



\* Vous vivez, nous veillons

## *Ipsos survey / Europ Assistance Europeans' summer holiday plans and concerns*

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*Summary*

*Ipsos for Europ Assistance*

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## ***Presentation of the Ipsos / Europ Assistance survey Europeans' summer holiday plans and concerns***

*Ipsos conducted a survey on behalf of Europ Assistance on a sample of **3,510 Europeans aged 18 or over** (British, French, German, Italian, Spanish, Belgian and Austrian) **between 9 February and 23 March 2015**. This survey was conducted **by phone** in the homes of those questioned and in accordance with the quota method (gender, age, profession of the head of the household, region and agglomeration size).*

*With the 2015 summer holidays fast approaching, this study was intended to assess the holiday plans of the citizens of the countries in question, in addition to their motivations, destinations and preferred types of trip.*

*The Ipsos / Europ Assistance 'Europeans' summer holiday plans and concerns' survey also aimed to assess the perceived risks by tourists and gauge how covered they feel in relation to these risks.*

## I. For the first time in three years, Europeans' summer holiday plans have picked up

- In 2015, more Europeans will be able to take a summer holiday

After several years of deprivation due to the crisis, the share of Europeans able to take a holiday has considerably picked up in 2015: **60% say they will take a holiday this summer, i.e. up six points on 2014.** This increase applies to Europeans who plan to take just one summer holiday, while the rate of holidaymakers planning to go away several times over the summer remains stable. This indicates that the number of people unable to take any form of summer holiday in previous years will decline this year.

**In 2015, differences between countries are tending to contract, with more uniformity in the holiday plans of Europeans:**

- Holiday plans have sharply risen in the countries most affected in recent years: Spain (+ 18 pts, 60%), Italy (+ 8 pts to 60%) and Belgium (+ 10 pts, 57%)
- France and Germany, which had decreased to a lesser extent, have also returned to higher levels (respectively +5 pts, 63% and +6 pts to 62%)
- The United Kingdom remains at 55%, while Austria has lost a few points after a peak in 2014 (- 6 pts, 62%)

### Holiday plans by country for the full period of June–September 2015

	Yes, several times	Yes, once	Total 'Yes'	Total development versus 2014
<b>TOTAL</b>	<b>17%</b>	<b>43%</b>	<b>60%</b>	<b>+6 pts</b>
France	17%	46%	63%	+5
Germany	16%	46%	62%	+6
Austria	16%	46%	62%	-6
Italy	12%	48%	60%	+8
Spain	18%	42%	60%	+18
Belgium	17%	40%	57%	+10
United Kingdom	22%	33%	55%	+1

- **A healthier holiday budget on average for Europeans, with large differences remaining between Northern and Latin countries**

**In tandem with this upsurge in holiday plans, Europeans have increased their holiday budget somewhat**, with more people able to preserve it (26%, + 5 pts), after several years of restriction. The average budget for Europeans in the Euro zone will be €2,390, i.e. a €180 increase on last year.

**The slight upward trend is particularly relevant to Europeans in the countries that already have the highest budgets:** Germany (€2,457, +€60) and Austria (€2,610, +€68). Outside of the Euro zone, the increase is sharpest in the United Kingdom: €3,081, +€149.

**However in Latin countries, the budget is generally stable or slightly declining:** France (€2,181, -€46), Spain (€1719, =), Italy (€1708, -€90). Europeans in Latin countries set to resume their holidays this year will therefore remain restricted by a tight budget.

### Average 2015 summer holiday budget in Euros by country

(countries in the Euro zone: Spain, Italy, France, Belgium, Germany and Austria)

	Average 2015 budget in Euros	Development versus 2014 – in Euros	Development versus 2014 – in %	Average 2014 budget in Euros
<b>TOTAL</b>	<b>€2,390</b>	<b>+€180</b>	<b>+8%</b>	<b>€2,210</b>
Belgium	€2,375	-€202	-9%	€2,577
Austria	€2,610	+€68	+3%	€2,542
Germany	€2,457	+€60	+2%	€2,397
France	€2,181	-€46	-2%	€2,227
Italy	€1,708	-€90	-5%	€1,798
Spain	€1,719	-€4	-	€1,723

## II. Warm, sunny Europe remains the top summer destination

- **With the promise of a change of scenery and relaxation, summer holidays are very often synonymous with the seaside, while the mountains are becoming increasingly popular each year**

Europeans' unfailingly dream of a holiday by the sea: 62% of those set to go away this summer are planning a seaside trip—a stable rate compared with 2014. This clear preference is linked to holidaymakers' strong desire to relax, with twice as many seeking rest (60%) as activities and discovery (34%).

Alongside these constants, the trend observed last year of a greater number of holidaymakers seeking a break in the mountains was confirmed (14% in 2013, 18% in 2014 and 20% in 2015).

Slowly but surely, Europeans are looking to the peaks, with a slight increase in popularity observed each year.

Thus 25% of French holidaymakers have expressed a desire to go away to the mountains this year, compared with 24% in 2014 and 15% in 2013 (the same proportions have been observed among Germans and Austrians with figures of 25% and 23% respectively). The sharpest increase was observed among the Spanish. Previously focused on seaside holidays, just over 20% expressed an interest in the mountains this year, compared with just 12% in 2014.

- **Intracommunity and domestic tourism widespread once again this year**

Slightly more Europeans again are planning to travel in Europe this year (79%, + 3 pts on 2014) while almost four in ten still prefer to spend their summer holidays in their home countries.

The appeal of southern European countries is irrefutable: France, Italy and Spain (16%, 17% and 18% respectively) remain the most popular destinations by far, with the Iberian peninsula recording an increase of five points on last year.

Cumulatively, the other Southern countries (Greece, Croatia and Portugal) also scored well with a 12% share, stable year over year. The other countries attract less holidaymakers in summer: 8% visit Germany, 6% visit the UK and between 1% and 3% visit the rest of Europe.

Following the annual trend, British, German, Austrian and Belgian people prefer to travel abroad (59%, 61%, 67% and 71% respectively), in contrast to the French, Italians and Spanish who typically holiday in their home countries, generating regional tourism (56%, 62%, 66%).

### III. Practical holidays and good deals: rapidly evolving customs

The internet has become the preferred method of organising a holiday: from 28% of users in 2005, the European figure reached 60% in 2015, proving that the digital age has brought about a fundamental shift in holidaymaker customs in just a decade.

In a few years, the use of intermediaries such as online tour operators has also consolidated, stepping up the competition with online transport and hotel services. In 2008, 27% of Europeans made their bookings via the websites of various service providers, while 16% used online tour operators. In 2015, their respective shares are almost on par: 32% versus 28%.

In terms of transport solutions, 15% of Europeans claim to be interested in car sharing this year (new indicator). Young people are most eager with almost 30% of 18–24 year olds and a quarter of 25–34 year olds expressing an interest. It is also a popular option with job seekers (24%) and those with a holiday budget of less than 1000 euros (29%).

Those who tend to improvise their holidays by choosing their travel destination at the last minute are also more open to the possibility of car sharing (20%).

Accommodation exchange between individuals during the holiday period also appeals to one in ten Europeans. While young people and households with a restricted holiday budget appear more open than average in this respect too (23% and 19% respectively), families also consider this form of accommodation to be an attractive cost-effective solution (18% of families with two children and 26% of families with three or more children).

Holidaymakers planning a city break are also slightly more keen on this type of accommodation (19%).

### IV. In 2015, Europeans are more concerned by the risk of attack, particularly the French

Over the holiday period, risks to personal and family health remain the primary concern (71% and 68%), ahead of the risk of losing personal belongings (64%).

This year, we have observed a significant increase in concern regarding the risk of attack, up five points to 51%. The increase applies to those who claim to be 'very' worried (37% vs 31% in 2014).

Following the attacks in January, French people are **much more concerned about the risk of an attack than last year**: 38% claim to be very worried, up ten points on 2014. A significant increase was also observed among Italian people (+18 pts to 44%).

### V. European travel insurance: coverage levels remain high and stable

Despite a decrease of several points, European holidaymakers remain essentially covered for risks relating to health issues (60%, -2 pts), vehicle breakdown (60%, -4 pts) and their home (59%, -6 pts).

For other types of risk, however, the discrepancy between the level of concern and the actual coverage rate remains significant. Therefore, 64% of Europeans claim to be worried about the loss of their personal belongings, but only 52% are now insured. The same is true for the risk of natural disaster (42% vs 25%), and the risk of attack, in particular, which has not resulted in increased coverage (with just 13% of Europeans insured) despite renewed concerns this year (51%, + 5 pts).

People still tend to go to their usual company for insurance (60%, stable versus 2014), while the proportion of Europeans insuring themselves via a specific website has increased slightly (11%, + 3 pts versus 2014).