Ipsos / Europ Assistance Barometer Europeans' Plans and Concerns in relation to Holidays

Summary

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Technical presentation of the Ipsos / Europ Assistance Barometer
"Europeans' Plans and Concerns in relation to Holidays"

On behalf of Europ Assistance, Ipsos conducted a study among a sample of 3,500 Europeans aged 18 years and over (French, German, British, Italian, Spanish, Belgian and Austrian), from February 14th to March 28th, 2011. The study was conducted by phone at the respondents' homes and using the quota method (gender, age, profession of head of household) after stratification by region and size of agglomeration.

On the eve of the 2011 summer holidays, the goal of this study was to evaluate the holiday plans of subjects of the countries concerned, their motivations, along with the destinations and types of stay prioritised. The Ipsos / Europ Assistance Barometer "Europeans' Plans and Concerns in relation to Holidays" also set the goal of evaluating the risks perceived by tourists, and evaluating their sense of being covered for these risks.

Finally, this year, following the growing development in the use of Smartphones, Europ Assistance wished to integrate questions on the use of Smartphones at the holiday site and their usefulness in the organisation of holidays.

The following note presents the key findings of this study.

I. HOLIDAY PLANS FOR SUMMER 2011 ARE ON THE RISE AGAIN

Holiday plans for summer 2011 are back to the level of 2007

After two years of crisis, Europeans' holiday plans are back on the rise this year: 66% (+2 points) of Europeans claim that they plan to go on holiday this year, as compared to 64% in 2010 and in 2009.
This slight increase catches up with the pre-crisis level, where 67% of Europeans claimed to be planning to go on holiday.

This trend is even more marked among the Spanish and Italians, where the alteration in holidaymaker behaviour was more tangible last year: this year, respectively 65% (+6 points) and 78% of them (+7 points) plan to go on holiday this summer. In France, holiday plans are stable compared to 2010 (68%) and so have still not returned to their pre-crisis level (74% in 2008).

This increase is carried by "multiple" holidays, which have suffered particularly from the bad economic context of the last two years: today 1 European out of 4 (25%) claims to want to go on holiday more than once this year, the highest score ever recorded (21% in 2010).

Holiday plans per country for the period June to September 2011 inclusive

	Yes, several times	Yes, once	S/T Yes	Change c.f. 2010
All	**25%**	**41%**	**64%**	**=**
Italy	37%	41%	78%	+7 points
France	20%	48%	68%	=
Spain	26%	39%	65%	+6 points
Austria	22%	42%	64%	+3 points
Belgium	14%	47%	61%	-2 points
UK	33%	28%	61%	-3 points
Germany	16%	44%	60%	+1 point

Medium-length stays (two weeks) are dropping

After the continuous increase observed over the past two years, the preference for 'medium' and 'short' stays is balancing out again and returning to its 2008 level: 39% (-4 points) of Europeans will leave for two weeks and 36% (+1 point) for a stay of one week and less.

This year, the French, viewed as fans of long stays, are opting more for one-week stays (20%, +5 points) to the detriment of two-week stays (37%, -6 points). Among the Italians, who will go on holiday more often this year, this trend is very clear since 32% of them (-10 points) will opt for this type of holiday. As a result, one-week stays (40%) are becoming a habit for Italians.

On the other hand, in Belgium, the preference for medium-length stays has been confirmed: 48% of Belgians will leave for two weeks this summer (as opposed to 40% in 2010) and only 20% (+1 point) will leave for one week.

Total duration of summer holidays

	Less than one week	1 week	2 weeks	3 weeks	4 weeks and more
All	**7%**	**29%**	**39%**	**15%**	**13%**
France	3%	20%	37%	20%	21%
Germany	4%	29%	50%	20%	7%
UK	6%	26%	42%	11%	14%
Spain	8%	30%	32%	12%	17%
Italy	13%	40%	32%	9%	10%
Belgium	3%	20%	48%	15%	13%
Austria	15%	36%	38%	13%	9%

Within a difficult socioeconomic context, Europeans are not giving up on their holidays and are managing to protect them. They are adapting and leaving for a shorter period, going away several times …but they are going away.

II. CRITERIA FOR CHOOSING DESTINATIONS ARE SENSITIVE TO CURRENT EVENTS

Budget and sun are naturally decisive criteria, but current events in North Africa and the Middle East are clearly having an impact on decisions

The budget that Europeans plan to allocate to their holidays this summer, along with climate, are still the most important factors in the choice of destination. However, current events on an international scale over the past few months – in North Africa, and in the Middle East – are logically having a significant influence on European holidaymakers.

Indeed, the "holiday budget" this year comes in third after the climate and risks of a terrorist attack. The latter thus becomes the leading factor intervening in the choice of destination: it plays an essential role for 42% of Europeans (+5 points), next comes the climate (41%, stable) and finally the "holiday budget" (40%, +1 point).
Moreover, the risk of social unrest (33%, +10 points) along with health risks (37%, +4 points) – the H1N1 flu epidemic is still in people's memories – also gain in importance this year. And so all the risks are on an upward trend, the consequence of increased sensitivity to risks this year.

In detail, this increase in social concerns in the choice of destination can be observed in the majority of countries (5 out of 7). Only France and Belgium do not seem to be heavily impacted. These developments clearly reflect Europeans' sensitivity to external factors over which they have no control.
Note that risks of a natural disaster play an increasing role in the choice of destination for Austrians (35%, +9 points c.f. 2010) and to a lesser extent the choices made by Spaniards (43%, +5 points).

Hierarchy of choice factors according to country *("essential" answers)*

	1st factor	2nd factor	3rd factor
All	**Risks of a terrorist attack**	**Climate**	**The budget you plan to allocate**
France	Climate	Risks of a terrorist attack	The budget you plan to allocate
Germany	Risks of a terrorist attack	Risks of social unrest	The budget you plan to allocate
UK	Risks of a terrorist attack	Risks of social unrest	The budget you plan to allocate
Spain	Risks of a terrorist attack	Health risks	Risks of a natural disaster / The budget you plan to allocate
Italy	Climate	The budget you plan to allocate	Risks of a terrorist attack
Belgium	Climate	Risks of a terrorist attack	The quality of the tourist infrastructures on site
Austria	Risks of a terrorist attack	Risks of social unrest	Possibilities for leisure and cultural activities

III. “HOLIDAY BUDGET” FOR SUMMER 2011

In terms of budget, an overall rise that conceals divergent changes according to country

As with plans to go on holiday, the “holiday budget” on a European level (weighted based on the demographic weight of countries) is on the rise again: this year it reaches 2,145 € (+62 € c.f. 2010).

We did however observe some real disparities between countries.
It has gone up in Italy (+112€), Belgium (+280€, continuous growth since 2007) and particularly in Germany (+287€), where the post-crisis economic situation influenced the behaviour of German holidaymakers.
The situation in France remains unchanged (+3€) while in Spain (-90€) but mainly in the UK (-147€), it has recorded a drop.

IV. HOLIDAY DESTINATIONS, WHAT PROSPECTS FOR 2011?

In terms of purpose, Europeans rest very largely focused on rest and less on discovery…

The situation in all the barometer countries is generally the same as last year: rest and peace and quiet remain vital expectations.
The search for peace and quiet and rest, which has been on an upward trend since 2009, remains a priority for Europeans. 61% of them (+1 point) make “rest” their main source of desire for these summer holidays, whereas the desire for “discovery”, which is secondary (38%), has been stable since 2008.

Moreover, we observed an alignment of the Italians’ behaviour with the behaviour of all the other countries we polled. Historically, Italians have tended to opt for “discovery” more than the average, but this year the trend has dissipated: carried by the desire to “rest and have peace of mind” (41%, + 13 points), 62% of them (+6 points) prefer rest over discovery (38%, -5 points).

N.B. in the UK, the need to get together as a family, at home, observed last year, is not as obvious (37%, -5 points c.f. 2010 and -3 points c.f. 2009).

…and the postcard image of rest "at the seaside" is still the preference for the vast majority of European holidaymakers

Alongside the growing desire for calm and serenity, the preference for holidays by the sea is strengthening: 65% of Europeans plan to go to the seaside this year compared to 62% in 2010 (back to its 2005 level, the highest ever reached).
This year, the seaside is attracting more Belgians (61%, +8 points) who had already distanced themselves somewhat from the mountains last year.

Moreover, the downward trend in going on touring holidays and holidays in the mountains is confirmed this year; respectively 18% (-2 points, lowest score ever attained) and 17% (-2 points) of Europeans are considering this destination.
In detail, tours generate the least interest among the Germans and Italians, respectively 19% (-6 points) and 11% (-9 points).

Europe is still the priority destination for Europeans, national tourism also has the wind in its sails in France, Spain and Italy.

The change in factors in the choice of destination is not significantly affecting the destinations actually chosen by Europeans. Indeed, Europe is still the leading holiday destination favoured by 79% of Europeans (80% in 2010), almost half of whom will stay in their own country (47%, -1 point). This trend remains unchanged compared to 2010 but also compared to previous years.
The leading trio also remains unchanged: Italy first (21%, +2 points), France (17%, +1 point) and finally Spain (16%, stable).

After the wave of withdrawal observed last year, the Germans and Austrians have less of an inclination for national tourism, with respectively 32% (-7 points) and 20% (-14 points) of them claiming that they will stay in their own country.
In Belgium, after the heavy increase observed last year, holidays in France are dropping: 34% of Belgians will go to France as opposed to 40% in 2010 and 28% in 2009.
These findings are however consistent with the increase in the "holiday budget", but also in the desire Austrians have to discover Southern Europe (52%, +7 points), and Belgians' desire to go to the seaside (61%, +8 points).

Destinations outside Europe are historically marginal. This year, the French seem less attracted to Africa (6% of them will go to Africa, -4 points). The political instability reigning in North African and the Ivory Coast explain this slight drop.

V. HOLIDAY ORGANISATION

Holiday organisation is based on a trio of factors that is already established: planning ahead of time, independently, over the Internet.

Holidays that are always prepared ahead of time

Over the past two years, the crisis has had no impact on the organisation of Europeans' holidays, and this is even less the case for the social unrest of this year. Indeed, stable compared to the previous year but also since the barometer began, 71% of Europeans prefer to anticipate the organisation of their summer holidays this year. While 28% (stable) of them will decide on their destination at the last minute.

In detail, the trend is also stable for 5 out of 7 countries, except among the Italians and Belgians where opposing situations can be observed.
In Italy, preparation is increasingly taking place ahead of time (68%, +7 points) while in Belgium, the decision is being made increasingly late (22%, +9 points).

Stability is also the rule as concerns the choice of holiday formulas and types of accommodation chosen. Europeans are even more inclined to organise their holidays themselves, especially the French (78%, +5 points) for whom the random events of everyday life seem to have more impact on the means of organisation. In contrast, 27% (stable) of Europeans will purchase an all-inclusive package covering transport and accommodation.

Holiday preparation for summer 2011: holiday formula and types of accommodation

Moreover, rentals – hotels rooms, bed and breakfast and apartments – remain stable (71%, +2 points) and far ahead of staying in a second home (23%, +2 points) or camping – caravanning (12%, -2 points).

In detail, although independent organisation remains predominant, "all-inclusive" organisation is making progress among Spaniards (31%, +6 points), whereas it has been dropping for several years among the Italians (26%, as opposed to 29% in 2010 and 33% in 2009).

The position of the Internet, as a dominant reservation channel, is being strengthened

This year we once again observed the increasing dominance of the Internet in the organisation of holidays. Holiday reservation via this means of communication has been constantly on the rise among Europeans since 2005; when 28% of Europeans used it as opposed to 57% in 2011.

This trend is even more marked in Germany, Italy and Austria, where respectively 57% of German holidaymakers (+11 points c.f. 2010), 52% of Italians (+6 points c.f. 2010), and 55% of Austrians (+7 points c.f. 2010) will make their purchases using this method.
But the British are still the biggest fans of electronic reservation with 71% (+3 points) of reservation via this channel.

Note that 25% of Europeans (-4 points) claim that they will physically go to a travel agency or Tour Operator, with this attitude particularly concerning the Italians (35%, -6 points), Spaniards (31%, -2 points) and Austrians (30%, -5 points).

And what about the mobile Internet in the future? Perceived usefulness is greater during holidays than when preparing them

To date, 1 European out of 4 (24%), claims to own a Smartphone and more than half of them would use it less often when they go on holiday than the rest of the year. This trend, in step with the search for peace of mind and rest observed this year, clearly reflects the aspirations Europeans have: the desire to "disconnect".

In detail, the British, who are more technological than the average, are also the best equipped with Smartphones; 31% of Britons claim to own a Smartphone as opposed to 25% for the French and 11% of Belgians, whose level of ownership is the lowest of the countries tested in the Barometer.

In terms of usage, disparities exist between Europeans.
While 57% of Europeans use their Smartphone less often when on holiday, this is only the case for 35% of Spaniards. On the other hand, the British and Austrians more readily let themselves go; respectively 71% and 69% use their Smartphone less than the rest of the year.

In terms of usefulness, the Smartphone seems to find its place more readily during Europeans' holidays than during the organisation of those holidays.
Indeed, one European out of 5 (21%) would find it useful to have access to offers of travel insurance policies, and one third of them (34%) to have access to practical information for the organisation of their holiday. The Spanish, French and British are the biggest demanders of this type of service.

But while travelling, over half of Europeans (52%) would find it helpful to be able to access or consult a list of useful numbers, 42% a conversation guide and 34% a telephone platform to facilitate their stay. Once again, the Spanish seem to be the biggest demanders in this respect.

VI. RISKS AND RISK COVERAGE

A hierarchy of fears that has evolved little and is focused on health risks

As in previous years, Europeans have greater fears about health problems, for an issue concerning themselves or their family (69% concerns). These fears remain stable with the exception of risks of a terrorist attack (48% concerns, +4 points) and strikes and delays in transportation (42%, +4 points), which are back on the rise this year. The international events of the past winter and this spring are of course a vital factor in these developments.

Regular progression in the level of risk coverage but a persistent gap between the level of concern and the level of coverage

On the whole, we can observe an upward trend in risk coverage by Europeans, especially the Germans, British, Italians and Austrians.
Europeans are getting more coverage than last year for a vehicle breakdown (64%, +7 points), a health problems concerning a person who is not travelling (32%, +9 points), and to a lesser extent, a strike or delay in transportation (26%, +5 points).

Moreover, for most of the risks, Europeans are still less covered than they are concerned. This is notably the case for risks of a terrorist attack which concern 48% of Europeans but for which only 17% are covered, or risks of a natural disaster (concern 43% of Europeans but 27% are covered).

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