



Ipsos / Europ Assistance barometer Intentions and Concerns of Europeans in relation to Holidays

Summary

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***Technical presentation of the Ipsos / Europ Assistance barometer
"Intentions and Concerns of Europeans in relation to Holidays"***

On behalf of Europ Assistance, from February 15 to March 23 2007, Ipsos conducted a survey among a sample of 3,500 Europeans (French, Germans, Britons, Italians, Spaniards, Belgians and Austrians). The survey was conducted by telephone, at the home of the respondents, and using the quota method (gender, age, profession of the head of household, after stratification by region and by town size).

On the eve of the 2007 summer holidays, the aim of this survey was to assess the intentions to go away on holiday of inhabitants of the countries concerned, along with their motivations, destinations and the preferred types of stay. The Ipsos/Europ Assistance Barometer "Intentions and Concerns of Europeans in relation to Holidays" also aimed to evaluate the risks perceived by tourists, and their impression of insurance coverage in relation to those risks.

Two thirds of Europeans intend to go on holiday this summer¹

Two thirds of Europeans (66%) **will go on holiday this summer, and 23% will do so several times.** These figures mark a clear increase over the figures recorded in 2005 and 2006 (+ 6 points compared to 2006).

The British are still the most inclined to travel, and have returned to their 2005 level (74% will go on holiday , + 6 points). The Germans (60% + 6 points) and the Belgians (61%, + 6 points) have increased, but these are still the countries in which declarations of intention to go on holiday are least widespread. Spain for its part registered the strongest increase (14 points in one year), ahead of Austria (+ 10 points) and Italy (+ 9 points).

France, with 65% intending to go on holiday, is situated within the average, but this is the only country not to register any increase in relation to 2006.

Intention to go on holiday by country for the period June to September 2007 inclusive

	Yes, several times	Yes, once	S/T Yes	Change compared to 2006
All	23%	43%	66%	+ 6 points
UK	47%	27%	74%	+ 6 points
France	15%	50%	65%	- 1 point
Italy	23%	45%	68%	+ 9 points
Germany	14%	46%	60%	+ 6 points
Belgium	16%	45%	61%	+ 6 points
Austria	17%	53%	70%	+ 10 points
Spain	17%	48%	65%	+ 14 points

In most cases (42%), the duration of the holiday will be two weeks, or even less (33% will go away for one week). As in 2006, these short stays will notably be chosen by Italians (39% will leave for a week), Austrians (47%) or the British (41%).

¹ Holiday makers are defined as people who have stated they will at least once, spend more than four consecutive nights away from home for reasons other than business between June and September 2007 inclusive.

In contrast, Germans tend to favour longer holidays: 55% will go away for two weeks, 16% for three weeks. The French have altered their habits somewhat: 26% will go away for just one week (compared with 22% in 2006), and 39% for two weeks (compared with 42% in 2006). In this respect they are returning to behaviour comparable to those registered in 2005.

Total duration of summer holidays

	Less than one week	1 week	2 weeks	3 weeks	4 weeks and over
All	8%	33%	42%	14%	11%
France	3%	26%	39%	20%	14%
Germany	9%	27%	55%	16%	8%
UK	13%	41%	42%	11%	6%
Spain	9%	33%	33%	8%	17%
Italy	6%	39%	35%	12%	12%
Belgium	7%	28%	41%	16%	12%
Austria	9%	47%	38%	13%	7%

[Total over 100, since respondents could give several answers]

Europeans once again give priority to rest, ahead of discovery, and continue to make Europe their preferred location

Most of the people interviewed (59%) make seeking rest their main motivation, well ahead of the idea of discovery (39%). This level of importance, which is consistent with the ones registered in 2005 and 2006, is generally common to all of the European countries questioned, although, once again, the British stand out through a greater appetite for discovery, a phenomenon already highlighted in 2005 and 2006, and which was confirmed this year (46%, as opposed to 42% in 2005 and 47% in 2006). But other countries recorded a strong increase in relation to this idea of "discovery": these were Belgium (40%, + 11 points), Spain (40%, + 5 points) and Italy (39%, + 5 points).

Moreover, **in summer 2007, Europe – with 80% – will once again constitute the favoured destination of Europeans.** Three destinations are particularly favoured : France (17%, - 2 points), Italy (18%, - 1 point), and Spain (16%, - 2 points). Moreover, 47% will remain in their own country (with no change compared to 2006). This is notably the case of the Spanish (59%), Italians (66%), and the French (64%). However, note that the proportion of Spaniards claiming to stay in their country has clearly dropped (- 11 points), in favour of other European countries.

It is in relation to the type of stay that the biggest changes were recorded, in favour of greater autonomy for tourists. 32% of the tourists questioned claim that they organise their trip themselves, by buying separate services (i.e. a 6-point progression in the space of one year), 30% will purchase a package holiday, including transport and accommodation (+ 5 points). In contrast, 24% claimed to have the intention of renting a house, a hotel room or a bed and breakfast room (- 7 points), and 14% will go to their second home or will stay with friends (- 6 points). Finally, a stable proportion (10%, - 1 point) will opt for camping-caravanning.

The factors that led to these choices of destination

Budget (79%, - 2 points), climate (78%, - 2 points), health risks (71%, - 2 points) constitute the main criteria of choice, on the same level as elements specific to the tourist offer i.e. the quality of on-site tourist infrastructures (73%, - 1 point) or the possibilities of leisure or cultural activities (69%, - 1 point). Risks of a terrorist attack also play an “essential” or “important” role for 61% of Europeans questioned (- 4 points). The risks of a natural disaster (53%, no change) or social problems (52%, - 2 points) for their part remain relatively stable, as does the travel time between the home and the holiday site (53%, + 3 points).

As in 2005 and 2006, it can be seen that the order of importance of decision-making factors varies very strongly according to country. The table below presents this hierarchical distinction. Note the importance of the economic factor for France and Italy, the fears in relation to terrorist attacks for Spaniards or Austrians, or even the need for a pleasant climate for Britons and Belgians. On a more general level, note that elements relative to the tourism offer specifically are very clearly lagging behind these elements, with the exception of Germany.

Order of importance of factors according to country (*"essential" answers*)

	1 st factor	2 nd factor	3 rd factor
All	Climate	The budget you intend to allocate	Risks of a terrorist attack
France	The budget you intend to allocate	The climate	Health risks
Germany	Possibilities in terms of leisure / cultural activities	The climate	The budget you intend to allocate
UK	The climate	Risks of a terrorist attack	Health risks
Spain	Risks of a terrorist attack	Health risks	The budget you intend to allocate
Italy	The budget you intend to allocate	The climate	The quality of the tourist infrastructures on-site
Belgium	Climate	Health risks	Risks of a terrorist attack
Austria	Risks of a terrorist attack	Health risks	The climate

Other factors were covered during the 2007 barometer. Attention paid to the issue of child labour (57% claimed to be "very attentive" to this issue in terms of plans to go abroad), to pollution (50%), the status of women (40%), the nature of the political regime (31%) and finally the working conditions of local populations (28%) testify to the sensitivity of opinions in relation to these issues. While not all of them constitute discriminating factors, their consideration clearly impacts on the image of the destination. Germans, Austrians and to a lesser extent Spaniards proved particularly attentive to these aspects. In contrast, Italians and Belgians were lagging behind.

Meanwhile, 45% of Europeans who claimed to intend to go on holiday this summer said they paid more attention to the protection of the environment on holiday than in their everyday life. This is notably the case of the Spanish (50%) and above all the Italians (71%). The other countries questioned did not however reveal any specific form of behaviour in this respect over the summer period.

Holiday preparation takes place over time for the majority of Europeans

For most of the people questioned (69%, + 1 point compared to 2006), holidays are planned a long way ahead. In contrast, less than one third of the people interviewed (29%, - 2 points) claimed that they will decide on their destination at the last minute. This is notably the case with the Spanish (38%, no change) and the Italians (38%, no change), with the strongest increase in relation to this item being recorded in France (32%, + 6 points compared to 2006).

The Internet is a particularly important vector today for preparing holidays, a clear and continuous rise compared to 2005 (28%) and 2006 (35%): 39% of European holidaymakers claim that they will use the internet to make reservations. 51% of Britons claim for example that they use this medium to make their reservations (+ 1 point), and 41% of the French (+ 9 points). All the countries featured in the survey recorded very clear increases, in the space of one year, in relation to this item. This is notably the case with Italy 28% (+ 9 points), which, in 2005 and 2006, was lagging in relation to the other countries concerned by the survey.

A holiday budget dropping slightly, and still variable according to country

The provisional budget allocated by Europeans to their holidays is 2,145 € on average per household (compared to 2,235 € on average in 2006), with strong variations according to country. Hence it is 2,579 € for the British, who still spend the most money, and 1,910 € for the Spanish. Obviously this aspect depends on the holiday site: it is in the countries where the proportion of people claiming to engage in tourism in their own country is largest that the budget is lowest.

Holiday budget 2007

	<i>Recap: Average budget 2006</i>	Average budget 2007	Change
All	2,235 €	2,145 €	-
UK	2,795 €	2,579 €	-
Germany	2,233 €	2,025 €	-
Belgium	2,195 €	2,120 €	-
Austria	2,170 €	2,267 €	+
Italy	2,085 €	2,029 €	-
France	1,884 €	2,006 €	+
Spain	1,880 €	1,910 €	+

European travellers testify to a concern about the various risks that is clearly on the increase , whatever the area tested

The list of concerns relating to risks confirms the predominance of health-related worries. It may be an issue of personal health or the health of someone close to them, whether or not they are also travelling. Hence, for more than half of the Europeans interviewed, the concerns expressed pertained to a health problem, whether it be the health of the traveller(s) (55% claimed that this is something that concerns them "a lot", i.e. a 3-point increase compared to 2006), or people from the family who remain in the home country (52%, + 3 points).

But the other areas covered are also on the increase. Hence, next are concerns relating to transport (plane, train, car, etc.), noticeable whatever the means of transport (46%, i.e. an 8-point increase compared to 2006), to the loss of personal effects (luggage, clothing, money), feared by almost four out of ten people (44%, + 7 points). 37% (+ 1 point) fear a problem concerning their home (water damage, fire, burglary...).

The risks of a terrorist attack (36%, + 3 points) and of a natural disaster (30%, + 5 points) also constitute two notable concerns. Transport problems, linked to a vehicle breakdown (26%, + 6 points) or a strike or delays (18%, + 6 points) come at the bottom of the list.

For all of these dimensions, France, the UK and Belgium registered remarkable increases, as did Spain.

The impression of being covered is increasing, but it is still lacking in relation to the level of concern

An analysis of the perceived risks, on one hand, and the impression of being covered by an insurance or assistance policy on the other, shows that the gap between perceived risks and the impression of being covered by insurance or assistance policies remains great.

**Concerns expressed and impression of being covered by an insurance or assistance policy
in relation to those concerns**

	Level of concern ["A lot" responses]	Claim to be covered by an insurance or assistance policy	Gap between level of concern and coverage by an insurance or assistance policy
A health problem concerning someone close to you, who is not with you on the trip	52%	36%	- 16 points
Risks of a terrorist attack	36%	17%	- 19 points
The risk of a natural disaster (earthquake, erupting volcano, flood, etc.)	30%	29%	- 1 point
A health problem concerning you or a person accompanying you	55%	69%	+ 14 points
A transport strike or delay	18%	24%	+ 6 points
A transport accident (plane, train, car, etc.)	46%	64%	+ 18 points
Loss of your personal effects (luggage, clothing, money)	44%	57%	+ 13 points
A problem concerning your home (water damage, fire, burglary, etc.)	37%	71%	+ 34 points
A vehicle breakdown	26%	67%	+ 41 points

Note however a big increase in the impression of being covered, which would tend to diminish the growth of levels of concern, which is also increasing. The impression of being covered thus increased in 2007, as was the case in 2006: people believe themselves to be covered for the most part for a home-related problem (71%, + 6 points), for a health-problem concerning oneself or a family member also on the trip (69%, + 4 points), for a vehicle breakdown (67%, + 10 points), for a transport accident (64%, + 5 points), for the loss of personal effects (57%, + 4 points).

Focus 2007: Spain

A population that is seeing its tourism habits evolve very strongly

One third of Spaniards (33%) expect their holiday to give them the opportunity to discover new cultures, to change worlds completely (as opposed to 28% for all Europeans interviewed). In relation to this specific item, they are in the lead.

This general interest is expressed in terms of habits: **65% of Spaniards claim that they will go on holiday this year, i.e. a 15-point rise in the space of one year.** This is the strongest increase registered as part of the barometer. The Spanish are now ahead of the Germans (60%), the Belgians (61%) and are on the same level as the French (65%).

A notable opening up to Europe, based on short stays

Their means of consumption is somewhat unique : tending to be more interested than Europeans in general in short stays (one week, 33%, + 10 points compared to 2006), the vast majority of them will stay in Spain (59%), but less so than their Latin counterparts (France, 64% and Italy, 66%). In reality, they are displaying an obvious increase in interest in other European destinations.

On the other hand, prior thought as to the choice of destination does not necessarily involve a particular concern about organisation: 38% of Spanish travellers will decide on their destination at the last minute (as opposed to 29% overall).

Greater mobility

The Spanish are also altering their habits in terms of tourism consumption. Less interested than they were in 2006 in renting a house, a hotel room or a bed and breakfast room (20% as opposed to 31% in 2006), or going to a second home or staying with friends, in 2007 they tended more than in 2006 towards formulas comprising transport and accommodation (26% as opposed to 21%), and more marginally towards camping and caravanning (9% as opposed to 5% in 2006).

Moreover, the Spanish remain attached to the relationship with the travel agency (45% as opposed to 38% overall), although the internet confirmed the increase registered between 2005 and 2006 (29%).

As for the budget the Spanish claim to devote to their 2007 summer holiday, this is still relatively modest (1,910€, i.e. 7th place among the countries tested), but it did increase between 2006 and 2007.

A population for whom the notion of risks is a key element taken into account when making their choice

At the time of choosing their destination, the risk of terrorist attacks is a major issue for the Spanish (50%, as opposed to 39% overall), which places them just behind the Austrians in relation to this item (55%), but far ahead of the other countries questioned. As concerns other elements to which the Spanish pay particular attention, the risk of a natural disaster is viewed as crucial by 37% of them (as opposed to 27% for all Europeans), as are health risks (48% as opposed to 39%). The Spanish can thus be characterised by an exacerbated tendency to consider the risk aspect.

They can also be distinguished by a strong consideration, when making their choice, of the socio-political characteristics of the destination. 65% claim to pay a lot of attention to child labour (as opposed to 57% overall), 54% to the status of women (as opposed to 40%), 36% to the nature of the political regime (as opposed to 31%) and 34% to the working conditions of local populations (as opposed to 28%). The Spanish are ahead of most of the countries questioned in relation to these different points.

Levels of apprehension directly linked to the alteration of aspirations and behaviours

Moreover, the greater mobility mentioned earlier has a very clear impact on the level of worry expressed. Spaniards are now particularly sensitive to transport-related risks: two thirds of them claim to be "very afraid" of a transport accident (66% as opposed to 46% overall), 61% to the loss of their personal effects (compared to 44%), 45% to a vehicle breakdown (as opposed to 26%) and 33% to a transport strike or delay (as opposed to 18%). The level of fear relating to the transport issue is meanwhile accompanied by a growing fear relating to the home (60% as opposed to 37%).

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