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Custom Engagement

Global Booking Anxiety: U.S. and Europe

Prepared for: Protect Group

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Northstar TRAVEL GROUP



About Phocuswright

Phocuswright is the travel industry research authority on how travelers, suppliers and intermediaries connect. Independent, rigorous and unbiased, Phocuswright fosters smart strategic planning, tactical decision-making and organizational effectiveness. Phocuswright delivers qualitative and quantitative research on the evolving dynamics that influence travel, tourism and hospitality distribution. Our marketplace intelligence is the industry standard for segmentation, sizing, forecasting, trends, analysis and consumer travel planning behavior. Every day around the world, senior executives, marketers, strategists and research professionals from all segments of the industry value chain use Phocuswright research for competitive advantage.

To complement its primary research in North and Latin America, Europe and Asia, Phocuswright produces several high-profile conferences in the United States and Europe and partners with conferences around the world. Industry leaders and company analysts bring this intelligence to life by debating issues, sharing ideas and defining the ever-evolving reality of travel commerce.

Phocuswright also operates PhocusWire, a media service that covers the world of digital travel 365 days a year with a range of news, analysis, commentary and opinion from across the travel, tourism and hospitality sector.

The company is headquartered in the United States with Europe and Asia Pacific operations and local analysts on five continents.

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About Web in Travel

Web in Travel provide news through our website and social platforms and run events that are strong in content and different in style and delivery. Our purpose is to take your mind to new places so that together, we can accelerate travel innovation to delight travelers and support local communities.

We launched our first event in 2005 and have been spreading learning through events in Singapore and Asia, including Malaysia, Seoul and Tokyo, New Zealand, and the Middle East and Africa. As part of the Northstar Travel Group, we also have taken our events to Europe and the US. Our flagship event, WiT Singapore, remains our beating heart and the must-attend experience for anyone shaping the future of travel in Asia Pacific.

Through curated content, immersive programming, and events like WiT Bootcamp, the Global Startup Pitch, the Global Travel Tech Thinktank, and The Travel Changemakers Awards, WiT champions innovation, fosters mentorship, and builds bridges across the travel tech ecosystem.

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Methodology

- Web in Travel and Phocuswright fielded an online survey May 12 to 22, 2026, through a Dynata consumer panel, targeting the general population who travel in the U.S., U.K., France and Germany.
- To qualify for participation in the study, respondentshad to meet four criteria: be aged 18 or over, personally play an active role in planning their leisure trips, have taken at leasttwo international leisure trips in the past 24 months, and are planning at least one international leisure trip in the next 12 months.
- Survey response metrics for each country are as follows:

Market	Travelers	Error margin
U.S.	309	+/- 5.7% @ 95%
U.K.	306	+/- 5.7% @ 95%
France	303	+/- 5.7% @ 95%
Germany	308	+/- 5.7% @ 95%

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Booking anxiety is reshaping travel purchase behavior.

The industry opportunity is to reduce uncertainty at the point of sale by making flexibility, refundability and protection easier to understand and easier to buy. Refund protection should be positioned primarily around full reimbursement and simple claims, with market-specific messaging.

Analysis Note: This research was conducted during a time of geopolitical instability that may have affected anxiety levels and responses.

Source: *Global Booking Anxiety Study 2026*

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Executive Summary

Booking anxiety is a meaningful commercial factor in international travel and event ticketing.

- It's strongest in the U.S. where 33% of travelers are extremely/very anxious about booking international travel and 28% are extremely/very anxious about purchasing event tickets.
- European travelers are less anxious overall, with travel booking anxiety reaching 15% in the U.K., 14% in France and 7% in Germany.
- Anxiety changes how consumers shop, book and evaluate platforms. They buy travel insurance, do more research, avoid destinations or events, choose refundable options and, in some cases, abandon purchases before payment.
- Anxiety is grounded in actual disruption experience.
  - Only 36% of U.S. travelers and 45% of France travelers had not missed an event or trip for unexpected reasons.
- Personal cancellations, event rescheduling/cancellation, delayed luggage and missed events due to cancelled flights have contributed to the perceived need for protection.

Source: *Global Booking Anxiety Study 2026*

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Executive Summary

- The top anxiety triggers are financial and practical.
  - Losing money if plans change, political instability/safety concerns, natural disasters/severe weather, booking errors and unclear cancellation/refund policies rank as important concerns.
- Anxiety peaks at the moment of payment, making the checkout experience a critical intervention point.
- Flexibility is highly valuable to consumers. Travelers overwhelmingly reject lowest-price, non-refundable options.
  - Travelers prefer higher pricing with free cancellation over other options.
- Refund protection that promises 100% money back is most appealing.
- Platform loyalty can also be impacted by refund protection.
  - Travelers are more likely to use a platform again if refund protection is available.

Source: *Global Booking Anxiety Study 2026*

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Implications for the Travel Industry

- **Flexibility is now a booking conversion tool.** Travelers are actively adjusting behavior in response to booking anxiety, including purchasing travel insurance, spending more time researching, choosing refundable options and abandoning bookings before payment.
  - Travel brands should treat flexible cancellation, refund protection and clear refund terms as conversion levers, not just customer-service features.
- **Checkout is the critical moment to reduce anxiety.** Across markets, anxiety peaks at checkout, making this the point where travelers most need reassurance.
  - Booking platforms should surface cancellation terms, refund eligibility and protection options clearly before payment. Use simple language that explains what is covered, how refunds work and how easy the claims process is.

Source: *Global Booking Anxiety Study 2026*

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Implications for the Travel Industry

- **Refund protection has meaningful commercial upside, especially when positioned around full reimbursement.** Interest in refund protection is substantial, particularly in the U.S., and travelers consistently identify "100% money back" as the most appealing feature.
  - Providers should lead with the financial-protection message, then support it with proof points around speed, ease of claims and breadth of coverage.
- **Market strategy should be tailored, not uniform.**
  - The U.S. represents the strongest near-term opportunity because anxiety, prior use and purchase intent are highest.
  - In Europe, the opportunity is more educational: Travelers need clearer differentiation between refund protection, flexible booking policies and traditional travel insurance.
  - Germany, where overall anxiety is lowest, may require a softer value-based positioning rather than anxiety-led messaging.

Source: *Global Booking Anxiety Study 2026*

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Detailed Findings

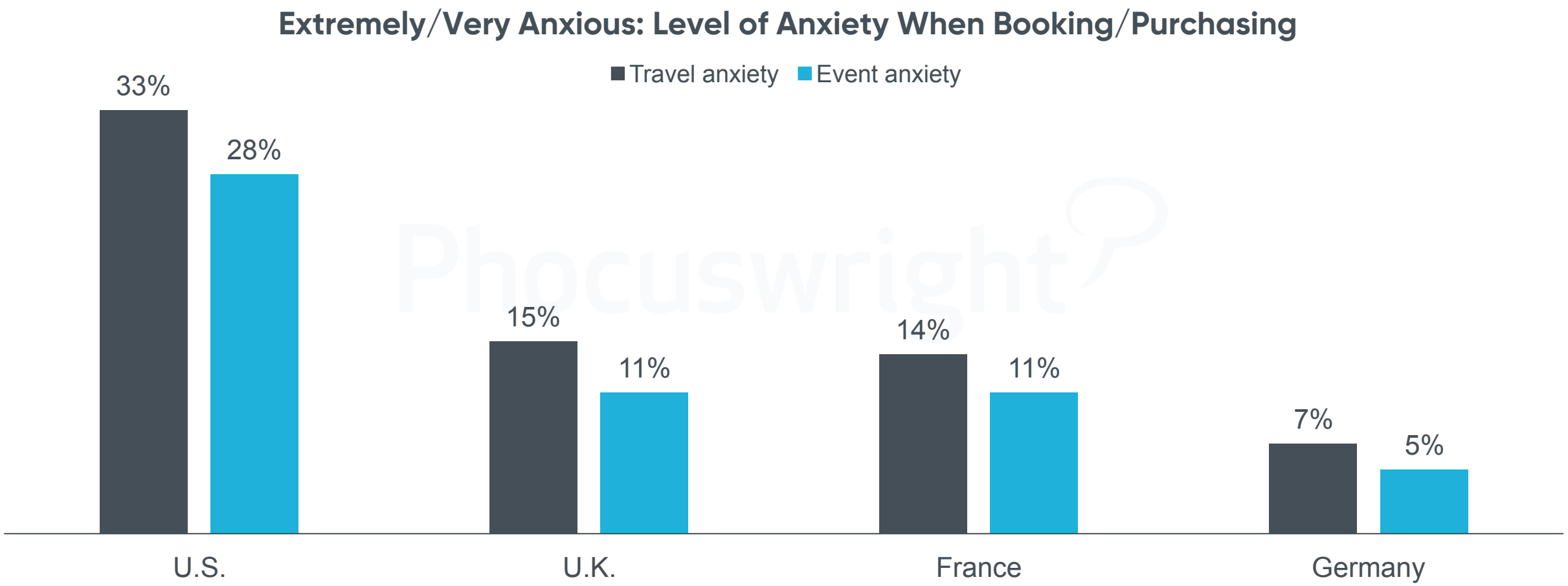
Traveler and Trip Profile

Market	% Under Age 45	HH Income % Under $75k	% of 2-3 International Leisure Trips P12M	% of 2-3 International Leisure Trips N12M
U.S.	62%	19%	65%	53%
U.K.	51%	59%	67%	59%
France	40%	82%	72%	52%
Germany	40%	69%	68%	56%

Question: Please enter your age below. What is your approximate total annual household income? Select one.; How many international leisure trips have you taken in the past 24 months?; How many international leisure trips are you planning to take in the next 12 months?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Travelers from the U.S. experience more anxiety when booking than those in Europe.



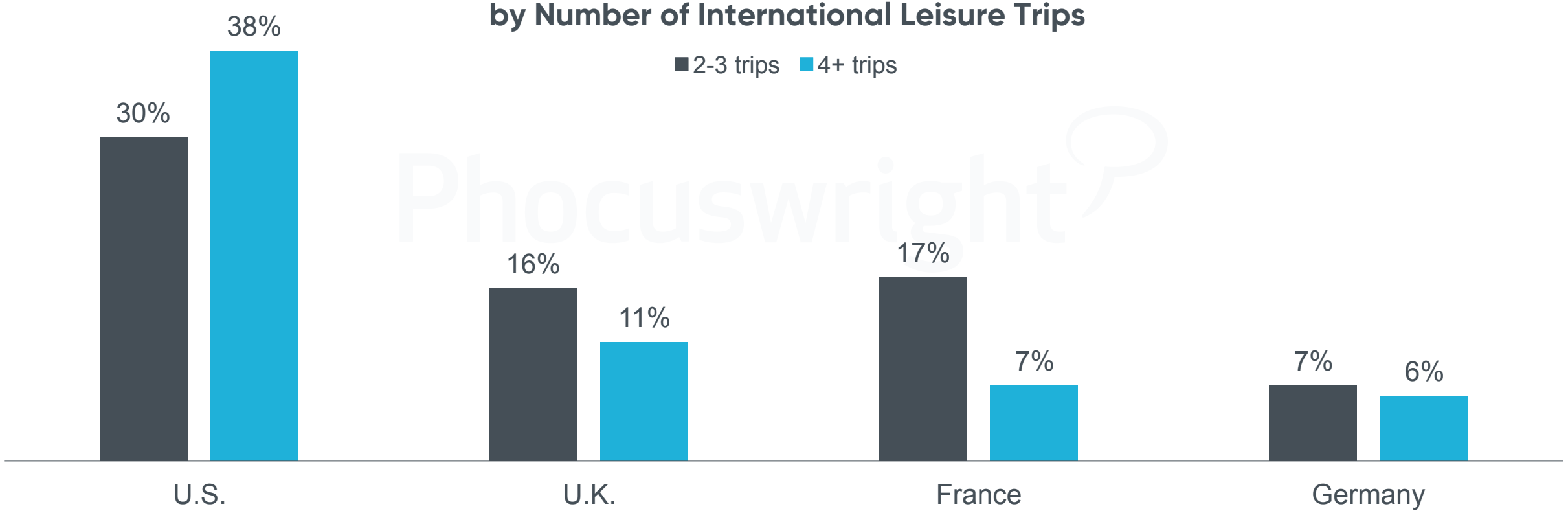
Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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The connection between travel frequency and anxiety varies by market.

Frequent U.S. travelers are more anxious, while less frequent travelers in the U.K. and France show higher anxiety.

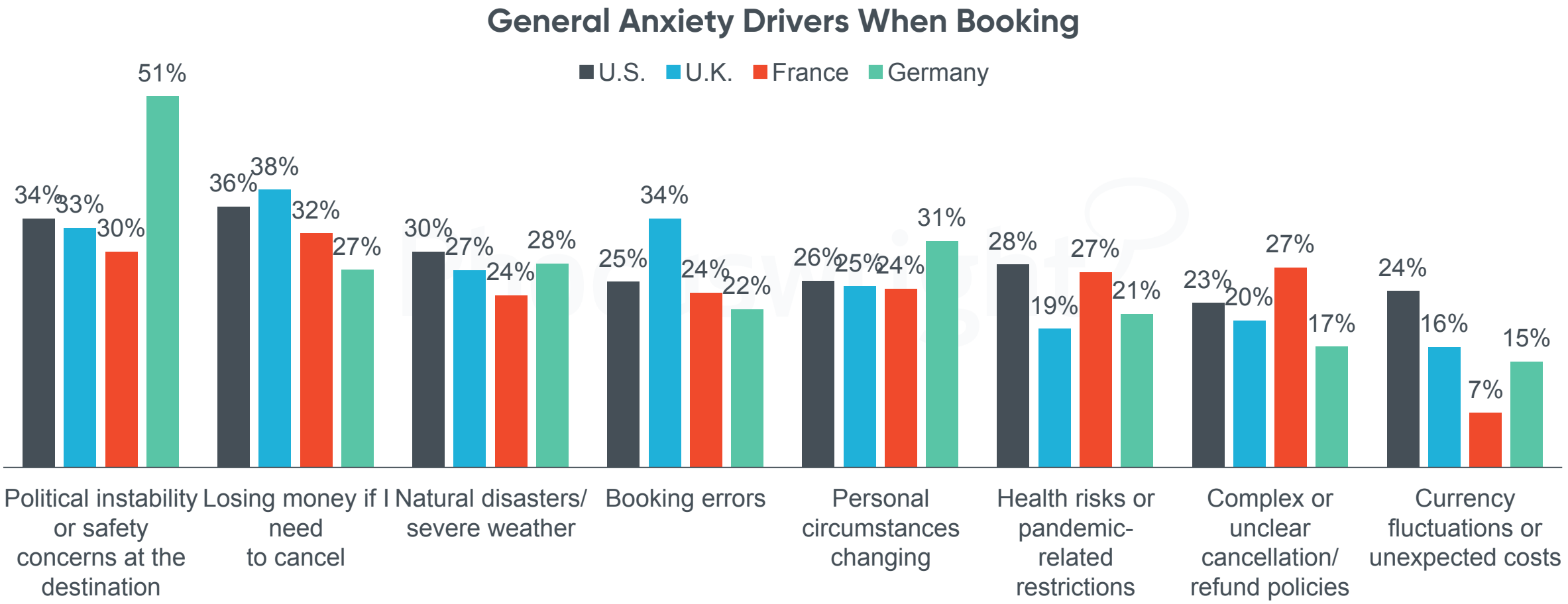
Extremely/Very Anxious: Level of Anxiety When Booking/Purchasing Travel, by Number of International Leisure Trips



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Current events and losing money are the biggest drivers of booking anxiety.

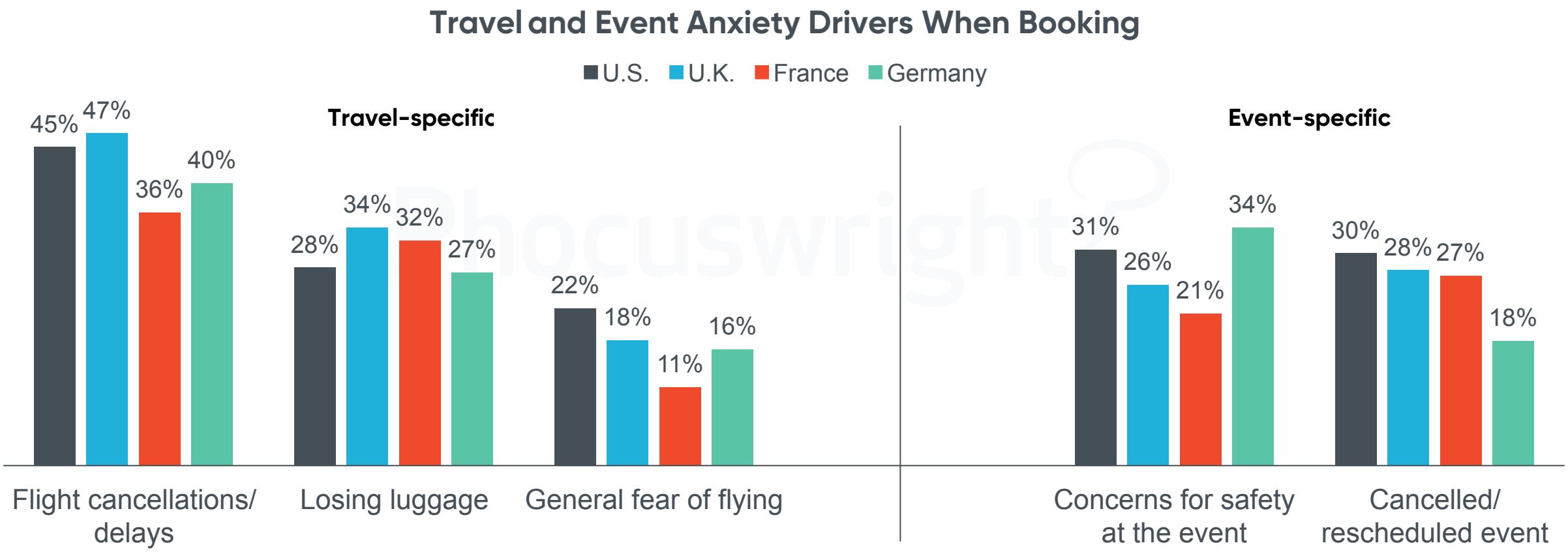


Question: Which of the following factors cause you the most anxiety when booking international travel or event tickets? Select up to five.
Base: Travelers who have anxiety (U.S. N=258; U.K. N=218; France N=205; Germany N=158)
Source: *Global Booking Anxiety Study 2026*

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Flight cancellations are the biggest cause of travel-specific anxiety.

Even anxiety related to safety and scheduling impact 18%-34% of travelers.

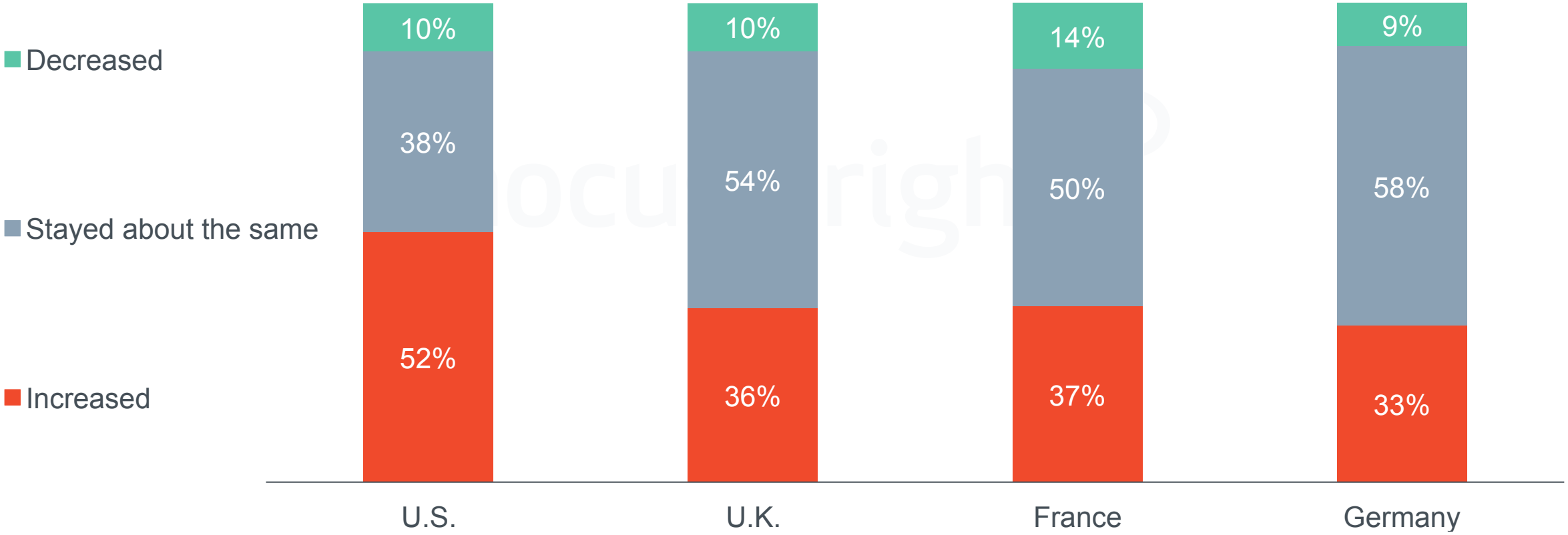


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Base: Travelers who have anxiety (U.S. N=258; U.K. N=218; France N=205; Germany N=158)
Source: *Global Booking Anxiety Study 2026*

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Booking anxiety has stayed the same for most travelers in Europe while increasing among those in the U.S.

Change in Booking Anxiety Compared to 2-3 Years Ago



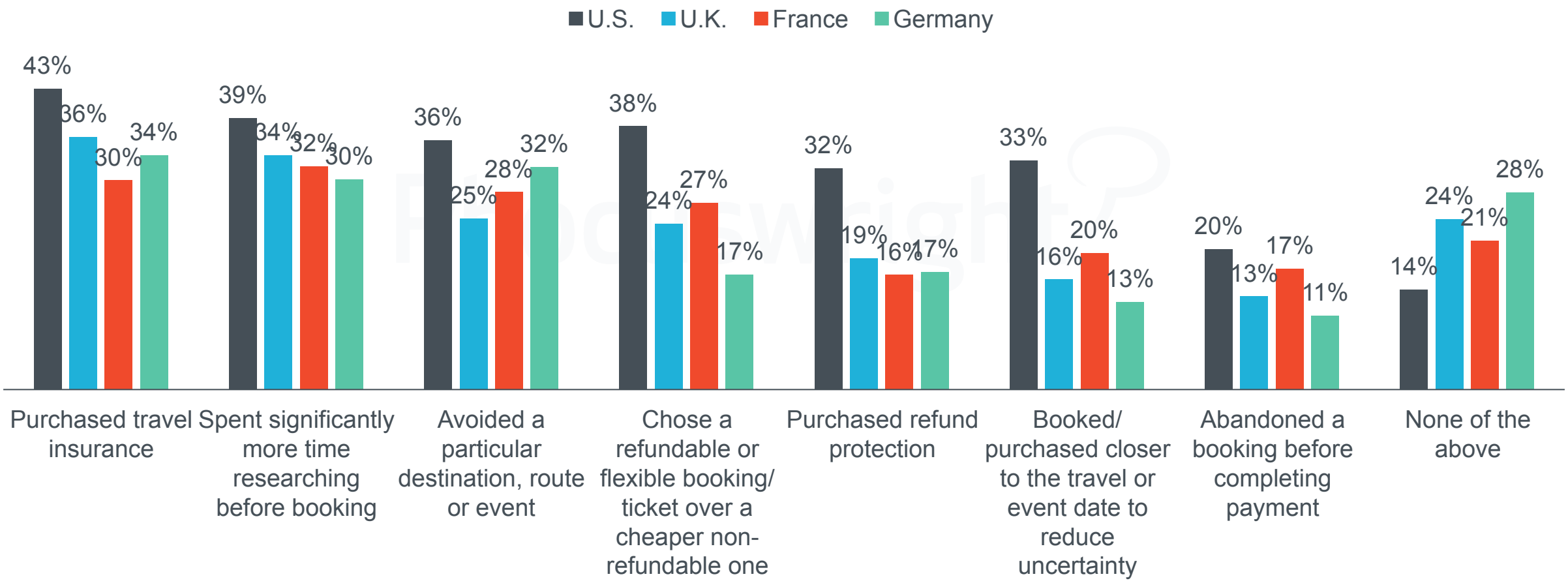
Question: Compared to 2–3 years ago, has your overall anxiety about booking international travel …?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Anxiety changes how most travelers book.

Fewer than three in 10 indicated they have not made any changes due to anxiety.
Among those who acted, purchasing travel insurance and doing more research topped the list.

Actions Taken as a Result of Booking Anxiety

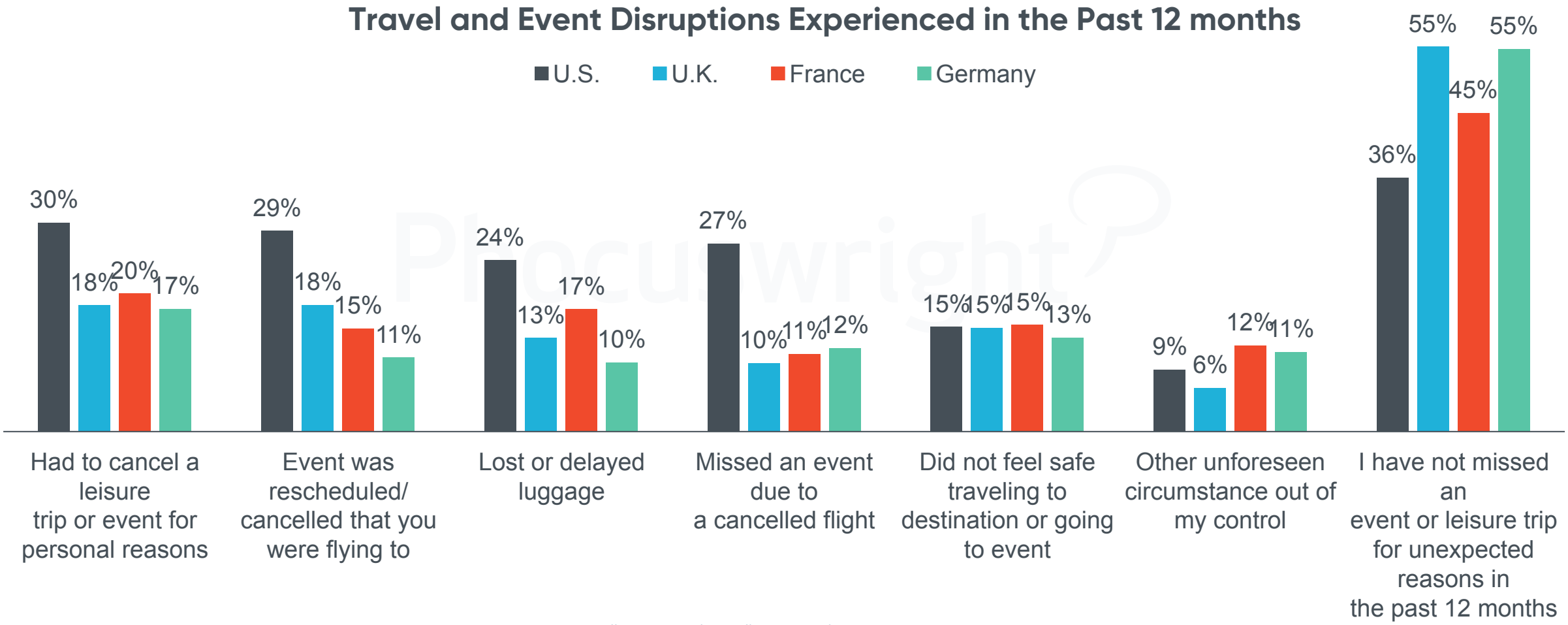


Question: Has anxiety or uncertainty ever caused you to do any of the following? Select all that apply.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Recent disruptions help explain anxiety.

At least 45% of travelers in each market experienced a travel or event disruption in the past 12 months.

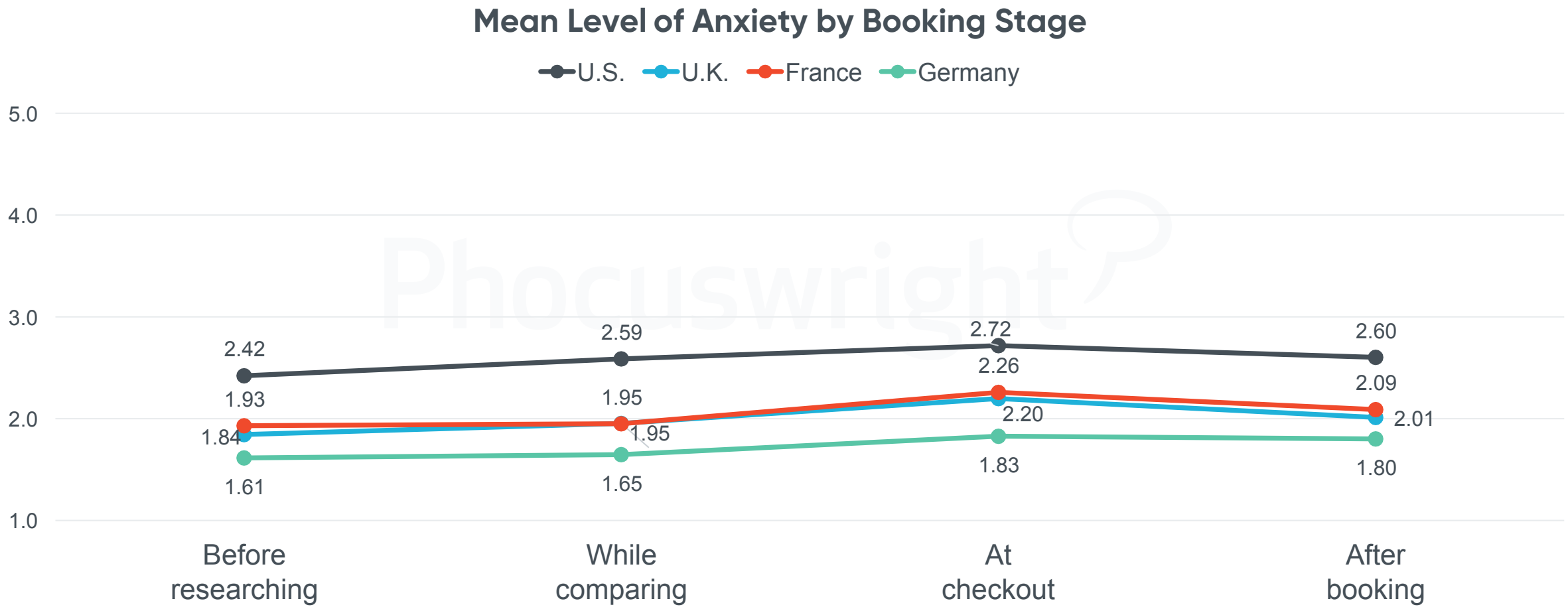


Question: In the past 12 months, have you experienced any of the following? Select all that apply.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Booking anxiety is highest at checkout.

Overall, the U.S. traveler expresses higher levels of anxiety than those in Europe.

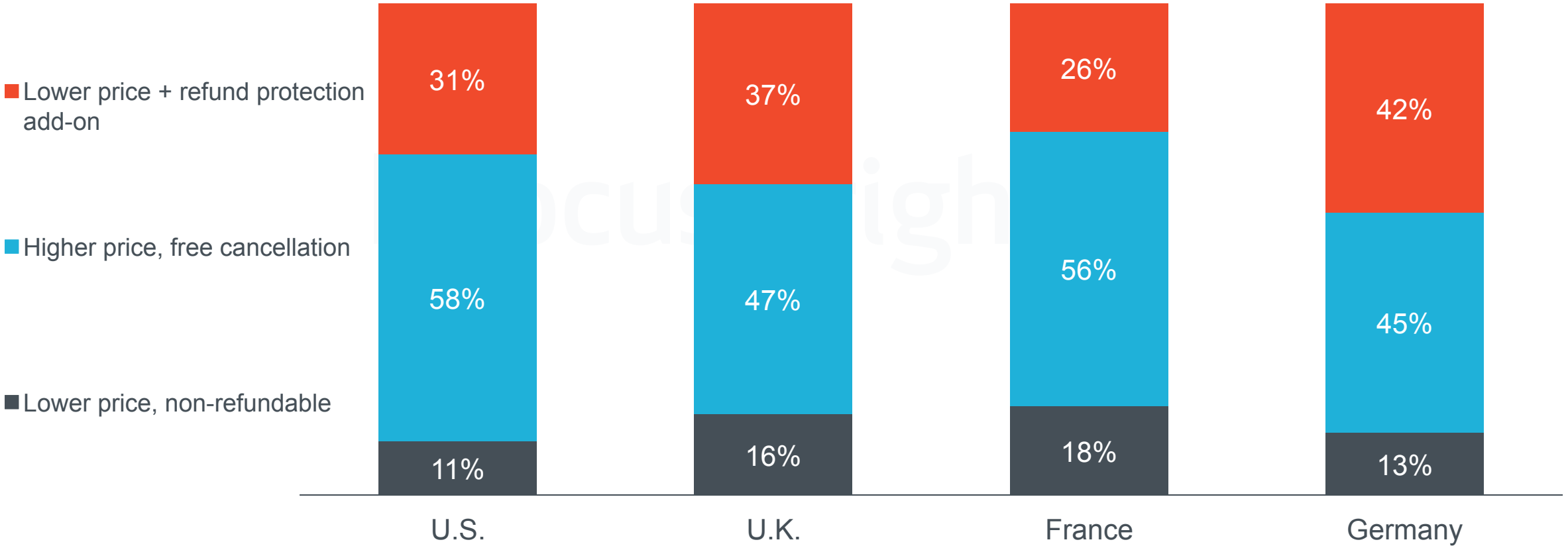


Question: When booking international trips or purchasing event tickets, for each stage of the process please rate how anxious you feel.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Most travelers would choose higher price with free cancellation over other options.

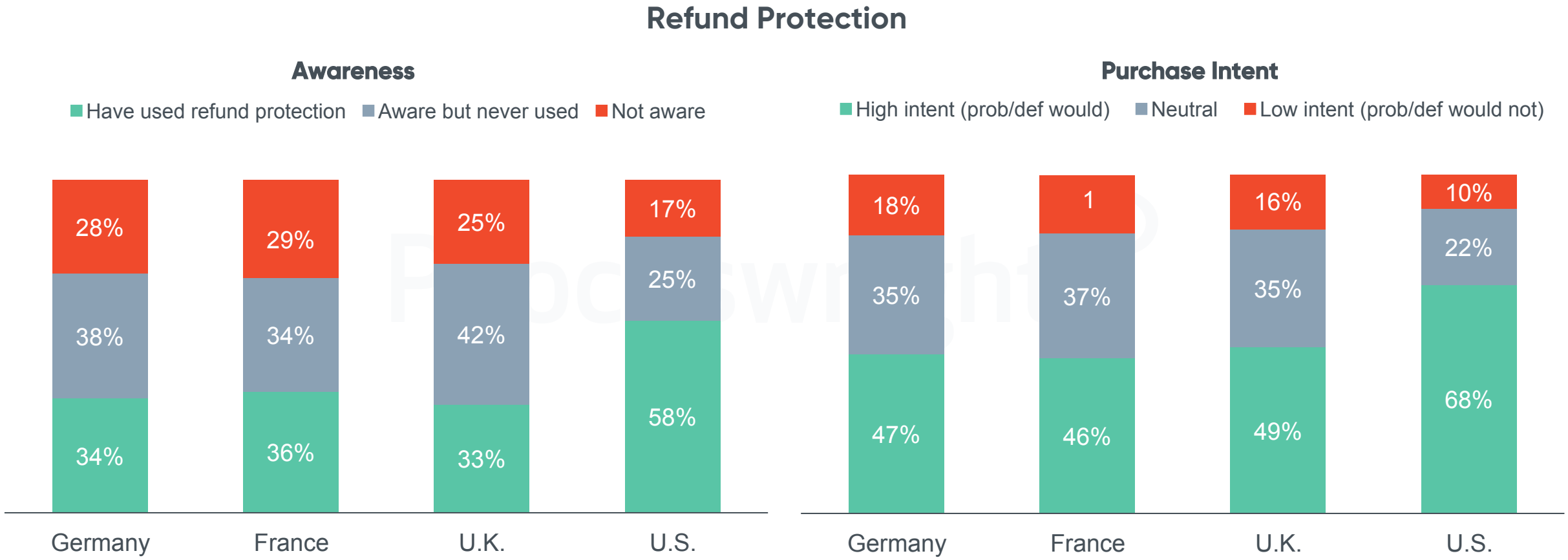
Choice Between Two Otherwise Identical Bookings



Question: Imagine you are choosing between two otherwise identical bookings (e.g., flight, hotel or event tickets). Which would you prefer?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Travelers expressed high levels of awarenessand purchase intent for refund protection.

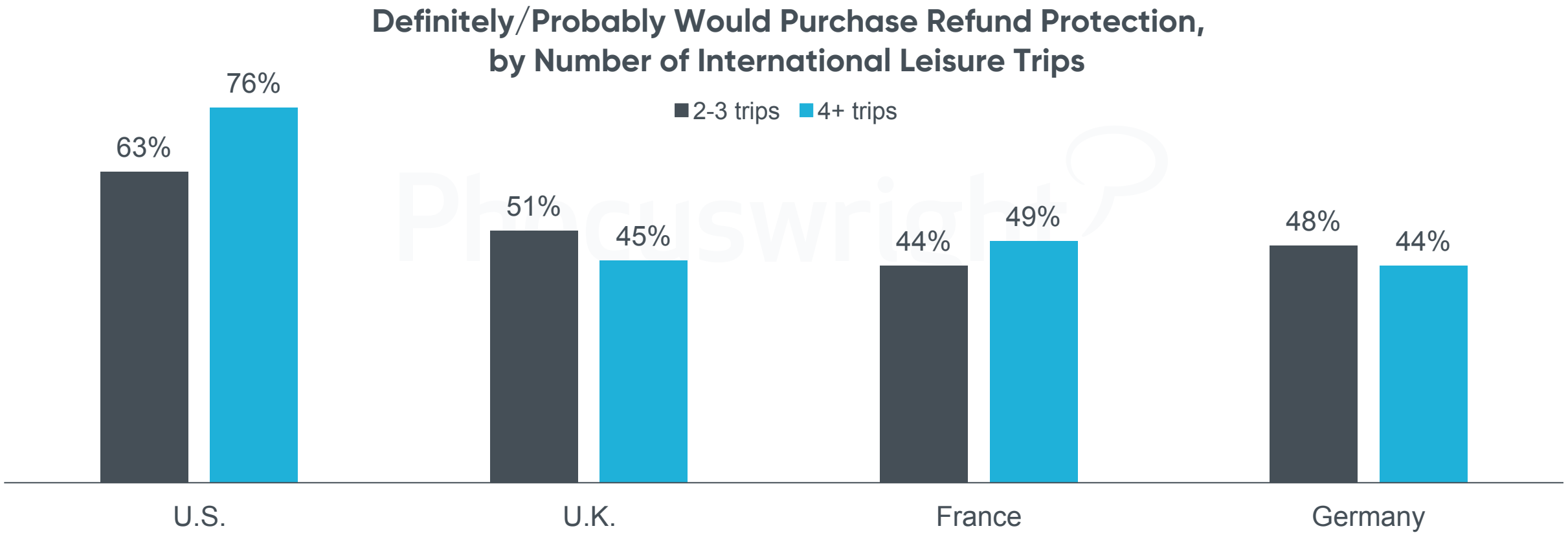


Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Interest in refund protection by travel frequency varies by market.

Frequent U.S. travelers are most interested.

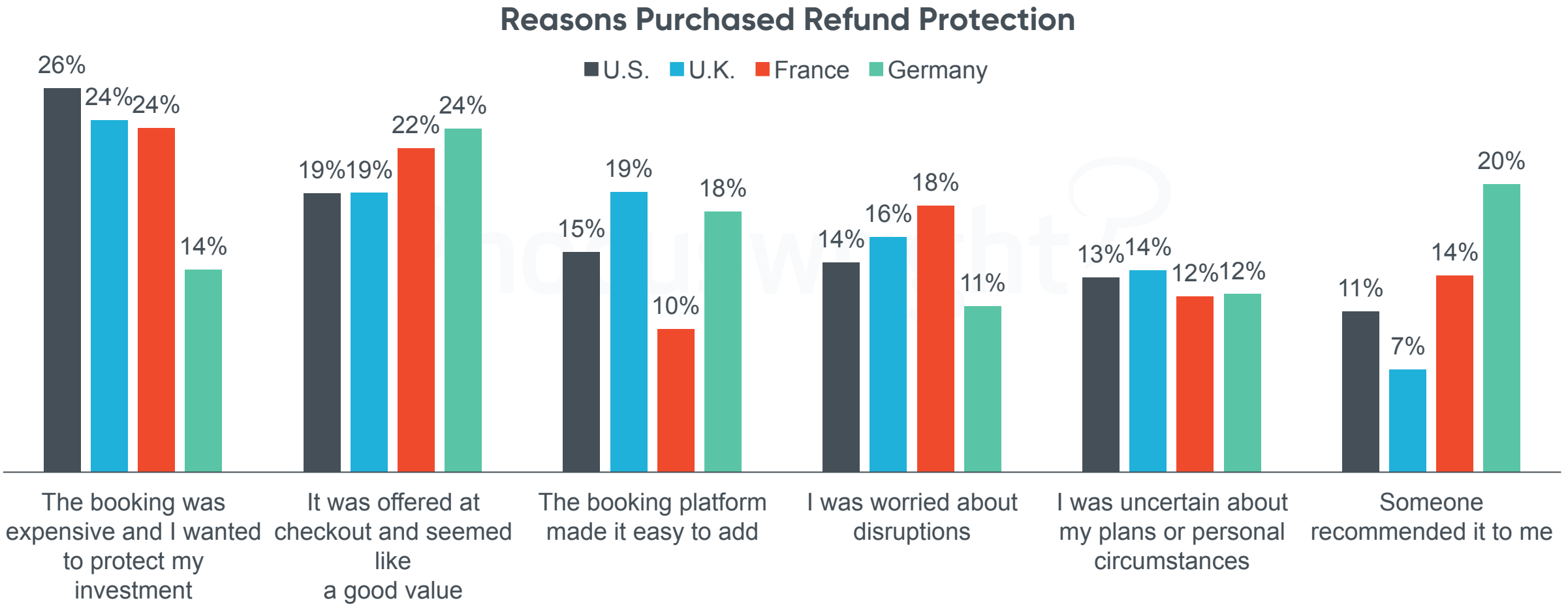


Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Expensive trips and good value are the top reasons for purchasing refund protection.

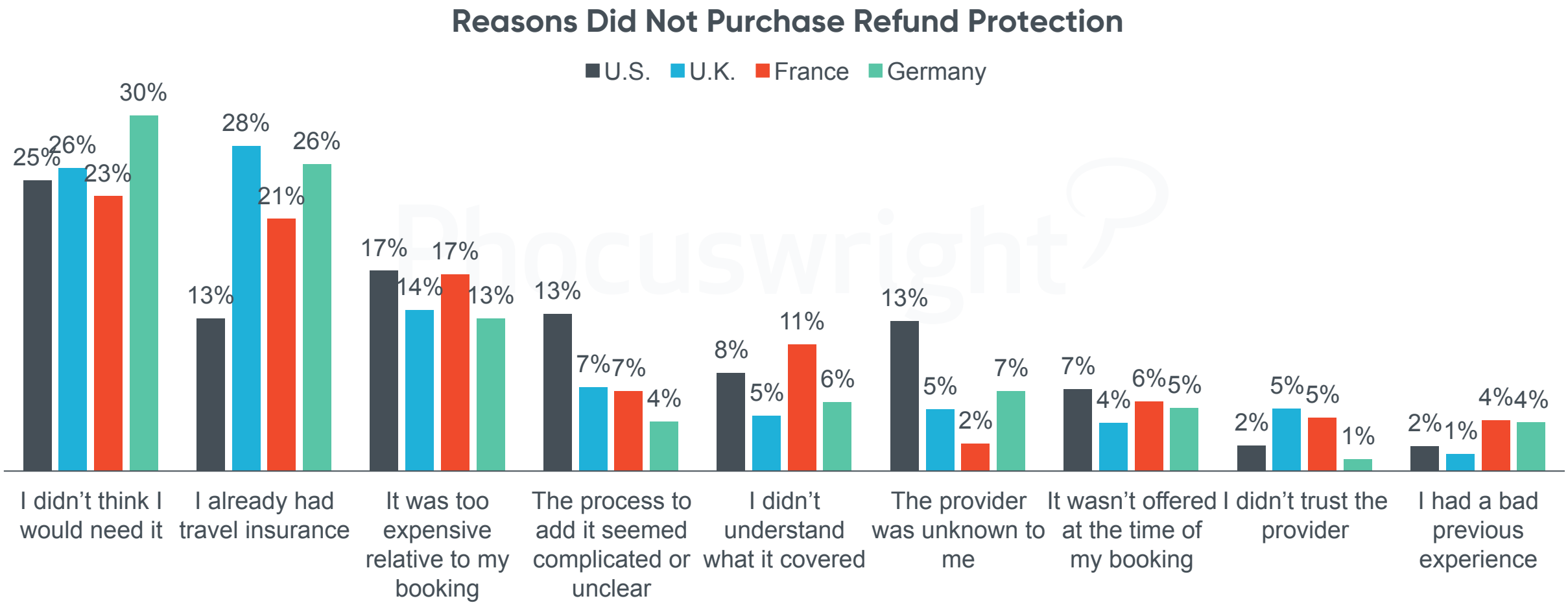
German travelers are more likely than others to purchase the option because it was recommended.



Question: What was the main reason you purchased refund protection?
Base: Purchased refund protection (U.S. N=179; U.K. N=100; France N=110; Germany N=106)
Source: *Global Booking Anxiety Study 2026*

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Perceived need and existing insurance are the main barriers to purchasing refund protection.



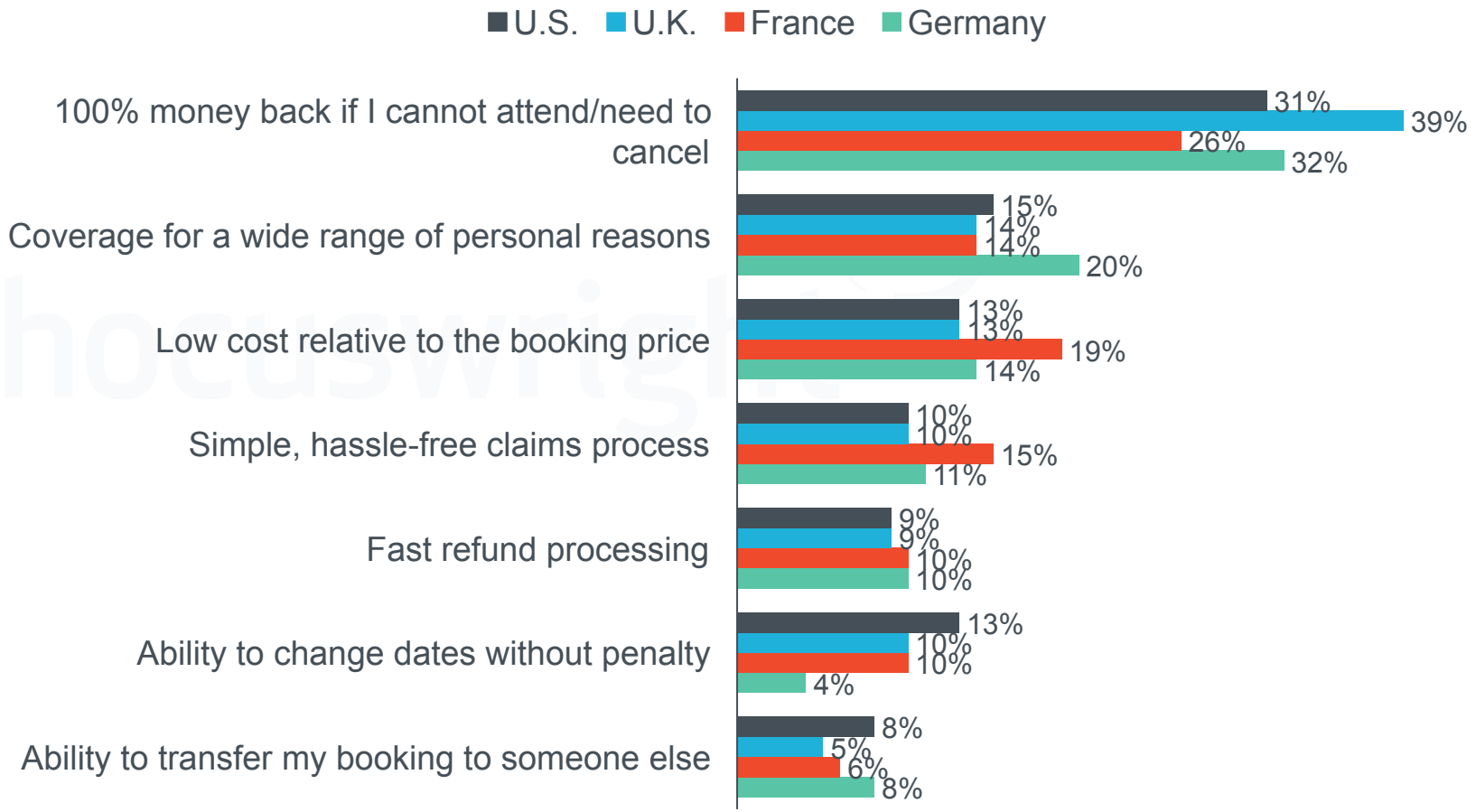
Question: What was the main reason you chose not to purchase refund protection?
Base: Did not purchase refund protection (U.S. N=78; U.K. N=130; France N=103; Germany N=116)
Source: *Global Booking Anxiety Study 2026*

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Money back is the most appealing feature of refund protection.

There is little variation by country except for flexibility without penalty, which is least motivating to the U.S. traveler.

Refund Protection Purchase Drivers, Ranked 1st

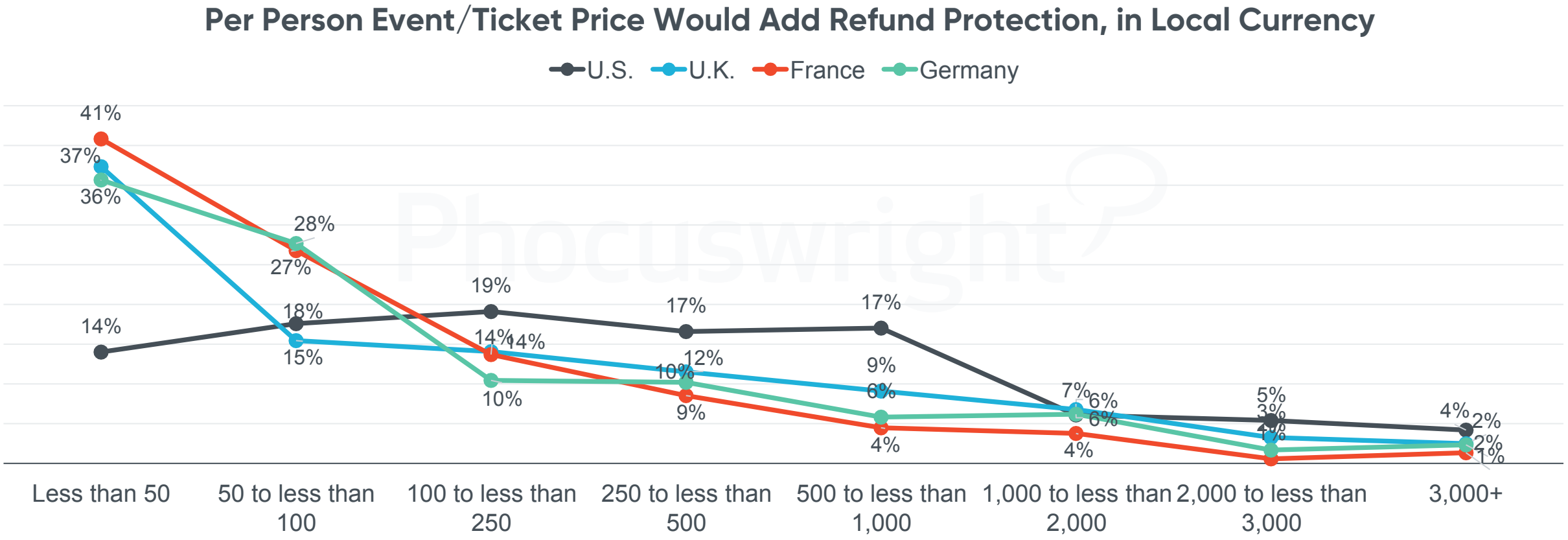


Question: Which of the following features would make you most likely to purchase refund protection? Rank your top 3 in order of importance where 1 is the most important.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Travelers in Europe are most likely to add protection to lower-priced purchases.

Among U.S. respondents, there is a less clear consensus with interest being split prior to the $1,000 price point.

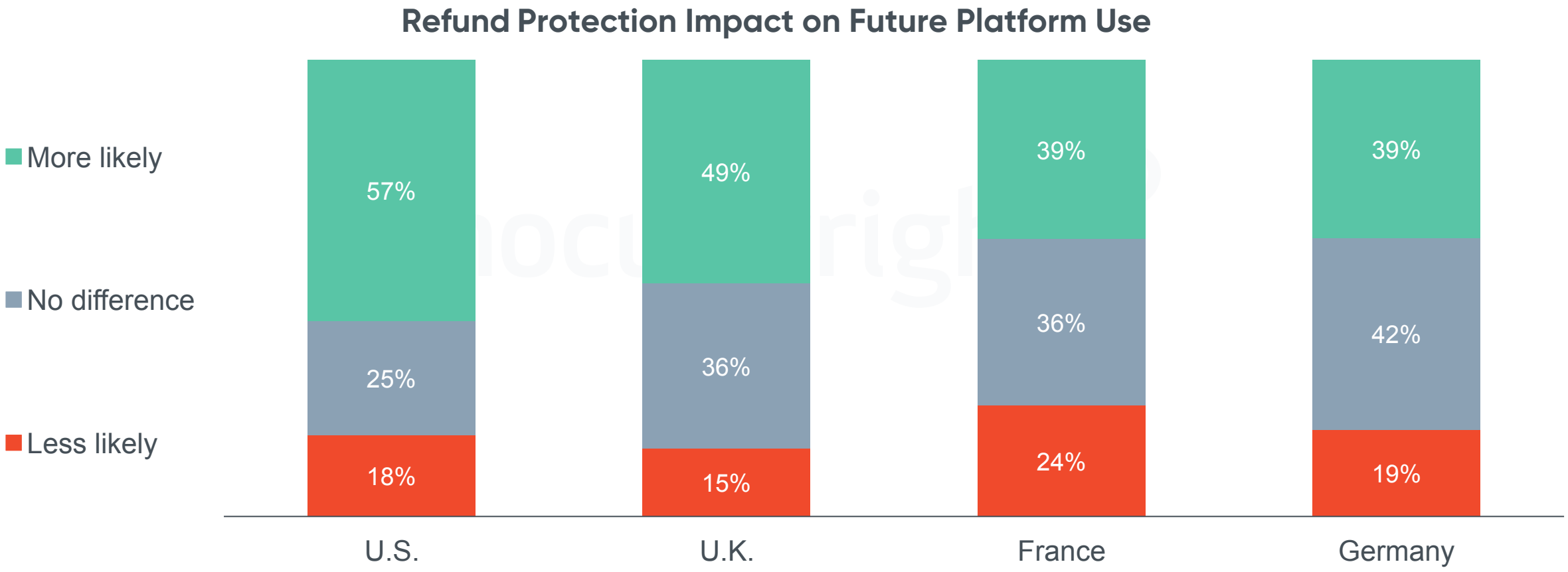


Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (U.S. N=78; U.K. N=130; France N=103; Germany N=116)
Source: *Global Booking Anxiety Study 2026*

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Refund protection has the strongest platform reuse impact in the U.S. and U.K.

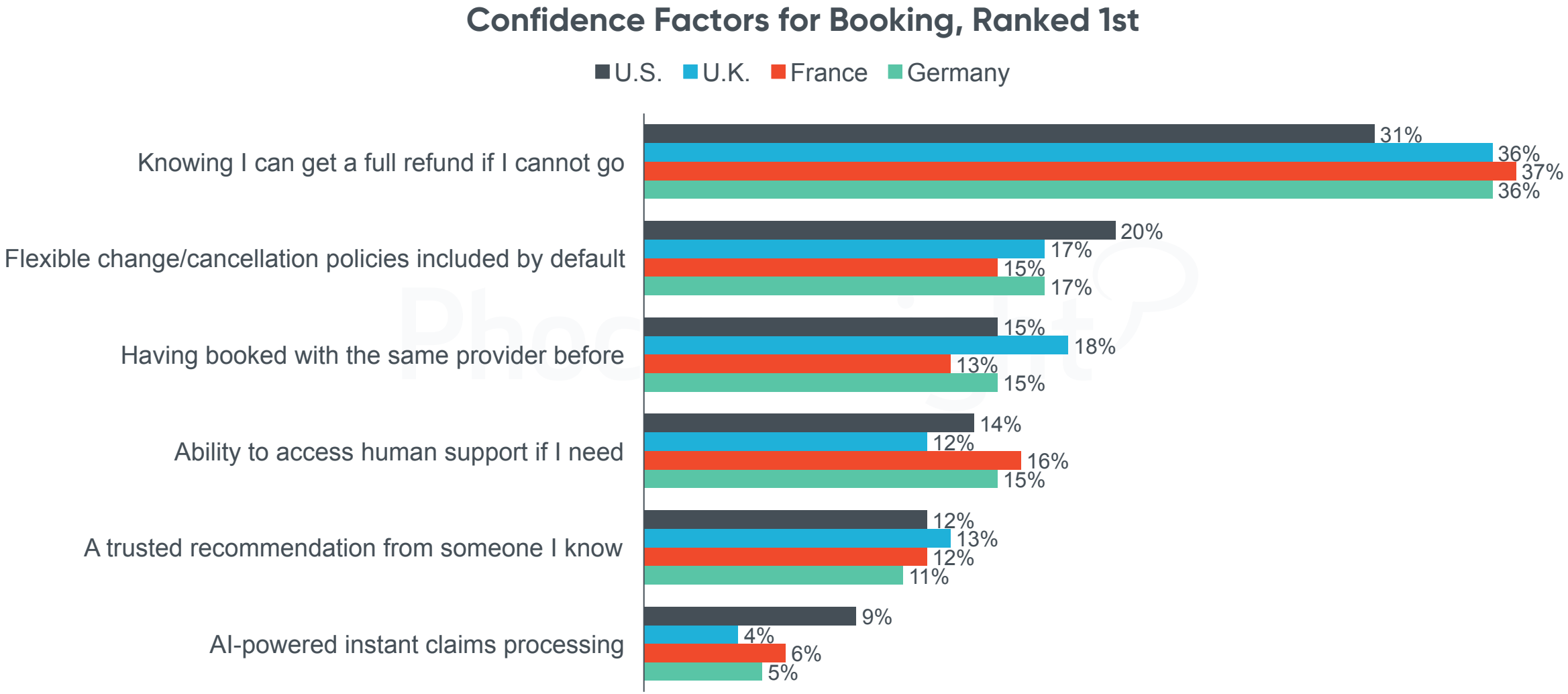
Those from France and Germany are more likely to say it would make no difference.



Question: If a booking platform consistently offered refund protection as a standard option, how would that affect your likelihood of using that platform again for future bookings?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Refunds provide booking confidence for most travelers.



Question: Which of the following would most increase your confidence to book an international trip or purchase event tickets today?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Country-Level Differences

U.S.

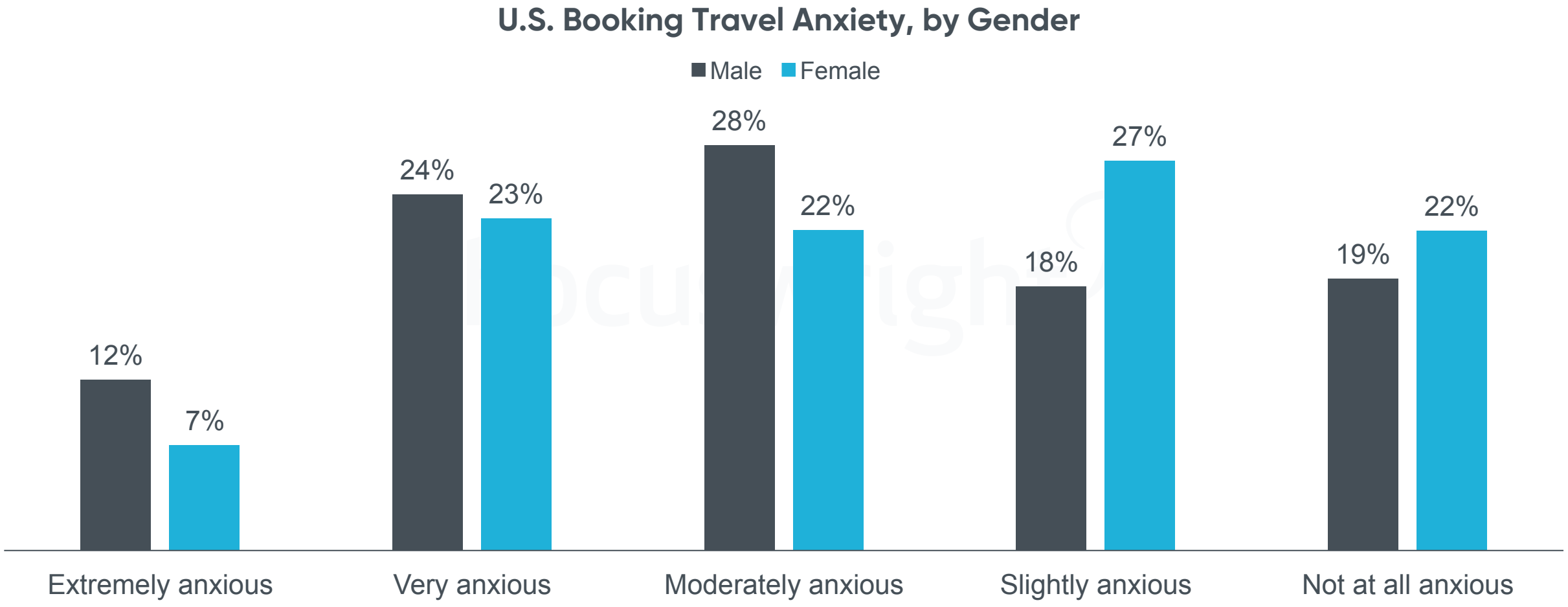
- Anxiety is not evenly distributed.
  - 35-54s and lower-income travelers are more anxious.
  - Men show higher reported anxiety than women on several measures.
  - Those with disruptions are much more anxious.
- Refund protection users are much more open to buying it again.



Source: *Global Booking Anxiety Study 2026*

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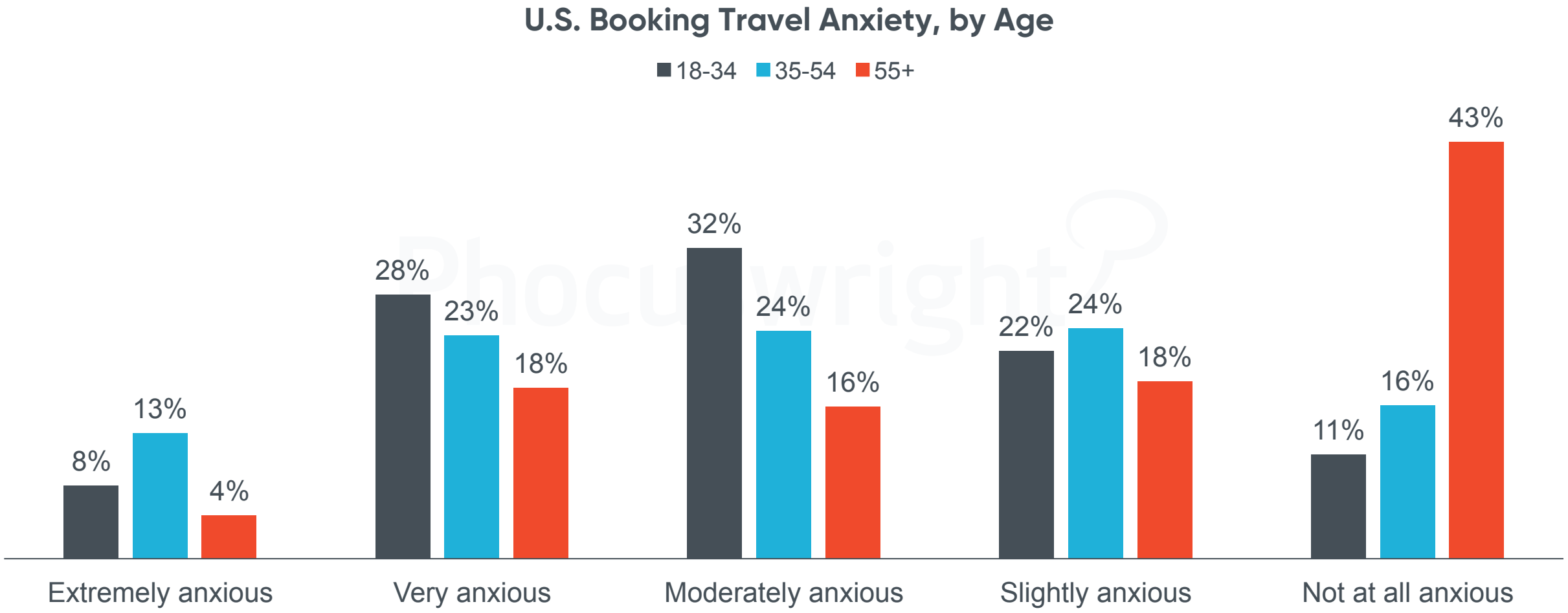
U.S. males tend to express more travel booking anxiety than females.



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309)
Source: *Global Booking Anxiety Study 2026*

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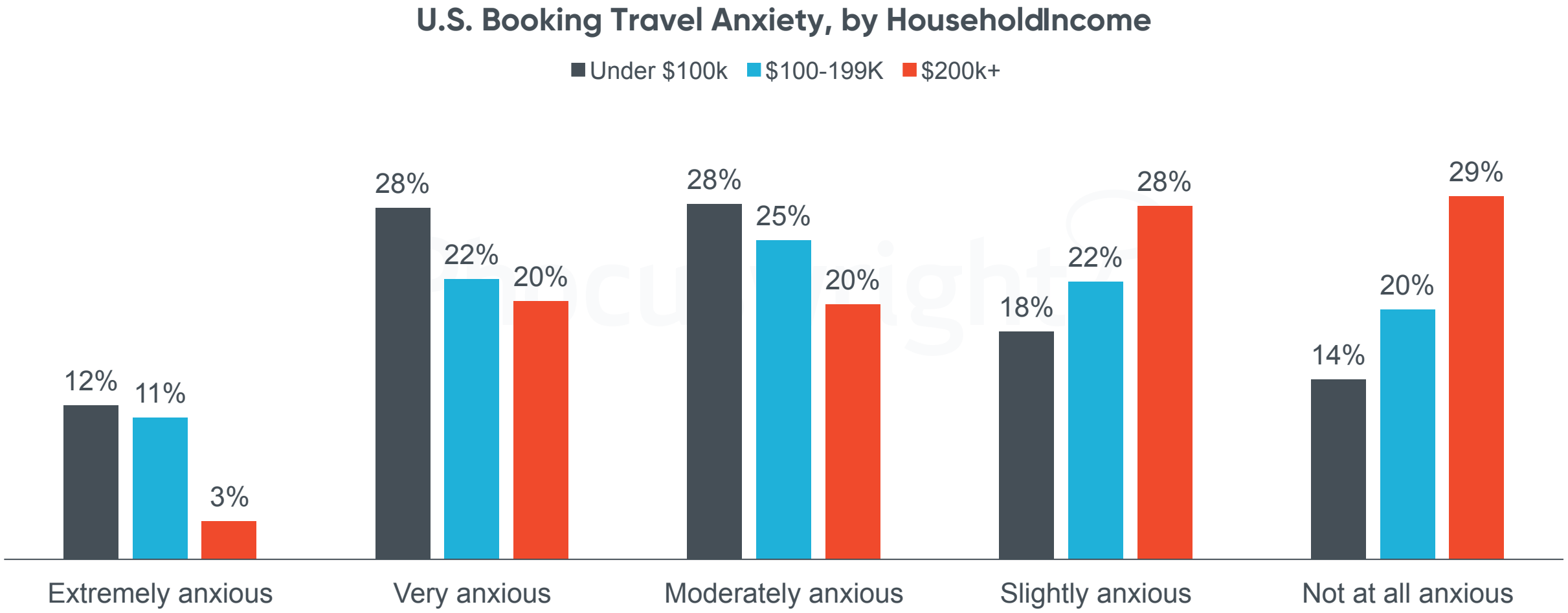
Older U.S. travelers exhibit the least amount of travel booking anxiety.



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309)
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U.S. travelers with lower household incomes have higher travel booking anxiety.

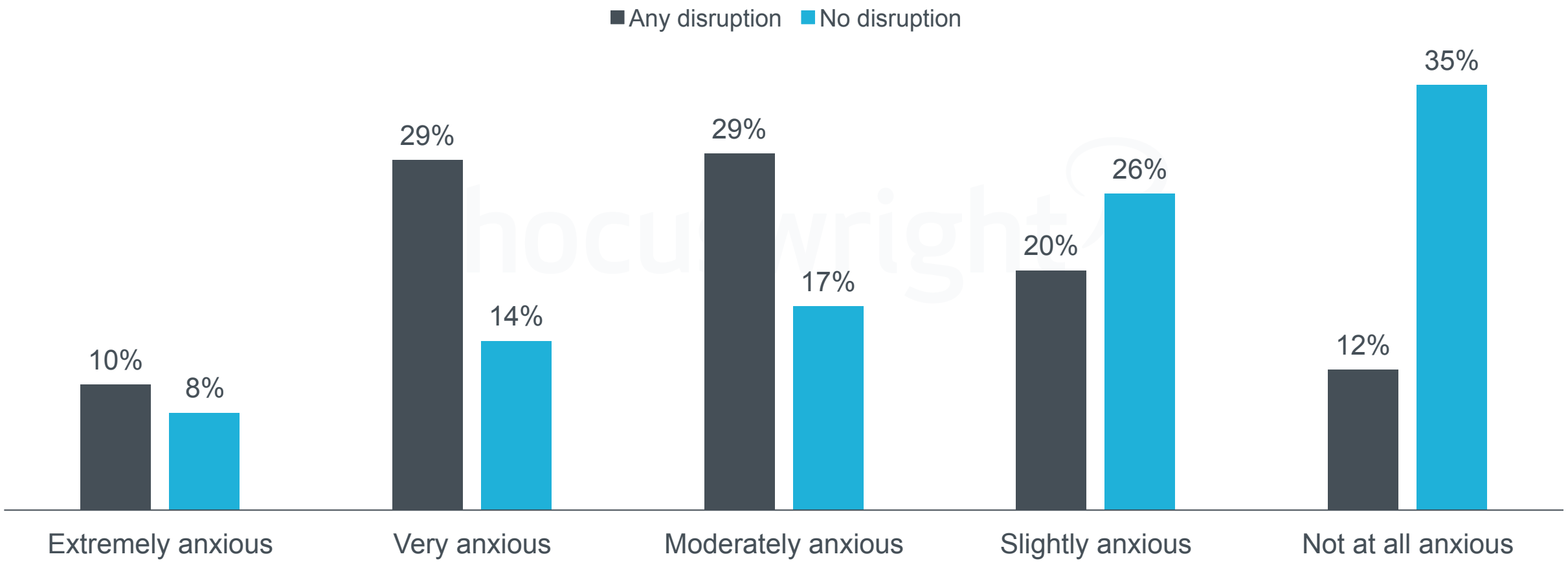


Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309)
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Previous disruption experiences among U.S. travelers are associated with higher travel booking anxiety.

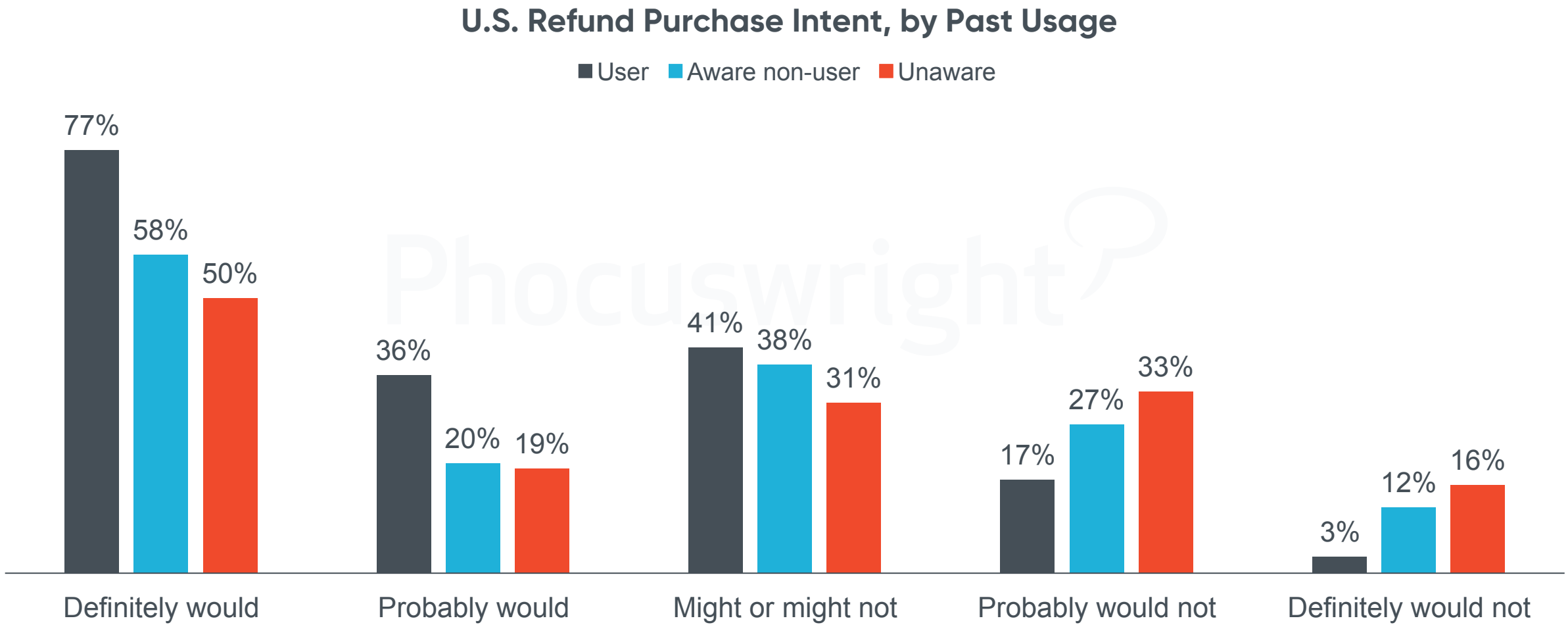
U.S. Booking Travel Anxiety, by Disruption Experience



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309)
Source: *Global Booking Anxiety Study 2026*

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Past U.S. users of refund protection are most likely to purchase protection with next booking.



Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (U.S. N=309)
Source: *Global Booking Anxiety Study 2026*

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U.K.

- Younger U.K. travelers are much more engaged with refund protection and more likely to intend to buy it, while 55+ travelers are less aware and more neutral.
- Higher-income travelers also show stronger purchase intent.



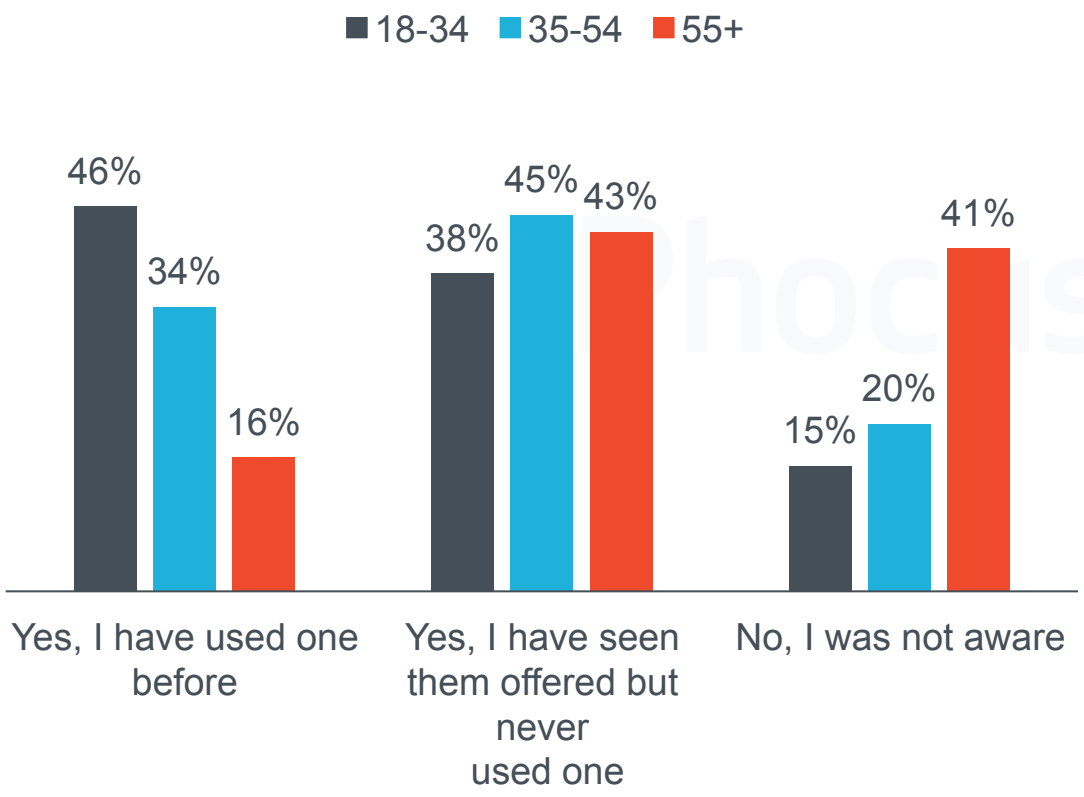
Source: *Global Booking Anxiety Study 2026*

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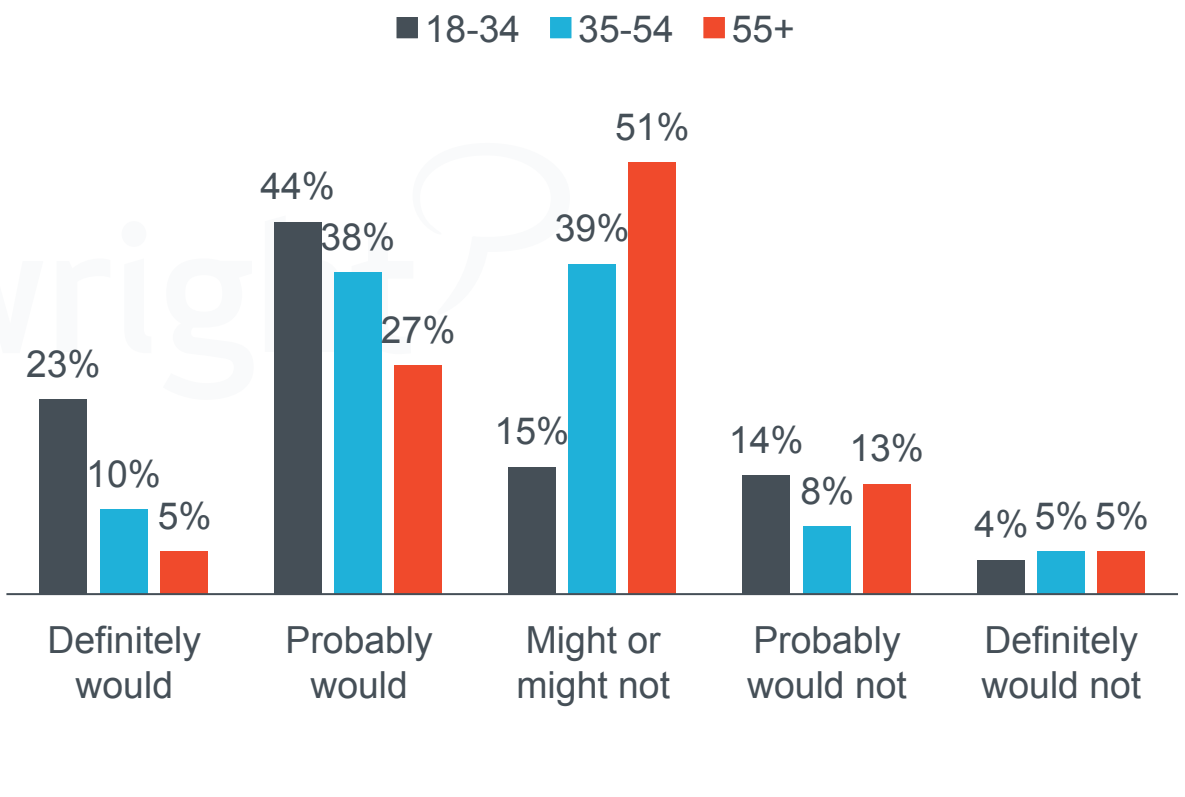
Younger U.K. travelers are more engaged with refund protection with higher awareness, usage and intent.

Refund Protection

U.K. Awareness, by Age



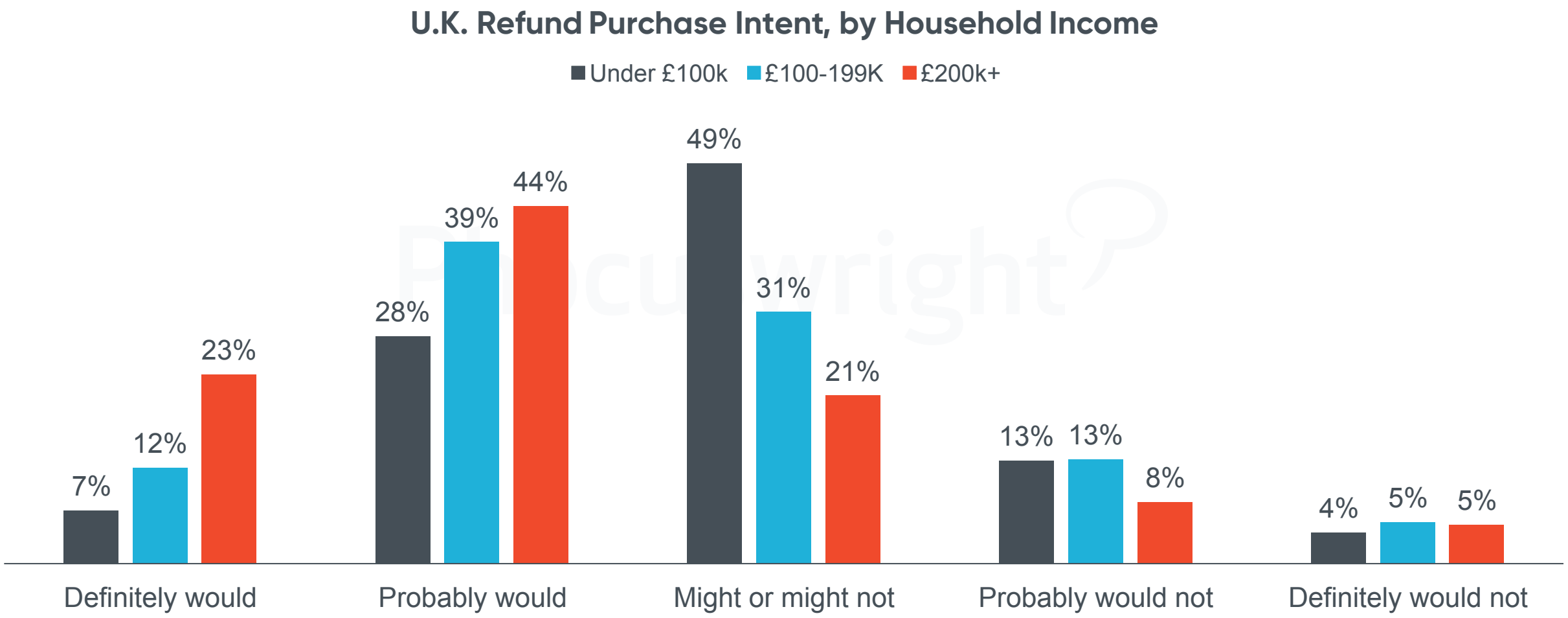
U.K. Purchase Intent, by Age



Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (U.K. N=306)
Source: *Global Booking Anxiety Study 2026*

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U.K. travelers with higher household income are more likely to purchase booking refund protection.



Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (U.K. N=306)
Source: *Global Booking Anxiety Study 2026*

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France

- Younger travelers from France are more likely to have used protection and are also more likely to purchase it in the future.
- Older travelers, 55+ travelers, are much more likely to be unaware.
- Women are more likely than men to be unaware.



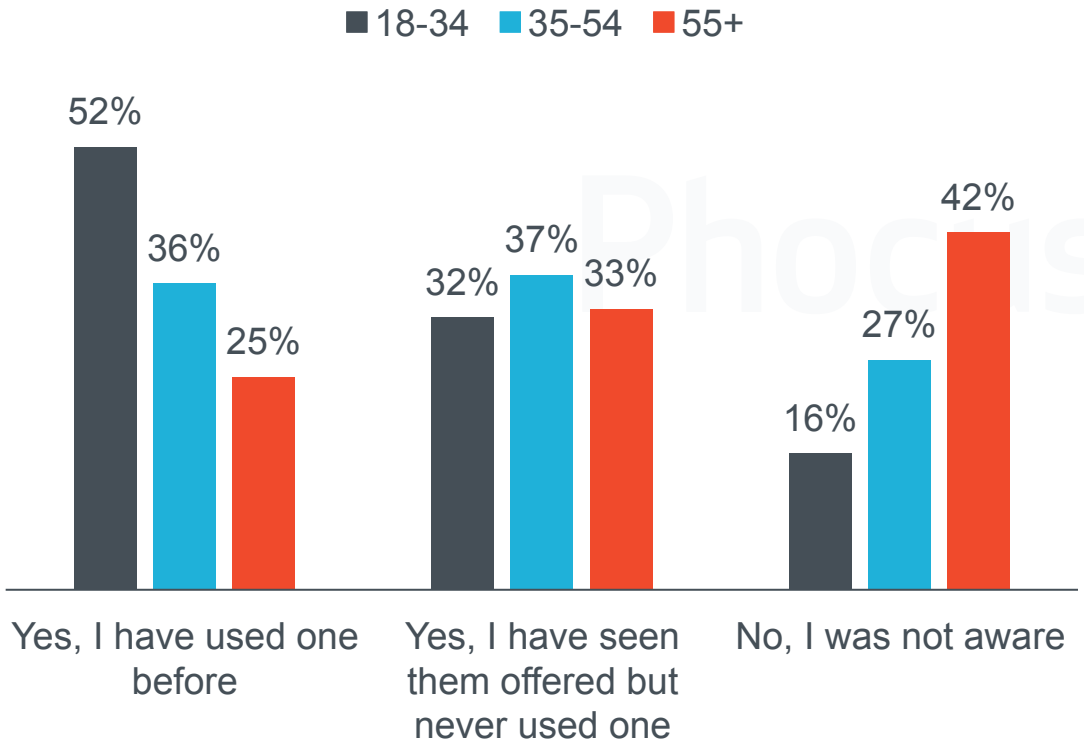
Source: *Global Booking Anxiety Study 2026*

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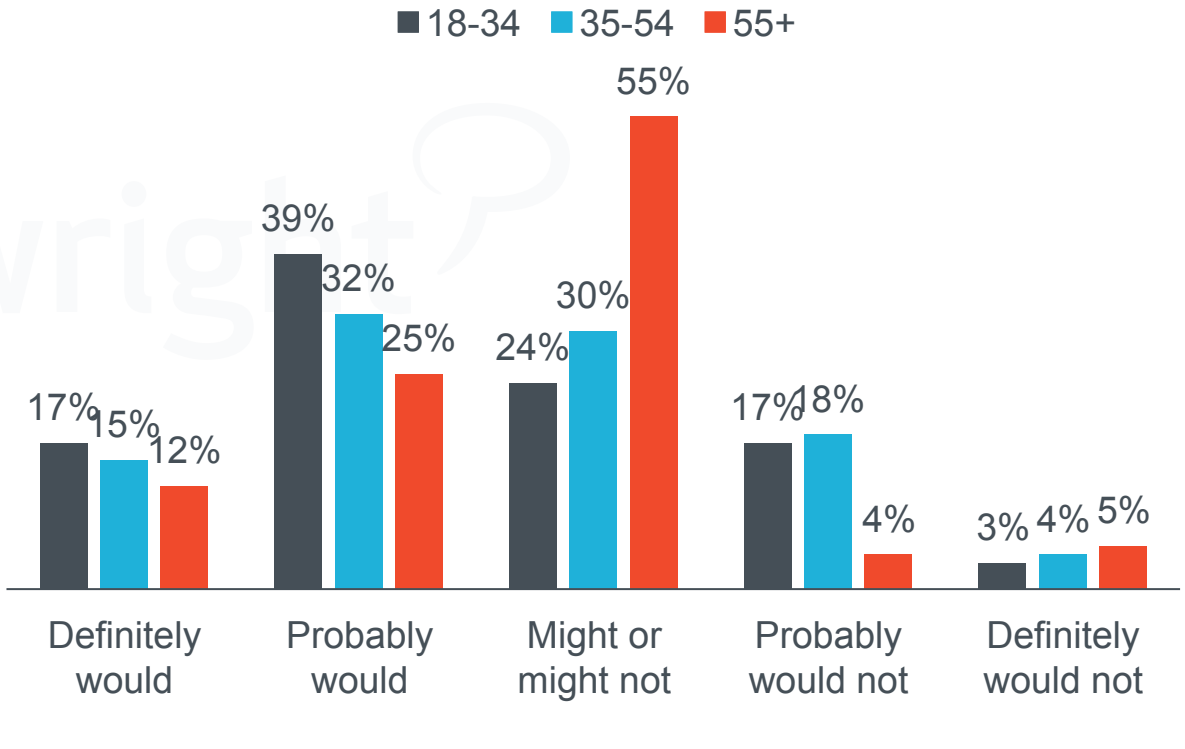
Younger France travelers are more engaged with refund protection having higher awareness, usage and intent.

Refund Protection

France Awareness, by Age



France Purchase Intent, by Age

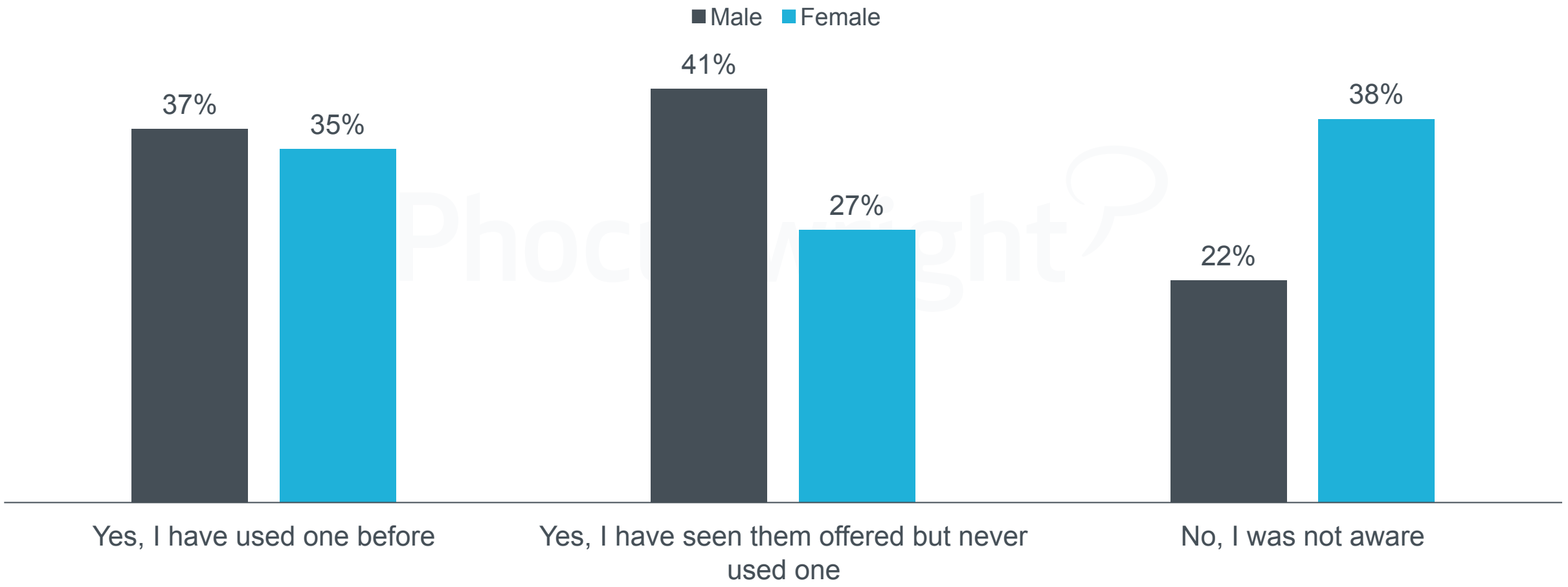


Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (France N=303)
Source: *Global Booking Anxiety Study 2026*

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Women from France are much less likely to be aware of refund protection.

France Refund Protection Awareness, by Gender



Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?
Base: Total respondents (France N=303)
Source: *Global Booking Anxiety Study 2026*

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Germany

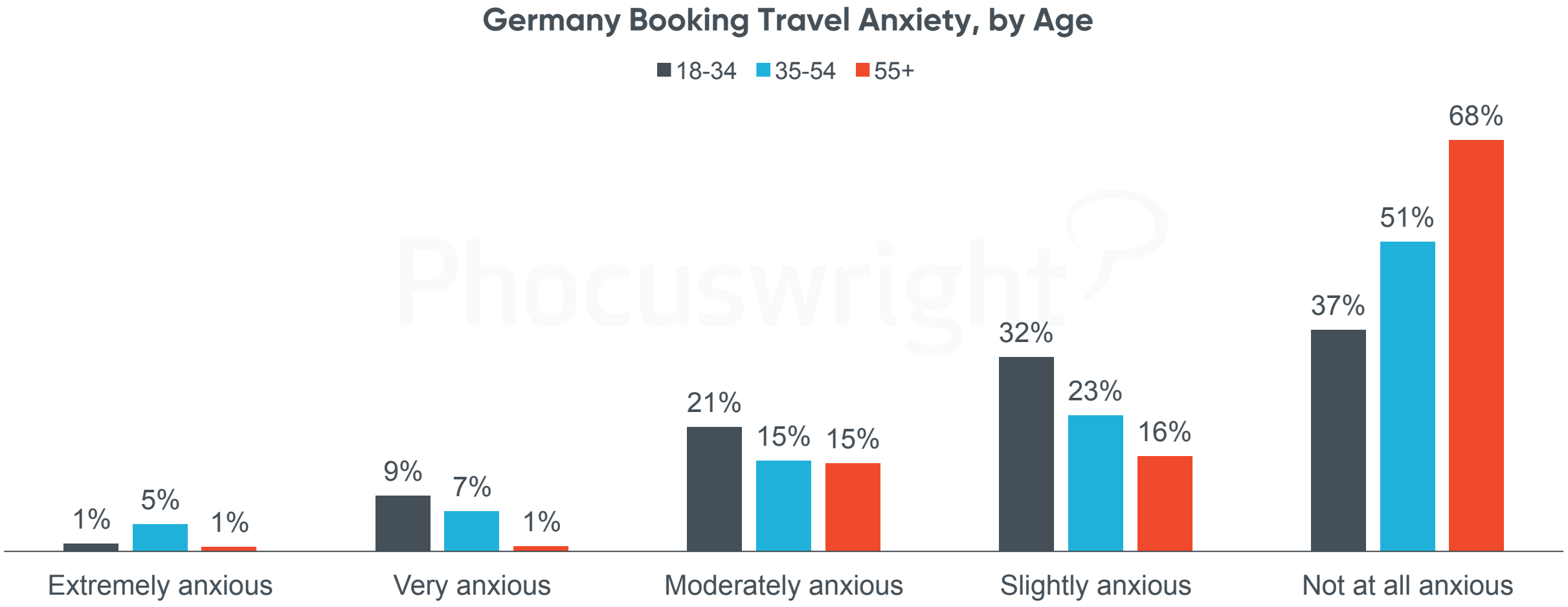
- Germany's overall anxiety is low, but younger Germans and those who have experienced disruptions stand out.
- Prior users are more willing to buy protection again, while aware non-users are the hardest sell.



Source: *Global Booking Anxiety Study 2026*

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Older Germany travelers exhibit the least amount of travel booking anxiety.

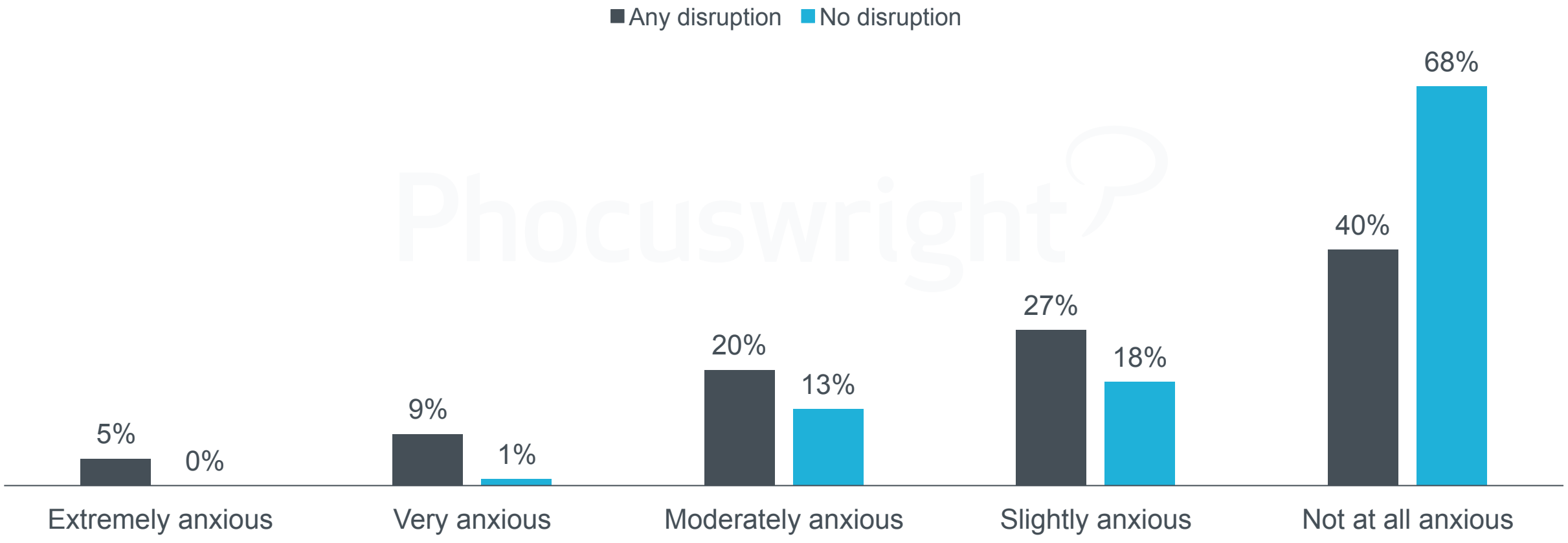


Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Previous disruption experiences lead to higher travel booking anxiety among travelers from Germany.

Germany Booking Travel Anxiety, by Disruption Experience

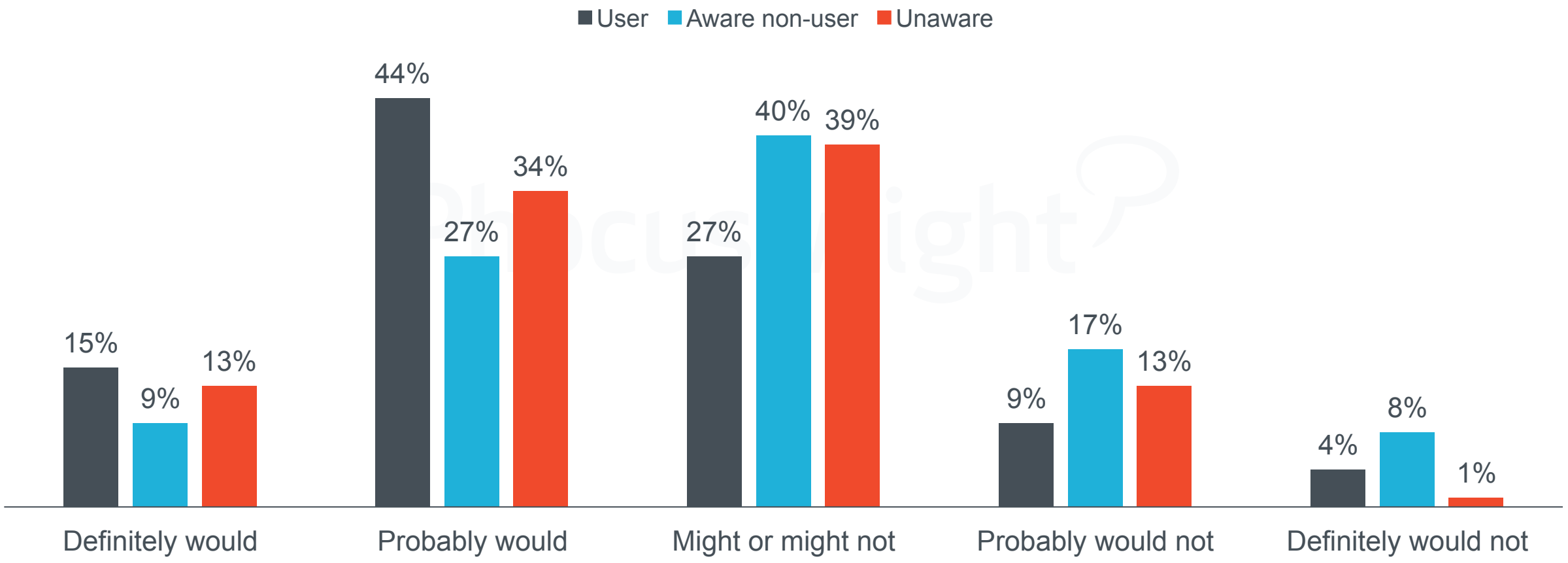


Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Past Germany users of refund protection are most likely to purchase with next booking.

Germany Refund Purchase Intent, by Past Usage



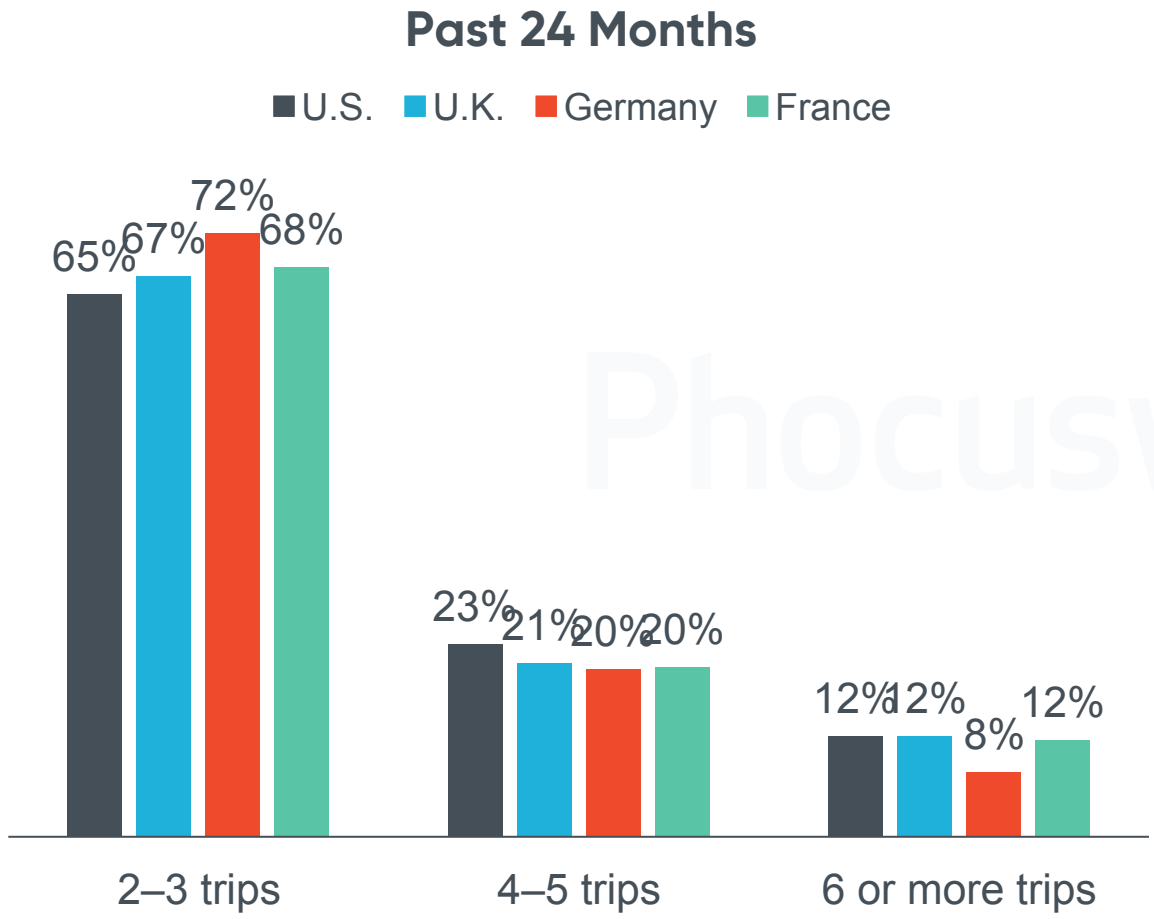
Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Germany N=308)
Source: *Global Booking Anxiety Study 2026*

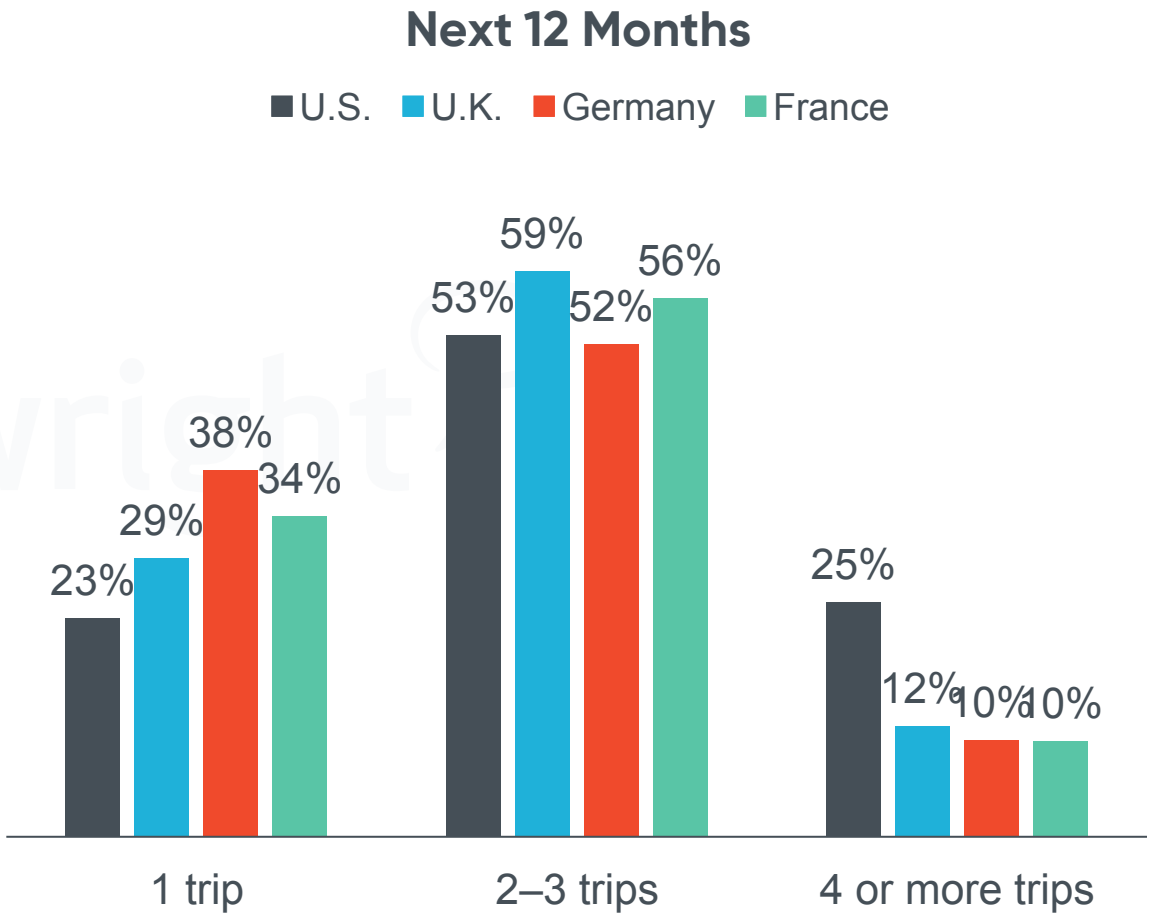
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Appendix

International Leisure Trips

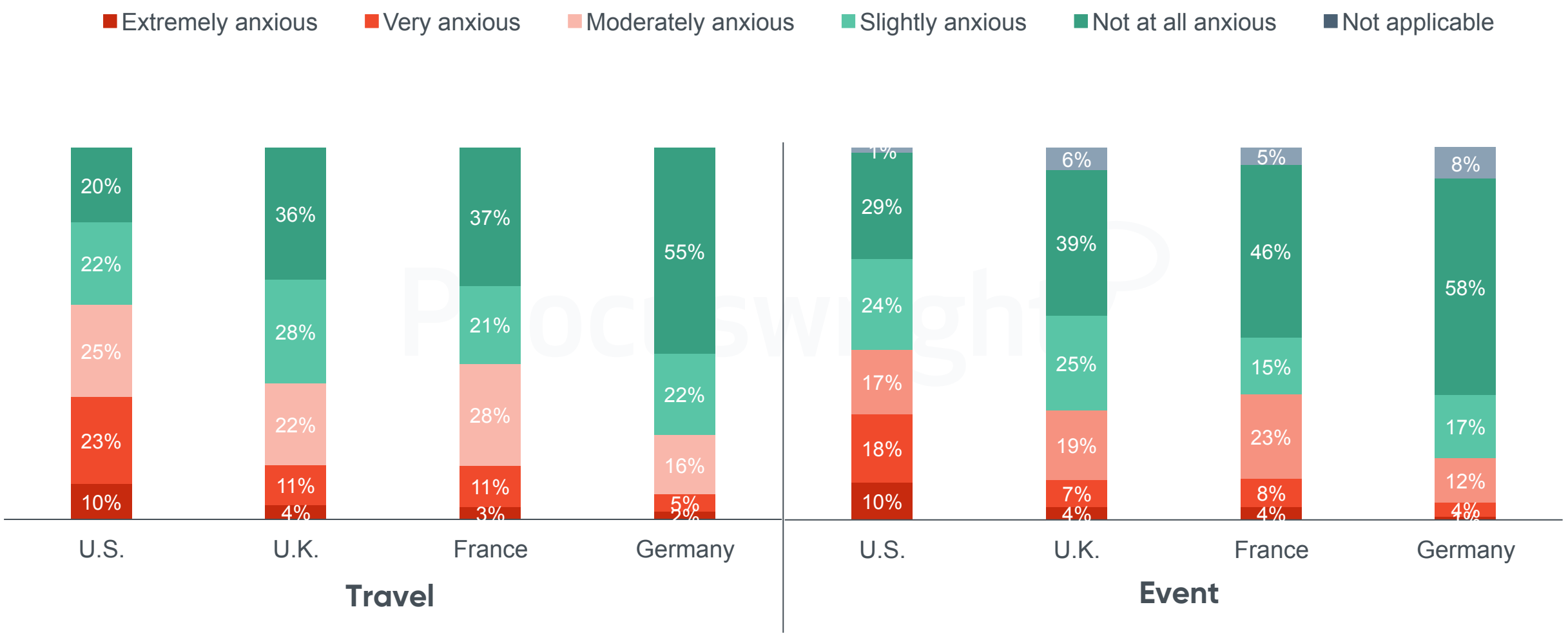




Question: How many international leisure trips have you taken in the past 24 months?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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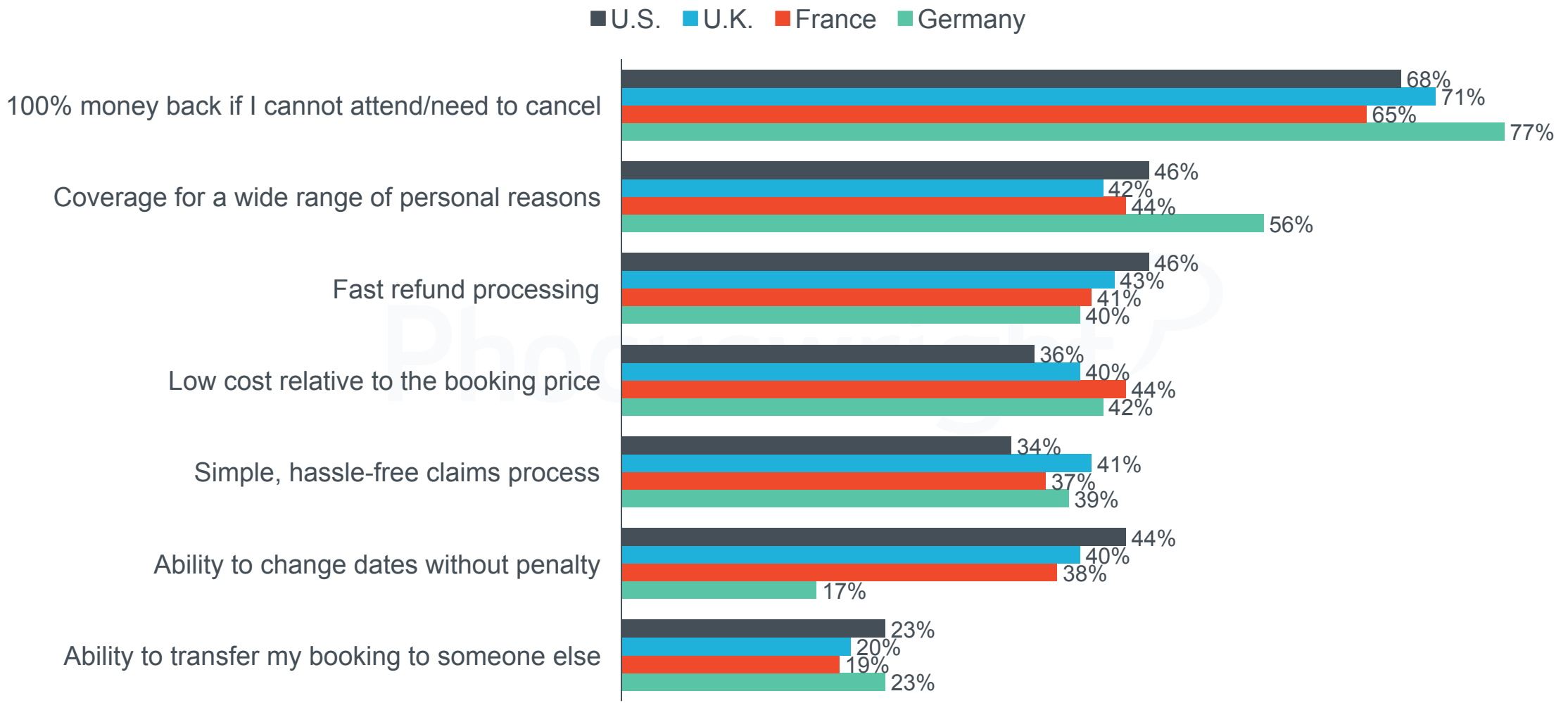
Level of Anxiety When Booking Purchasing



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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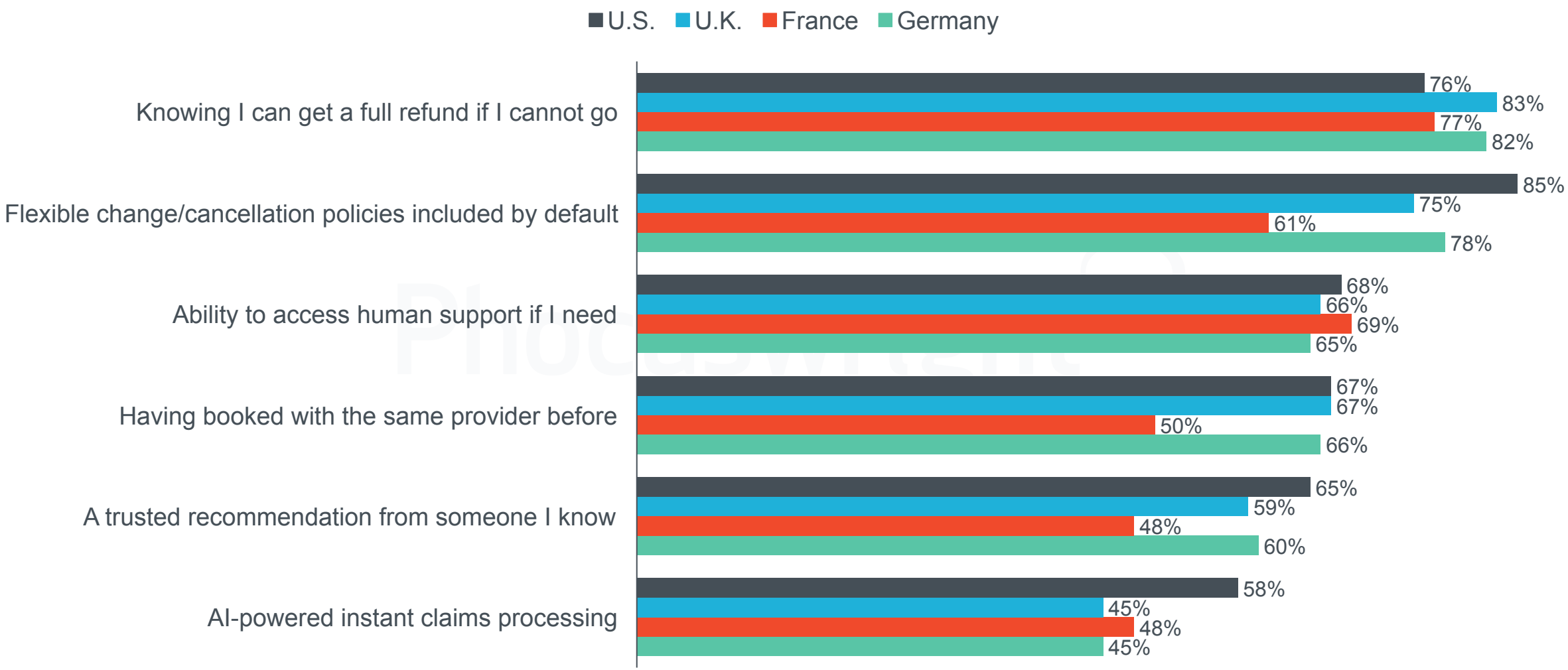
Refund Protection Purchase Drivers, Ranked Top Three



Question: Which of the following features would make you most likely to purchase refund protection? Rank your top 3 in order of importance where 1 is the most important.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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Confidence Factors for Booking, Ranked Top Five



Question: Which of the following would most increase your confidence to book an international trip or purchase event tickets today?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

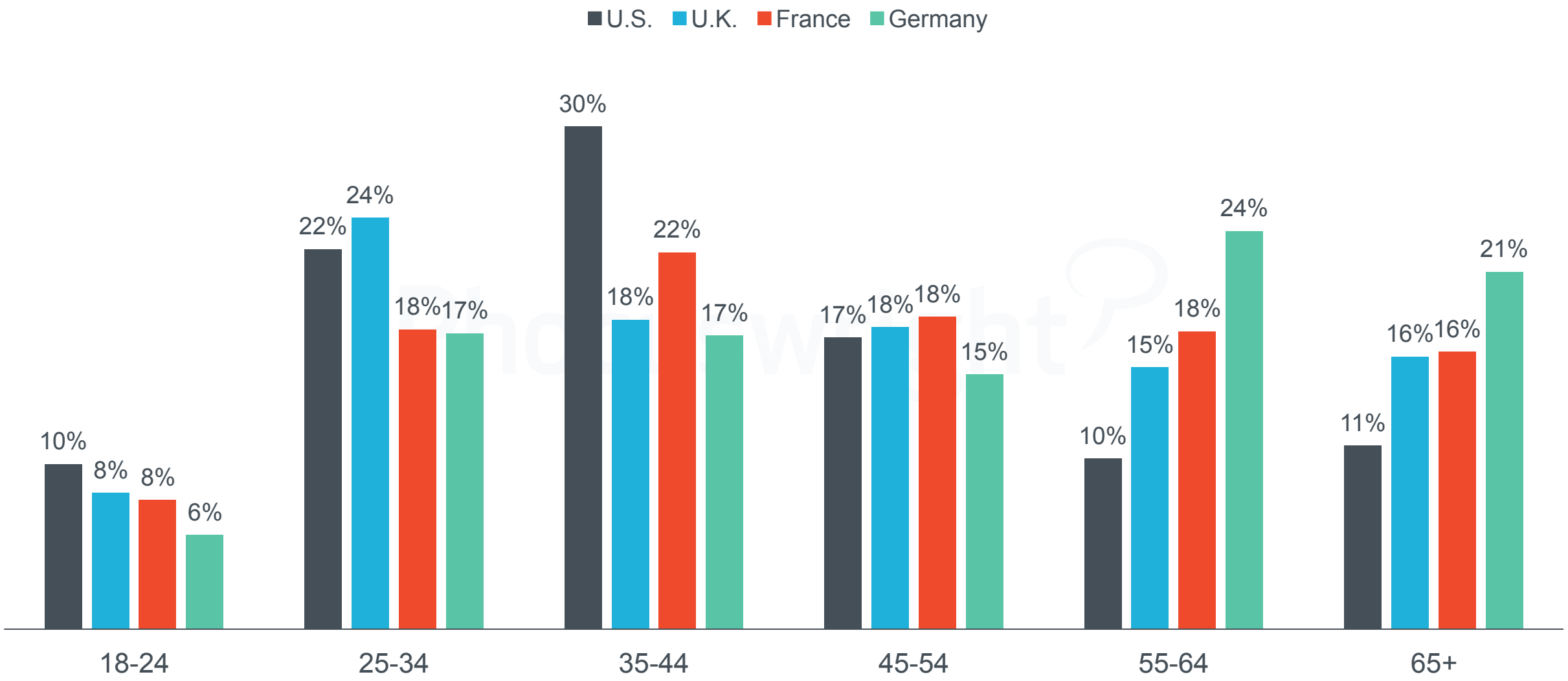
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Demographics

WiT

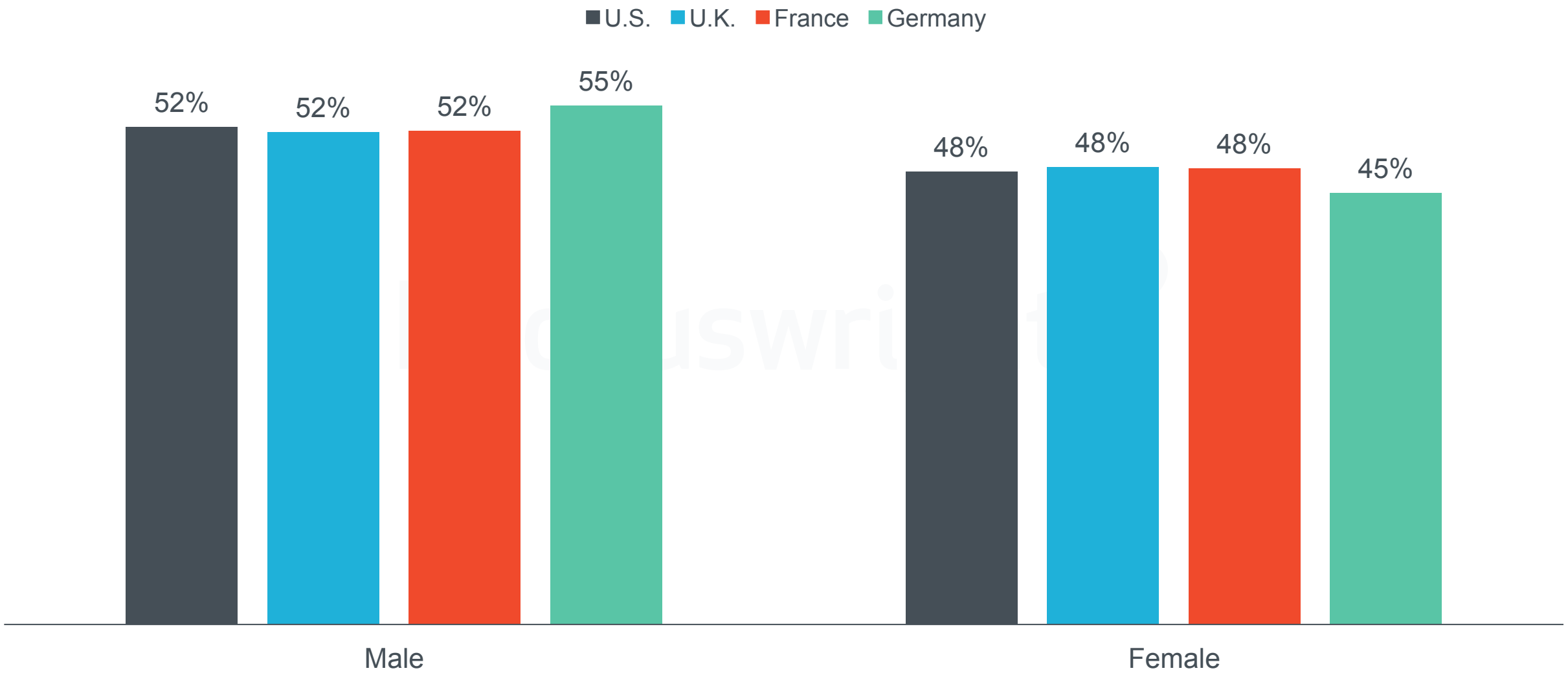
Age



Question: Please enter your age below.
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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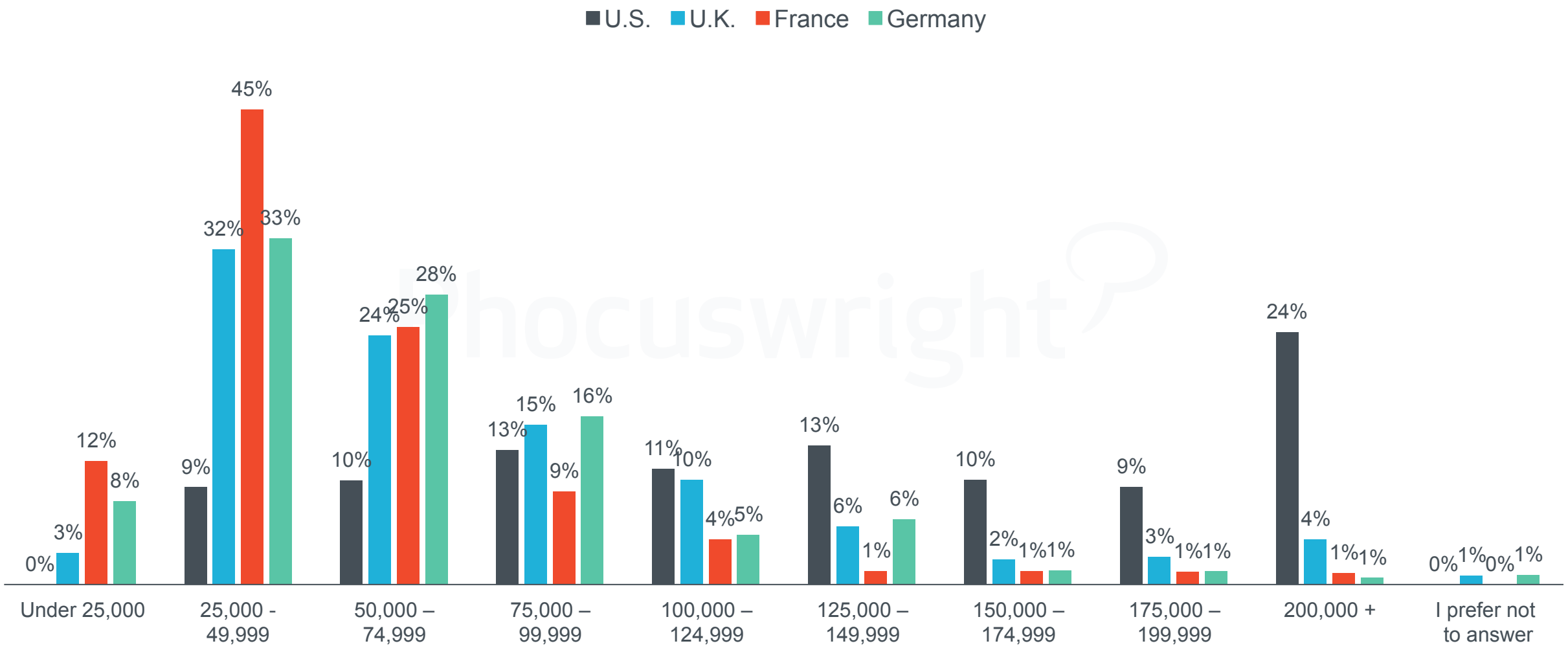
Gender



Question: Which gender identity do you most identify with?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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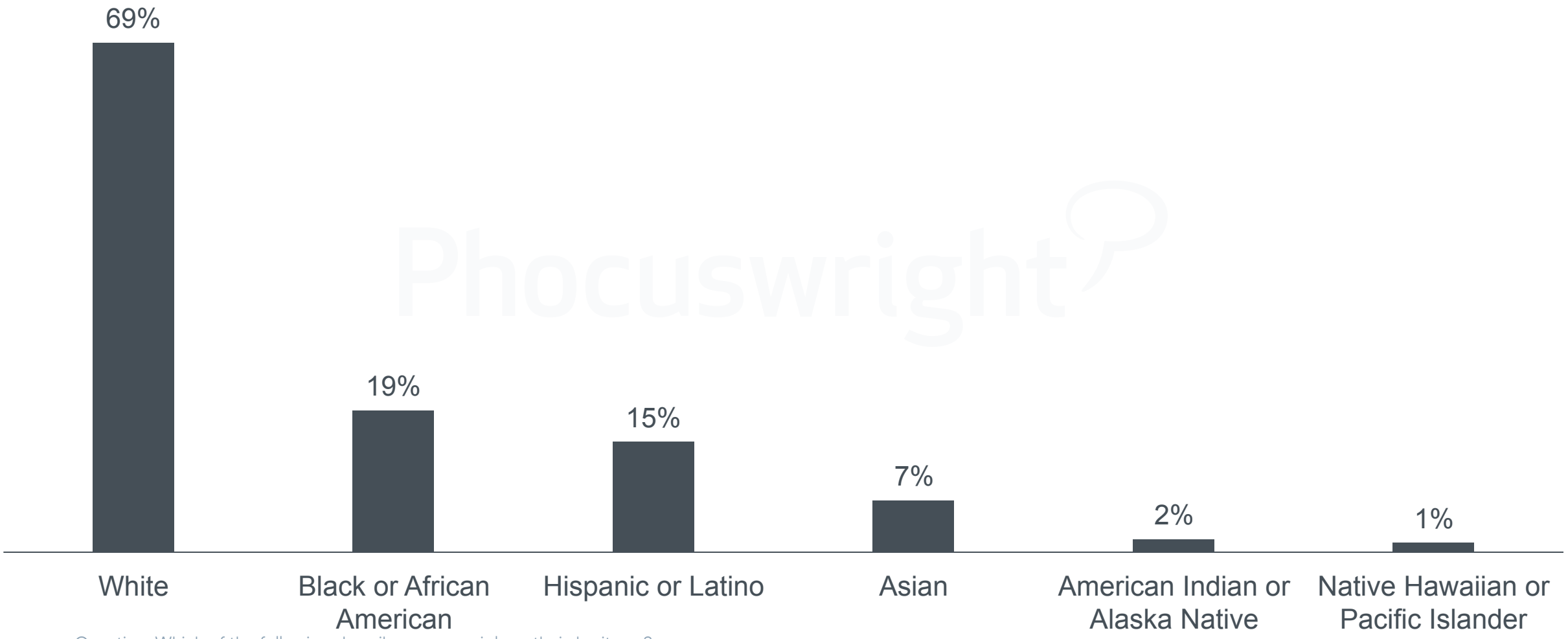
Household Income, in Local Currency



Question: What is your approximate total annual household income?
Base: Total respondents (U.S. N=309; U.K. N=306; France N=303; Germany N=308)
Source: *Global Booking Anxiety Study 2026*

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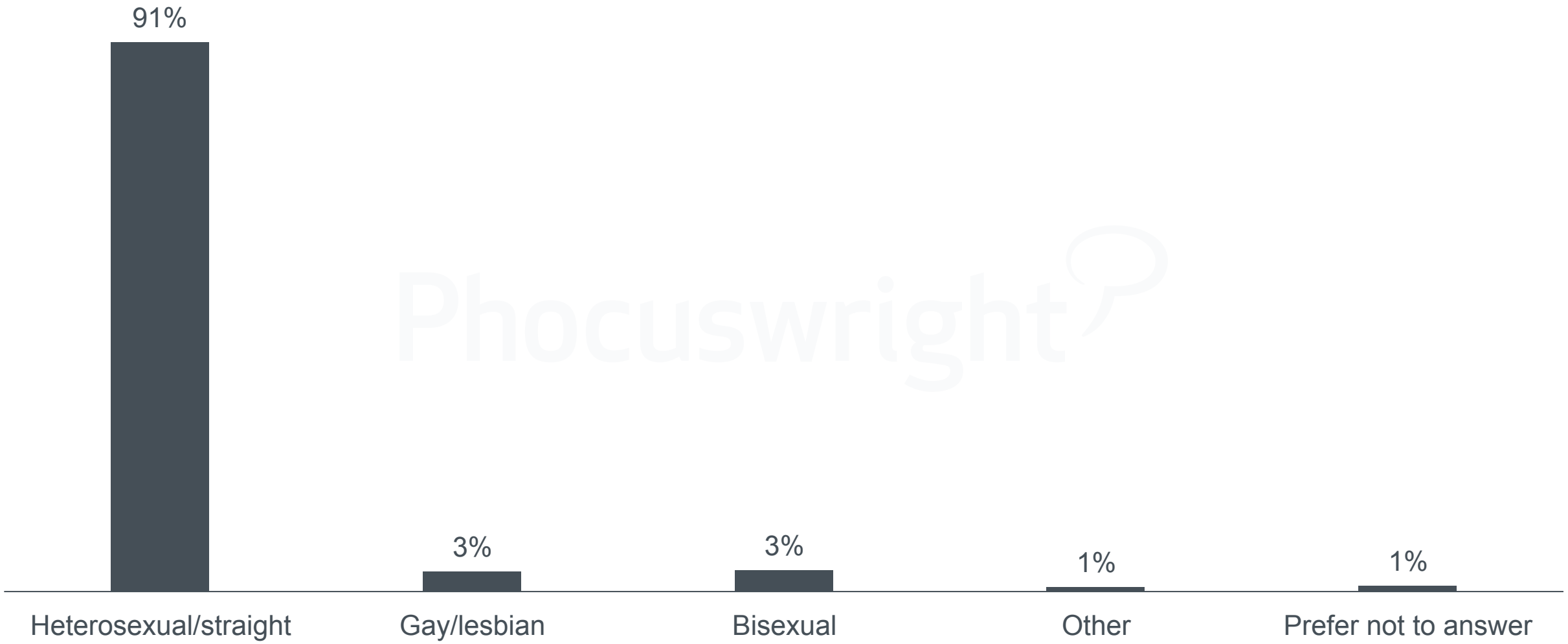
Race, U.S. Only



Question: Which of the following describes your racial or ethnic heritage?
Base: Total respondents (U.S. N=309)
Source: *Global Booking Anxiety Study 2026*

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Sexual Orientation, U.S. Only



Question: What is your sexual orientation?
Base: Total respondents (U.S. N=309)
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