



Summer Holidays of the Europeans and Americans

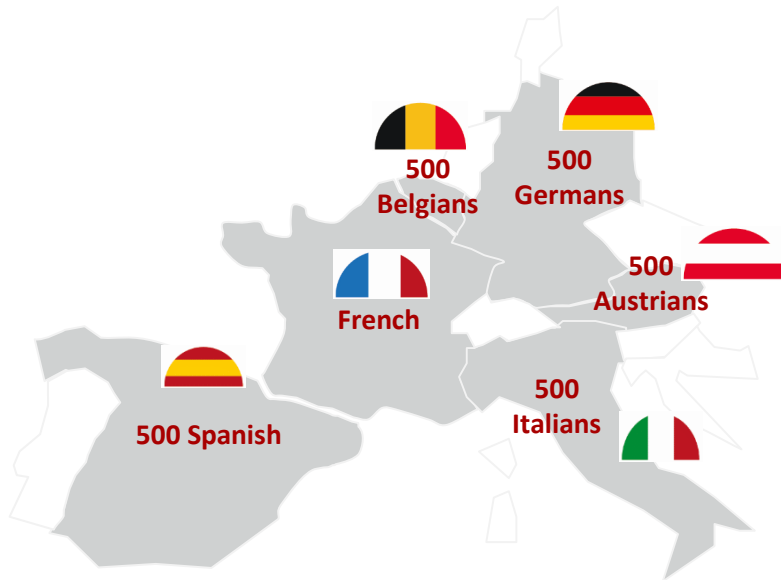
16th Ipsos Barometer / Europ Assistance

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AREAS OF THE 2016 BAROMETER

European area

Survey conducted in a sample of 3000 Europeans



What's new?

Surveys in the US and in Brazil



METHODOLOGY



Sample

National representative samples of each country's population, aged 18 years and older, using the quota method (gender, age, profession of head of household, region and city size)



Calendar

From March, 23 to May, 2nd 2016



Data collection

Survey conducted by phone in the European countries
Online survey in the US and in Brazil

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1. SUMMER HOLIDAYS PLANS

IN 2016, EUROPEAN'S SUMMER HOLIDAY PLANS HAVE DECREASED

EUROPEANS' SUMMER HOLIDAYS PLANS IN 2016



EUROPE

54%

(-7 vs 2015)

AFTER AN IMPROVEMENT IN 2015, HOLIDAY PLANS RETURN TO THE LEVELS OF THE PREVIOUS YEARS. IN THE US AND IN BRAZIL, THE SHARE OF HOLIDAY-MAKERS APPEARS HIGHER.

EVOLUTION OF THE EUROPEANS' SUMMER HOLIDAYS PLANS IN 2016

(IN %)



HOLIDAYS PLANS IN US & IN BRAZIL



61%



64%

2012

2013

2014

2015

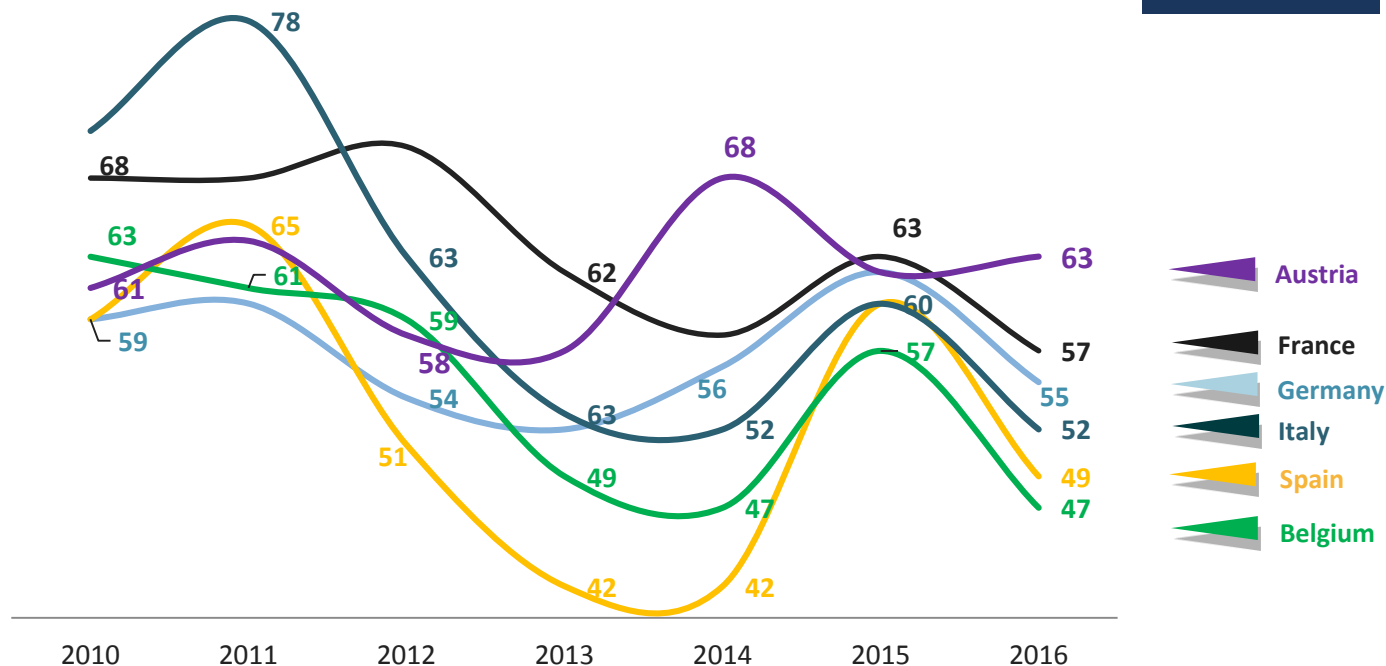
2016

HOLIDAY PLANS HAVE DECREASED IN ALL EUROPEAN COUNTRIES, EXCEPT FOR AUSTRIA

SUMMER HOLIDAYS PLANS BY COUNTRY

(IN %)

EUROPE



THE AVERAGE BUDGET OF EUROPEANS IS SLIGHTLY UP COMPARED TO LAST YEAR
AND HIGHER THAN THOSE OF AMERICANS AND BRAZILIANS

AVERAGE BUDGET FOR EUROPEANS



2 247 €

(+ 4% vs 2015)

AVERAGE BUDGET FOR THE US AND BRAZIL



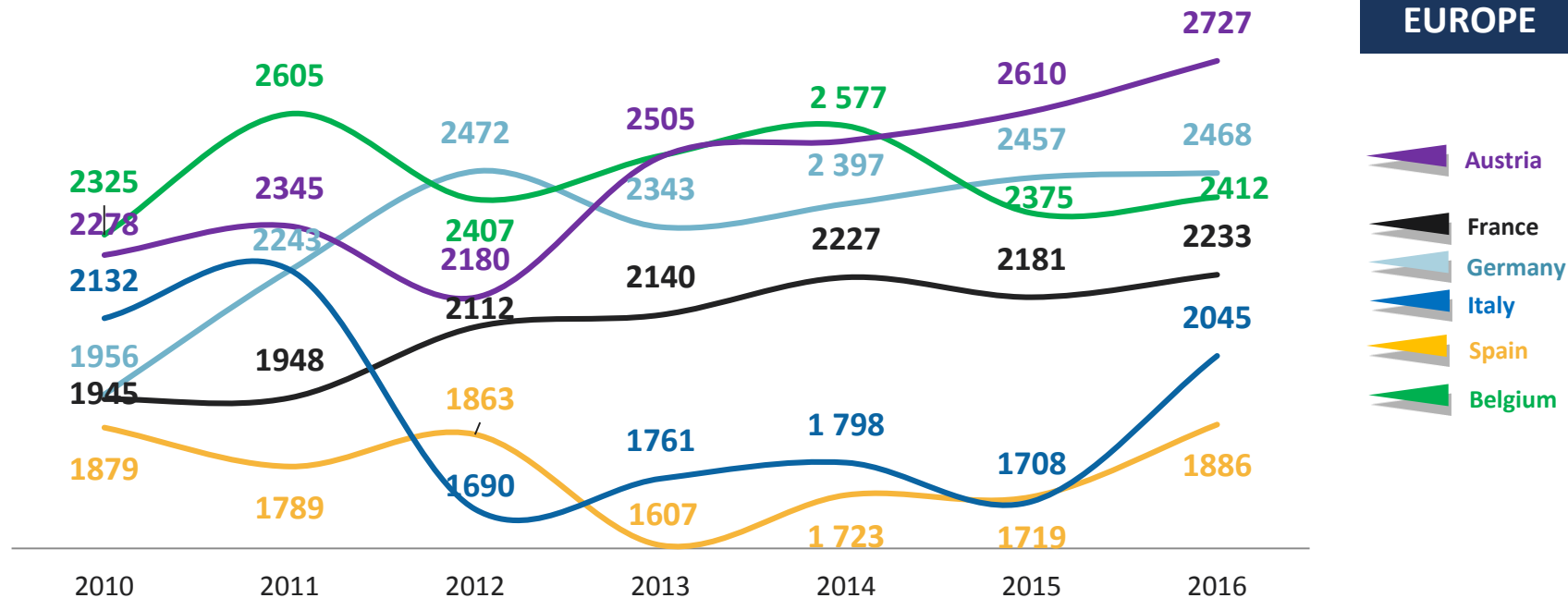
\$ 1 771 (1892 €)



1 212 BRL (905 €)

HOLIDAY BUDGET IS SLIGHTLY UP IN MOST OF COUNTRIES

CURB OF THE EUROPEANS HOLIDAYS BUDGET (IN €)



SUMMER TRIPS REMAIN A CATEGORY WHERE EUROPEANS WANT TO SAVE MONEY, EVEN IF THE SHARE OF HOLIDAYMAKERS WHO WILL SUCCEED IN SETTING ASIDE MONEY HAVE INCREASED IN 2016. MODEST HOUSEHOLDS ARE THE MOST LIKELY TO DO WITHOUT SUMMER TRIPS.

Summer trips make up a category...



Where I want to cut costs

39%

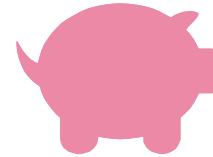
-5



I don't want to touch

32%

+6



I will do without

18%



GAME CHANGERS

US AND BRAZIL ARE MORE LIKELY TO CUT COSTS. FOR ITALIANS, SUMMER TRIPS MAKE UP A CATEGORY THEY WILL DO WITHOUT, WHILE AUSTRIANS DON'T WANT TO TOUCH IT.

Summer trips make up a category...



Where I want to cut costs



42%



66%



I will do without



35%



I don't want to touch

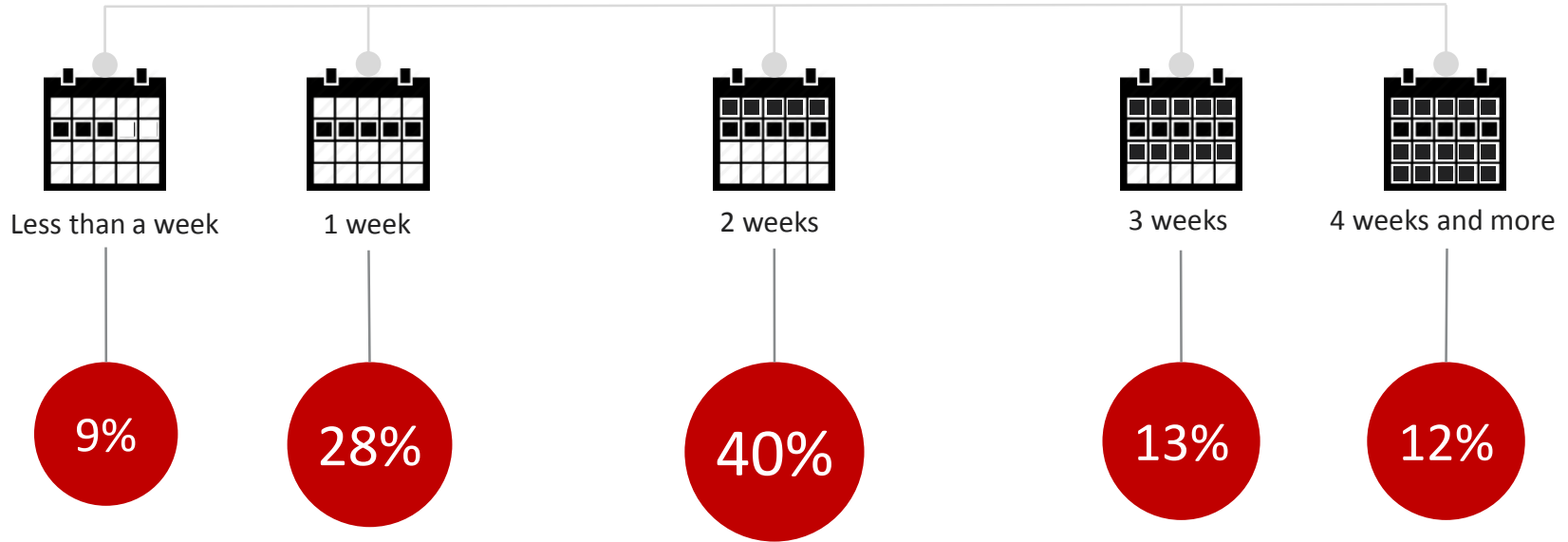


42%

MOST OF HOLIDAYMAKERS WILL SPEND TWO WEEKS IN HOLIDAYS

NUMBER OF WEEKS PLANNED FOR SUMMER TRIPS

EUROPE



FRENCH GO AWAY ON SUMMER HOLIDAYS LONGER THAN AMERICANS

average

EUROPE : 2,1 weeks on average



2,5



1,8



2,0



2,0



2,1



2,1

US & BRAZIL



1,6



2,4

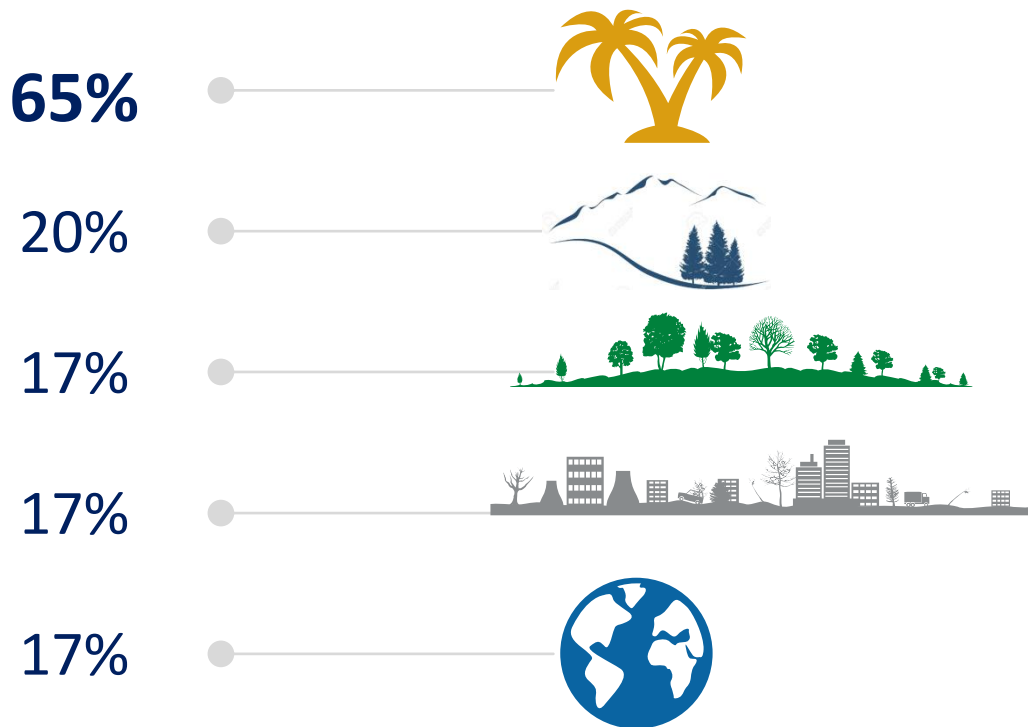
GAME CHANGERS

2. CHOICE OF DESTINATIONS & SUMMER ACTIVITIES

WHILE EUROPEANS FAVOR THE SEASIDE...

FAVOURITE PLACES OF DESTINATION

EUROPE



AMERICANS AND BRAZILIANS ARE INTERESTED IN DIFFERENT TYPES OF DESTINATIONS. CONTRARY TO EUROPEANS, THEY ENJOY CITY TRIPS DURING SUMMER.



44%



52%



43%

42%



27%

32%



26%

18%



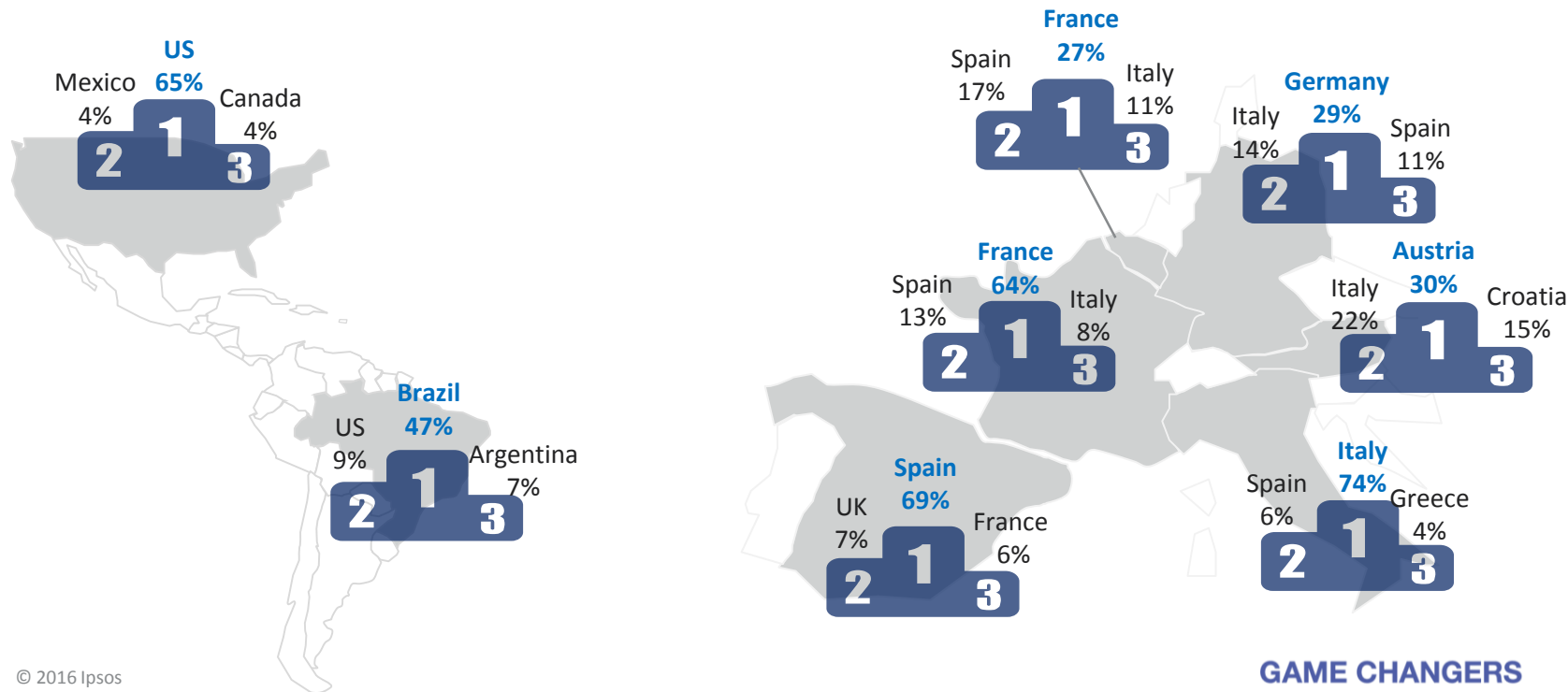
24%

31%



EUROPEANS TRAVEL MOSTLY WITHIN THEIR OWN COUNTRY, ESPECIALLY IN LATIN COUNTRIES.

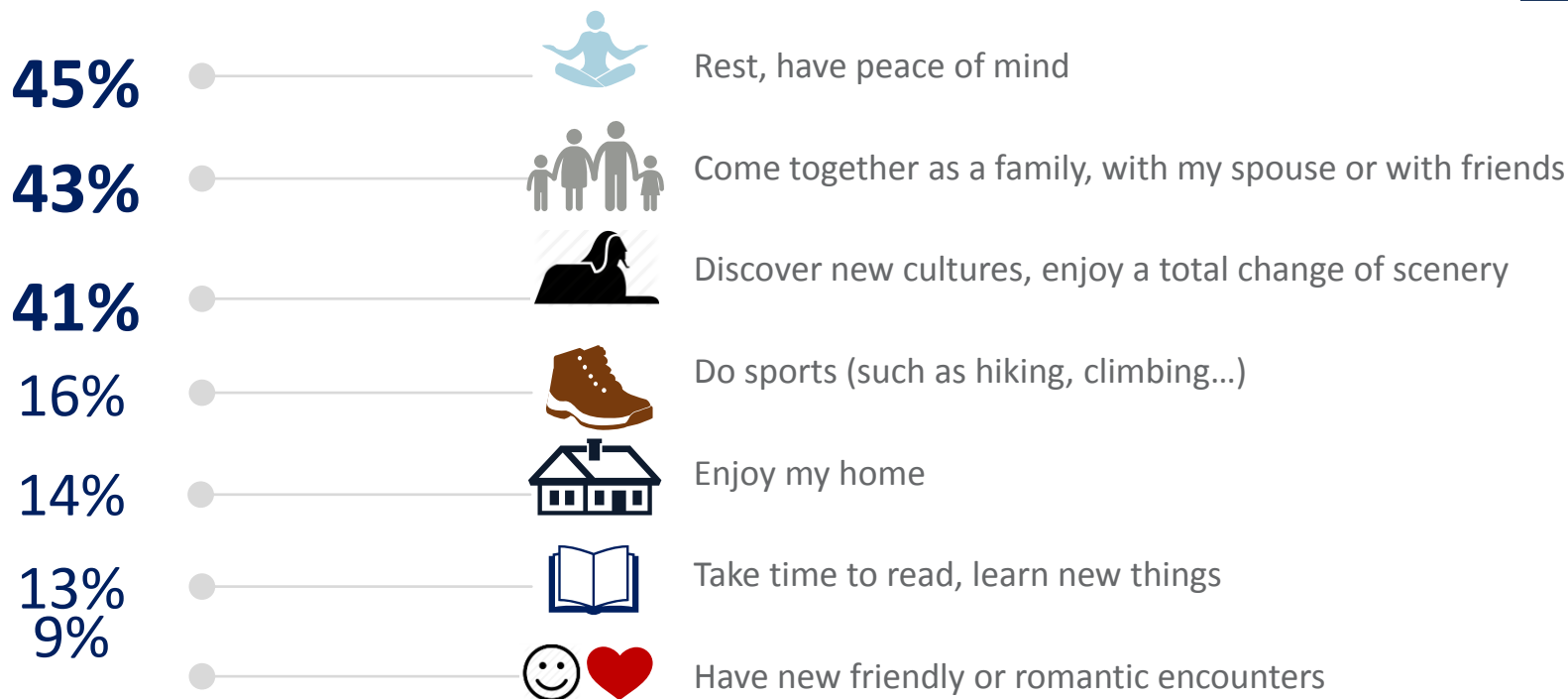
DESTINATION CONSIDERED FOR THIS SUMMER



DURING SUMMER, EUROPEANS MOSTLY WANT TO REST, COME TOGETHER WITH THEIR FAMILY AND FRIENDS AND DISCOVER NEW CULTURES

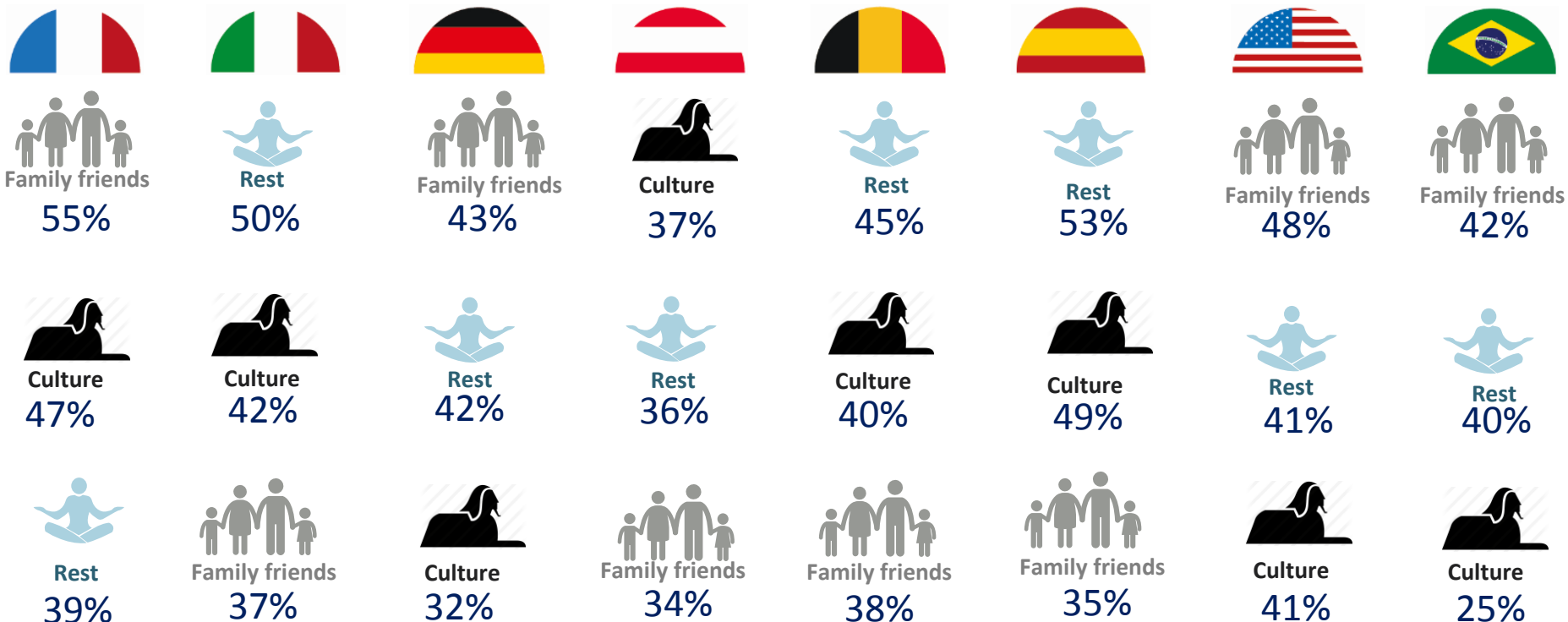
SUMMER ACTIVITIES

EUROPE



THE TOP THREE SUMMER ACTIVITIES ARE THE SAME ACCROSS ALL COUNTRIES

MAIN SUMMER ACTIVITIES



THE RISK OF A TERRORIST ATTACK IS ONE OF THE MAIN ESSENTIAL FACTOR IN THEIR CHOICE OF DESTINATION FOR SUMMER TRIPS, BUT ITS LEVEL IS SLIGHTLY LOWER COMPARED TO 2015

ESSENTIAL FACTORS IN THEIR CHOICE OF DESTINATION

EUROPE

% "Essential"

Vs 2015



THE RISK OF A ZIKA VIRUS INFECTION PLAYS ALSO A SIGNIFICANT ROLE IN CHOICE OF DESTINATION

ESSENTIAL FACTORS IN THEIR CHOICE OF DESTINATION



THE FIRST FIVE ESSENTIAL FACTORS IN THE CHOICE OF DESTINATION

EUROPE



Climate
43%



Budget
44%



Leisure Activities
49%



Leisure activities
46%



Quality infrastructures
51%



Terorrist attacks
47%

Terrorist attacks
37%

Climate
44%

Climate
44%

Climate
44%

Leisure activities
50%

Budget
46%

Budget
31%

Terrorist attacks
37%

Terorrist attacks
43%

Terrorist attacks
43%

Climate
49%

Health risks
42%

Zika Virus
26%

Health risks
33%

Budget
37%

Quality infrastructures
39%

Health risks
40%

Personal attacks
39%

Leisure activities
25%

Quality infrastructures
32%

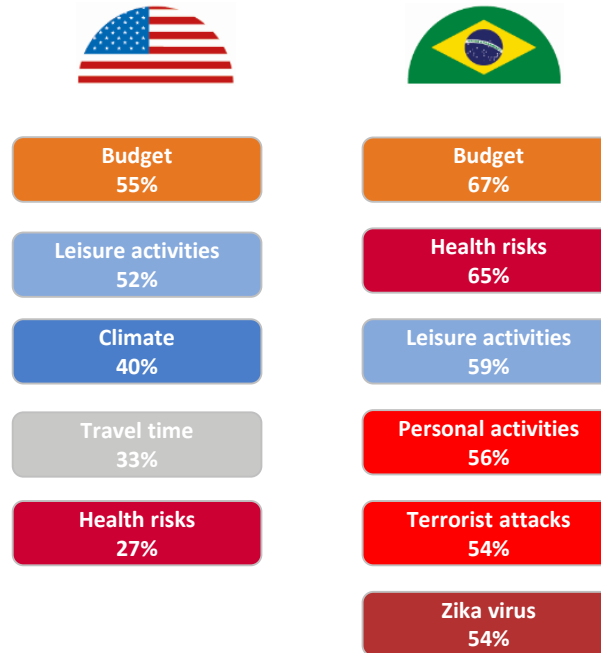
Quality infrastructures
37%

Social Unrest
39%

Budget
33%

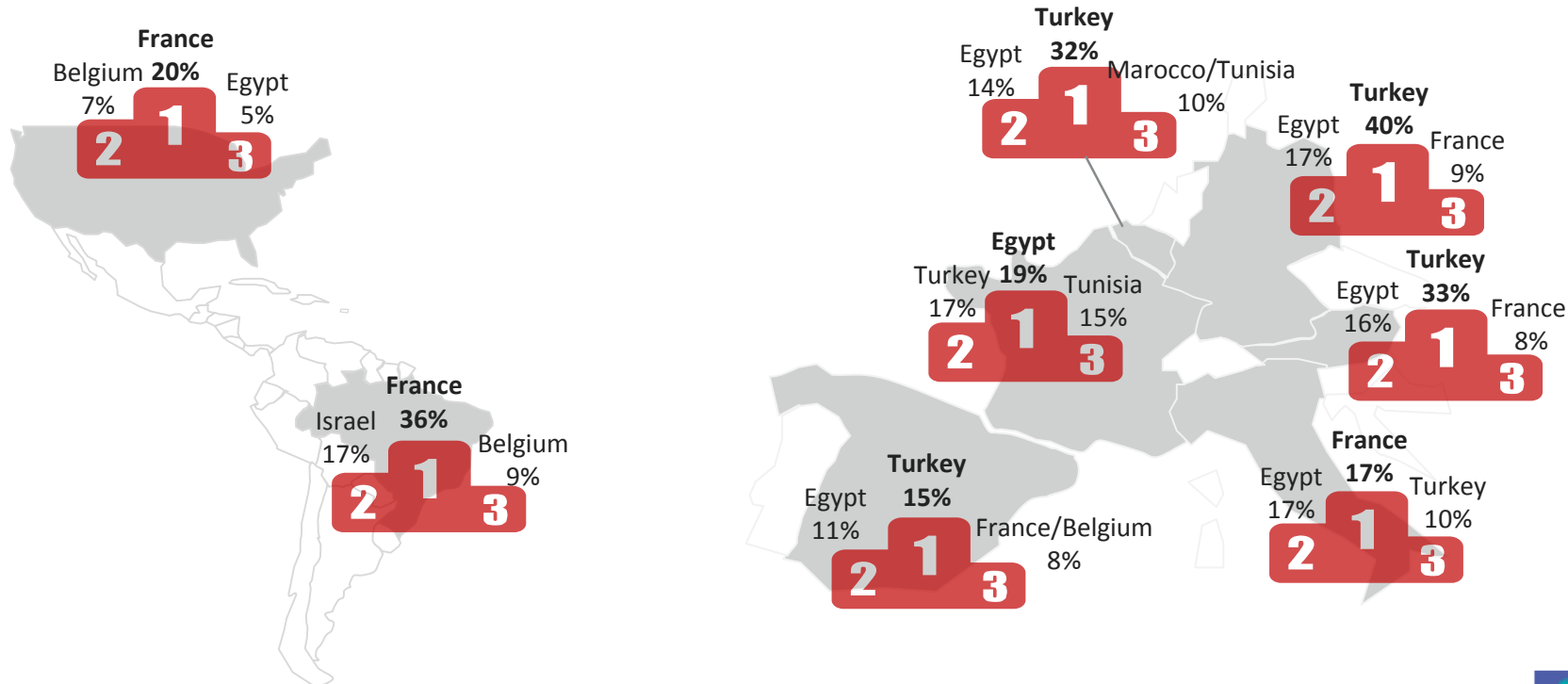
Zika Virus
34%

THE FIRST FIVE ESSENTIAL FACTORS IN THE CHOICE OF DESTINATION



TURKEY COMES FIRST AMONG COUNTRIES AVOIDED BY HOLIDAYMAKERS CONCERNED BY THE RISK OF A TERRORIST ATTACK

COUNTRIES THAT HOLIDAY-MAKERS, CONCERNED BY THE TERRORIST ATTACK, GIVE UP VISITING.





3. ACCOMODATION AND TOURISTIC PRACTICES

THE HOTEL IS THE FAVOURITE ACCOMMODATION FOR MOST OF EUROPEANS

FAVOURITE ACCOMMODATION FOR SUMMER TRIPS

EUROPE

40%



Book a hotel

29%



Rent an apartment/a house

23%



Stay for free at a friend's place, at my family's or at my vacation home

10%



Stay at a bed and breakfast

8%



Go camping at a campsite

5%



Go on a road trip in a camper van/caravan

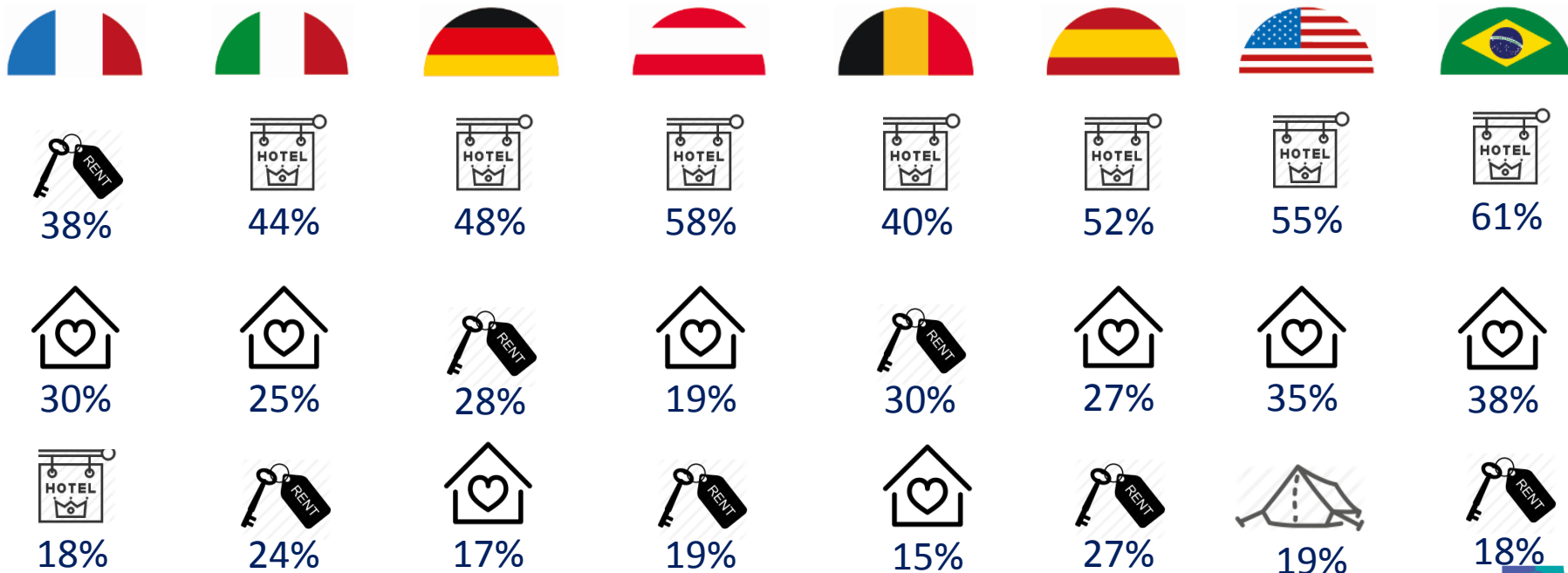
3%



Go on a boat/a cruise

THE FRENCH ARE MORE LIKELY TO RENT A HOUSE OR AN APPARTMENT THAN THE OTHER COUNTRIES

FAVOURITE ACCOMMODATION FOR SUMMER TRIPS



RENTING AN ENTIRE PRIVATE HOME FOR SUMMER TRIPS IS THE MOST INTERESTING COLLABORATIVE PRACTICE FOR EUROPEANS

LEVEL OF INTEREST FOR ACCOMMODATION AND MODE OF TRANSPORTATION

EUROPE

34%



Renting an entire private home

15%



Car-sharing

13%



Renting a room or shared space in a private home

11%



Home exchange between individuals

RANKING OF THE COUNTRIES THE MOST INTERESTED BY THESE PRACTICES

Renting an entire
private home



 46%

 40%

 38%

 38%

EUROPE 34%

Car-sharing



 26%

 23%

15%

Renting a room or shared
space in a private home



 30%

 21%

 20%

13%

Home exchange
between individuals



 18%

 15%

 13%

11%

EUROPEANS GENERALLY PAY THEIR TRIP BETWEEN 1 AND 4 MONTHS BEFORE THEIR DEPARTURE. GERMANS ARE THE ONES WHO PAY THE EARLIEST, SPANISH THE LATEST.



The last time you considered and/or purchased travel, how long before your trip did you book and pay for the trip (either a down payment or the entire trip)?

EUROPE

More than 6 months in advance 14%

 27%

4-6 months 17%

1-4 months 32%

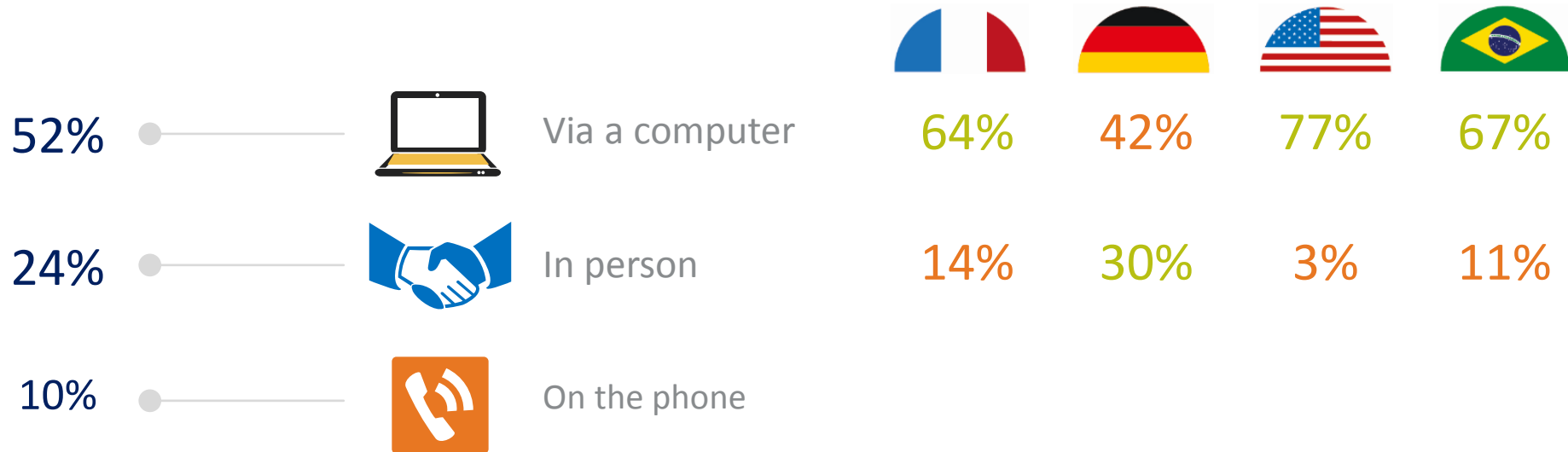
1 month or less in advance 22%

 32%

You don't make any reservation 13%

GERMANS' PREFER TO BOOK THEIR ACCOMMODATION IN PERSON

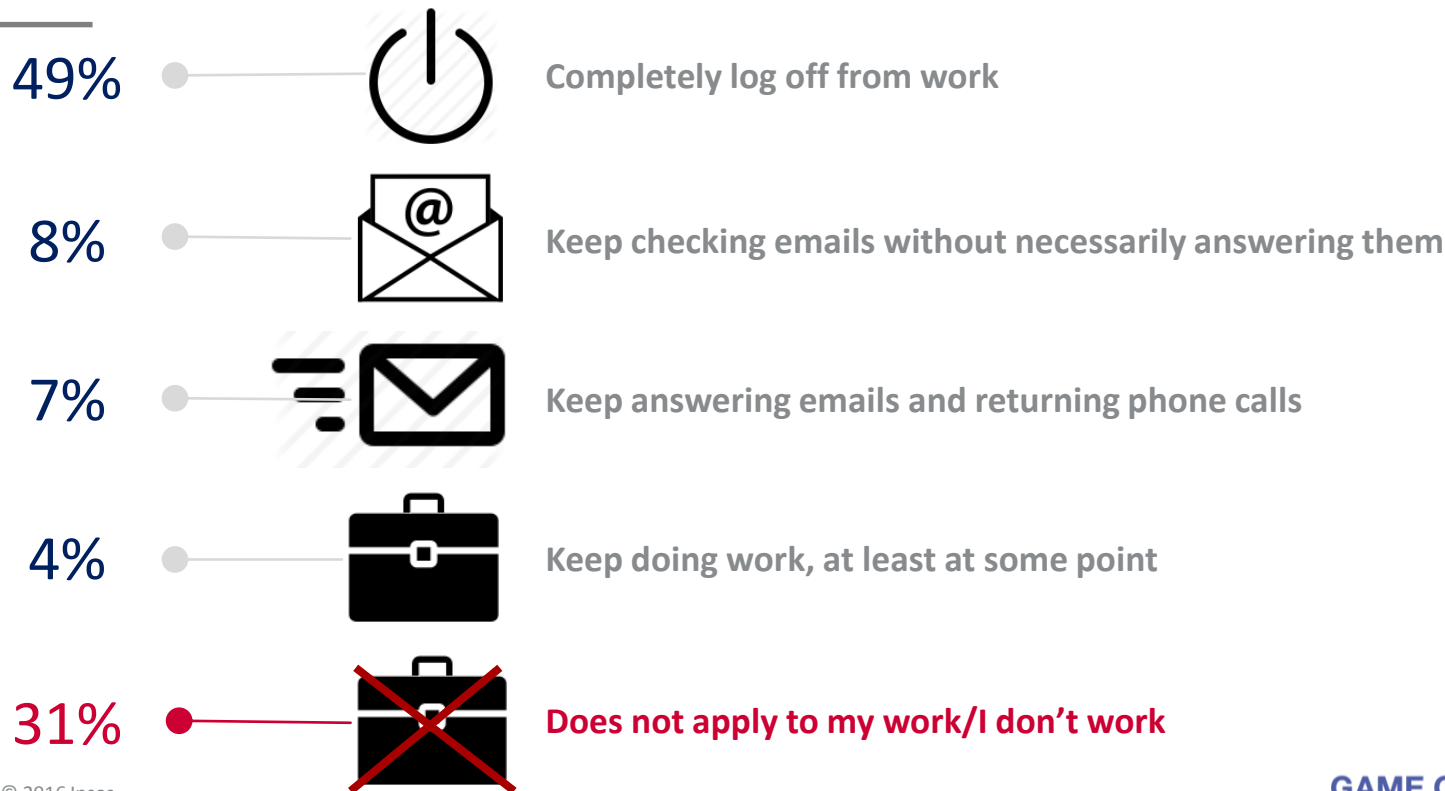
What is your favourite way to book your accommodations?



4. WORK & SOCIAL NETWORKS: CONNECT OR DISCONNECT DURING HOLIDAYS?

MOST OF EUROPEANS INTEND TO COMPLETELY LOG OFF FROM WORK DURING HOLIDAYS

Regarding your work, do you think during your « vacation » you will:



GERMANS ARE THE MOST LIKELY TO DISCONNECT, WHEREAS AMERICANS WILL STAY CONNECTED DURING HOLIDAYS.



Completely log off from work

Among interested

EUROPE: 71%



69%



68%



80%



65%



56%



69%

US & BRÉSIL



53%



67%

GAME CHANGERS

WORKING IN HOLIDAYS: LESS THAN TWO HOURS PER WEEK IN GENERAL

Is yes, how much time per week?

EUROPE

Among interested



26%



37%



12%



9%



You don't know yet

12%

GAME CHANGERS

MASSIVE DISCONNECTION FROM THE SOCIAL NETWORKS DURING THE HOLIDAYS

Do you plan to use the following social networks more, less or the same amount of time as usual during your vacation time?

Among social networks users

EUROPE

More than
usual

Same than
usual

Less than
usual



Professional social networks



6%

24%

65%



General social networks



6%

33%

59%



Dating social networks



11%

22%

56%



Photo-sharing social networks



12%

31%

54%

EUROPEANS ARE VERY LIKELY TO DIVERT FROM SOCIAL NETWORKS DURING THE HOLIDAYS, CONTRARY TO THE AMERICANS AND BRAZILIANS

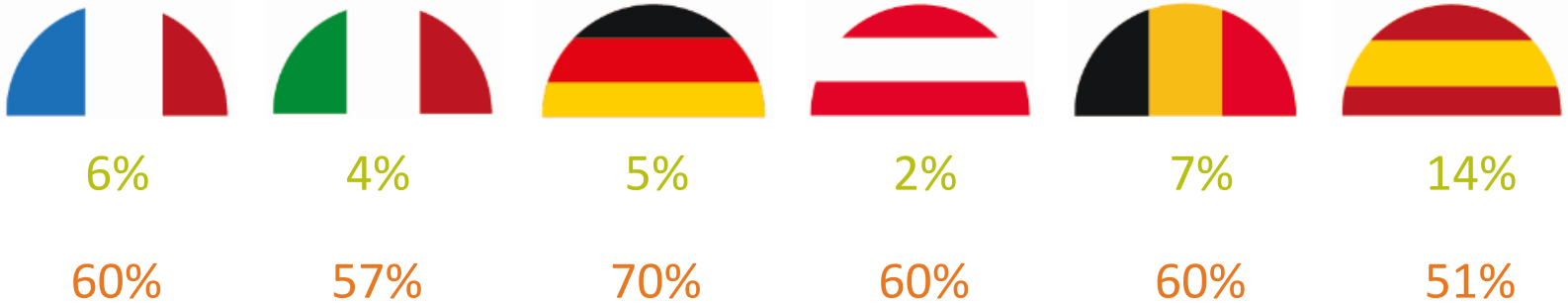




General social networks

Among social networks users

EUROPE



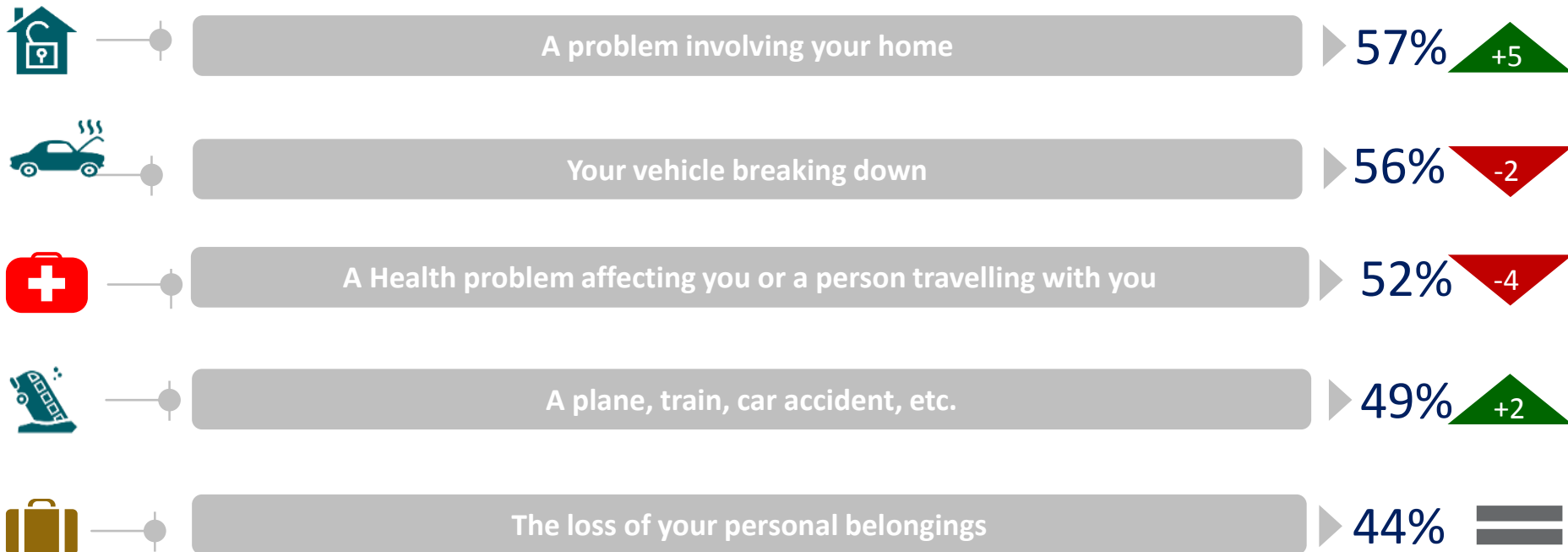
US & BRAZIL



5. HOLIDAYS AND INSURANCE

INCREASE OF THE HOME INSURANCE AMONG EUROPEANS HOLIDAYMAKERS

When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?



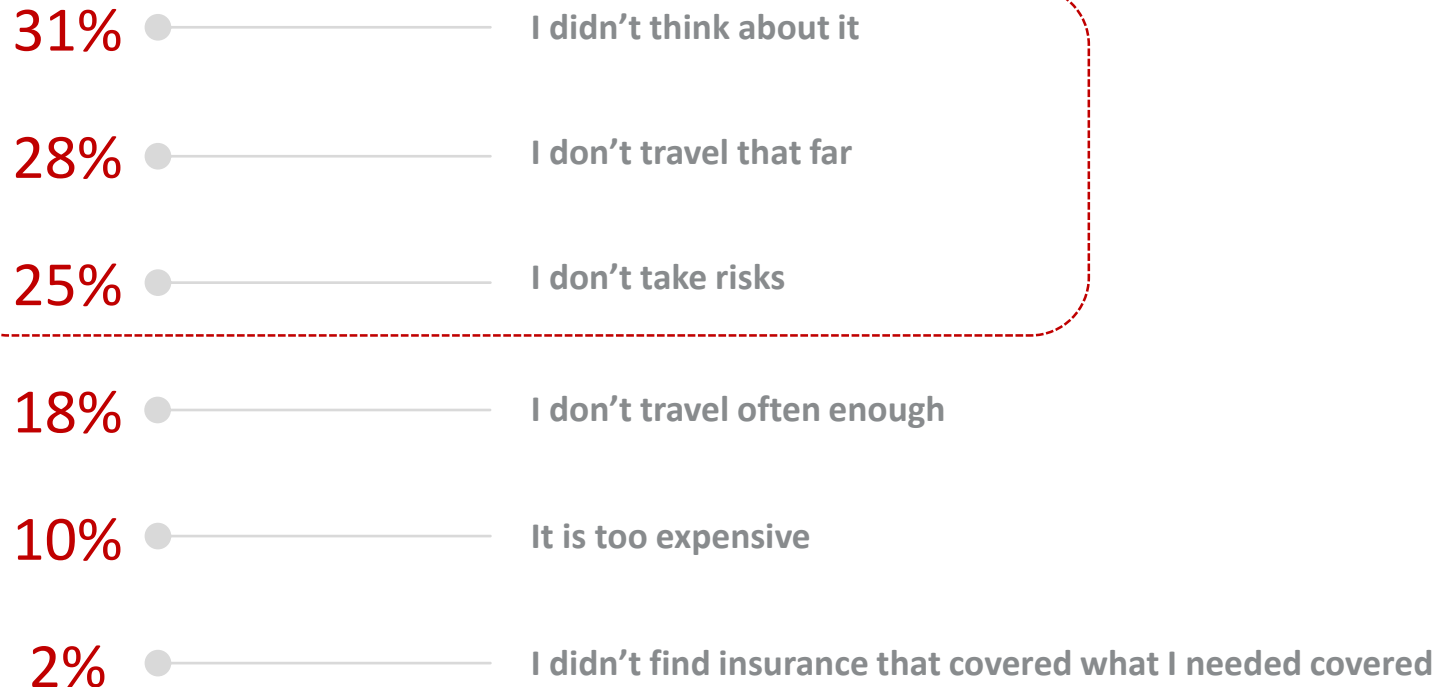
PERSONAL ATTACKS COVERED FOR ONE THIRD OF THE HOLIDAYMAKERS

When you go on a trip, are you usually covered by an insurance or protection policy for the following risks?



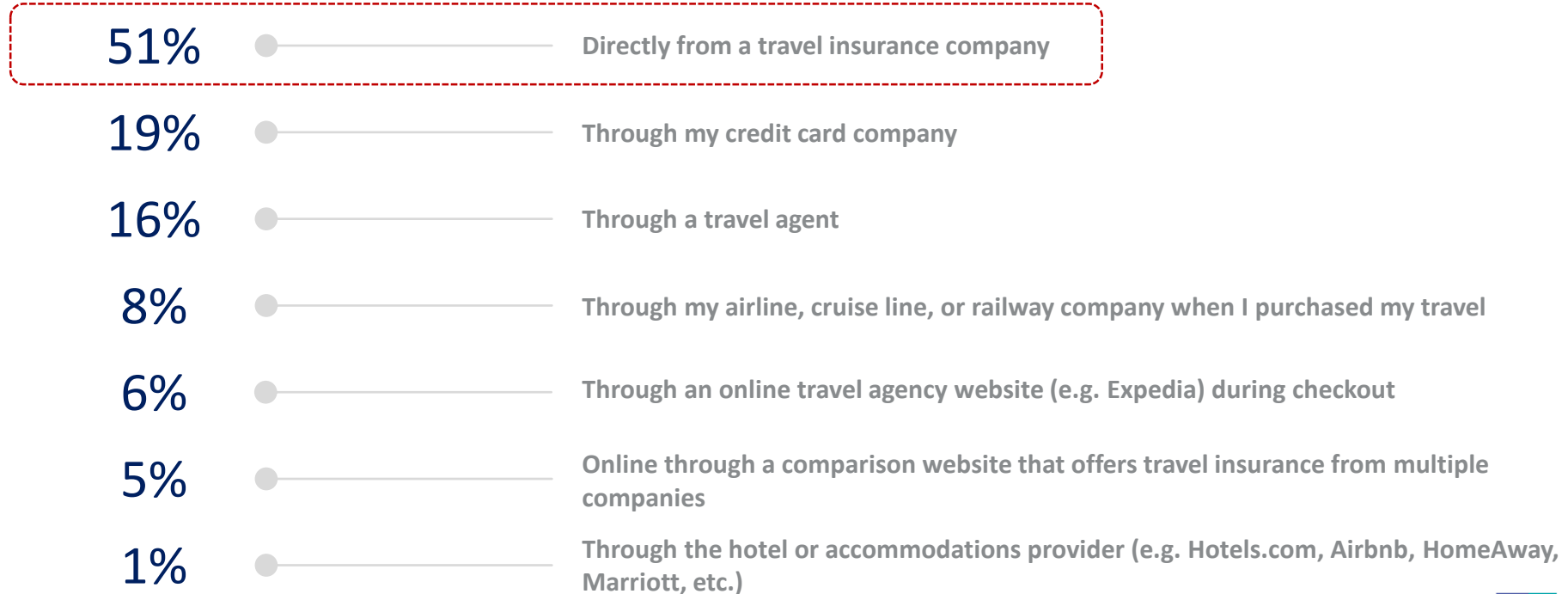
AWARENESS DEFICIENCY AMONG THE NON-INSURED

Why did you decide not to purchase travel insurance for your vacation travel?



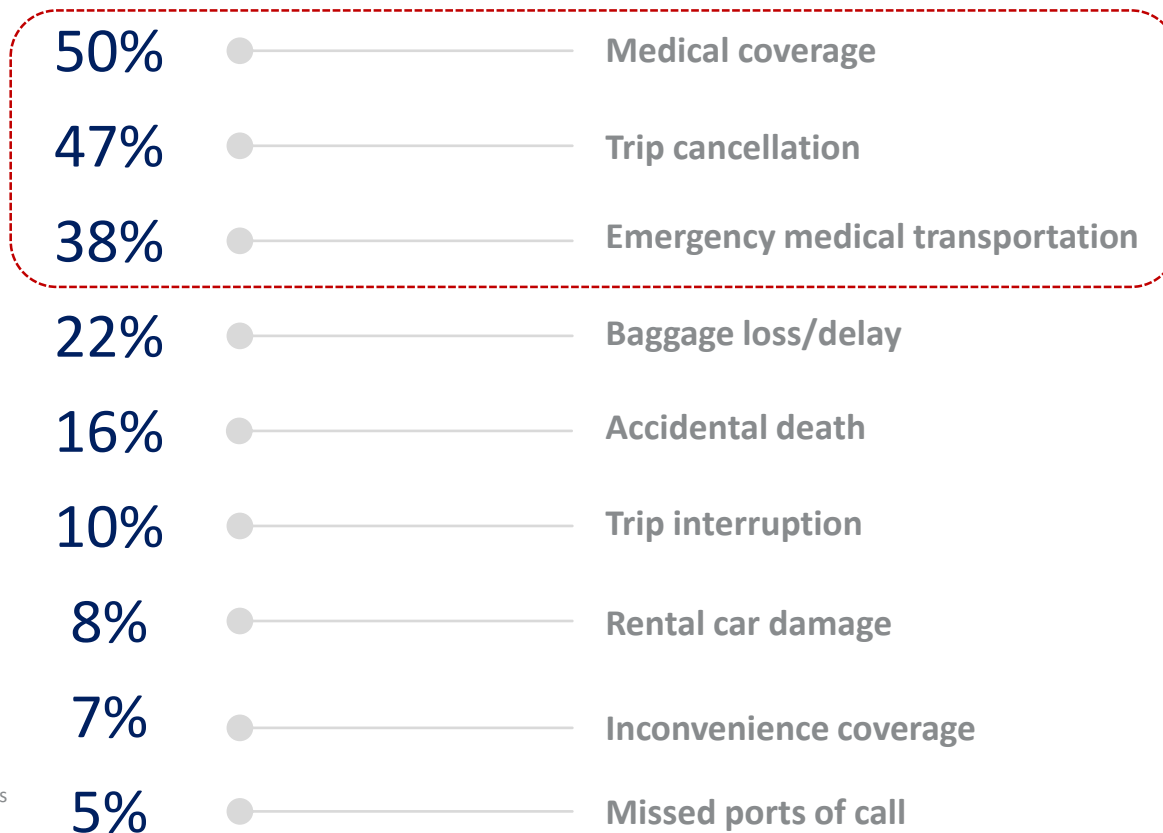
INSURANCE COMPANY AS #1 REFERENCE TO PURCHASE A TRAVEL INSURANCE

How did you ultimately make your purchase of travel insurance?



ESSENTIALS OF TRAVEL INSURANCE: CANCELLATION ET MEDICAL SUPPORT

Among the following items, which of these would be the three most critical elements when you are considering a travel insurance package?



6. COUNTRIES EXECUTIVE SUMMARY

FRANCE



Holiday plans: **57%**

Average budget: **€2,233**

In country holidays: **64%**

Favorite foreign destination: **Spain**

- This year, **57% of the French plan to go on a trip this summer (versus 63% in 2015)**. Two main factors can explain this drop : because of the economic context, for 48% of the French, their intended budget plays an important role in their choice of destination. Moreover, 20% of the French declare they will not go away on holiday this summer.
- Nevertheless, **the average budget** of the French able to pay for their holidays is up slightly with **€2,233** in 2016 versus €2,181 in 2015 : a budget staying the same over the years but slightly lower than the average of the countries (€2,247).
- **64%** (versus 56% last year) **will spend their holidays in France**: they are among the most likely to stay at home, after Spanish and Italian people. Unlike the other countries, French people are the only one who favor the holiday rentals (38%) over the hotel (18%).
- The French want **to come together as a family**, with spouse or friends (30%; -2pts) but also **to rest** (22%;+1) and **to discover new cultures** (25%; -2pts). The seaside remains their favorite destination, up slightly this year (62% versus 59%).
- During their holidays, 28% of the French want to **use the general social networks less than usual (Facebook, Twitter)**. 46% would completely switch off from work during their holiday whereas the others plan to spend between 30min & 2hours per week on it (42%).
- French people are more likely to decide on their destination two weeks in advance (40% versus 35%). And 16% of them don't make reservations.

GERMANY



Holiday plans: **55%**

Average budget: **€2,468**

In country holidays : **29%**

Favourite foreign destination: **Italy**

- **55% of Germans intend to go on holiday this summer**, a slightly lower level than last year (62%).
- The **average budget** of German holiday-makers rose from €2,457 in 2015 to €2,468 in 2016. This makes it the country with the second highest budget after Austria.
- This year, for **their ideal holiday**, Germans want to get together as a family (26%), have a rest (22%) and discover new cultures (17%). 64% of Germans chose the seaside as a holiday destination.
- Even though the economic crisis is still here, 38% of Germans do not want to cut their holiday budget.
- **53% say they plan their holidays in advance (from 4 to 6 months in advance)**. This represents a significant change compared to last year: 42% of Germans book their accommodation **via the computer** versus 32% who went to an agency in 2015.
- For those who do not take out **insurance**, this is because 32% are not very concerned about the various risks related to holidays.
- 55% of Germans would completely switch off from work during their holiday and 30% of Germans want **to spend less time on general social networks**.



Holiday plans: **61%**

Average budget: **€1,892**

In country holidays: **65%**

Favourite foreign destination:

Mexico

- **61% of Americans intend to go on a trip this summer, for one week (39%) or two (26%).**
- **The average budget is €1,892. Less than half of Americans consider summer trips to be a category in which they want to cut costs,** slightly for 25% or even significantly for 17% of them. However, their intended budget plays an essential role in their choice of destination (55%). Opportunities for leisure or cultural activities also play an essential role (52%).
- When they think of their ideal vacation, **they want to get together as a family, with their spouse or with friends (30%), and have a rest and find peace of mind (21%).**
- **The seaside (44%) and the city (43%) are the favourite destinations for their summer trips.**
- As far as their practices are concerned, **the preferred way for Americans to book their accommodation is via a computer (77%),** mainly for the convenience (37%) and also because they usually book this way (21%).
- While **55% intend to book a hotel,** 35% would choose to stay for free with friends or family, or at their holiday home.
- They show interest in renting an entire private home (38%) and in renting a room or shared space (20%).
- **35% of Americans would not completely switch off from work during their holiday.** Half of them would spend between 30 min & 2 hours per week on it.

BRAZIL



Holiday plans: **64%**

Average budget: **€905**

In country holidays: **47%**

Favourite foreign destination: **US**

- **64% of Brazilians plan to go away on holiday between June and September this year.**
- **The average budget is €905. More than half of Brazilians consider their summer trip to be a category in which they want to cut costs**, slightly for 26% or even significantly for 40% of them. As a result, **their intended budget plays an essential role in their choice of destination (67%).**
- When they think of their ideal vacation, **they want to get together as a family, with their spouse or with friends (27%), and have a rest and find peace of mind (26%).**
- **The seaside (52%) and the city (42%) are the favourite destinations for their summer trips.**
- As far as their practices are concerned, **the preferred way for Brazilians to book their accommodation is via a computer (67%),** for the convenience (14%) and also because they usually book this way (15%).
- While **61% intend to book a hotel**, 38% would choose to stay for free with friends or family, or at their holiday home.
- They show interest in renting an entire private home (36%), renting a room or shared space (30%), and in car-sharing (26%).
- **60% of Brazilians would completely switch off from work**, whereas 48% stay touch for between 30 min & 2 hours per week (for half of them).

SPAIN



Holiday plans: **49%**

Average budget: **€1,886**

In country holidays : **69%**

Favourite foreign destination:

UK, France

- **49% of Spanish plan to go on a trip this summer.**
- **The average budget is 1886€. Less than half of Spanish (40%) consider their summer trips to be a category in which they want to cut costs**, slightly for 11% or even significantly for 26% of them. As a result, their intended budget plays one of the essential role in their choice of destination (46%). The risk of a terrorist attack (47%) and Health risks (42%) play essential roles as well.
- **When they think of their ideal vacation, they want to discover new cultures as to enjoy a total change of scenery (34%) and to have a rest and find peace of mind (29%).**
- **The seaside (69%) and the city (27%) are the favourite destination for their summer trips.**
- As far as their practices are concerned, **the preferred way for Spanish people to book their accommodation is via a computer (55%), mainly for the convenience (43%).**
- While **52% intend to book a hotel**, 27% would choose to rent an apartment or a house or to stay for free with friends or family, or at their holiday home.
- They show interest in renting an entire private home (40%) and in car-sharing (23%).
- **52% of Spanish would completely switch off from work during their holiday** whereas 22% keep doing work. 41% of them would spend between 30 minutes & 2 hours per week.

ITALY



Holiday plans: **52%**

Average budget: **€2,045**

In country holidays : **74%**

Favourite foreign destination:

Spain

- **52% of Italians (versus 60% last year) plan to go away on holiday** this summer. In this period of economic crisis, 35% of Italians consider summer trips to be a category they will do without.
- **The average budget** of Italian holiday-makers is **€2,045**. This represents a significant change compared to last year since the average budget in 2015 was around €1,708.
- When they think of **their ideal holiday**, Italians want to have a rest (32%), discover new cultures (27%) and get together as a family (15%). 73% of Germans chose the seaside as a holiday destination (+11).
- **41% of Italians book their holiday between 1 and 4 months in advance** versus 34% last year who booked at the last minute. More than the average book their accommodation via a computer.
- During their holiday, **47% of Italians would completely switch off from work** whereas 28% stay touch for between 30 min & 2 hours per week.
- 29% of them want **to spend less time on general social networks**.
- Finally, they still have one of the **lowest coverage levels** for the 9 tested risks. Only 26% of Italians are covered by an insurance.

AUSTRIA



Holiday plans: **63%**

Average budget: **€2,727**

In country holidays : **30%**

Favourite foreign destination:

Italy

- **62% of Austrians plan to go on a trip this summer, for two weeks (37%) or one week (29%).**
- **The average budget is 2,727€.** This makes it the country with the first highest budget.
- **When they think of their ideal vacation, Austrians want to discover new cultures, as to enjoy a total change of scenery (21%),** to rest, have peace of mind (21%) and to get together as a family, with spouse and friends (20%). Opportunities for leisure or cultural activities (46%) as well as the climate (44%) play an essential role for their choice of destination.
- For Austrians, **summer trips make up a category they do not want to touch (42%).** Whereas, in this period of economic crisis, 33% would choose to significantly cut costs.
- While a majority of Austrians intend to go mainly to the seaside (58%), others would choose the countryside (24%)
- Regarding their accommodations, **if 58% of Austrians intend to book a hotel,** 19% would rent an apartment and other 19% would stay for free at a friend's place, at their family's or at their vacation home.
- As far as their practices are concerned, **the preferred way for Austrians to book their accommodation is via a computer (48%). Nevertheless, one third of Austrians keep booking their accommodation in person.** Their choice is explained by the convenience (38%) and their previous positive experience (27%)
- **41% of Austrians would completely switch off from work during their holiday.** Only 21% stay connected, and 38% of them would spend between 30 min & 2 hours per week on it.

BELGIUM



Holiday plans: **47%**

Average budget: **2 412€**

In country holidays: **9%**

Favorite foreign destination:

France

- **This summer, 47% of Belgians plan to go on a trip** (-10pts versus 2015), for two weeks (48%) or one week (19%). In this period of economic crisis, for 28% of them, summer trips make up a category where they want to **significantly cut costs**. The intended budget plays an essential role for 42% of Belgians in their choice of destination.
- **The average budget is up slightly : 2,412€** in average versus €2,375 last year. This makes it the country with the third highest budget after Austria and Germany.
- The seaside remains their favorite destination (53%) with discovery travels (23%) in second place. Belgians want **to rest** (25%; steady), **to discover new cultures** (23%; -3pts) and **to come together as a family, with spouse or friends** (19%; -2pts) during their holidays.
- Belgians **book their accommodations via a computer** (57%), and in person (23%) mainly for convenience (35%). 29% of them make their reservations between one and four months in advance. 40% book a hotel whereas 30% want to rent a house or an apartment.
- **37% of Belgians would completely switch off from work during their holiday** whereas 30% keep doing work and plan to spend between 30 minutes & 2 hours per week on it.
- Finally, 36% of Belgians want to use the social networks less than usual during their holidays.



The end

GAME CHANGERS

