



11th Ipsos - Europ Assistance holiday barometer

Despite the crisis, Europeans are keeping their holidays, although adopting new types of behaviour

Martin VIAL, CEO of the Europ Assistance Group, has presented the findings of the 11th Ipsos – Europ Assistance barometer on Europeans' plans and concerns in relation to holidays.

Conducted by Ipsos at the request of the Europ Assistance Group among a sample of 3,500 Europeans (French, German, British, Italian, Spanish, Belgian and Austrian), **this reference study published for the 11th consecutive year** aims to estimate, each year, the holiday plans of subjects of the countries in question, along with their motivations, destinations and the types of holiday favoured. Given the spectacular increase in Smartphone sales, this year Europ Assistance wished to integrate questions on their usage at the holiday location and their usefulness in the organisation of holidays.

Despite the crisis, Europeans are keeping their holidays, and more of them want to go away this summer (66%)

After two years of crisis, and despite an unfavourable economic context in 2011, **once again 66% of Europeans claim that they will go on holiday this year (+2 points compared to 2010 and 2009)**, catching up with the pre-crisis level when 67% of them were planning summer holidays.

In terms of destination, Europe is still preferred by 8 Europeans out of 10, and the success of national tourism continues: 47% of Europeans will remain in their native country. This proportion is even greater in countries enjoying a favourable climate, and following the sun is a decisive factor in the choice of destination. Hence, in Italy, France and Spain, 6 to 7 travellers out of 10 will stay at home.

Rest and peace of mind are still the absolute priorities for Europeans, a trend that has been confirmed since 2009. 61% of them now make rest their main goal for these summer

holidays, whereas a desire for “discovery” affects only 38% of them (a figure that has been stable since 2008).

In response to this quest for tranquillity, **the seaside is preferred by the vast majority of Europeans** (65%).

With 2,145€, the average budget devoted to holidays is also progressing across Europe (+62€ and +3% c.f. 2010)

This increase can mainly be felt in Italy (+112€), Belgium (+280€) and particularly Germany (+287€).

Europeans continue to pay attention to their holiday spending: 81% consider the “budget” criterion to be important or even essential in the choice of destination.

... But Europeans are adopting new types of behaviour and are organising themselves differently

Europeans are not giving up on their holidays. But they are adapting to the situation by leaving for a shorter period and several times over. Two-week stays are still favoured (39% of Europeans will leave for a fortnight) but their proportion is diminishing. In France and the UK, only one-week stays are on the rise in 2011.

The crisis has accentuated the lasting adoption of new types of behaviour. Nowadays, holidays are organised in advance, and independently: 71% of Europeans started to prepare their holidays ahead of time, and the same figure organise themselves by buying separate services. Europeans are increasingly inclined to organise their own holidays, especially the French (78%, +5 points).

Europeans are using the new media more and more to organise and manage their holidays

Europeans are organising more and more via the Internet in preparing their holidays, with 57% of them claiming to reserve mainly via the Internet (an uninterrupted progression since 2005 when only 28% of Europeans used it). The British are still the most technophile: 71% of them reserve their holidays using this channel.

As for Smartphones, their use is clearly progressing: 1 European out of 4 claims to own one. While 57% claim to use it less on holiday than during the rest of the year, a sign of the desire to “disconnect”, **the device can find a new purpose during the holidays.** Hence, one third of Europeans (34%) would find it useful to have access to practical information for the organisation of their stay, and more than half of them (52%) would find it helpful to be able to consult a list of

useful numbers during their trip, 42% a conversation guide, and 34% a telephone platform facilitating their stay.

Risk perception is being impacted by events in the Middle East and Southern Mediterranean

This year, international events are clearly impacting decisions and accentuating sensitivity to risks. Europeans have been marked by the events of the past winter and this spring, and particularly by the movements in North Africa and the Middle East. **Perceived risks of a terrorist attack and risks of social unrest influencing Europeans' choice of destination have progressed the most, respectively +5 points and +10 points compared to 2010**

As was the case in previous years, health risks are the focal point of fears for Europeans: 69% of them are mainly or even very concerned about a health problem concerning them or someone travelling with them. This year, perception of risks of social unrest along with health risks (doubtless with reminiscence of the H1N1 pandemic) is worrying an increasing number of Europeans.

Europeans are getting covered more and more: especially the Germans, Italians and Austrians. This coverage relates to a vehicle breakdown (64%, +7 points), a health problem concerning a person not travelling with them (32%, +9 points) or a strike or delay in transportation (26%, +5 points). But a gap persists between the level of concern and the level of coverage. Hence, only 17% of Europeans are covered for the risk of a terrorist attack, yet this is a concern for 48% of them.

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** The survey was conducted by phone between February 14th and March 28th 2011, at the home of the respondents and using the quota method (gender, age, profession of head of household, after stratification by region and by size of agglomeration). It is available at www.europ-assistance.com.*