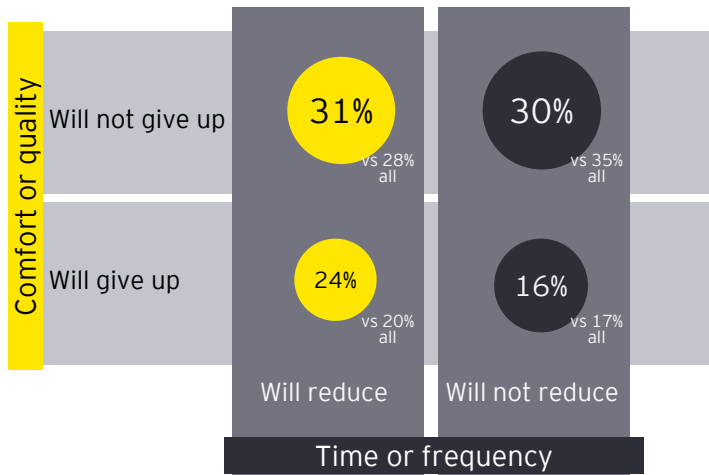


6

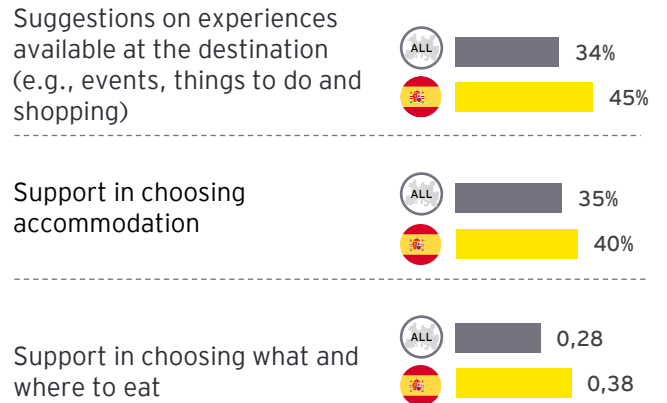
Focus Spain: Influences in travel choices

The interest in using AI, particularly to obtain suggestions on the experiences available at the destination, exceeds the average. For Spanish travelers, the environmental impact of the medium is important. The inflation effect that Spanish travelers expect on their travel choices is higher than last year.

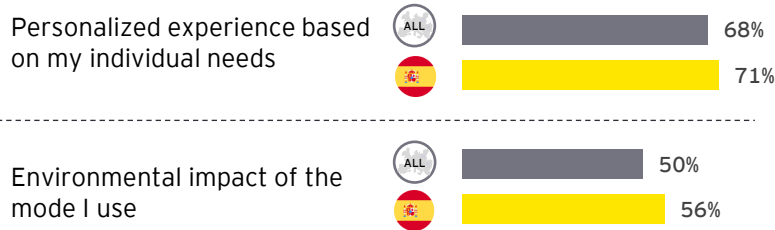
Impact of price inflation on consumer travel habits



AI: main purposes of use



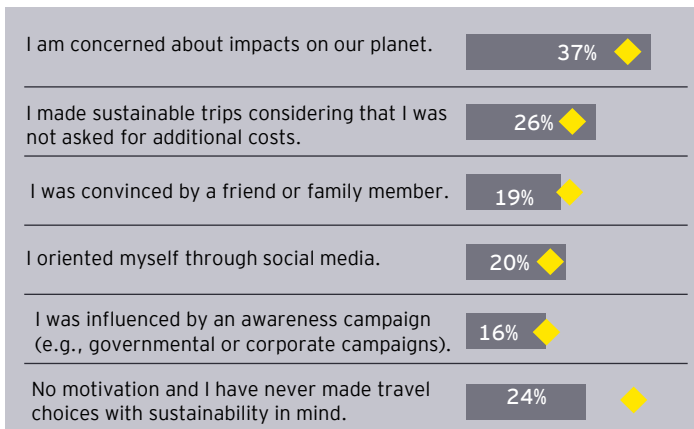
Importance given to factors of choice



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



◆ All

Implicit attitudes

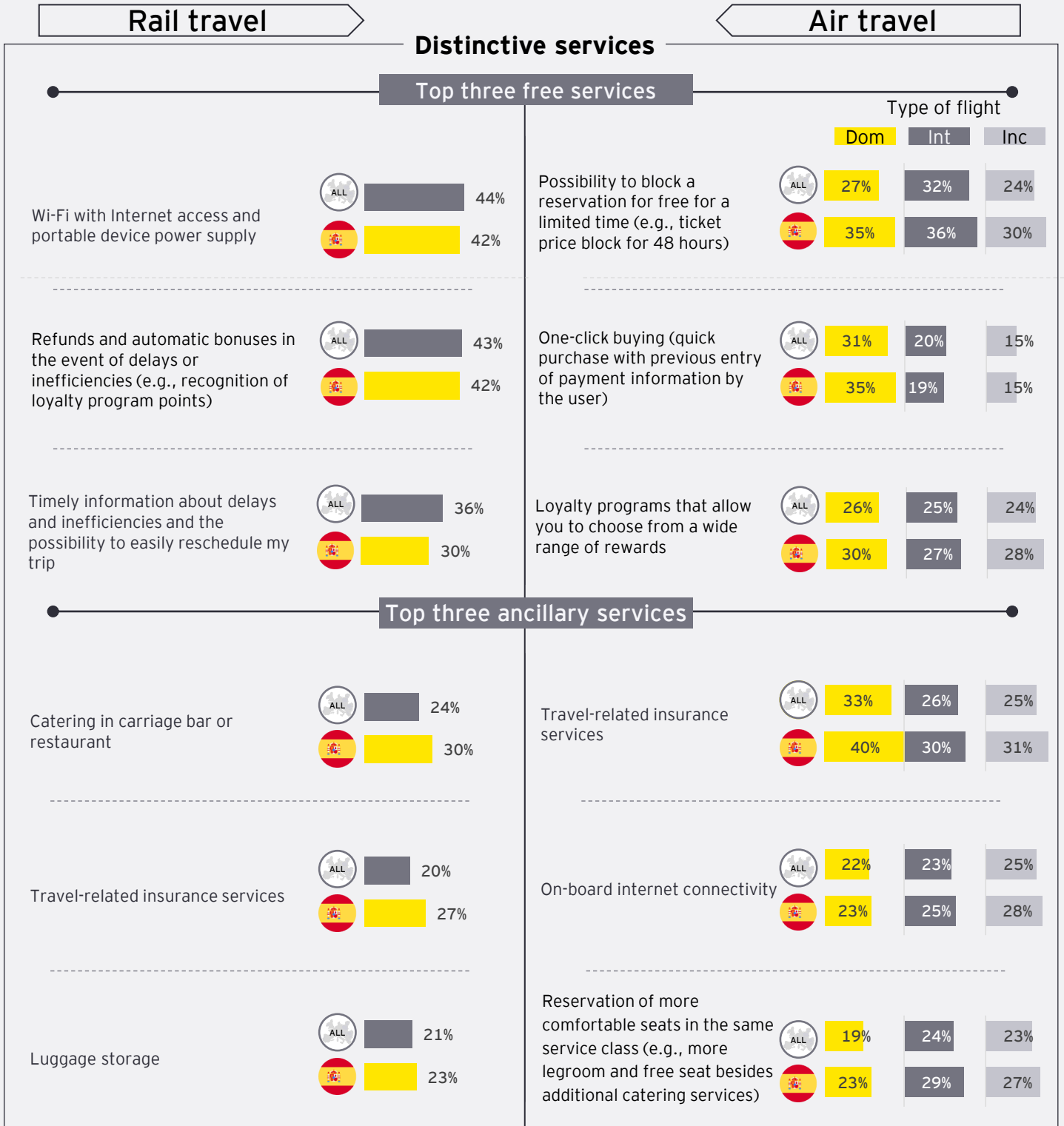
Concern for environmental issues



6

Focus Spain: distinctive services required for rail and air travel

The free services preferred by Spanish travelers are Wi-Fi on the train and services that facilitate the booking of airline tickets. Catering, insurance services and services that facilitate door-to-door experience for a fee are among the most attractive.



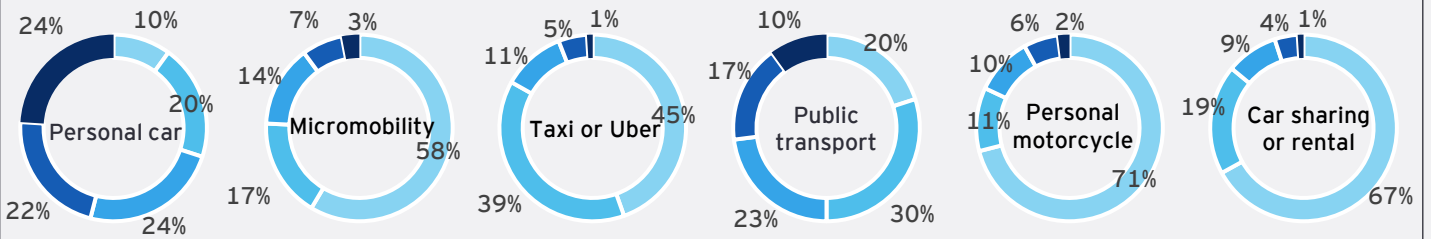
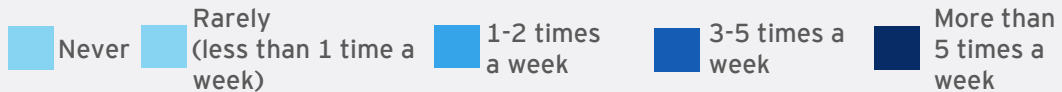
6

Focus Spain: trends in short-distance mobility

The use of public transport and micromobility by Spanish travelers would be impacted more than the average by the availability of digital services that simplify the travel experience (in particular the flat-rate subscription that allows the personalised and unlimited use of bundles of transport services).

Usual short journeys

Frequency and modes

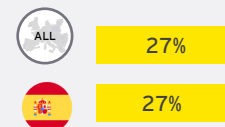


Propensity to use public transport and micromobility

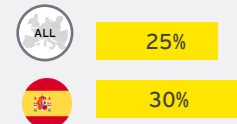
Positively influence the use

Potential solutions that would influence use

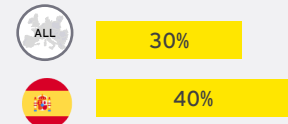
A single digital channel to plan my journeys and pay for various transport services.



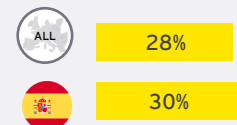
An AI-based virtual assistant that suggests how to move around considering my personal needs and preferences, service availability and expected times.



A flat-rate subscription that allows for personalized and unlimited use of a bundle of transport services.



An account-based ticketing system that eliminates the need to buy tickets or subscriptions, I check in with my smartphone and I'm charged for the transport services I actually use.



6

Focus UK: travel habits and main destinations

UK travelers expect to increase the frequency of their travel in 2023, particularly business travel. Air travel is particularly popular as a mode of transport for both leisure and business trips. The preferred destinations abroad are Spain, France and Italy.



Leisure travel



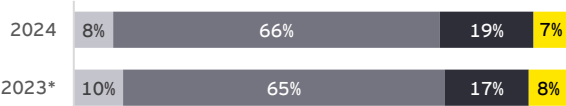
Business travel

% calculated on leisure travelers

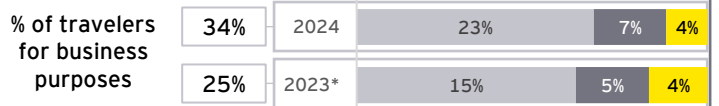
% calculated on business travelers

Frequency and modes of travel

Legend: No travel (light grey), From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)

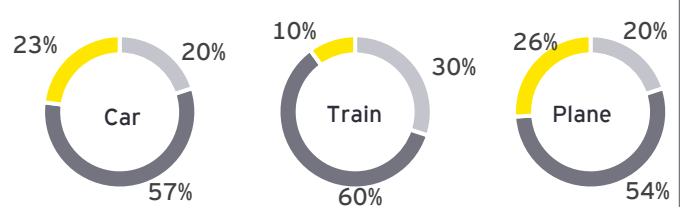
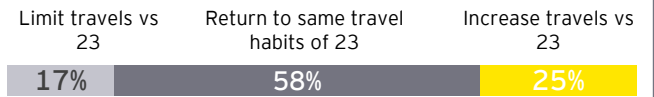
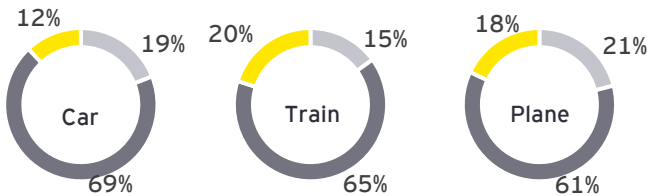
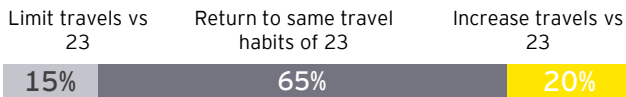


Legend: From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



(*) travel forecasts measured in 2022 - EY Future Travel Behaviors Observatory 2023.

Intentions for 2024



Where are you thinking of traveling in 2024? Main destinations in Europe

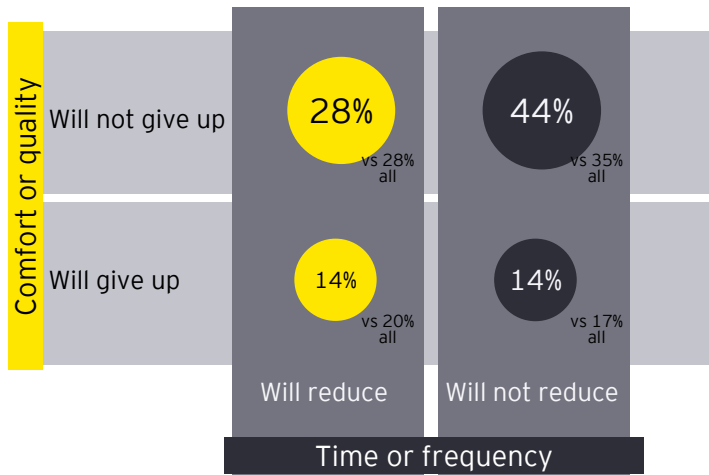


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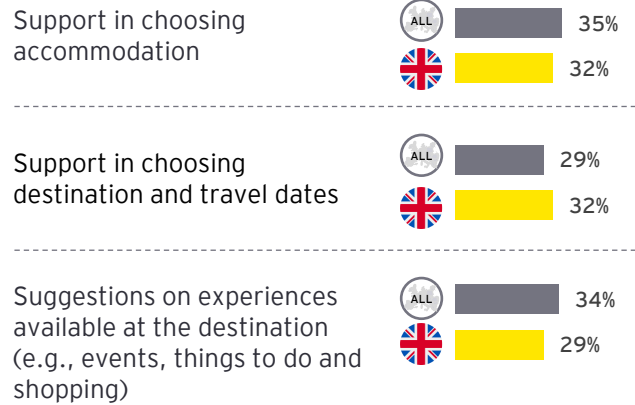
Focus UK: Influences in travel choices

A significant proportion of UK travelers do not expect inflation to impact their purchasing power. They are more sensitive to the personalization of their travel experience.

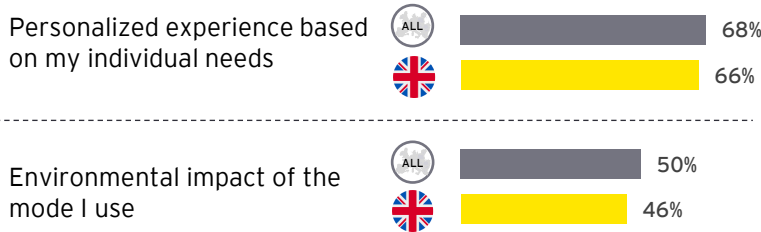
Impact of price inflation on consumer travel habits



AI: main purposes of use



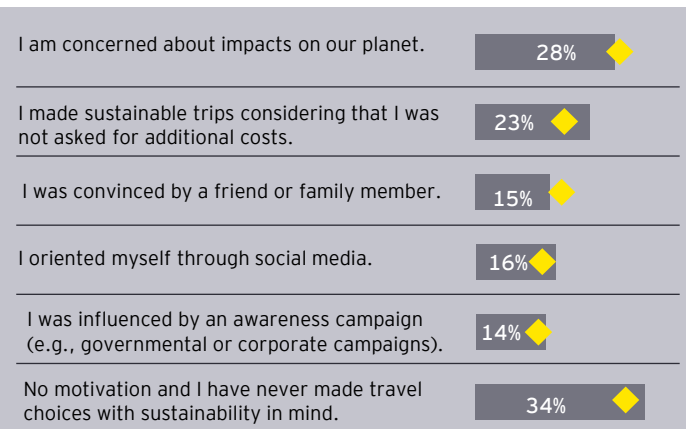
Importance given to factors of choice



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



◆ All

Implicit attitudes

Concern for environmental issues

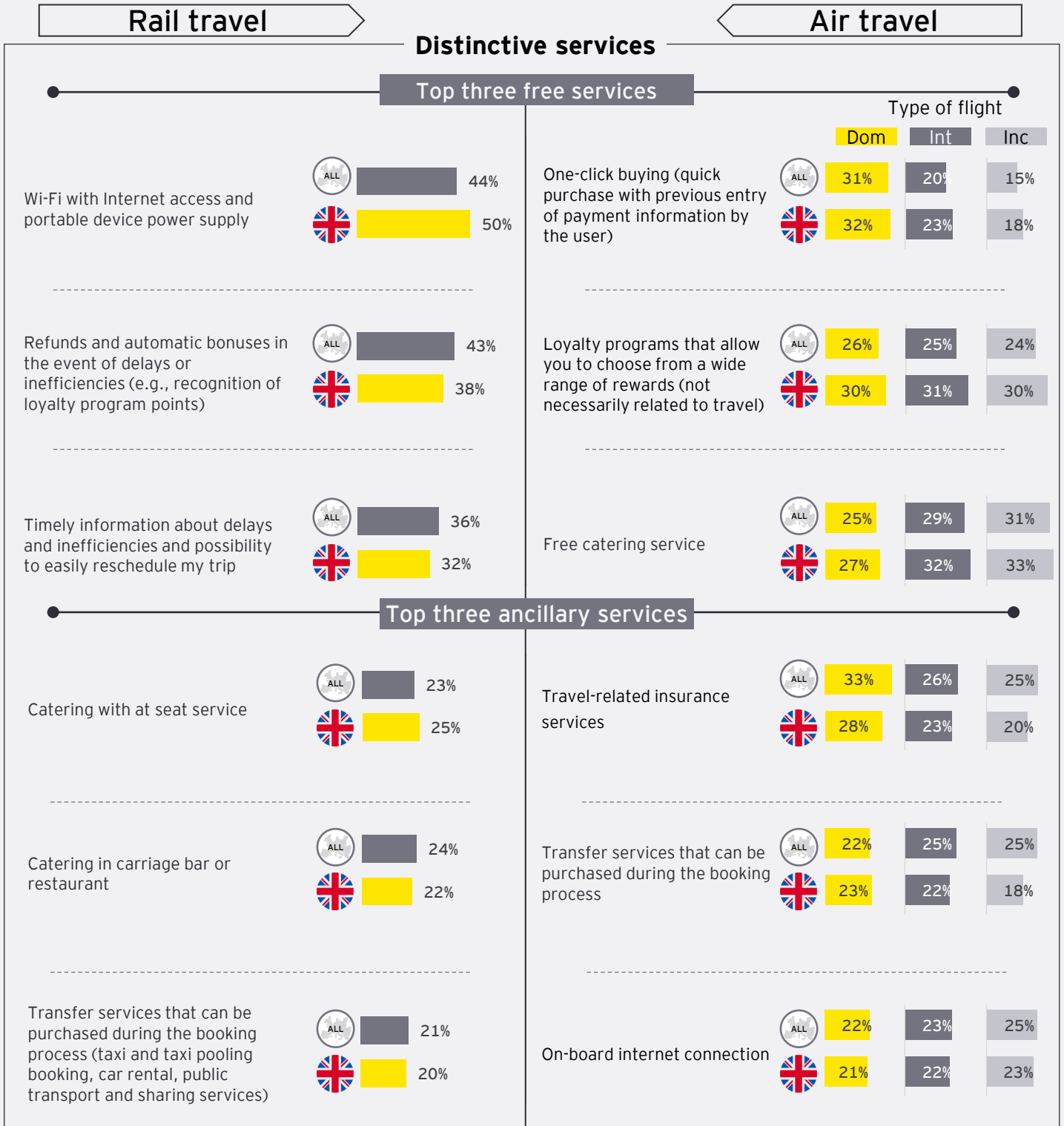


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Focus UK:

distinctive services required for rail and air travel

In line with the general trend, the free services preferred by UK travelers are related to delay and disruption management, for both rail and air travel. Catering with seat service (for rail travel) and booking more comfortable seats (for air travel) are the main ancillary services.



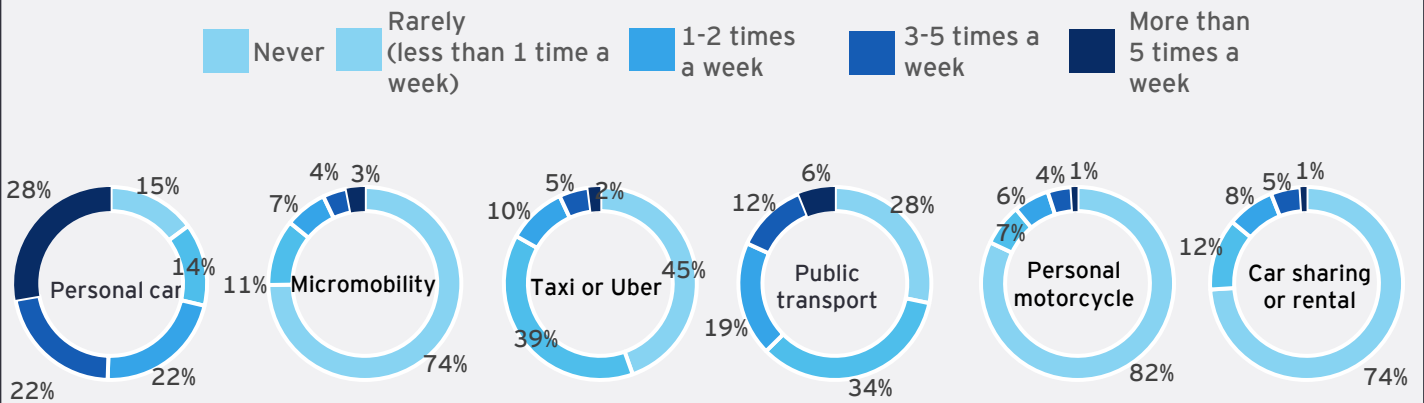
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Focus UK: trends in short-distance mobility

The use of public transport and micromobility, for UK subjects, would be affected more than average by the availability of the flat-rate season ticket, which would allow personalized and unlimited use of bundles of transport services.

Usual short journeys

Frequency and modes

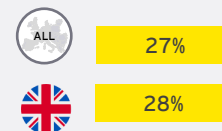


Propensity to use public transport and micromobility

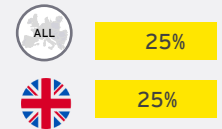
Positively influence the use

Potential solutions that would influence use

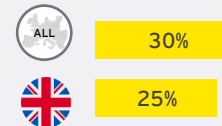
A single digital channel to plan my journeys and pay for various transport services.



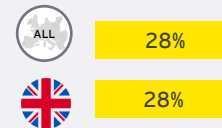
An AI-based virtual assistant that suggests how to move around considering my personal needs and preferences, service availability and expected times.



A flat-rate subscription that allows for personalized and unlimited use of a bundle of transport services.



An account-based ticketing system that eliminates the need to buy tickets or subscriptions, I check in with my smartphone and I'm charged for the transport services I actually use.



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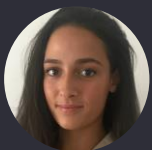
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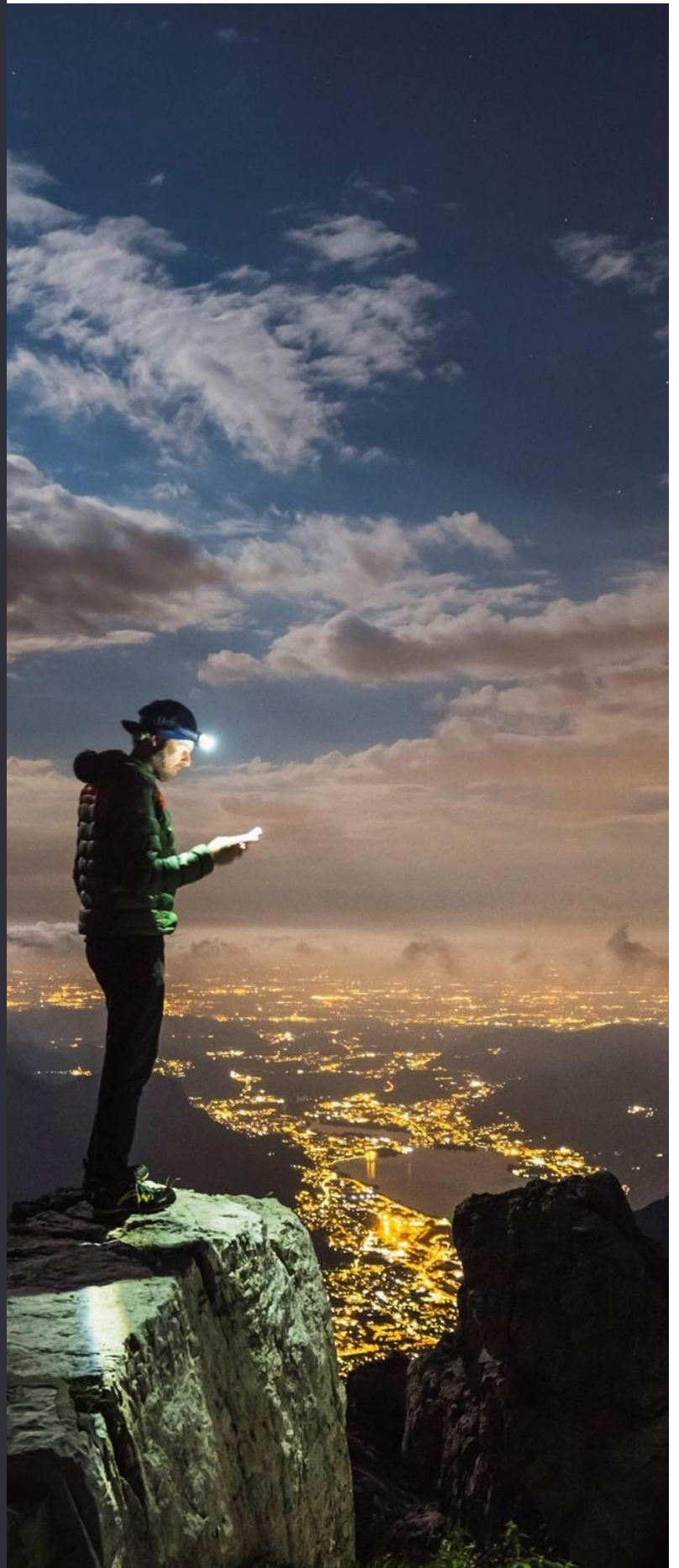
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