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Press Release

Europ Assistance releases its 19th annual Barometer on Summer Holidays, focusing on Europeans and Americans holidays plans

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- ⇒ In 2019, summer holiday plans are consolidating in almost all countries with an increasing budget in Europe but decreasing in the United States and in Brazil.
 - ⇒ Millennials and senior holidaymakers behave quite differently when it comes to holidays (anticipation, choice, activities...).
 - ⇒ There is a growing trend towards more “natural” holidays in Europe, with an increasing share of holidaymakers attracted to the mountains and the countryside.
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Tuesday, June 4th, 2019 - 09:00

KEY DATA & LEARNINGS

Summer plans

- 63% of Europeans report they will take leave this summer (-1 pt vs. 2018)
- 68% of Americans and Brazilians intend to go on holidays this summer (= vs. 2018)

Summer holidays duration

- The summer holiday duration remains below 2 weeks, except for France (2 weeks) and Brazil (2,2 weeks)

Budget

- The average budget reported for their summer holiday is €2,019 (+3% vs. 2018) for Europeans, \$ 2,373 (-10% vs. 2018) (equivalent to €2,131) for Americans, R\$ 5,058 (-3% vs. 2018) (equivalent to €1,138) for Brazilians.

Destinations

- In Europe, the top destination is always one's own country, France being the champion with 56% of French holidaymakers that will go on holidays in France this summer.
- Americans and Brazilians also opt for their own country first (respectively 50% and 32% of them).
- Europeans are increasingly travelling abroad (69% in 2019, +4pts vs 2017) whereas Americans are increasingly travelling in their own country (77%, +13pts vs 2017).
- When it comes to travelling outside of their own country, Europeans keep favouring the same top 3: Spain, France and Italy
- Seaside remains the top destination for all interviewed countries, but Europeans are increasingly attracted to the countryside (22%, +3pts) and to the mountains (20%, +2pts).

Organization

- Summer holidays are mostly shared with the nuclear family: 71% of Europeans go on holidays with their partner, 34% with their children. It is respectively 67% and 31% for the Americans and 57% and 42% for the Brazilians.
- Children mostly travel with their parents for summer holidays: 66% of European children do, 59% of American children, and 46% of Brazilian children.

Disconnection

- 69% of Europeans intend to disconnect completely from work during their holidays (+3pts vs 2018), especially the British (76% of them, +5pts), the French (71%, +1pt), and the Germans (70%, +2pts) while only 63% of Brazilians and 54% of Americans will disconnect from work.

In 2019, summer plans are stable in Europe, in the United States and in Brazil, consolidating a positive trend since 2016

After an increase observed in 2017 in Europe, but also in the United States and Brazil, 2019 marks a second year of consolidating high levels of summer holiday plans. 63% of Europeans report they will go on holidays this summer, 1 point below last year's measure and at the same level as 2017.

Within European countries, the outlook is quite stable with very few variations, to the exception of Austria and Switzerland. 70% of Austrians intend to go on holidays this summer, a four-points increase vs 2018. 69% of the French will go on holidays (stable), 65% of the Belgians (+2pts), 64% of the British (-2pts) and 63% of the Germans (-1pt). The Swiss are only 62% to declare going on holidays this summer, which represents a four-points decrease vs 2018. 61% of Italians will go on holidays (-1pt), 61% of the Polish (+1pt), 60% of the Portuguese (+1pt) and 60% of the Spanish (-1pt).

Americans and Brazilians are also pursuing the same stabilization process for the second year in a row. 68% of Americans and 68% of Brazilians will go on holidays this summer, which represent a stable number for both countries and a two-points increase vs 2017.

The average budget is increasing in Europe, with some national exceptions and decreasing in the United States and Brazil

In 2019, if about the same share of Europeans will go on holidays vs 2018, their holiday budget is increasing by 3%, averaging € 2,019. The increase is even higher among the Euro Zone, with an average budget of € 2,099 and a 5% increase vs 2018.

The European budget increase is mainly driven by 3 countries: France, with an average budget of €2,201 and a 10% increase vs last year, Spain, with an average budget of €1,798 and an 8% increase vs last year and Germany with an average budget of €2,467 representing a 4% increase vs 2018.

Then 4 countries have a stable holiday budget: Switzerland and Austria are the highest holiday budgets of Europe with respectively CHF 3,250 (stable, equivalent to €2,856) and €2,627 (-1% vs 2018). Then Italy (€1,757, -1%) and Poland (Zł 4,341, stable, equivalent to € 1,010).

Then 3 countries are going in reverse of the 2019 budget positive trend: The Belgian average budget is decreasing by 3% (€2,242), the British budget is decreasing by 5% (£1,861, equivalent to €2,151) and the Portuguese budget is decreasing by 3% at €1,333.

With a doubled budget...

When asked what they would do if their summer holiday budget was doubled, Europeans declare that they would mostly travel more frequently (36%), but also longer (20%) and to other destinations (17%). In their top 3 actions with a doubled budget, Belgians and Germans would also spend more on site (both 14%).

Americans would also travel more frequently (30%), then to other destinations (20%) and travelling longer is only their third option (17%).

Brazilians also pick those three options, but equally: 21% would travel longer, 21% would travel to other destinations and 20% would travel more frequently. 10% of Brazilians would also bring more people with them (vs only 3% of the Europeans and 4% of the Americans).

Summer holiday destination: While most holidaymakers stay within their own country, Europe and the US are on opposite trends

In a majority of countries, people tend to choose their own country first as a summer destination. France is the champion with 56% of its holidaymakers staying in France for the holidays. Then comes Poland (52%), Spain (51%) and the United States (50%). Italy (48%) and Portugal (47%) are following.

However, those seemingly identical figures are hiding contrasted trends when it comes to summer destination. First, the share of holidaymakers declaring they haven't decided yet their summer destination varies greatly across countries: they are 22% in Europe, 35% in the United States and 43% in Brazil.

Second, looking only at holidaymakers who have already picked their destination, the trends in Europe and in the United States are going opposite ways: while Europeans are increasingly traveling outside of their own country (69% in 2019, + 4pts vs 2017), Americans are increasingly picking the United States as their summer destination (77% in 2019, +13pts vs 2017).

This national choice can be explained by Americans criteria when choosing a summer destination. First comes the budget (as for Europeans and Brazilians), then comes the activities offered and the climate, composing the same top 3 criteria as the Europeans. However, the risk of a personal attack is criteria #4, the risk of a terrorist attack comes fifth and the travel time to destination is #6 (while it's only #9 in Europe).

This latest criterion does not come as a surprise as Americans have the lowest summer holidays duration among all countries surveyed (1.4 weeks).

The dream places to visit: between natural sites, famous monuments and wonders of the world

Holidaymakers all over the world share some top places they would want to visit at least once in their life and they are quite diverse: from famous monuments to natural sites and wonder of the world, they all have in common to be equally breath-taking.

Europeans top 10 places are the following: the Eiffel Tower (12%), the Egyptian Pyramids (11%), the Great Wall of China (7%), the Taj Mahal (7%), the Statue of Liberty (6%), the Grand Canyon (5%), the Niagara Falls (4%), the Coliseum (4%), the Machu Picchu (4%) and the Pisa Tower (3%).

The Eiffel Tower ranks first in 7 of the 10 European countries surveyed, as well as in Brazil. It is also ranked second in the United States.

While Europeans mostly mention places outside of Europe (18% are in the United States, which makes it the first country with places to visit), Americans and Brazilians – living in vast countries – are favouring national places to visit. For Americans, the first country with places to visit is their own (44%) with places such as the Grand Canyon (22% of Americans mention it), Mont Rushmore (11%), Yellowstone (8%), the Statue of Liberty (7%), the Niagara Falls (5%) or Yosemite (3%).

Brazilians are also favouring their own country, Brazil being the first country for them with places to visit (23% of places quoted by Brazilians are in Brazil). The top places for Brazilians include the Corcovado Christ (15%), Fernando de Noronha (4%) and the Sugarloaf Mountain (3%).

Because their country is so rich in staggering landscapes and national parks, Americans are 39% to mention natural sites to visit once in their life, whereas only 18% of Europeans and 13% of Brazilians mention natural sites.

Millennials and senior holidaymakers behave quite differently when it comes to preparing their holidays

European Millennials (aged less than 35 years old) and seniors (aged 65 years old and over) have different attitudes regarding the preparation of their holidays.

First, they differ in their motivations in choosing their destination: while Millennials have several motivations weighting about the same in the decision process (having already been there (24%), the weather (22%), activities available (21%), senior holidaymakers value much more having already been there (38%), whereas their second motivation, having a friend there, is much weaker (18%).

Second, they define themselves differently when it comes to their traveler type. While Millennials define themselves first as “looking for the best deals before booking” (39%), the seniors put themselves first in the category of those who “plan the bare minimum only” (29%).

Millennials are more likely to plan every detail of the trip (18% vs 14% for seniors), while seniors are more likely to plan very little in advance (17% vs 11% for Millennials) and get back most often to the same place (15% vs 7% for Millennials).

Paradoxically, even if they plan the bare minimum in advance (transportation and accommodation), seniors anticipate booking their trip much more than the Millennials: 78% of them book their trip 1 month or more in advance vs 70% for Millennials.

Lastly, when choosing their accommodation, Millennials have different criteria weighting about the same in the decision process (location (48%), then travelers’ reviews (40%), then pictures of the place (28%) and promotional offers (20%)), while senior holidaymakers make their decision based on one important criteria, location (58%), all other criteria being much weaker (reviews (18%), pictures of the place (14%), promotional offers (12%)).

There is a growing trend towards more “natural” holidays in Europe, with an increasing share of holidaymakers attracted to the mountains and the countryside

While the seaside is still dominant as a summer destination in Europe (62% of holidaymakers will go to the seaside), a growing share of holidaymakers are favouring natural spots, such as the mountains (20%, +2pts) and the countryside (22%, +3pts). This is true in many European countries, especially in Germany where the mountains (21%, +5pts) and the countryside (23%, +3pts) are gaining momentum, but also in France with the same increases: 23% of holidaymakers will go to the mountains (23%, +5pts), and 24% will go to the countryside (+3pts). The British follow the same trend: 33% will go to the countryside (+4pts) and 14% will go to the mountains (+2pts).

Those 3 countries are also those where holidaymakers intend the most to disconnect from work during their holidays, and this trend keeps increasing. 69% of active Europeans intend

to disconnect from work which represents a 3-points increase vs 2018. In the UK, they are 76%, with a 5-points increase vs 2018, in France 71% (+1pt) and in Germany 70% (+2pts).

In addition to this “unwind” trend, some holidaymakers are also taking in consideration the ecological footprint of their trip when picking a destination: 17% consider it plays an essential role in their choice and it is even more important for Brazilians (playing an essential role for 52% of them, it is criteria #9 while it is only #15 for Europeans). Within Europe, the most concerned countries are Poland (“an essential role”, 26%), Italy (24%) and Portugal (23%).

Brazil, Portugal and Italy are also among the countries being the most interested in going on an ecological trip, along with Spain. 46% of Portuguese holidaymakers would be interested in such a trip, 40% of Brazilians and Spanish and 39% of Italian holidaymakers would too.

Methodology:

*Conducted by Ipsos at the request of Europ Assistance on **a sample of 12,000 individuals in Europe** (France, Germany, Italy, Spain, Belgium, Austria, United Kingdom, Switzerland, Poland and Portugal) and in **America** (United States and Brazil), the aim of this reference survey – carried out by Internet and published for the 19th 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 18th and April 10th 2019** 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.