

P R E S S R E L E A S E

Europ Assistance releases its 18th annual Barometer on Summer holidays, focusing on Europe, the Americas and the first time Asia's holidays plans

In 2018, summer holiday plans are consolidating in all countries with a stable budget in Europe and the United States while increasing in Brazil.

Millennials are disrupting traditional practices giving new strength to alternative lodging and online reviews.

Brexit could impact European's preference to visit the UK, while the British appear to be less concerned by potential changes to border arrangements.

KEY DATA & LEARNINGS

Summer plans	<p>64% of Europeans report they will take leave this summer (+1 pt vs. 2017).</p> <p>68% of Americans and Brazilians intend to go on holidays this summer (+2 pts vs. 2017).</p> <p>67% of the Chinese and 64% of the Indians intend to take a leave this summer (survey not conducted last year).</p>
Summer holiday duration	<p>The summer holiday duration remains below 2 weeks, except for France (2 weeks), Switzerland (2 weeks) and Brazil (2,2 weeks).</p>
Summer holiday booking	<p>Most Europeans book their summer holidays less than 4 months in advance, as well as 65% of Indians and 81% of Chinese.</p> <p>Brazilians and Americans anticipate the most their holidays with respectively 51% and 46% of them booking more than 4 months in advance.</p>
Budget	<p>The average budget reported for their summer holiday is:</p> <ul style="list-style-type: none">€1,957 (-2% vs. 2017) for Europeans;\$ 2,643 (-1% vs. 2017; equivalent to €2,163) for Americans;R\$ 5,209 (+18% vs. 2017; equivalent to €1,238) for Brazilians;¥ 15,707 (equivalent to €2,035) for Chinese;₹181,626 (equivalent to €2,234) for Indians.
Destinations	<p>In Europe, the top destination is always one's own country, France being the champion with 57% of French holidaymakers will go on holidays in France this summer (-6% vs. 2017).</p> <p>Americans also opt for their own country first (46% of them) as well as Brazilians (33%), one third of the Chinese (32%) and a quarter of the Indians (25%).</p> <p>When it comes to travelling outside of their own country, Europeans keep favouring the same top 3: Spain, France and Italy.</p> <p>Seaside remains the top destination for all interviewed countries.</p>
Disconnection	<p>Most Europeans intend to disconnect completely from work during their holidays, especially the British (71% of them) and the French (70% of them), while 60% of the Chinese and of the Indians will not disconnect from work</p> <p>56% of Europeans declare they will use less the general social networks such as Facebook while 69% of the Chinese intend to use the same or more general social networks.</p>

Alternative lodging

59% of the **European** and the **American Millennials**, 58% of the **Brazilian Millennials** and 55% of the **Indian Millennials** are interested in immersive and authentic housing solutions.

59% of the **European Millennials**, 83% of the **American Millennials** and 81% of the **Indian Millennials** already tried at least one atypical activity.

The potential impact of Brexit

7% of **Europeans** would reconsider visiting the UK if Brexit resulted in a situation where a visa and longer security measures were imposed at the border. The **Spanish** (56%) and **Portuguese** (54%) show the strongest preference to reconsider but also the **French** (47%), **Germans** (45%) and **Italians** (45%) show concern.

Conversely only 34% of **British** nationals would reconsider visiting Europe

In 2018, summer plans are stable in Europe, the US and Brazil, consolidating the increase measured in 2017

After the increase observed last year, the outlook for **Europeans'** summer holiday plans this year remains quite high: 64% of them report they will take leave this summer, 1 point above what we measured in 2017. This increase is above the European average in **France** (69%, +4 pts vs. 2017), which becomes the country with the highest percentage of holidaymakers, 3 points ahead **Austria** (66%, stable compared to 2017), **Switzerland** (stable) and the **United Kingdom** (+1pt). 63% of **Belgians** (+3 pts), 62% of **Italians** (+1 pts), and 61% of **Spanish** (+3 pts) intend to go on holidays this summer. **Poland** and **Portugal**, both surveyed for the first time in 2018, have the lowest share of holidaymakers with 60% of people having holiday plans this summer in **Poland** and 59% in **Portugal**.

The phenomenon of stabilization at a high level is even reinforced in the **United States** and in **Brazil**, where holiday plans are 2 points higher than last year at 68%.

In **Asia**, where the barometer is conducted for the first time, proportions are similar to the rest of the world: 67% of the **Chinese** and 64% of the **Indians** intend to take a leave this summer.

The proportion of holidaymakers is particularly high among the **Millennials**: 67% of **Europeans** under 35 y.o. - and even 70% of those between 18 and 24 y.o. - want to take summer holidays, compared to 63% of elders. In the **USA**, **Brazil** and **China**, we observe the same contrast between Millennials and the elders but in **India**, it is the contrary: the intent to leave for summer holidays is lower among the younger than among the elders: 59% for Millennials vs. 69% for people above 35 y.o.

After a great decrease last year, the summer holiday duration remains below 2 weeks, except for France, Switzerland and Brazil

The duration of the summer holiday has stabilised following a fall last year with the majority taking less than two weeks for their summer leave. It is in Asia and in the “Anglo-Saxon” countries that the average duration is the lowest with only 1,3 weeks on average in **India** and **China**, 1,5 weeks in the **USA** and 1,6 in **UK**.

On the contrary, **Brazil**, **France** and **Switzerland** record the highest average duration: equal to 2 weeks in the two European countries, and even more in **Brazil** with 2,2 weeks.

Anticipation of summer holidays booking varies highly across countries

Most Europeans book their summer holidays less than 4 months in advance. However, northern countries anticipate their summer holidays more: for instance, almost half of the **British** and the **Germans** (49%) book their holidays more than 4 months in advance. On the contrary, they are much less rushed in the southern countries – about one third: 35% of the **Italians** and 33% of the **Spanish** book their holidays more than 4 months in advance.

Outside of Europe, **Brazilians** anticipate the most their holidays: they are 51% to book them more than 4 months in advance. The **United States** are following with 46% of Americans booking their summer holidays more than 4 months in advance.

Asian holidaymakers are much more spontaneous: 65% of **Indians** and 81% of **Chinese** book their summer holidays less than 4 months in advance.

The average budget remains stable overall, with a few exceptions

In 2018, budget is still the number one decision making factor for **Europeans** when it comes to choosing a destination, as 52% of them consider it an essential factor. This year, the average budget reported by **Europeans** for their summer holiday is €1,957.

In the same trend as summer holiday plans and average duration, the average budget is stable compared to last year (-2%); hiding some contrasts depending on the country.

The countries with the highest budgets are also those with increasing budgets: **Switzerland** with 3,235 CHF, +9% (equivalent to €2,710), followed by **Austria** (€2,645, +9%), **Germany** (€2,376, +3%), **Belgium** (€2,318, +6%) and the **UK** (£1,955, +23% - equivalent to €2,230).

Budgets are more modest in Southern and Eastern Europe: **France** €1,993 with a +1% increase, **Italy** and **Spain** are respectively at €1,776, +2% and €1,658, stable, and **Portugal** and **Poland** are following with respective budgets of €1370€ and €1030.

Across the Atlantic, the summer holiday budget for **Americans** remains quite stable after a decrease last year: \$2,643, -1% (equivalent to €2,163). And when it comes to **Brazil**, the summer holiday budget of **Brazilians** gains back with an 18% increase what it lost last year, with a budget of R\$5,209 (equivalent to €1,238).

In Asia, the summer holidays budgets are above the European average: **Chinese** holidaymakers spend ¥15,707 on average (equivalent to €2,035) and **Indian** holidaymakers spend ₹181,626 (equivalent to €2,234).

Traditional holidays are still the majority: domestic holidays and seaside destinations attract most holidaymakers, who mostly pick destinations they have already visited

In 2018, holiday practices are still quite traditional as the vast majority of holidaymakers consider mostly domestic holidays: In **Europe**, the top destination is always **one's own country**, France being the champion – even with a 6pts decrease considered - 57% of **French** holidaymakers will go on holiday in France this summer. **Spain** and **Italy** are following with similar figures with 56% and 52% of their holidaymakers staying in the country for the summer. Two countries are the exception and favour neighbouring countries: the **Belgians** prefer to go on holiday in France (34%) rather than in their own country (16%) while the **Swiss** would rather go to Italy (25%) than staying in Switzerland (20%).

When it comes to travelling outside of their own country, **Europeans** keep favouring the traditional **top 3: Spain, France and Italy**.

Spain is favoured by the British (18% of UK holidaymakers are intend to go to Spain this summer), France (16%), Portugal (26%), Germany (15%), Poland (9%) and Italy (14%).

Italy is favoured by neighbouring countries: Switzerland (25%) and Austria (29%), as is France by visitors from Spain (12%) and Belgium (34%).

Across the Atlantic, **Americans** also opt for their own country first (46% of them) as well as **Brazilians** (33%). In Asia, one's own country is also the top destination. About one third of the **Chinese** (32%) and a quarter of the **Indians** (25%) plan to go on holidays in their own country.

But no matter the destination country, **seaside** remains the top destination for all interviewed countries. 70% of the **Italians**, 68% of the **Chinese**, 67% of the **Austrians**, 65% of the **Germans**, 64% of the **Spanish**, 62% of the **Swiss**, 61% of the **French**, 59% of the **Polish**, 58% of the **Portuguese**, 57% of the **Belgians** and the **British**, 50% of the **Brazilians** 48% of the **Indians** and 43% of the **Americans** intend to go on holidays to the seaside this summer.

When asked the reasons motivating the choice of the destination, **Europeans** holidaymakers are quite conservative as the first reason given is that they have already been there.

Across the Atlantic, having friends or family there is the first motivation for picking a holiday destination (for 27% of **Americans** and 21% of **Brazilians**).

In **China**, proposed activities prevail for 36% of the holidaymakers and in **India** recommendation is the first choice criteria (mentioned by 25% of holidaymakers).

... but touring is trending

Even if traditional holidays are the majority with domestic destinations, a preference for seaside and already known places, touring to discover new things is a practice that is gaining ground: this year, 22% of **Italians** intend to go on a tour, which is a 5pts increase vs last year. It is also quite high among **Brazilian** holidaymakers (40%), as well as **Indian** and **Chinese** ones (respectively 42% and 47%).

Europeans will disconnect more easily from work and social networks than Americans and Asians during their holidays

When it comes to being connected during the holidays – be it to work or to social networks- the attitude of Europeans and non-Europeans vary greatly.

Most Europeans intend to disconnect completely from work during their holidays, especially the **British** (71% of them) and the **French** (70% of them), whereas Asians will mostly remain connected to work: 60% of the **Chinese** and of the **Indians** will not disconnect from work.

When it comes to social networking, **Europeans** will try to take a break and use them less than usual. 56% said they would visit general social networks such as Facebook less while 54% declared they will limit the use of photo sharing networks such as Instagram.

On the contrary, most **Americans**, **Brazilians** and **Asians** declare they will use social networks the same or more than usual during their holidays. For instance, 69% of the **Chinese** intend to use the same or more general social networks and 78% intend to use the same or more photo sharing networks.

Alternative lodging and online reviews: Millennials are driving new travel practices

Once again this year, holidaymakers have expressed a strong enthusiasm towards unusual accommodation and experiences.

This tendency is even more important among the **Millennials**. They are particularly attracted by immersive and authentic housing solutions like private houses/apartments rentals, which allow them to embrace the local way of life. 59% of the **European** and the **American Millennials** (vs 46% and 38% in the general population), 58% of the **Brazilian Millennials** (vs 52% in the general population) and 55% of the **Indian Millennials** (vs 48% in the general population) are interested in this practice.

When choosing their holiday activities, they are also more sensitive to new environmental and cultural experiences: This is particularly the case among the **European, American** and **Indian Millennials**, as respectively 59% (vs 53% in the general population), 83% (vs 67%) and 81% (vs 70%) of them already tried at least one atypical activity (such as primitive camping, taking part in solidarity tourism or going on an ecological trip).

Millennials also focus more on social media and are likely to post more online reviews after their holiday about the services they used (hotels, restaurants, airlines). This most likely with Asian holidaymakers: 96% of the **Chinese** and 95% of the **Indians** (vs 93% and 92% in the general population) post reviews.

The dream holidays: a collective imagination

Holidaymakers share a common vision of their dream holidays and of the cities they would like to visit at least once in their life.

Europeans, Americans and Asians consider **New York, Paris** and **London** as part of the top 4 locations they wish to travel to someday.

In addition to these common idealized cities, European and Americans also dream of visiting **Rome**, while the 3 remaining countries, that are quite vast, include cities from their own country in their top destinations: **Brazilians** mention Rio de Janeiro in fourth position, the **Chinese** mention Beijing in second position and **Indians** mention New Delhi in fourth position.

When it comes to country image, **Europeans** and **Americans** often share the same vision. Other nationalities mostly choose their own country as the most representative of the different topics:

When it comes to landscapes and nature most countries share the same country list. **Thailand** (for European, Americans and Chinese) and **India** (for Brazilians and Indians) are considered the most exotic, when **Australia** (for Europeans and Americans) and **South Africa** (for Brazilians and Indians) are considered the wildest.

Outside of Europe, **France** is seen as the most romantic country (by Americans, Brazilians and Asians) but within Europe, it is **Italy** which is deemed the most romantic country.

Italy is also considered as the country with the best heritage by **Europeans** and **Americans** (most culturally rich, with the best food and the most historical), when holidaymakers from the 3 other countries (**Brazilians**, **Indians** and **Chinese**) favor their own country on these topics.

Finally, when it comes to the atmosphere of a country (the most relaxing, the most welcoming, and the cheapest to visit) holidaymakers are rather considering **their own country** as the most relevant.

Brexit may have an impact on the consideration to visit

47% of **Europeans** would reconsider visiting the UK if Brexit resulted in a situation where a visa and longer security measures were imposed at the border. The **Spanish** (56%) and **Portuguese** (54%) show the strongest preference to reconsider but also the **French** (47%), **Germans** (45%) and **Italians** (45%) show concern.

Conversely only 34% of **British** nationals would reconsider visiting Europe.

Methodology

Conducted by Ipsos at the request of Europ Assistance on a sample of 16,000 individuals in Europe (France, Germany, Italy, Spain, Belgium, Austria, United Kingdom, Switzerland and, for the first time this year, Poland and Portugal), in Asia (India and China, both for the first time this year) and in America (United States and Brazil), the aim of this reference survey – carried out by Internet and published for the 18th year running – is to offer an annual estimate of the holiday plans of the citizens of the countries in question, in addition to their motivations, destinations and preferred types of trip.

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This survey was conducted on the Internet between March 27th and April 19th 2018 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