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17th edition of the Ipsos/Europ Assistance survey on summer holidays

In 2017, summer holiday plans are on the rise again in all countries.

Shorter leaves are in the works, hence an average budget in decline.

In 2017, more Europeans and Americans will go on summer holiday

After the drop seen in 2016, the outlook for Europeans' summer holiday plans this year appears sunnier: 63% of them report they will take leave this summer, which is a 9-point gain over 2016. Austria (+3 pts) and Switzerland (surveyed for the first time) will have the highest percentage of holidaymakers with 66% having holiday plans this summer. The rise is seen in all the other population groups surveyed: 65% of the French (+8 pts versus 2016), 63% of Germans (+8 pts), 61% of Italians (+9 pts), 60% of Belgians (+13 pts), and 58% of Spaniards (+9 pts). Meanwhile, the British also posted a high score (65%), on par with the French.

The phenomenon extends to the United States, where holiday plans are 5 points higher than last year at 66%, matching the level also measured in Brazil (66%, +2 pts versus 2016).

This year there is an overall rebalancing of holiday plans across the various countries, with reduced gaps between those with the highest and lowest rates of holidaymakers.

Similarly, the increase is uniform across all social categories. Although there are still significant lags between high-income families and low-income families, the rise in European holiday plans was seen among executives and office clerks (respectively +5 pts to 77% and +12 pts to 73%), as well as among manual workers (63%, +13 pts), retirees (51%, +6 pts) and the unemployed (48%, +12 pts).

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More holidaymakers this summer, but a shorter average leave...

The rise in the number of holidaymakers is partially explained by an increase in shorter trips instead of extended holidays.

At the European level, there is a rise in breaks lasting a few days (10%, +1 pt) or a week (32%, +4 pts), at the expense of two-week trips (35%, -5 pts) and longer trips of 4 or more weeks (9%, -3 pts).

Overall, this summer Europeans will take 1.9 week of holiday (compared to 2.4 weeks last year). All countries are affected by this shortening in the duration of summer holidays: France (2 weeks compared to 2.7 in 2016), followed by Germany (1.9 compared to 2.5), Spain (1.9 compared to 2.3), Italy (1.7 compared to 2.1), Belgium (1.8 compared to 2.5), and Austria (1.8 compared to 2.3).

In France, 8% of holidaymakers will only leave for a few days (+4 pts compared to last year) and 29% will go away for a week (+13 pts). There is a simultaneous drop in the share of French holidaymakers who will take 4 or more weeks of leave (10%, -10 pts), while the percentage of the French who will leave for 2 or 3 weeks is stable overall (respectively 35% and 18%).

... And a reduced holiday budget

This year, the average budget reported by Europeans for their summer holiday amounts to €1,989.

Because more Europeans are planning holidays this summer and the average duration of their leave is shorter, the average budget is down 12% compared to last year*.

The countries with the highest budgets are Switzerland with 2,981 CHF (i.e. €2,802), followed by Austria (€2,423, -11%), Germany (€2,297, -7%) and Belgium (€2,179, -10%).

This year the average budgets of the French and British are hovering right below 2,000 Euro (respectively at €1,982, -11%; and £1,587, i.e. €1,888).

Budgets are more modest in Italy and Spain (respectively at €1,737, -15%, and €1,651,-12%).

The same phenomenon of shrinking holiday budgets also pertains to the other side of the Atlantic: \$2,679 in the United States (-20%, i.e. €2,491); \$R 4,407 in Brazil (-23%, i.e. €1,322).

In this context, budget is once again the top decision-making factor cited by holidaymakers to explain their choice of accommodation this summer (55%, +17 pts), while climate returned to third place (44%, +2). The risk of terrorism, which is now taken under consideration by holidaymakers, is still the number 2 decision-making factor, with a slightly higher degree of concern (48%, +8 pts). Indicating a still-tense environment, there is a significant rise in the level of fear of attacks (41%, +10 pts).

* With the same scope as 2016, i.e. excluding the United Kingdom and Switzerland, which were not part of the survey last year.

Domestic holidays are still preferred and seaside destinations continue to attract most holidaymakers

As in previous years, domestic travel is a favourite with Europeans, the great majority planning to stay in their own country. In the Latin European countries, the score is over 50% (France: 63%; Italy: 56%; Spain: 52%), whereas the figure is lower in the United Kingdom (31%), Germany (28%) and Austria (30%).

Between June and September, Europeans' top destinations are still Italy, Spain and France. Spain continues to be the number 1 summer destination for the British (21%), Germans (15%), Italians (13%) and French (12%), while the Swiss and the Austrians travel most to Italy (25%). The Spanish are virtually tied between Italy (11%) and France (10%).

Belgium and Switzerland are the only countries from which a majority of holidaymakers head abroad in the summer: 32% of Belgians will go to France versus the 16% who will remain in Belgium, and 25% of the Swiss will head to Italy versus the 20% who will stay in Switzerland.

Across the Atlantic, domestic travel is preferred by 41% of Americans and 34% of Brazilians. The foreign destinations most frequented by Americans are Canada (8%), Mexico (7%) and Italy (5%). Meanwhile, Brazilians plan to holiday in Argentina (10%), France and in Italy (5% each).

Therefore, once again this year, sunny destinations with multiple seaside resort options will be the most favoured by holidaymakers (64%, -3 pts), but there is a returning interest in urban holidays this year (24%, +6 pts), particularly in conjunction with the rise in short breaks.

Although the majority of holidaymakers seek the comfort of a hotel...

Hotel stays are still, by far, the most popular form of lodging chosen by European (47%), American (57%) and Brazilian (59%) holidaymakers. However, other types of travel and accommodations are winning over more and more people. First, a growing share of holidaymakers are interested in the person-to-person lodging arrangements (35%), which ranks second behind hotels: an average of 45% among Europeans (compared to just 34% in 2016). The French are already well accustomed to this form of lodging (42%): indeed, they are the only group to prefer it to hotels (30%).

... alternative lodging options are now attracting a large share of holidaymakers, especially across the Atlantic

Parallel to these traditional solutions, holidaymakers are looking for something new, original accommodations or unusual experiences.

Notably, new tourism practices that are more in touch with nature are appealing: 23% of Europeans have participated in primitive camping, 18% have slept in a cabin and 13% have engaged in eco-tourism (exploring nature while minimising harmful impacts).

Along the same lines, 24% of Europeans, in search of an authentic experience, have slept in a private home and 12% have participated in socially responsible tourism alongside local populations.

On the other side of the Atlantic, such practices are already well established in the value system, especially among Americans: 48% have done primitive camping and 40% have slept in a cabin (compared to 26% and 41% of Brazilians).

They are also more familiar with private home hosting solutions (41% of Brazilians and 30% of Americans) and welcoming travellers into their homes (18% of Brazilians and 14% of Americans).

Online reviews: a widespread practice and a decisive factor in choosing lodging

Checking online opinions is now a common practice among holidaymakers: it is now the third decision-making criterion in selecting holiday lodging (31% in Europe, 31% in the United States and 28% in Brazil), behind value (respectively 67%, 56%, 58%) and location (53%, 60%, 39%).

But holidaymakers do not simply consider reviews from others: they have also adopted the habit of giving their own recommendations online, though Americans and Brazilians do so more systematically than Europeans, and especially more than Germans.

Hotels are the service that elicits the most online reviews: 60% of Europeans have posted a comment about hotel lodging and as many as 68% of Americans and 71% of Brazilians. There are comparatively fewer comments about seasonal rentals (43% of Europeans, 47% of Americans and 54% of Brazilians).

Restaurants are the second-most popular service when it comes to consumer comments (67% of Americans and 70% of Brazilians, compared to 51% of Europeans).

In Europe, airlines come in last place in the ranking (34%) of commented service, whereas they are much more frequently rated by Americans (52%) and Brazilians (59%).

Finally, Americans and Brazilians have a greater tendency to give their opinions about tourist attractions than Europeans (respectively 56% and 68% compared to 41%).

Conducted by Ipsos at the request of Europ Assistance on **a sample of 10,000 individuals in Europe** (France, Germany, Italy, Spain, Belgium, Austria, United Kingdom and Switzerland), **in the United States and in Brazil**, the aim of this reference survey – carried out through Internet and published for the 17th year running – is to offer an annual overview of the holiday plans of the

citizens of the countries in question, in addition to their motivations, destinations and preferred types of trip.

About Europ Assistance Group

Founded in 1963 as the inventor of the assistance concept, the Europ Assistance Group globally supports 300 million customers with solutions for day-to-day or emergency situations 24 hours a day, 365 days a year across five lines of business: Automotive, Travel, Health, Home & Family and Conciergerie & CRM.

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*This survey was conducted on the Internet between 28 March and 21 April 2017
in accordance with the quota method (gender, age, profession of the head of
household, region, and size of town or city).*

It is available at www.europ-assistance.com.