



# 14<sup>th</sup> Europeans and Holidays barometer

Presentation of findings

13 may 2014





1

## European

Nationally representative samples questioned over the phone

2

## Barometric

The existence of previous studies enables us to outline major trends and spot any emerging ones

3

With the **objective** of

- **evaluating departure intentions** among European nationals;
- **exploring their motivations, desires, plans** in terms of destination and type of stay;
- understanding **how holidays are decided on and prepared**;
- and **measuring the level of fear, sensitivity to risks and their coverage**.



- Study conducted among a **sample of 3,505 people living in Europe:**

	France: 502
	Spain: 501
	Belgium: 500
	Austria: 500
	UK: 500
	Germany: 500
	Italy: 502

The **samples are representative of national populations, aged 18 and over**, put together using the quota method (gender, age, profession of head of household) after stratification by region and agglomeration size.



- Study conducted from **February 10 to March 21 2014**



- The interviews were conducted over the **phone**, at the home of the people interviewed, based on contact lists extracted randomly from telephone directories.

*(As with any quantitative study, this study presents findings subject to the margins of error inherent in the laws of statistics)*

*This report was put together in observance of the ISO 20252 international standard "Market, opinion and social research »*

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**Europeans are increasingly unequal as concerns the possibility of going on holiday**

# The share of Europeans who will not go on holiday in 2014 is increasing: the increase mainly concerns the French, Belgians and Italians, with the latter reaching the record level set by the Spanish. In contrast, the Germanic countries display positive indicators.

In total, how many times are you thinking of going on holiday in 2014?

By holiday we mean a stay of 4 nights or more away from home and excluding business trips.

Base : Ask all

Single answer

	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>S/T YES (at least once)</b>	<b>68%</b>	<b>69%</b>	<b>79%</b>	<b>70%</b>	<b>54%</b>	<b>58%</b>	<b>67%</b>	<b>84%</b>
2013	71%	77%	77%	76%	55%	63%	79%	87%
2012	72%	80%	75%	71%	61%	66%	76%	75%
2011	81%	82%	80%	80%	77%	84%	80%	84%
<b>NO</b>	<b>29%</b>	<b>27%</b>	<b>20%</b>	<b>29%</b>	<b>40%</b>	<b>40%</b>	<b>30%</b>	<b>16%</b>
2013	25%	17%	21%	24%	41%	30%	24%	17%
2012	26%	17%	22%	20%	36%	31%	23%	24%
2011	20%	15%	20%	19%	20%	15%	18%	16%

## Overall

### THOSE WHO WILL NOT GO ON HOLIDAY IN 2014

**PENSIONERS: 42% (+10pts)**

- ✓ In France: 42% (vs. 26%)
- ✓ In Italy: 50% (vs. 40%)
- ✓ In Belgium: 40% (vs. 30%)

**WOMEN: 32% (+5 pts)  
vs Men 26% (+ 3 pts)**



### THOSE WHO WILL NOT GO ON HOLIDAY IN 2014

**PENSIONERS**

- ✓ In France: 42% (vs. 26%)

**WOMEN (30%) vs. Men (24%)**

Year	Share
2014	27%
2013	17%
2012	17%
2011	15%
2010	16%
2009	17%
2008	11%

# The drop in departures is affecting those who usually only go away once a year

In total, how many times are you thinking of going on holiday in 2014?

By holiday we mean a stay of 4 nights or more away from home and excluding business trips.

Base : Ask all

Single answer

	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>S/T YES</b>	<b>68%</b>	<b>69%</b>	<b>79%</b>	<b>70%</b>	<b>54%</b>	<b>58%</b>	<b>67%</b>	<b>84%</b>
2013	72%	77%	77%	76%	55%	63%	79%	87%
2012	71%	80%	75%	71%	61%	66%	76%	75%
2011	81%	82%	80%	80%	77%	84%	80%	84%
<b>1 time</b>	<b>-3 pts</b> <b>29%</b>	<b>26%</b>	<b>29%</b>	<b>24%</b>	<b>30%</b>	<b>37%</b>	<b>30%</b>	<b>25%</b>
2013	32%	27%	26%	34%	37%	39%	31%	29%
2012	31%	32%	31%	31%	34%	36%	35%	27%
2011	33%	26%	28%	33%	40%	42%	34%	33%
<b>2 times</b>	<b>22%</b>	<b>25%</b>	<b>26%</b>	<b>23%</b>	<b>15%</b>	<b>15%</b>	<b>22%</b>	<b>31%</b>
2013	22%	26%	28%	23%	10%	16%	24%	29%
2012	23%	24%	23%	23%	18%	20%	23%	23%
2011	27%	29%	32%	24%	25%	24%	26%	24%
<b>3 and more</b>	<b>17%</b>	<b>18%</b>	<b>24%</b>	<b>23%</b>	<b>9%</b>	<b>6%</b>	<b>15%</b>	<b>28%</b>
2013	18%	24%	23%	19%	8%	8%	24%	29%
2012	17%	24%	21%	17%	9%	10%	18%	25%
2011	21%	27%	20%	23%	12%	18%	20%	27%
<b>NO</b>	<b>29%</b>	<b>27%</b>	<b>20%</b>	<b>29%</b>	<b>40%</b>	<b>40%</b>	<b>30%</b>	<b>16%</b>
2013	25%	17%	21%	24%	41%	30%	24%	17%
2012	28%	17%	22%	28%	36%	31%	23%	24%
2011	18%	15%	20%	19%	20%	15%	18%	15%

In total, how many times are you thinking of going on holiday in 2014?

By holiday we mean a stay of 4 nights or more away from home and excluding business trips.

Base : Ask all

Single answer

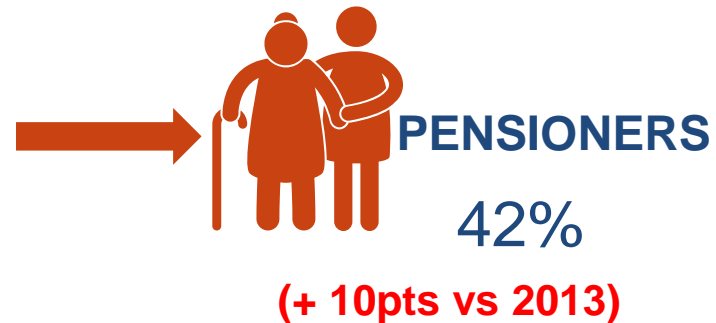
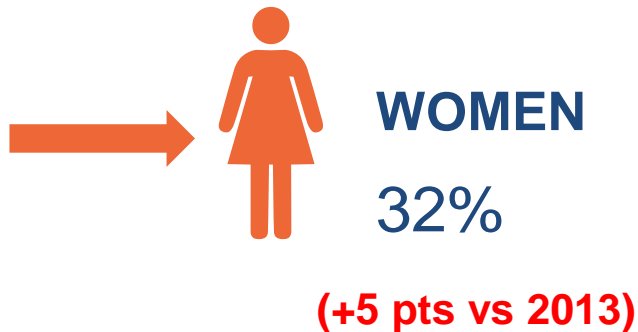
## Those who WON'T GO ON HOLIDAY in 2014

(Average of 7 countries tested)

29%

(+4 pts vs 2013)

*And in particular...*



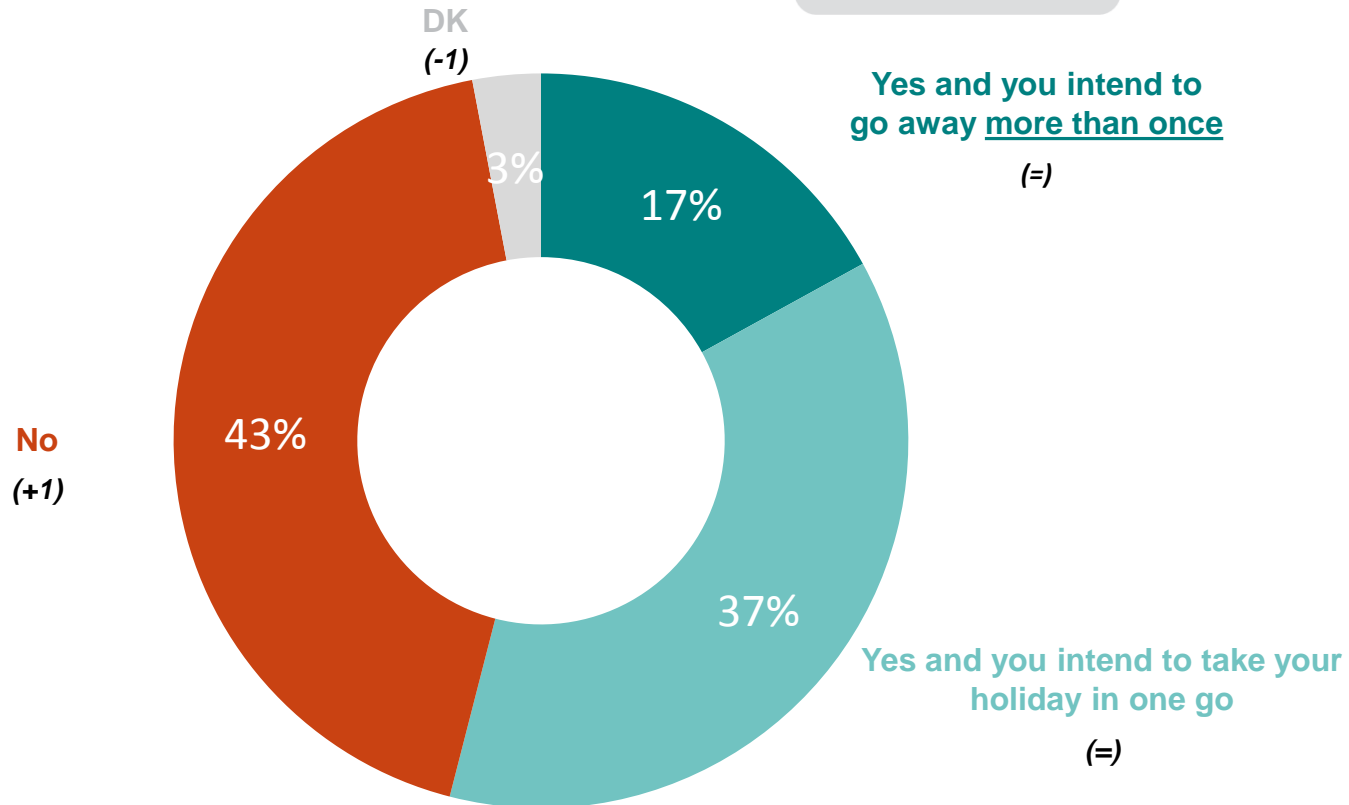


Do you intend to go on holiday this summer, that is to say between June and September inclusive?

Base : Ask all

Single answer

Total "YES"  
54% (=)



... the drop observed in certain categories is compensated for by multi-vacationers who will leave more in summer compared to last year

Do you intend to go on holiday this summer, that is to say between June and September inclusive?

Base: Ask all

Single answer

Total "YES"  
54% (=)

Pensioners  
40% (-7 pts)

Women  
51% (-3 pts)

"Multi-vacationers"

In 2014:

Those who will go away twice → 80% in summer  
(+ 7 pts)

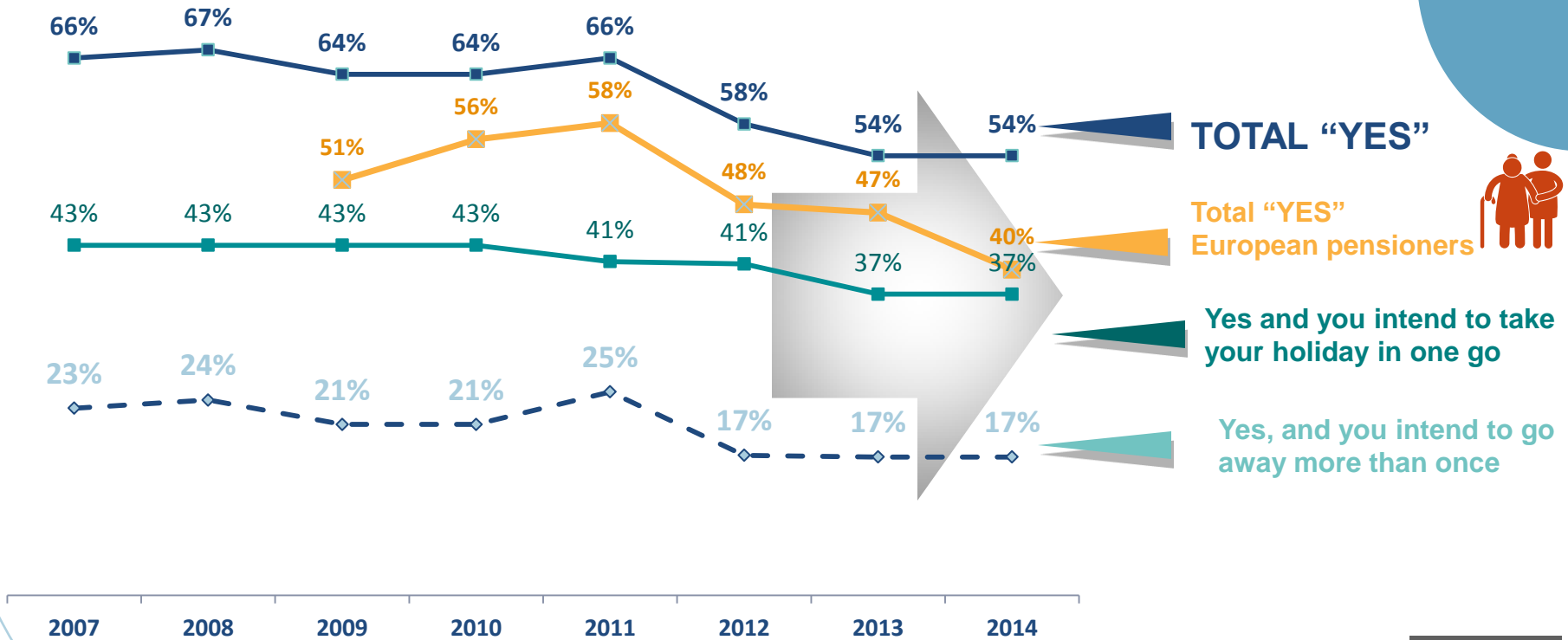
Those who will leave 3 times  
→ 85% in summer (+5 pts)

# Overall, intentions to go on holiday remain far below the pre-crisis measurements

Do you intend to go on holiday this summer, that is to say between June and September inclusive?

Base: Ask all

Single answer



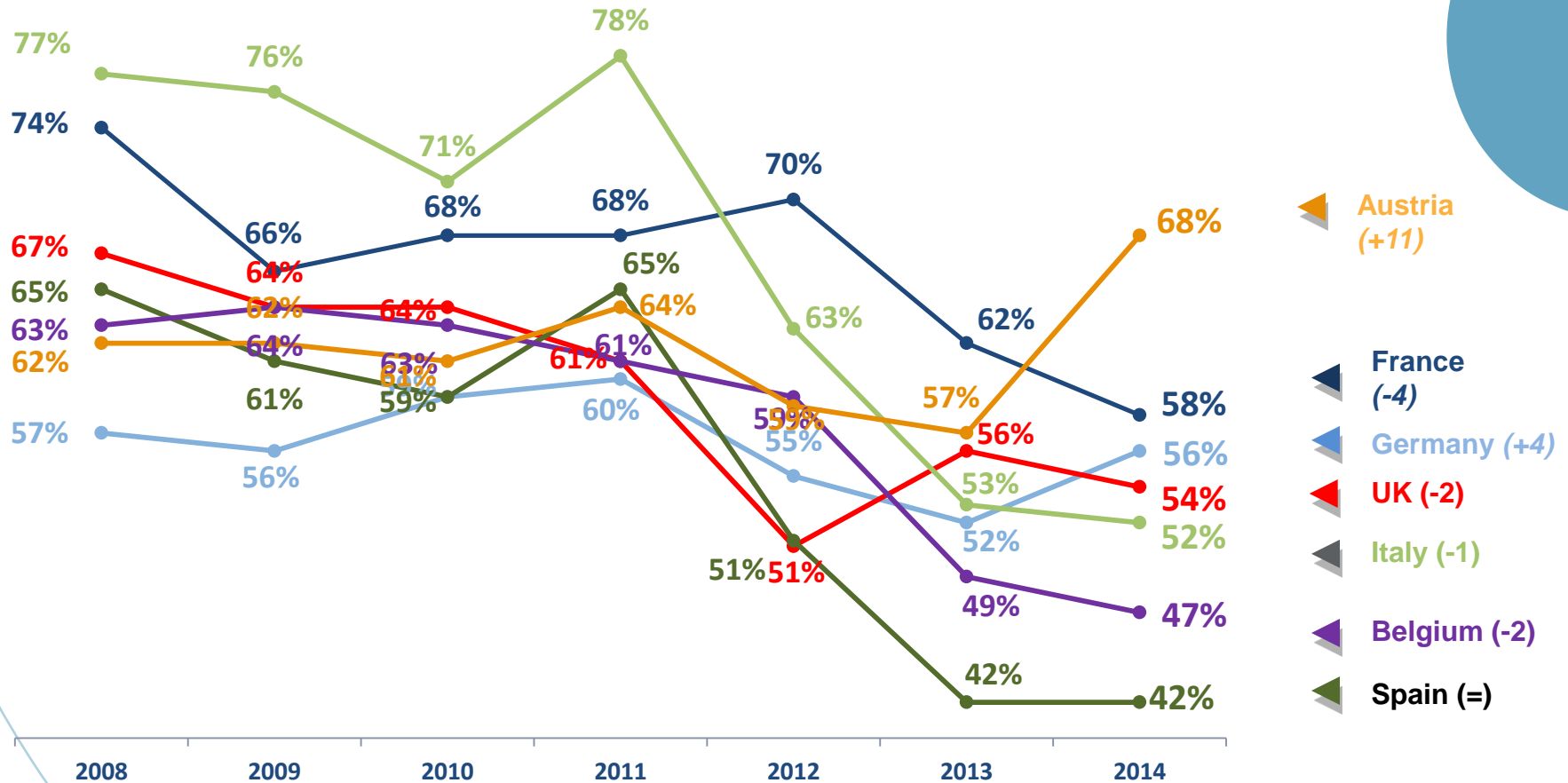
NSP : 3%

An upward trend in the Germanic countries and particularly in Austria, which for the first time ranks first in departure intentions. The countries that saw the sharpest drops over the last few years have stabilised (Italy, Belgium, Spain). In 2014, although in 2<sup>nd</sup> place, departure among French people continue to erode.

Do you intend to go on holiday this summer, that is to say between June and September inclusive?

Base: Ask all

ST "YES"



This year, of all Europeans, the Austrians are the only ones to go away more this summer than in 2013. As concerns the Spanish, the share of those who will only go away once is further reduced.

Base: Ask all	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>Yes, and you intend to go away more than once</b>	<b>17%</b>	<b>14%</b>	<b>15%</b>	<b>26%</b>	<b>11%</b>	<b>18%</b>	<b>13%</b>	<b>22%</b>
2013	17%	17%	13%	26%	6%	18%	16%	22%
2012	17%	15%	15%	26%	10%	18%	16%	18%
2011	25%	20%	16%	33%	26%	37%	14%	22%
2010	21%	19%	13%	34%	13%	25%	19%	18%
2009	21%	15%	14%	37%	18%	23%	18%	18%
<b>Yes, and you intend to take your holiday in one go</b>	<b>37%</b>	<b>44%</b>	<b>41%</b>	<b>28%</b>	<b>31% ↗</b>	<b>34%</b>	<b>34%</b>	<b>46% ↗</b>
2013	37%	45%	39%	30%	36%	35%	33%	35%
2012	41%	54%	39%	25%	41%	45%	44%	40%
2011	41%	48%	44%	28%	39%	41%	47%	42%
2010	43%	49%	46%	30%	46%	46%	44%	43%
2009	43%	51%	42%	27%	43%	53%	46%	44%
<b>S/T "YES"</b>	<b>54%</b>	<b>58%</b>	<b>56%</b>	<b>54%</b>	<b>42%</b>	<b>52%</b>	<b>47%</b>	<b>68%</b>
2013	54%	62%	52%	56%	42%	53%	49%	57%
2012	58%	70%	55%	51%	51%	63%	59%	59%
2011	66%	68%	60%	61%	65%	78%	61%	64%
2010	64%	68%	59%	64%	59%	71%	63%	61%
2009	64%	66%	56%	64%	61%	76%	64%	62%
<b>No</b>	<b>43%</b>	<b>37%</b>	<b>42%</b>	<b>43%</b>	<b>53%</b>	<b>46%</b>	<b>48%</b>	<b>31%</b>
<b>DK</b>	<b>3%</b>	<b>5%</b>	<b>2%</b>	<b>3%</b>	<b>5%</b>	<b>2%</b>	<b>5%</b>	<b>1%</b>

## Holidays for everyone? Fewer and fewer Europeans are able to leave

**This year, almost 30% of Europeans will not go away on holiday at all** (29% exactly, i.e. 3 points more than last year). Giving up their holidays is affecting Europeans who would usually leave once a year, while holidaymakers planning to leave several times will be able to do so. So it is the least privileged who will have to scale down their plans: among them, women (32%, +5 pts) and above all pensioners (42%, +10 pts). The increase can mainly be seen in France, in Belgium and in Italy, while the Iberian Peninsula still posts a record level (40% of Spanish people will not go on holiday in 2014). In contrast, in the Germanic countries, only 20% of the population will have to give up on going away, i.e. 10 points less than the European average.

## Summer holidays: a period some will need to give up

As concerns summer holidays, departure intentions remain at 54%, as in 2013. This figure does however cover some major disparities: fewer women and pensioners will leave this summer than last year (respectively 51% and 40%, i.e. - 3 pts and -7 pts). These drops will be compensated for by a change in habits among “multi-vacationers”, in other words Europeans with the means to go away several times in the year. The latter do in fact intend to go on holiday more this summer than they did in 2013: 80% of those who will leave twice in the year will take a summer holiday (+ 7 pts compared to 2013) and 85% of those who will leave 3 times and more in the year (+5 pts).

Likewise, the gaps between countries are large: the Austrians clearly stand out, with a real “boom” in plans to go away in summer this year (+11 pts), reaching a score closer to the pre-crisis measurements than to the current levels. Slightly more Germans will also go on holiday than last year during the summer (56%, + 4 pts). These situations contrast with the other countries in the European Union, which for several years have experienced a continuous drop in intentions to go away. In this respect, France loses a few points (58%, - 4pts), its original characteristic as the country where people go away on holiday a lot has been wearing away year after year. However, it is still privileged compared to the Latin countries, particularly Spain which has stabilised at the lowest level (42%).

2

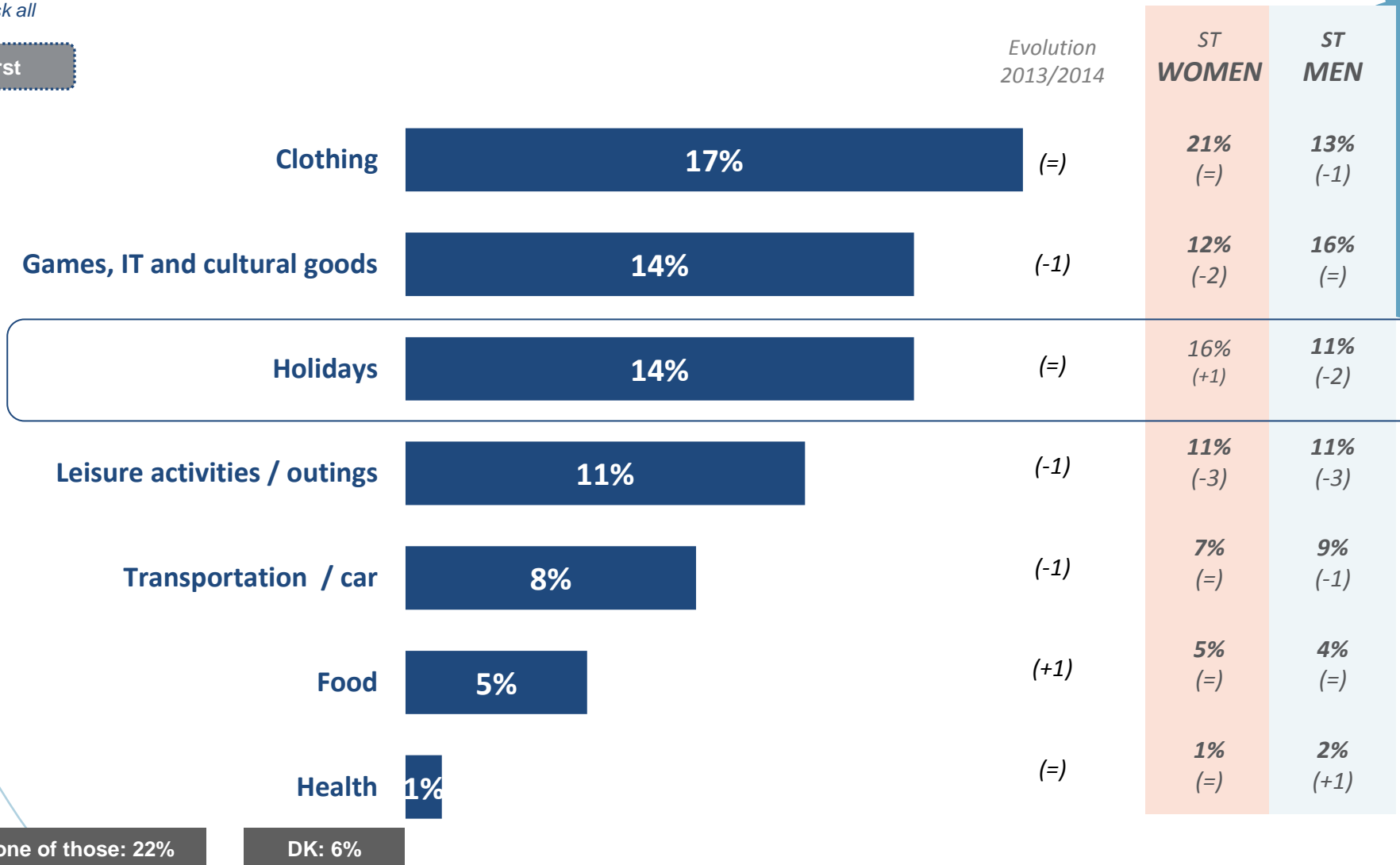
# Holiday budget: growing gaps between Northern Countries and Latin countries

# Holidays are still a budget item that Europeans plan to save money on – and particularly women

Among the following types of expenditure, please tell me which you are reducing at present or intend to reduce in the coming months?

Base: Ask all

First





# Germans and Austrians are still the only ones able to preserve their holiday budget while the Spanish are increasingly forced to limit their spending. The tendency towards restriction is also on the rise among the French.

“First”

Base : Ask all

	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>Clothing</b>	<b>17%</b>	<b>16%</b>	<b>17%</b>	<b>11%</b>	<b>15%</b> ↘	<b>27%</b>	<b>10%</b>	<b>18%</b>
2013	17%	20%	13%	12%	20%	23%	12%	17%
2012	17%	17%	14%	12%	20%	24%	16%	17%
<b>Games / IT and cultural goods</b>	<b>14%</b>	<b>20%</b>	<b>12%</b>	<b>5%</b>	<b>13%</b> ↗	<b>23%</b>	<b>11%</b>	<b>16%</b>
2013	15%	21%	12%	8%	8%	24%	10%	13%
2012	14%	19%	13%	6%	12%	22%	16%	10%
<b>Holidays</b>	<b>14%</b>	<b>13%</b> ↗	<b>8%</b>	<b>13%</b>	<b>27%</b> ↗	<b>15%</b>	<b>11%</b>	<b>7%</b>
2013	14%	7%	10%	16%	23%	18%	10%	8%
2012	13%	10%	8%	14%	20%	17%	13%	12%
<b>Leisure activities / outings</b>	<b>11%</b>	<b>13%</b>	<b>6%</b>	<b>8%</b> ↘	<b>22%</b>	<b>14%</b>	<b>11%</b>	<b>4%</b>
2013	12%	12%	6%	15%	20%	17%	10%	4%
2012	11%	12%	6%	9%	23%	12%	15%	5%
<b>Transportation / car</b>	<b>8%</b>	<b>12%</b>	<b>11%</b>	<b>6%</b>	<b>2%</b>	<b>6%</b>	<b>5%</b>	<b>10%</b>
2013	9%	11%	11%	9%	3%	6%	6%	12%
2012	10%	12%	11%	10%	5%	8%	7%	10%
<b>Food</b>	<b>5%</b>	<b>6%</b>	<b>4%</b>	<b>8%</b>	<b>2%</b>	<b>3%</b>	<b>3%</b>	<b>6%</b>
2013	4%	5%	5%	5%	3%	2%	5%	5%
2012	4%	5%	4%	7%	2%	1%	3%	5%
<b>Health</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>
2013	1%	1%	1%	2%	1%	1%	1%	2%
2012	1%	0%	1%	1%	1%	1%	1%	1%

# The share of Europeans forced to give up their summer holiday is equal to the share able to keep it

Which of the following statements best suits your opinion?

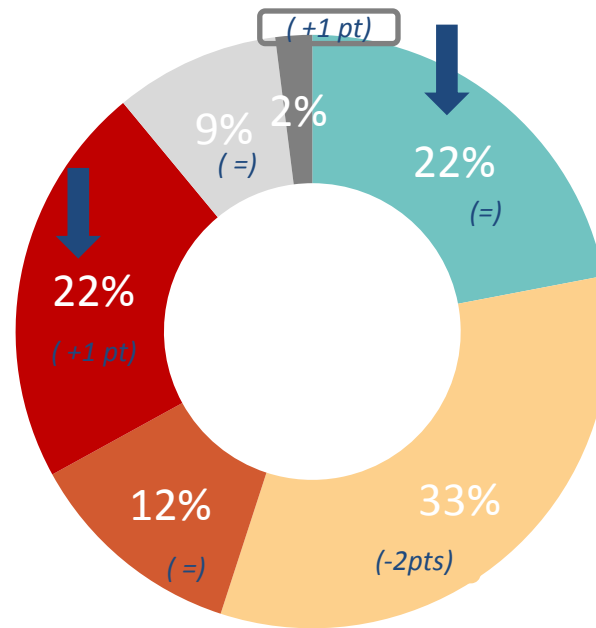
Nowadays, in a period of economic crisis, summer holidays are an expenditure item...

## Europeans

S/T Save money  
**45%**

Ask all

- Which you definitely don't want to save on
- Which you will make some slight savings on
- Which you will make significant savings on
- Which you will stop
- None of these
- No comment

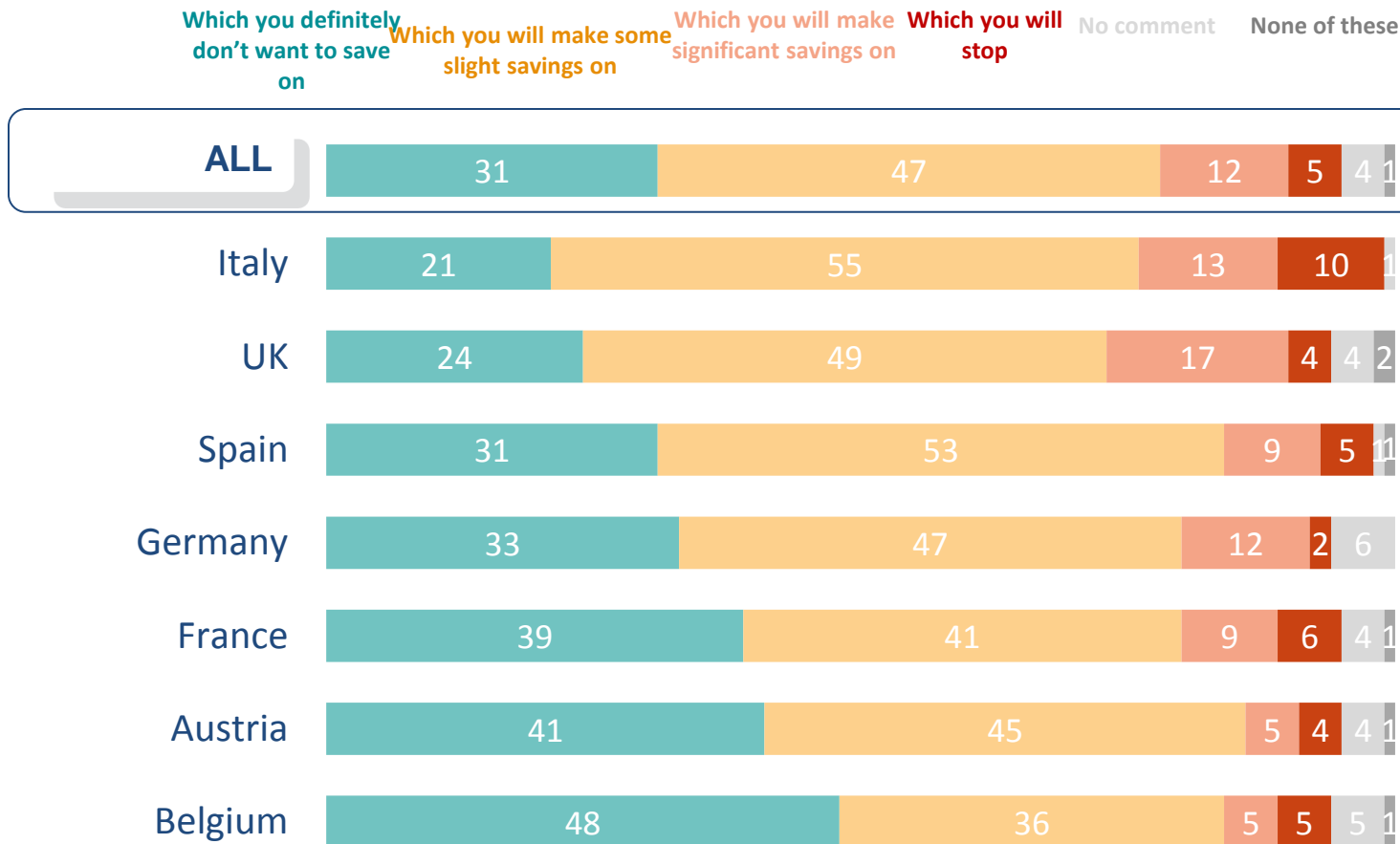


# Whatever their financial situation, European holidaymakers are trying to preserve their holiday budget as much as possible, by not touching it or making limited savings

Which of the following statements best suits your opinion?

Base: Plan to go away on holiday this summer

**Nowadays, in a period of economic crisis, summer holidays are an expenditure item...**



# This year, the feeling of having to sacrifice their holidays is again increasing among the Spanish and Italians, and to a lesser extent in France and Belgium

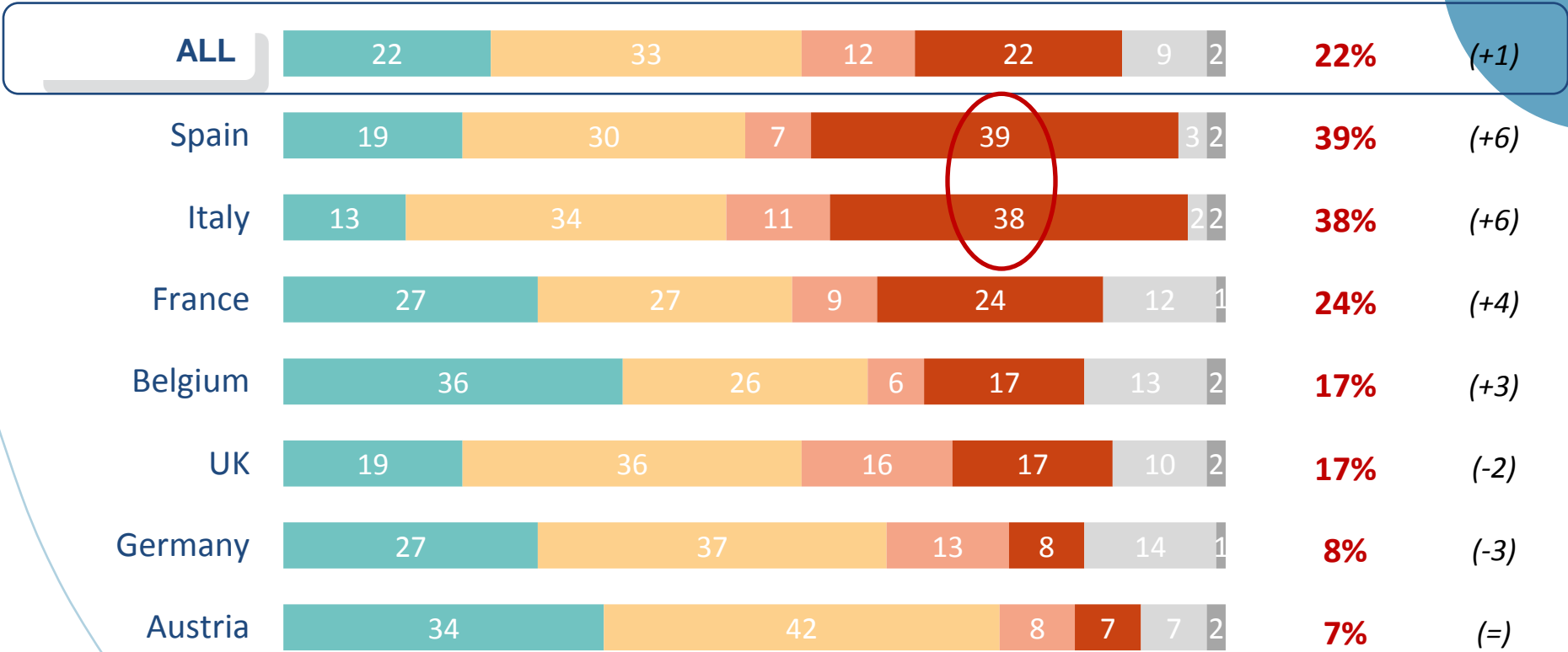
Which of the following statements best suits your opinion?

Base: Ask all

Nowadays, in a period of economic crisis, summer holidays are an expenditure item...

Which you will stop

Which you definitely don't want to save on | Which you will make some slight savings on | Which you will make significant savings on | Which you will stop | No comment | None of these



Zone



## Average budget for countries in the euro zone:

Spain, Italy, France, Belgium, Germany and Austria



Compared to 2013:

+ 110 €

+ 5.2%

EU  
7  
count  
ries

## Average budget for the 7 countries

Countries in the Euro zone and the UK



Compared to 2013:

+ 71€

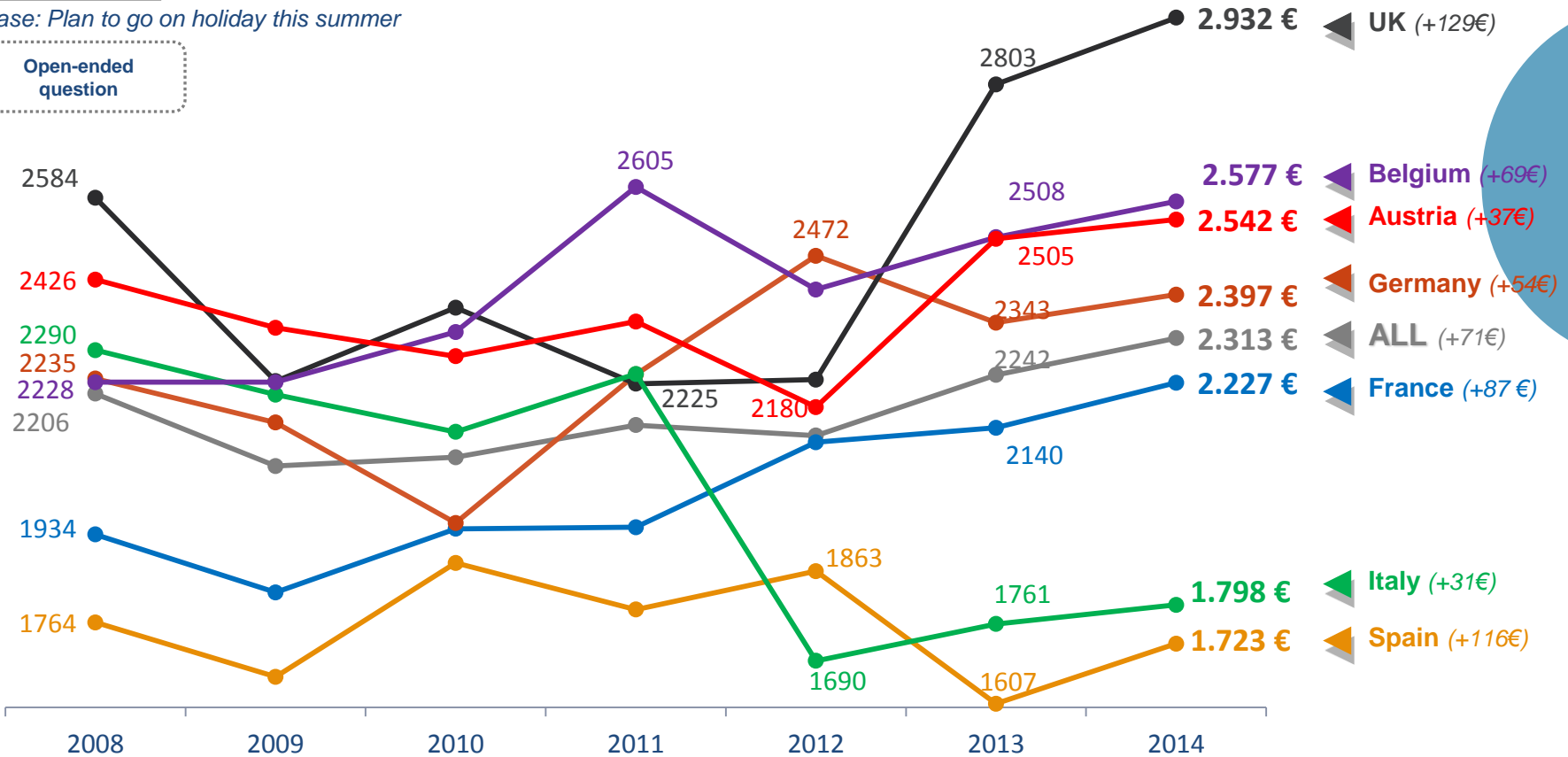
+ 3.2%

## A 700 euro difference exists between the two for the average holiday budget.

What is the total budget you intend to allocate to your 2014 summer holidays (when you add up transport, accommodation, food, leisure activities, etc.)?

Base: Plan to go on holiday this summer

Open-ended question



**Difference** between Latin countries (France, Italy, Spain) and Northern countries (UK, Belgium, Germany, Austria)

➔ **696 €** c.f. 372 € in 2008

- \* Exchange rate 2014: 1€ = £0.835
- \* Exchange rate 2013: 1€ = £0.853

In pounds sterling  
 2014 : £2,741  
 2013 : £2,391  
 +£351 (+14.6%)

# Within the euro zone, the gap between the highest and the lowest holiday budget has increased by almost 50%

2014

Highest budget: 2,577 € (Belgium)  
Lowest budget: 1,723 € (Spain)

→ Difference of **1,209 €**

2008

Highest budget: 2.426 € (Austria)  
Lowest budget: 1,764 € (Spain)

→ Difference of **820 €**

I.e. an increase of

**47%**

Base: Plan to go on holiday this summer

Open-ended question

	All Holidaymakers	€URO ZONE (6 countries)	n=320	n=262	n=291	n=211	n=265	n=235	n=293
<b>Average budget</b>	<b>2 313€</b>	<b>2 210€</b>	<b>2 227€</b>	<b>2 397€</b>	<b>2 932€ *</b>	<b>1 723€</b>	<b>1 798€</b>	<b>2 577€</b>	<b>2 542€</b>
<b>Rank</b>	-	-	5e	4e	1er	7e	6e	2e	3e
<b>Change c.f. 2013</b>	<b>+71 €</b>	<b>110€</b>	<b>+87 €</b>	<b>+54 €</b>	<b>+129 € *</b>	<b>+116 €</b>	<b>+31 €</b>	<b>+69 €</b>	<b>+37 €</b>
<b>Change c.f. 2013 (in %)</b>	<b>+3.2</b>	<b>+5.2</b>	<b>+4.1</b>	<b>+2.3</b>	<b>+4.6</b>	<b>+7.2</b>	<b>+2.1</b>	<b>+2.7</b>	<b>+1.5</b>
<i>Average budget 2013</i>	<i>2 242€</i>	<i>2 100€</i>	<i>2 140€</i>	<i>2 343€</i>	<i>2 803€ *</i>	<i>1 607€</i>	<i>1 761€</i>	<i>2 508€</i>	<i>2 505€</i>
<i>Average budget 2012</i>	<i>2 125€</i>	<i>2104€</i>	<i>2 112€</i>	<i>2 472€</i>	<i>2 233€</i>	<i>1 863€</i>	<i>1 690€</i>	<i>2 407€</i>	<i>2 180€</i>

Source : Eurostat, press release of February 21<sup>st</sup> 2014  
\* Annual inflation rate in March 2014

- \* Exchange rate 2014: 1€ = £0.835
- Exchange rate 2013: 1€ = £0.853
- Exchange rate 2012: 1€ = £0.832



**Europeans are clearly determined to preserve their holiday budget as much as possible, but those no longer able to maintain it are growing in number.**

Holiday budget ranks 3<sup>rd</sup> among items on which Europeans intend to save money, behind clothing and cultural consumer goods. For all countries, at various levels, and on a par with their resources, holidaymakers want to preserve as much of their budget as possible, by making the most limited savings possible.

Nevertheless, 22% of Europeans are left with no choice but to simply give up on a holiday this summer, with the rate reaching almost 40% in Spain and Italy (respectively +6 pts).

## **Holiday budget: Europe operating at several speeds**

While Europeans' average budget devoted to summer holidays is stable overall, a different type of evolution can be observed from one country to another, along with a growing gap between the countries most affected by the economic crisis and those whose economy is holding up better.

In 2014, the difference in the average holiday budget between the Northern countries (UK, Germany, Belgium, Austria) and Latin countries (France, Italy, Spain) reached 700 €. Before the crisis, in 2008, the difference was 372 €.

Likewise, within the euro zone, the gap between the highest and lowest average budgets has increased by almost 50% in six years.

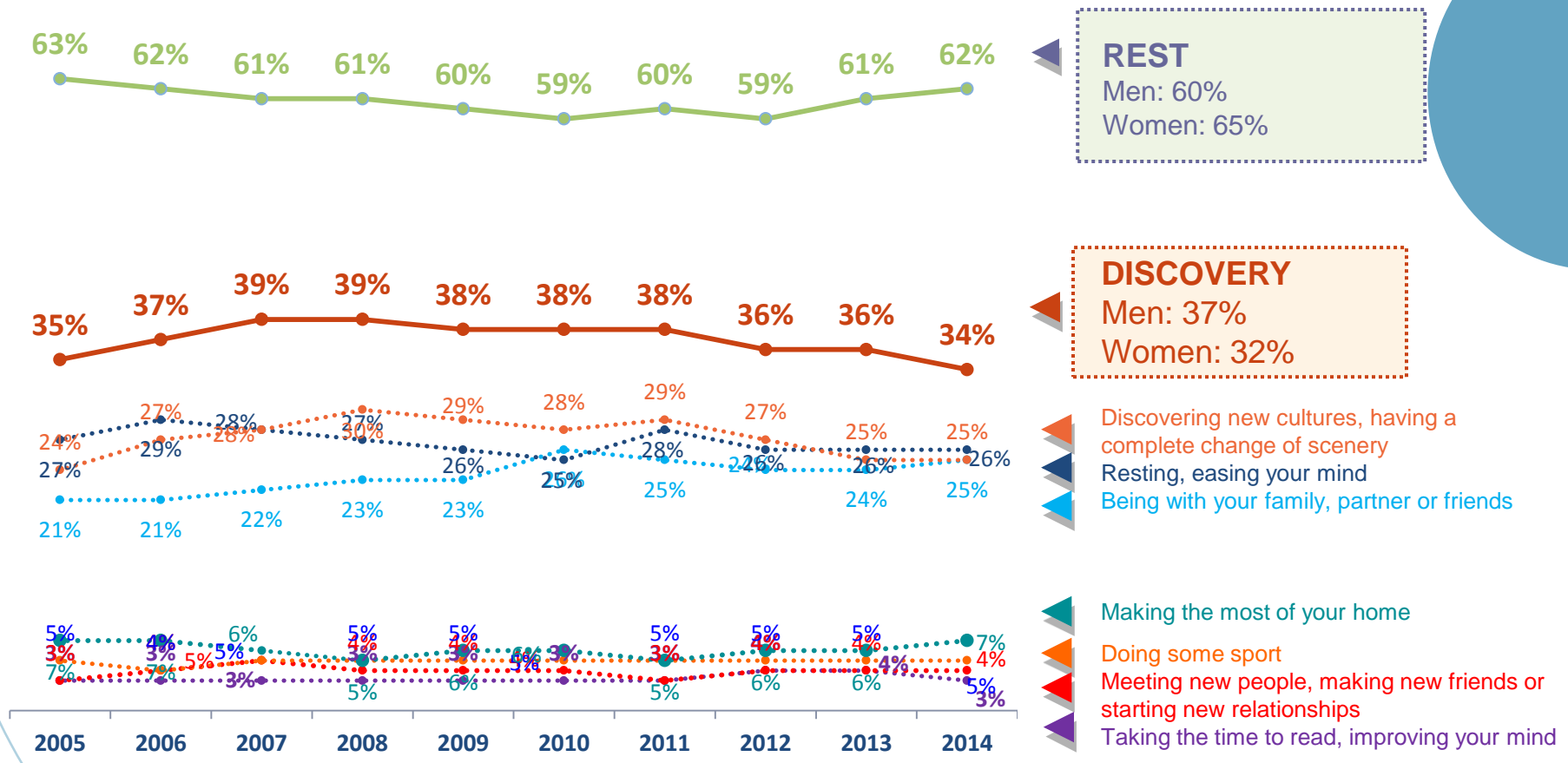
3

**Rest goes hand in hand with summer holidays for the majority of Europeans, and is especially valued by certain categories**

## When you imagine what would be for you the ideal summer holidays in 2014, what would you most feel like doing?

Base : Ask all

First response



**REST**  
Men: 60%  
Women: 65%

**DISCOVERY**  
Men: 37%  
Women: 32%

- Discovering new cultures, having a complete change of scenery
- Resting, easing your mind
- Being with your family, partner or friends
- Making the most of your home
- Doing some sport
- Meeting new people, making new friends or starting new relationships
- Taking the time to read, improving your mind

DK: 1,4%

None of these:  
1.3%

# In 2014, an increased share of Spaniards expressed the need to restore their peace of mind during their holiday, while Britons mainly wish to prioritise time spent with family

## First response

Base: Ask all

	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>S/T REST</b>	<b>63%</b>	<b>60%</b>	<b>67%</b>	<b>66%</b> ↗	<b>62%</b> ↗	<b>57%</b>	<b>60%</b>	<b>62%</b>
2013	62%	63%	65%	59%	57%	61%	61%	63%
2012	61%	56%	65%	62%	53%	60%	65%	64%
2011	61%	53%	67%	60%	60%	62%	66%	60%
<b>Resting, easing your mind</b>	<b>26%</b>	<b>24%</b>	<b>25%</b>	<b>18%</b>	<b>39%</b>	<b>32%</b>	<b>26%</b>	<b>20%</b>
2013	26%	22%	25%	20%	33%	35%	23%	23%
2012	26%	20%	26%	20%	33%	34%	25%	23%
2011	28%	21%	26%	17%	36%	41%	29%	24%
<b>Being with your family, partner or friends</b>	<b>25%</b>	<b>24%</b> ↘	<b>27%</b>	<b>43%</b> ↗	<b>15%</b>	<b>15%</b>	<b>17%</b> ↘	<b>25%</b>
2013	24%	30%	25%	29%	17%	16%	23%	25%
2012	24%	27%	24%	36%	14%	16%	25%	25%
2011	25%	22%	27%	37%	17%	16%	25%	21%
<b>Making the most of your home</b>	<b>7%</b>	<b>6%</b>	<b>10%</b>	<b>3%</b>	<b>5%</b>	<b>6%</b>	<b>11%</b>	<b>10%</b>
2013	6%	6%	7%	3%	5%	5%	10%	9%
2012	6%	6%	9%	3%	3%	6%	9%	14%
2011	5%	5%	8%	3%	4%	2%	7%	10%
<b>Taking the time to read, improving your mind</b>	<b>3%</b>	<b>4%</b>	<b>4%</b>	<b>1%</b> ↘	<b>3%</b>	<b>4%</b>	<b>5%</b>	<b>5%</b>
2013	4%	4%	3%	4%	2%	4%	4%	4%
2012	4%	4%	4%	3%	2%	5%	5%	2%
2011	3%	4%	5%	2%	3%	2%	4%	4%

When you imagine what would be for you the ideal summer holidays in 2014, what would you most feel like doing?

Base: Ask all

First response



**REST (Average 63%)**

- ✓ **Families with 2 or 3 children: 72%**
- ✓ **35-44 years: 70%**
- ✓ **Executives: 66%**
- ✓ **Manual workers: 66%**
- ✓ **Women: 65% (vs. Men 60%)**

DK: 1.4%

None of these:  
1.3%

First response

Base: Ask all

	All							
	Ask all	n=502	n=500	n=500	n=501	n=502	n=500	n=500
<b>S/T DISCOVERY</b>	<b>34%</b>	<b>37%</b>	<b>31%</b>	<b>32%</b> ↓	<b>32%</b> ↓	<b>40%</b>	<b>34%</b>	<b>36%</b>
2013	36%	35%	31%	40%	40%	37%	35%	35%
2012	36%	43%	32%	35%	35%	37%	33%	34%
2011	38%	46%	32%	39%	38%	38%	33%	38%
Discovering new cultures, having a complete change of scenery	25%	30%	20%	23%	27% ↓	30%	25%	24%
2013	25%	26%	19%	26%	36%	26%	26%	22%
2012	27%	36%	21%	22%	31%	29%	24%	21%
2011	29%	38%	22%	28%	34%	28%	27%	26%
Doing some sport	5%	4%	8%	4%	3%	3%	7%	8%
2013	5%	5%	6%	4%	3%	4%	5%	10%
2012	5%	4%	7%	5%	2%	3%	6%	9%
2011	5%	4%	6%	4%	3%	6%	4%	8%
Meeting new people, making new friends and starting new relationships	4%	2%	3%	4%	2%	7%	3%	3%
2013	4%	3%	4%	8%	1%	6%	3%	3%
2012	4%	3%	4%	7%	2%	5%	3%	3%
2011	3%	3%	3%	6%	1%	4%	1%	3%

The desire for a change of scenery and discovery is found more among young people, single people and people working in the professions. It is also slightly more prominent among men than women.

When you imagine what would be for you the ideal summer holidays in 2014, what would you most feel like doing?

Base: Ask all

First response



**DISCOVERY (Average 34%)**

- ✓ **18-24 years: 48%**
- ✓ **Professions: 40%**
- ✓ **Single people: 39%**
- ✓ **Men: 37% (VS WOMEN 32%)**

DK: 1.4%

None of these:  
1.3%

4

**While the seaside is still the unbeatable destination in summer, more Europeans are expressing a desire for different destinations**



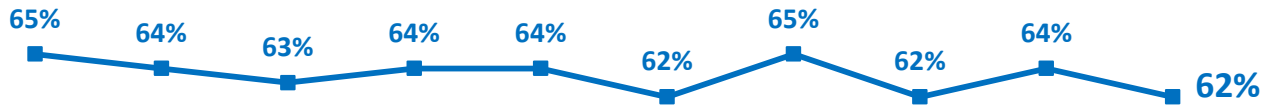


# While the seaside is still the unbeatable destination for Europeans in summer, the popularity of the mountains, the countryside and even the town are winning a few points back

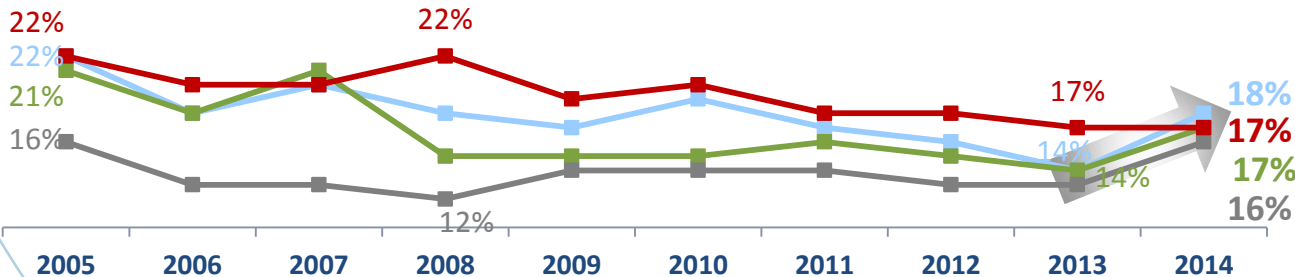
For your summer holidays, do you intend to spend them primarily...?

Base: People claiming they will go on holiday in summer 2014

Several answers possible



◀ The seaside



◀ Touring, discovering new places  
 ◀ In the mountains  
 ◀ In the country  
 ◀ In a town

DK: 2%

The desire to vary holidays between seaside, mountains, countryside and town mainly concerns the Germans and Austrians. For the French, who had turned away from the mountains last year, the charm of the mountains is making a come-back. As for the Belgians, they are reaffirming a major desire for the coast to the detriment of the countryside.

Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>At the seaside</b>	<b>62%</b>	<b>61%</b>	<b>69%</b>	<b>51%</b>	<b>54%</b>	<b>70%</b>	<b>59%</b> ↗	<b>66%</b>
2013	64%	65%	66%	55%	63%	72%	50%	61%
2012	62%	56%	71%	45%	57%	75%	54%	62%
2011	65%	63%	60%	53%	60%	74%	61%	65%
<b>In the mountains</b>	<b>18%</b> ↗	<b>24%</b> ↗	<b>23%</b>	<b>10%</b>	<b>12%</b>	<b>15%</b>	<b>18%</b>	<b>25%</b>
2013	14%	15%	18%	7%	16%	15%	21%	23%
2012	16%	18%	18%	6%	16%	17%	20%	27%
2011	17%	22%	20%	10%	12%	19%	20%	21%
<b>In the country</b>	<b>17%</b> ↗	<b>19%</b>	<b>25%</b> ↗	<b>19%</b>	<b>8%</b>	<b>6%</b>	<b>16%</b> ↘	<b>25%</b> ↗
2013	14%	15%	15%	19%	7%	6%	25%	17%
2012	15%	15%	21%	22%	9%	3%	19%	23%
2011	16%	17%	24%	21%	14%	4%	20%	20%
<b>Touring, discovering new places</b>	<b>17%</b>	<b>14%</b>	<b>22%</b> ↗	<b>23%</b>	<b>6%</b>	<b>10%</b>	<b>20%</b>	<b>25%</b> ↗
2013	17%	17%	15%	25%	5%	13%	25%	18%
2012	18%	20%	22%	26%	2%	10%	27%	23%
2011	18%	22%	19%	29%	2%	11%	25%	21%
<b>In a town</b>	<b>16%</b> ↗	<b>9%</b>	<b>21%</b> ↗	<b>15%</b> ↘	<b>22%</b>	<b>11%</b>	<b>18%</b>	<b>23%</b>
2013	13%	8%	10%	22%	17%	11%	19%	18%
2012	13%	10%	12%	13%	21%	11%	12%	18%
2011	14%	8%	14%	17%	18%	14%	12%	18%

When you imagine what would be for you the ideal summer holidays in 2014, what would you most feel like doing?

Base: Ask all

First response



Average: 62%

Seaside

- ✓ 68% Under 35
- ✓ 67% 1 holiday in 2014
- ✓ 70% Italians



Average : 18%

Mountains

- ✓ 23% 55 years and +
- ✓ 22% Pensioners
- ✓ 23% 3 holidays in 2014
- ✓ 25% Austrians



Average : 17%

Country

- ✓ 20% 55 years and +
- ✓ 22% Pensioners
- ✓ 27% Families 3 children and +
- ✓ 25% Austrians



Average : 17%

Touring

- ✓ 21% 55 years and +
- ✓ 21% Executives
- ✓ 24% 3 holidays in 2014
- ✓ 24% Austrians



Average : 16%

Town

- ✓ 20% Under 35s
- ✓ 23% Non-working
- ✓ 17% 3 holidays in 2014 (vs. 14% 1 holiday)
- ✓ 24% Austrians

DK: 1.4%

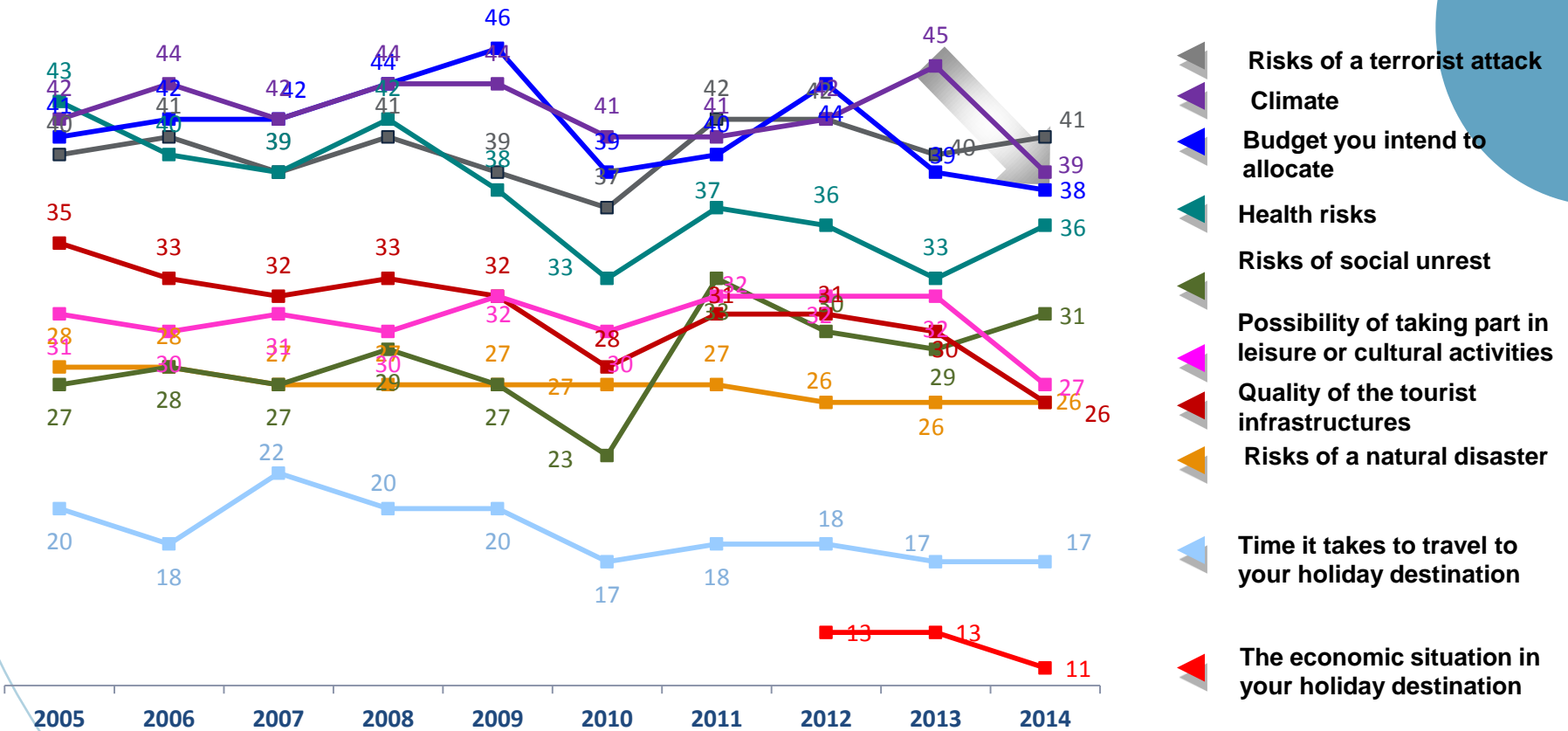
None of these: 1.3%

# Meanwhile, this year, climate is playing a less vital role in choice of destination compared to last year

For each of the following factors, tell me whether it will play a vital role, an important but not vital role, or a secondary role in your choice of destination

Base : People claiming they will go on holiday in summer 2014

% "Vital"



Wanting to diversify the setting for their holidays (seaside, town, mountains), Germans are focused less on the climate criterion, as are Britons.

S/T "Vital" + "Important"

% "Vital"

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>Risks of a terrorist attack</b>	<b>41%</b>	<b>32%</b>	<b>46%</b>	<b>45%</b>	<b>50%</b>	<b>33%</b>	<b>34%</b> ↗	<b>56%</b>
2013	40%	35%	51%	37%	42%	35%	26%	51%
2012	42%	38%	50%	34%	41%	40%	42%	50%
2011	42%	29%	49%	44%	54%	39%	35%	53%
<b>Climate</b>	<b>39%</b> ↘	<b>37%</b>	<b>39%</b> ↘	<b>33%</b> ↘	<b>34%</b>	<b>45%</b>	<b>54%</b>	<b>46%</b>
2013	45%	41%	50%	45%	39%	45%	53%	46%
2012	42%	35%	47%	45%	32%	43%	48%	51%
2011	41%	36%	42%	39%	35%	50%	46%	43%
<b>The budget you intend to allocate</b>	<b>38%</b>	<b>31%</b>	<b>38%</b>	<b>27%</b>	<b>43%</b>	<b>55%</b>	<b>28%</b>	<b>43%</b>
2013	39%	30%	42%	32%	44%	49%	34%	41%
2012	44%	40%	49%	36%	38%	52%	34%	47%
2011	40%	26%	44%	40%	43%	48%	24%	37%
<b>Health risks</b>	<b>36%</b> ↗	<b>28%</b>	<b>41%</b>	<b>31%</b>	<b>47%</b> ↗	<b>33%</b>	<b>27%</b>	<b>42%</b>
2013	33%	24%	43%	28%	37%	33%	30%	39%
2012	36%	31%	42%	29%	40%	35%	39%	44%
2011	37%	23%	39%	39%	47%	38%	32%	45%
<b>Risks of social unrest</b>	<b>31%</b>	<b>19%</b>	<b>44%</b>	<b>29%</b>	<b>31%</b>	<b>23%</b>	<b>18%</b>	<b>54%</b>
2013	29%	17%	48%	23%	27%	25%	17%	47%
2012	30%	18%	48%	25%	28%	25%	27%	48%
2011	33%	15%	45%	41%	42%	26%	24%	50%

Base: People claiming they will go on holiday in summer 2014

% "Vital"

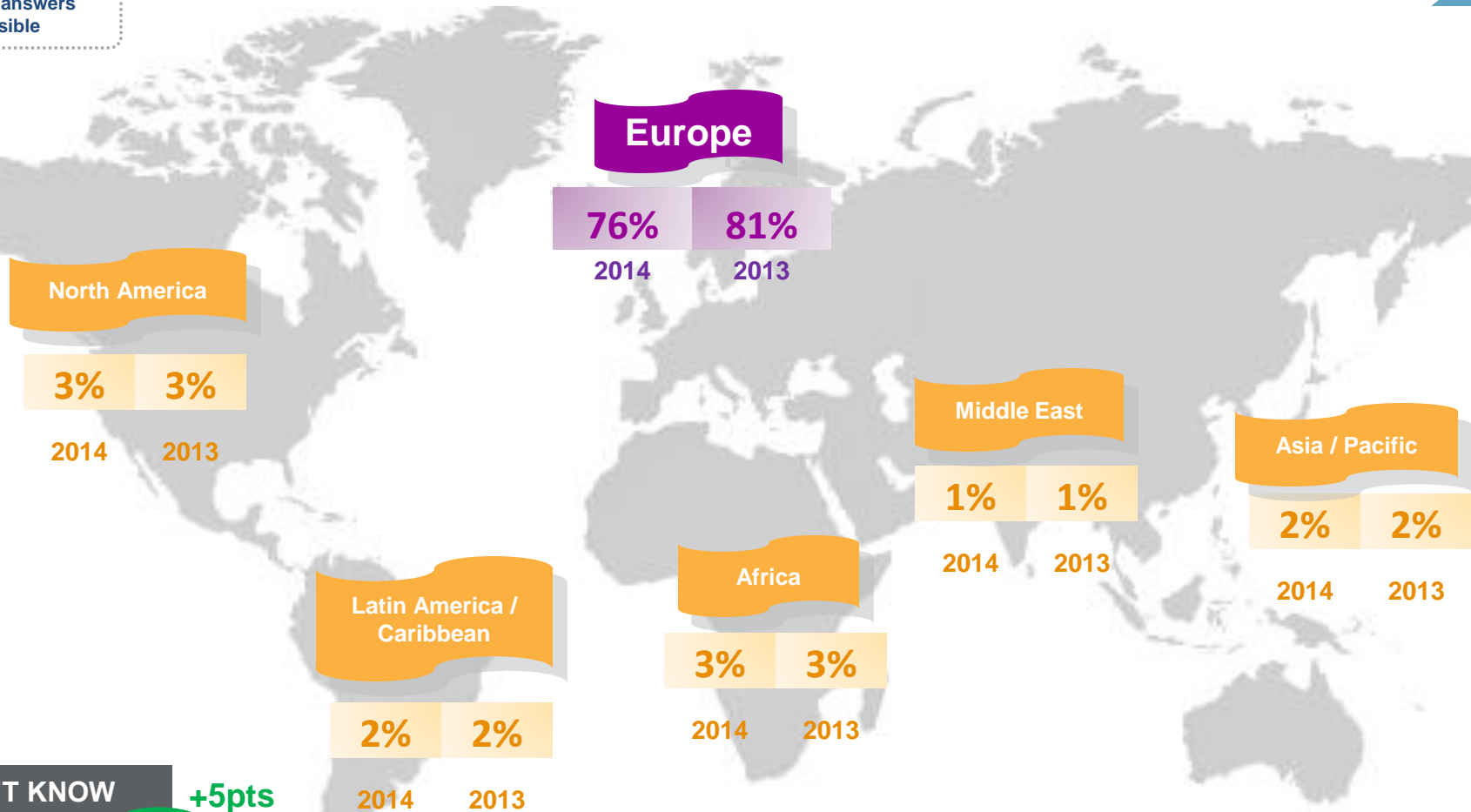
	All Holidaymakers							
	n=290	n=283	n=273	n=211	n=260	n=235	n=337	
<b>The possibility of taking part in leisure or cultural activities</b>	<b>27% ↘</b>	<b>21%</b>	<b>37%</b>	<b>17% ↘</b>	<b>22%</b>	<b>25%</b>	<b>35%</b>	<b>46%</b>
2013	32%	22%	45%	34%	18%	26%	32%	49%
2012	32%	34%	44%	23%	21%	24%	30%	50%
2011	32%	25%	43%	30%	27%	28%	24%	49%
<b>Quality of tourist infrastructures on-site</b>	<b>26% ↘</b>	<b>22%</b>	<b>27%</b>	<b>17% ↘</b>	<b>29%</b>	<b>35%</b>	<b>39%</b>	<b>34%</b>
2013	30%	22%	35%	27%	27%	38%	33%	39%
2012	31%	25%	36%	26%	28%	35%	37%	31%
2011	31%	20%	31%	32%	36%	38%	33%	37%
<b>Risks of a natural disaster</b>	<b>26%</b>	<b>18%</b>	<b>27%</b>	<b>29%</b>	<b>36%</b>	<b>24%</b>	<b>17%</b>	<b>35%</b>
2013	26%	20%	30%	22%	38%	27%	14%	28%
2012	26%	24%	30%	24%	32%	25%	21%	28%
2011	27%	16%	32%	27%	43%	23%	21%	35%
<b>The time it takes to travel to your holiday destination</b>	<b>17%</b>	<b>11%</b>	<b>20%</b>	<b>15%</b>	<b>14%</b>	<b>20%</b>	<b>16%</b>	<b>26%</b>
2013	17%	8%	24%	13%	18%	20%	20%	28%
2012	18%	11%	25%	19%	9%	21%	20%	23%
2011	18%	9%	21%	20%	21%	22%	9%	20%
<b>The economic situation in your holiday destination</b>	<b>11% ↘</b>	<b>7%</b>	<b>12%</b>	<b>13%</b>	<b>13%</b>	<b>13%</b>	<b>9%</b>	<b>12%</b>
2013	13%	10%	15%	13%	16%	12%	12%	16%
2012	13%	10%	18%	11%	10%	11%	13%	15%
<i>Not asked in 2011</i>								

# The majority of people still choose intra-community holidays, but there is a higher level of indecision which explains the slight drop in score

## Where are you thinking of going for your holidays this summer?

Base: People claiming they will go on holiday in summer 2014

Several answers possible



DON'T KNOW	
2014	15%
2013	10%
2012	10%

+5pts

Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>TOTAL EUROPE</b>	<b>76% ↘</b>	<b>80%</b>	<b>80%</b>	<b>71% ↘</b>	<b>67% ↘</b>	<b>76%</b>	<b>78%</b>	<b>85%</b>
2013	81%	79%	85%	81%	78%	80%	79%	85%
2012	79%	82%	82%	71%	69%	83%	80%	83%
2011	80%	81%	82%	73%	75%	82%	83%	82%
<b>Including in your own country</b>	<b>42% ↘</b>	<b>64%</b>	<b>28%</b>	<b>21%</b>	<b>51% ↘</b>	<b>64%</b>	<b>11%</b>	<b>25%</b>
2013	46%	60%	33%	24%	65%	70%	9%	30%
2012	48%	67%	33%	27%	53%	70%	11%	26%
2011	47%	60%	32%	29%	59%	69%	10%	20%

## DON'T KNOW

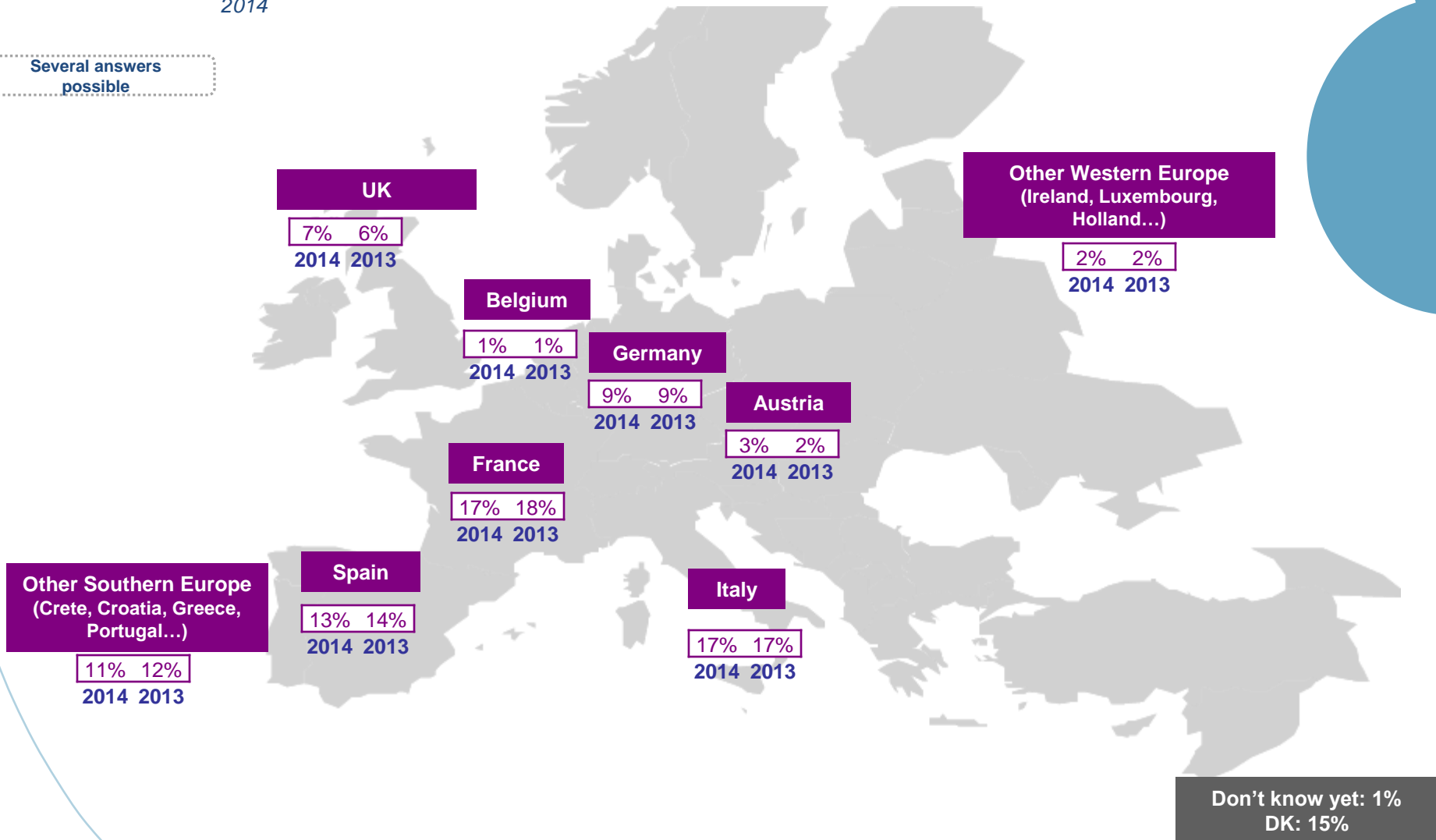
2014	15%
2013	10%
2012	10%



## Where are you thinking of going for your holidays this summer?

Base: People claiming they will go on holiday in summer  
2014

Several answers possible

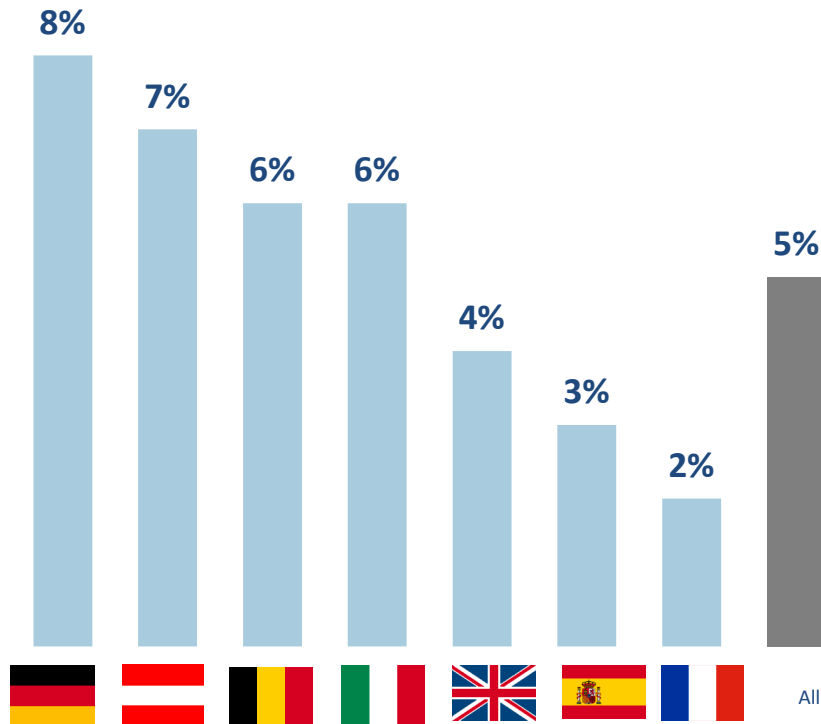


# The upcoming Football World Cup does not seem to be impacting the period when Europeans go on holiday

The next Football World Cup will take place from June 12<sup>th</sup> to July 13<sup>th</sup>, 2014, in Brazil.  
Taking this into account, would you say that you will change your holiday period compared to last year as a result?

Base: Ask all

## Answers « YES »



### PROFIL E OF EUROPEAN HOLIDAYMAKERS

WHO WILL ORGANISE THEIR HOLIDAYS TAKING THE SOCCER WORLD CUP INTO ACCOUNT (June 12 to July 13 2014 – Brazil)

- ✓ Men: 7%
- ✓ 18-24 yo: 11%
- ✓ Employees: 6%



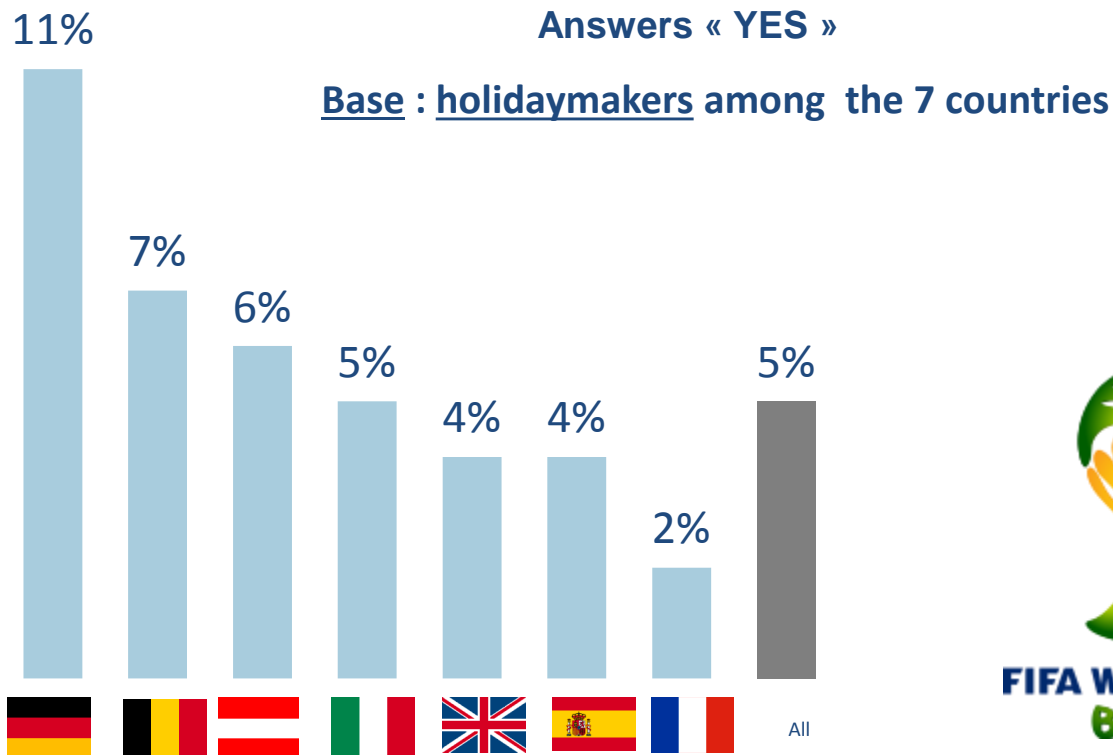
**FIFA WORLD CUP**  
**Brasil**

# The upcoming Football World Cup does not seem to be impacting the period when Europeans go on holiday .

The next Football World Cup will take place from June 12<sup>th</sup> to July 13<sup>th</sup>, 2014, in Brazil.

Taking this into account, would you say that you will change your holiday period compared to last year as a result?

Base: People claiming they will go on holiday in summer 2014



# Austrians are increasingly attracted to travel outside their own country

Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>TOTAL EUROPE</b>	<b>76%</b> ↘	<b>80%</b>	<b>80%</b>	<b>71%</b> ↘	<b>67%</b> ↘	<b>76%</b>	<b>78%</b>	<b>85%</b>
2013	81%	79%	85%	81%	78%	80%	79%	85%
2012	79%	82%	81%	71%	69%	83%	80%	83%
2011	80%	81%	82%	73%	75%	82%	83%	82%
<b>Including in your own country</b>	<b>42%</b> ↘	<b>64%</b>	<b>28%</b>	<b>21%</b>	<b>51%</b> ↘	<b>64%</b>	<b>11%</b>	<b>25%</b>
2013	46%	60%	33%	24%	65%	70%	9%	30%
2012	48%	67%	33%	27%	53%	70%	11%	26%
2011	47%	60%	32%	29%	59%	69%	10%	20%
<b>Including Europe outside your own country</b>	<b>37%</b>	<b>22%</b>	<b>55%</b>	<b>53%</b>	<b>15%</b>	<b>13%</b>	<b>68%</b>	<b>71%</b> ↗
2013	37%	21%	58%	57%	14%	10%	72%	62%
2012	33%	18%	53%	45%	19%	14%	70%	66%
2011	35%	25%	54%	50%	15%	16%	74%	64%
<b>Including Western Europe</b>	<b>37%</b>	<b>65%</b>	<b>46%</b>	<b>40%</b>	<b>9%</b>	<b>3%</b>	<b>49%</b>	<b>39%</b>
2013	37%	61%	45%	42%	6%	3%	50%	44%
2012	38%	69%	48%	39%	10%	4%	54%	39%
2011	36%	63%	49%	40%	9%	7%	50%	31%
<b>Germany</b>	<b>9%</b>	<b>1%</b>	<b>28%</b>	<b>2%</b>	<b>2%</b>	<b>-</b>	<b>2%</b>	<b>7%</b>
2013	9%	0%	33%	1%	2%	1%	3%	6%
2012	9%	1%	33%	1%	2%	1%	3%	7%
2011	9%	-	32%	2%	1%	1%	4%	5%
<b>Austria</b>	<b>3%</b>	<b>-</b>	<b>7%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>2%</b>	<b>25%</b>
2013	2%	1%	3%	1%	-	-	3%	30%
2012	3%	-	7%	1%	-	-	3%	26%
2011	3%	1%	7%	-	-	1%	3%	20%
<b>Belgium</b>	<b>1%</b>	<b>-</b>	<b>1%</b>	<b>0%</b>	<b>-</b>	<b>-</b>	<b>10%</b>	<b>-</b>
2013	1%	-	1%	1%	-	-	9%	0%
2012	1%	-	1%	-	-	-	11%	-
2011	1%	1%	-	-	1%	-	10%	-

Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>France</b>	<b>17%</b>	<b>64%</b>	<b>6%</b>	<b>8%</b>	<b>2%</b>	<b>1%</b>	<b>30%</b>	<b>5%</b>
2013	18%	60%	5%	10%	1%	1%	34%	4%
2012	20%	67%	6%	7%	7%	1%	34%	5%
2011	17%	60%	4%	11%	5%	2%	34%	4%
<b>UK</b>	<b>7%</b>	<b>1%</b>	<b>3%</b>	<b>27%</b>	<b>4%</b>	<b>1%</b>	<b>2%</b>	<b>3%</b>
2013	6%	-	2%	26%	1%	1%	1%	3%
2012	6%	1%	1%	30%	1%	-	1%	2%
2011	7%	2%	3%	29%	1%	2%	3%	2%
<b>Including Southern Europe</b>	<b>39%</b>	<b>19%</b>	<b>30%</b>	<b>34%</b>	<b>55%</b> ↓	<b>71%</b>	<b>35%</b>	<b>58%</b> ↑
2013	41%	17%	34%	35%	70%	74%	33%	47%
2012	39%	13%	31%	32%	59%	76%	26%	48%
2011	43%	19%	30%	32%	63%	76%	34%	52%
<b>Spain</b>	<b>13%</b>	<b>8%</b>	<b>8%</b>	<b>15%</b>	<b>51%</b> ↓	<b>2%</b>	<b>14%</b>	<b>7%</b>
2013	14%	7%	12%	12%	65%	2%	14%	7%
2012	14%	7%	11%	15%	53%	3%	7%	5%
2011	16%	7%	11%	15%	59%	5%	12%	8%
<b>Italy</b>	<b>17%</b>	<b>5%</b>	<b>12%</b>	<b>4%</b>	<b>1%</b>	<b>64%</b>	<b>10%</b>	<b>19%</b>
2013	17%	3%	8%	4%	2%	70%	11%	18%
2012	18%	3%	9%	4%	2%	70%	8%	17%
2011	20%	5%	11%	5%	3%	69%	11%	20%
<b>Including Central Europe</b>	<b>2%</b> ↓	<b>1%</b>	<b>4%</b>	<b>2%</b>	<b>1%</b>	<b>2%</b>	<b>2%</b>	<b>4%</b>
2013	3%	2%	6%	3%	2%	2%	3%	3%
2012	2%	2%	4%	2%	1%	1%	2%	4%
2011	2%	2%	4%	2%	1%	1%	2%	3%
<b>Including Northern Europe</b>	<b>2%</b>	<b>0%</b>	<b>5%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>3%</b>
2013	2%	1%	7%	1%	1%	-	1%	3%
2012	2%	1%	4%	2%	1%	2%	3%	4%
2011	2%	0%	7%	1%	-	1%	1%	1%

## Rhyming holidays with “idleness”

Of all the activities available during summer holidays, rest is what Europeans vote for most (62%), as they do each year. Working people, parents and women are the ones who express this desire (...or need) for rest the most, while the desire for a change of scenery and for discovery are found more among young people, single people and the professions. It is also a bit more marked among men than women. This year, we noted as well that the French are being won back a little to the prospect of more active holidays (30%, +4 pts).

## The seaside stay is a must-do... but more interest in other destinations

For most Europeans (62%), summer holidays are inconceivable without a stay at the seaside. This constant finding of the barometer shows some variations according to years. In 2014, the other destinations – the mountains, countryside or even the town – are seeing their popularity rise slightly to 18% and 17% (respectively +4 and +3 pts).

The desire to vary holidays between seaside, mountains, countryside and town mainly concerns the Germans and Austrians. As concerns the French who had turned away from the mountains last year, the mountains have regained their appeal. As for the Belgians, they are reaffirming a major desire for the coast to the detriment of the countryside.

In these conditions, the climate criterion is still vital in terms of choice of destination, but has dropped back slightly compared to last year (39%, -6pts).

## Intra-community holidays are still the norm

Few Europeans venture outside the frontiers of their own continent, and the attraction for Southern European countries persists year after year. In 2014, the main novelty stems from the fact that Europeans seem a bit more undecided than last year about the destination they will choose for the summer: at the time the survey was conducted (February-March), 15% had not yet decided, as opposed to 10% in 2013.

5

**Internet, or the  
freedom to design  
your own a la carte  
holidays**

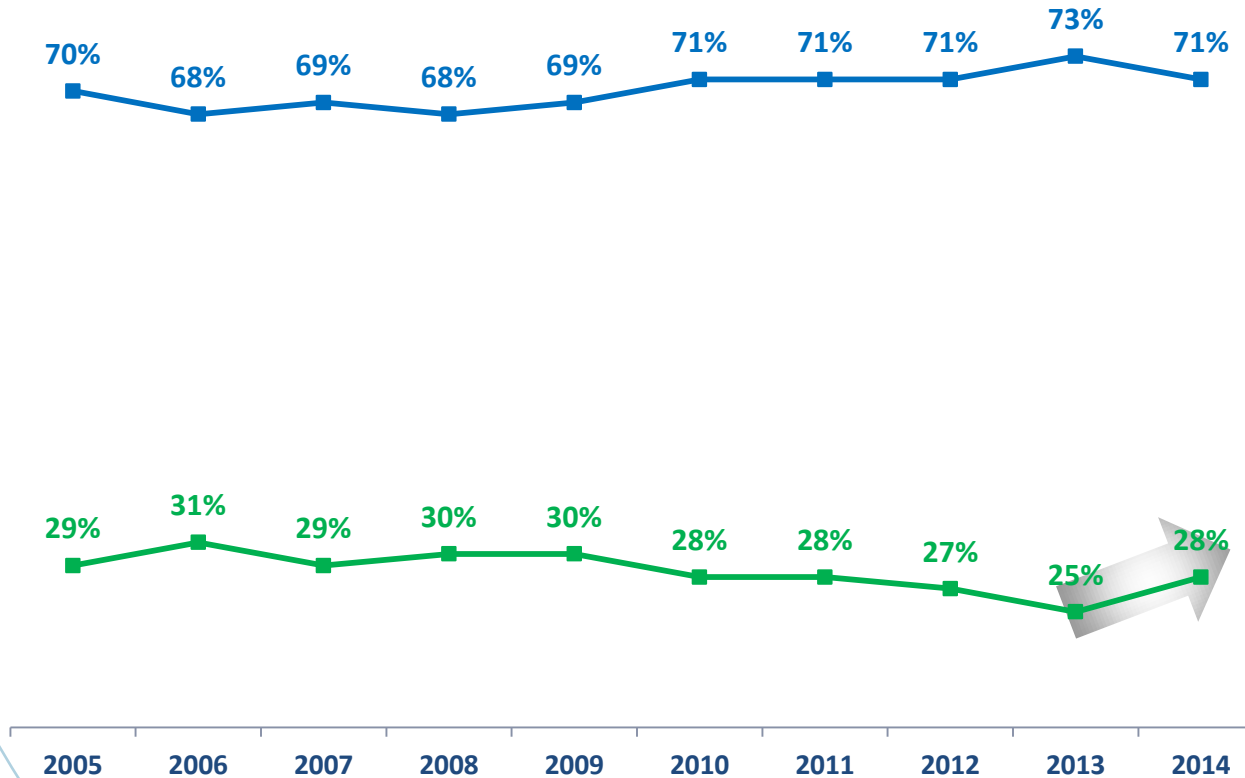


# Preparation ahead of time is still the preferred method of organisation for most Europeans. However, after two years of dropping back, last-minute travel is regaining ground

Which of the following statements applies most closely to you?

Base: People claiming they will go on holiday in summer 2014

Single answer



You have already started planning your holidays well in advance

You will decide on your destination at the last minute

DK: 1%



# It is among the French that we can see a change this year in favour of greater improvisation, behind the Italians who are still the champions of last-minute travel

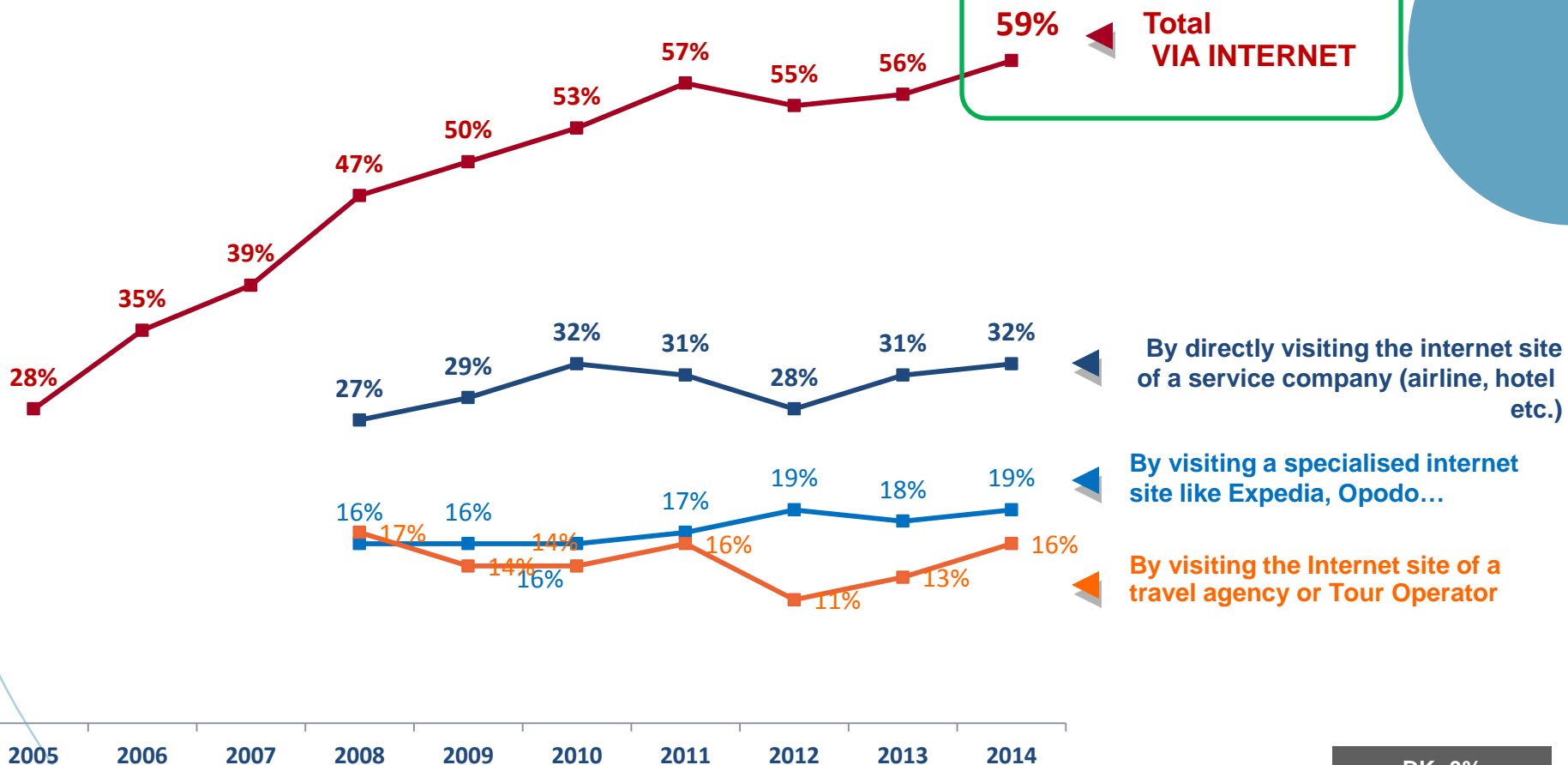
Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>You will decide on your destination at the last minute</b>	<b>28% ↗</b>	<b>32% ↗</b>	<b>19%</b>	<b>24%</b>	<b>27%</b>	<b>44%</b>	<b>22%</b>	<b>18%</b>
2013	25%	22%	17%	25%	24%	40%	18%	21%
2012	27%	28%	18%	15%	31%	41%	21%	19%
2011	28%	32%	23%	29%	27%	31%	22%	22%
<b>You have already started planning your holidays well in advance</b>	<b>71%</b>	<b>67% ↘</b>	<b>80%</b>	<b>74%</b>	<b>73%</b>	<b>56%</b>	<b>77%</b>	<b>81%</b>
2013	73%	76%	81%	71%	75%	57%	79%	79%
2012	71%	71%	81%	75%	66%	57%	77%	79%
2011	71%	66%	77%	69%	71%	68%	77%	77%
<b>DK</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>0%</b>	<b>0%</b>	<b>1%</b>	<b>1%</b>
2013	2%	2%	2%	4%	1%	3%	3%	0%
2012	2%	2%	1%	-	3%	3%	2%	3%
2011	1%	2%	-	2%	2%	1%	1%	1%

How do you intend to book your holiday, that is, booking your plane, train, hotel, club?

Base: People claiming they will go on holiday in summer 2014

Several answers possible



# The dominant trend is to design an a la carte holiday from providers' websites. Tour operators are particularly valued by the French this year, but they are being given the cold shoulder by the Belgians. Finally, Tour Operator websites are still mainly used by the British.

How do you intend to book your holiday, that is, booking your plane, train, hotel, club?

Base: People claiming they will go on holiday in summer 2014

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>By directly visiting the internet site of a service company (airline, hotel, etc.)</b>	<b>32%</b>	<b>35%</b>	<b>36% ↗</b>	<b>38%</b>	<b>16%</b>	<b>24%</b>	<b>32%</b>	<b>32%</b>
2013	31%	37%	26%	37%	24%	29%	29%	28%
2012	28%	38%	26%	32%	21%	21%	28%	26%
2011	31%	35%	33%	36%	27%	23%	27%	28%
<b>By visiting a specialised internet site like Expedia, Opodo...</b>	<b>19%</b>	<b>20% ↗</b>	<b>19%</b>	<b>21%</b>	<b>18%</b>	<b>20%</b>	<b>10% ↘</b>	<b>21%</b>
2013	18%	11%	24%	21%	12%	17%	17%	24%
2012	19%	14%	21%	21%	12%	25%	14%	19%
2011	17%	14%	21%	17%	13%	20%	10%	19%
<b>By visiting the Internet site of a travel agency or Tour Operator</b>	<b>16% ↗</b>	<b>11%</b>	<b>16%</b>	<b>27%</b>	<b>15%</b>	<b>9%</b>	<b>15%</b>	<b>18%</b>
2013	13%	8%	12%	20%	11%	11%	14%	14%
2012	11%	6%	12%	15%	11%	10%	18%	17%
2011	16%	9%	16%	30%	12%	14%	17%	21%
<b>S/T INTERNET</b>	<b>59% ↗</b>	<b>61%</b>	<b>58%</b>	<b>72%</b>	<b>50%</b>	<b>51%</b>	<b>56%</b>	<b>54%</b>
2013	56%	57%	55%	66%	47%	49%	58%	54%
2012	55%	57%	51%	67%	45%	51%	57%	54%
2011	57%	56%	57%	71%	49%	52%	51%	55%

# To choose their holiday destination, Spaniards, Italians, Belgians and Austrians consult the social networks the most, but this is still done by a minority of people.

Do you personally use social networks (Twitter, Facebook, Pinterest, etc.)?

Do you personally consult social networks (Twitter, Facebook, Pinterest, etc.) when choosing your holiday destination?

Base : Ask all

Consults

Yes, always

Yes, sometimes

No, but I may do so in the future

No, never

No comment

Does not visit the social networks

ALL



Spain



Italy



Belgium



Austria



UK



Germany



France



# Reservations are mainly made over the Internet by organising their own holiday, although all-inclusive packages are holding up well among the Austrians, Germans and British.

What kind of holiday programme do you intend on using for your 2014 summer holidays?

Base: People claiming they will go on holiday in summer 2014

Several answers possible

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>You will buy an all-inclusive package including transport and accommodation</b>	<b>26%</b>	<b>20%</b>	<b>31%</b>	<b>33%</b>	<b>20%</b>	<b>21%</b>	<b>26%</b>	<b>35%</b>
<i>2013</i>	<i>25%</i>	<i>15%</i>	<i>27%</i>	<i>33%</i>	<i>25%</i>	<i>21%</i>	<i>26%</i>	<i>35%</i>
<i>2012</i>	<i>26%</i>	<i>17%</i>	<i>30%</i>	<i>29%</i>	<i>28%</i>	<i>27%</i>	<i>31%</i>	<i>31%</i>
<i>2011</i>	<i>27%</i>	<i>16%</i>	<i>30%</i>	<i>35%</i>	<i>31%</i>	<i>26%</i>	<i>32%</i>	<i>28%</i>
<b>You will organise your holidays yourself and buy your services separately</b>	<b>72%</b>	<b>73%</b>	<b>73%</b>	<b>69%</b>	<b>71%</b>	<b>73%</b>	<b>68%</b>	<b>70%</b>
<i>2013</i>	<i>71%</i>	<i>75%</i>	<i>73%</i>	<i>67%</i>	<i>71%</i>	<i>68%</i>	<i>72%</i>	<i>66%</i>
<i>2012</i>	<i>69%</i>	<i>74%</i>	<i>69%</i>	<i>69%</i>	<i>65%</i>	<i>62%</i>	<i>66%</i>	<i>72%</i>
<i>2011</i>	<i>71%</i>	<i>78%</i>	<i>69%</i>	<i>68%</i>	<i>66%</i>	<i>69%</i>	<i>68%</i>	<i>71%</i>
<b>None of these</b>	<b>2%</b>	<b>4%</b>	<b>1%</b>	<b>0%</b>	<b>3%</b>	<b>4%</b>	<b>3%</b>	<b>0%</b>
<b>DK</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>1%</b>	<b>4%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>

# Renting remains the favourite accommodation solution among Europeans, but camping and caravanning are progressing, notably for the French, Italians and Austrians.

And what kind of accommodation do you intend to use for your 2014 summer holidays?

Base: People claiming they will go on holiday in summer 2014

Several answers possible

	All Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>You will rent a house, a hotel room or bed and breakfast</b>	<b>67%</b>	<b>56%</b>	<b>70%</b>	<b>72%</b>	<b>68%</b>	<b>70%</b>	<b>73%</b>	<b>77%</b>
2013	67%	53%	71%	71%	71%	68%	72%	83%
2012	69%	57%	76%	68%	70%	72%	77%	77%
2011	71%	56%	76%	70%	71%	77%	82%	78%
<b>You will go to your house in the country or stay with friends</b>	<b>23%</b>	<b>30%</b>	<b>25%</b>	<b>21%</b>	<b>21%</b>	<b>18%</b>	<b>19%</b>	<b>18%</b>
2013	23%	33%	19%	18%	26%	20%	19%	16%
2012	21%	32%	16%	14%	26%	21%	11%	19%
2011	23%	39%	18%	19%	23%	17%	15%	17%
<b>You will go camping/caravanning</b>	<b>14%</b>	<b>22%</b>	<b>13%</b>	<b>14%</b>	<b>6%</b>	<b>11%</b>	<b>14%</b>	<b>13%</b>
2013	13%	21%	11%	12%	4%	9%	14%	8%
2012	11%	15%	10%	17%	5%	6%	14%	9%
2011	12%	17%	12%	15%	6%	8%	11%	8%
<b>None of these</b>	<b>1%</b>	<b>0%</b>	<b>1%</b>	<b>-</b>	<b>1%</b>	<b>0%</b>	<b>1%</b>	<b>1%</b>
2013	1%	-	1%	1%	1%	2%	0%	1%
2012	1%	1%	0%	-	2%	3%	1%	-
2011	1%	0%	1%	-	0%	1%	1%	1%
<b>DK</b>	<b>1%</b>	<b>0%</b>	<b>-</b>	<b>0%</b>	<b>5% ↗</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>
2013	1%	1%	0%	0%	1%	0%	1%	0%
2012	1%	2%	-	-	2%	1%	0%	0%
2011	1%	1%	1%	2%	1%	1%	0%	1%

## Anticipation or improvisation, that is the question

Preparation in advance is still by far the method of organisation preferred by the majority of Europeans (71%). However, after two years of dropping back, last-minute travel is regaining ground (28%, + 3 pts). This trend should be linked to the higher level of indecision among Europeans when it comes to their choice of destination this year.

The change of attitude in favour of greater improvisation can be seen most among the French (32%, + 10 pts), behind the Italians who are still the champions of last-minute travel (44%).

**Not surprisingly, the Internet has become the indispensable tool for preparing holidays. But the proportion of people using it is not as noteworthy as the way Europeans use it.**

Indeed, they use it with the goal of designing their holidays a la carte, clearly preferring to reserve services one by one according to their needs over purchasing all-in “packages”. For tourism, as with everyday consumer products, Europeans position themselves as informed and “smart” consumers in finding holidays they will like, at the best price.

6

**A stable level of concern about risks, except for the Spanish who are very worried this year**



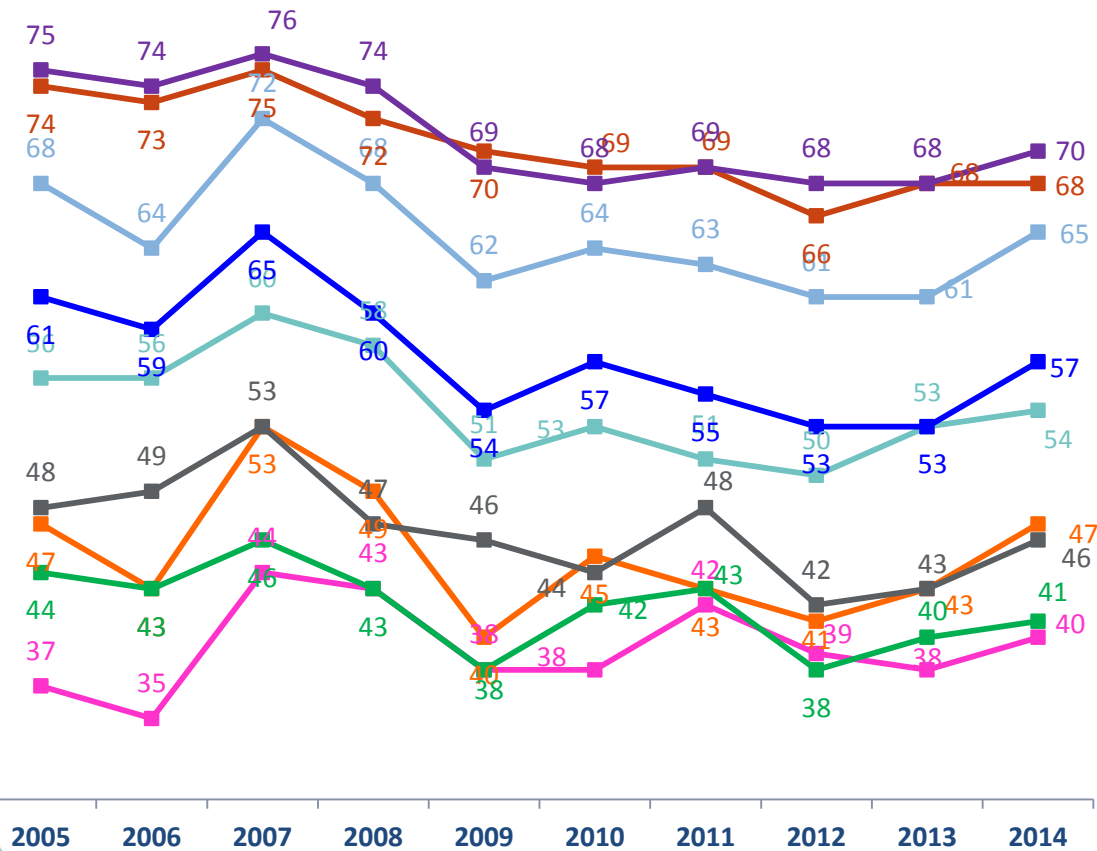
# Overall, Europeans' concerns remain at stable levels and have kept their hierarchies

For each one of the following incidents, tell me whether it is something that worries you personally a great deal, somewhat, not really or not at all when leaving for your holidays:

Base: People claiming they will go on holiday in summer 2014

% "A great deal" "Somewhat"

- ◀ Illness amongst family or friends who are staying behind
- ◀ You or a member of your family who is accompanying you has a health problem whilst on holiday
- ◀ Loss of your personal belongings
- ◀ A plane, train, car accident etc.
- ◀ A problem concerning your home (flooding, fire, theft, etc.)
- ◀ Risks of a terrorist attack
- ◀ Your vehicle breaks down
- ◀ Risks of a natural disaster
- ◀ A transport strike or delays



# Health problems are still the major subject of concerns for Europeans.

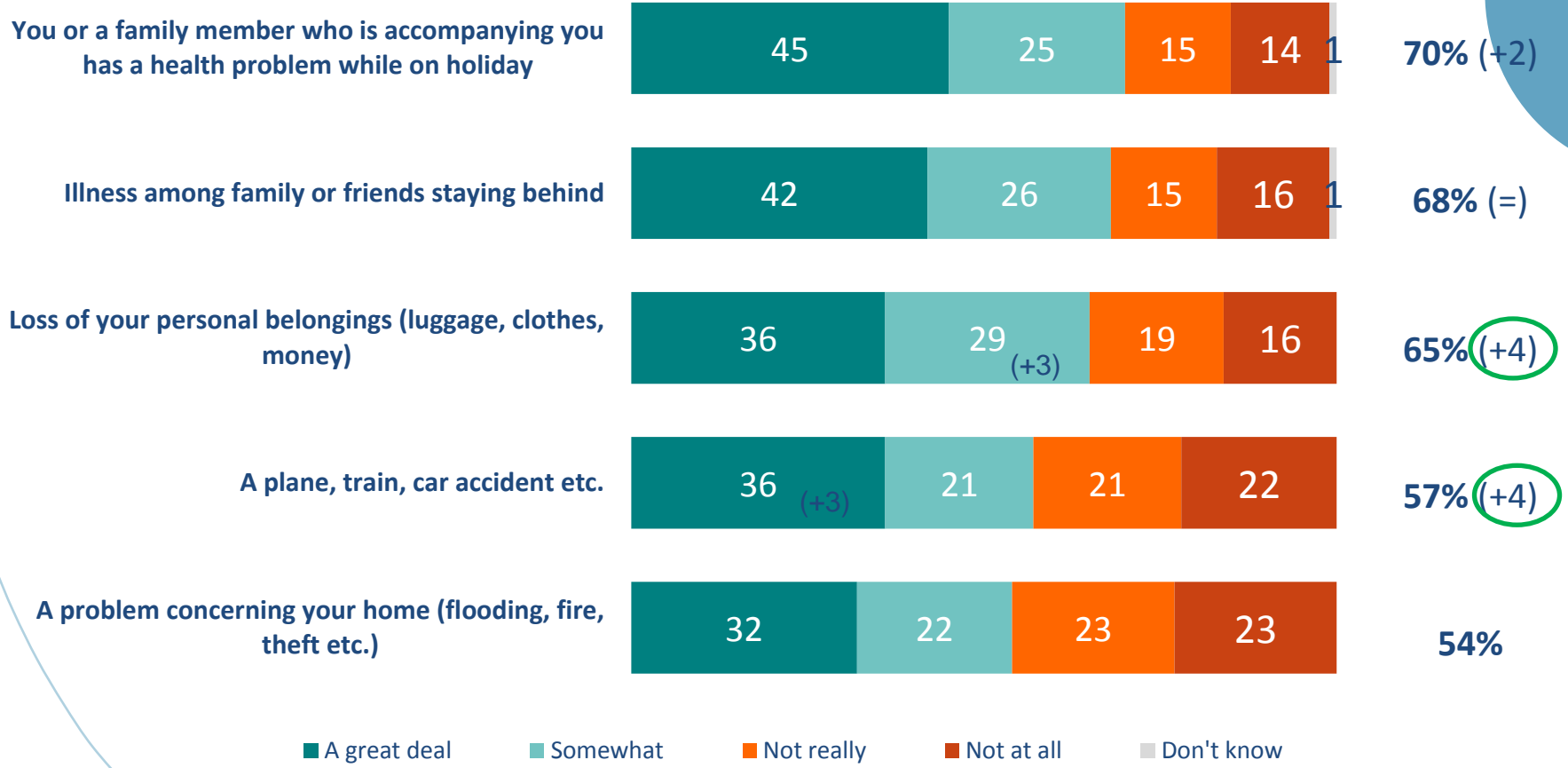
## NB: a slight increase in concerns linked to the loss of personal belongings or the risk of accidents

For each one of the following incidents, tell me whether it is something that worries you personally a great deal, somewhat, not really or not at all when leaving for your holidays:

Base: People claiming they will go on holiday in summer 2014

Single answer

S/T "Worried"



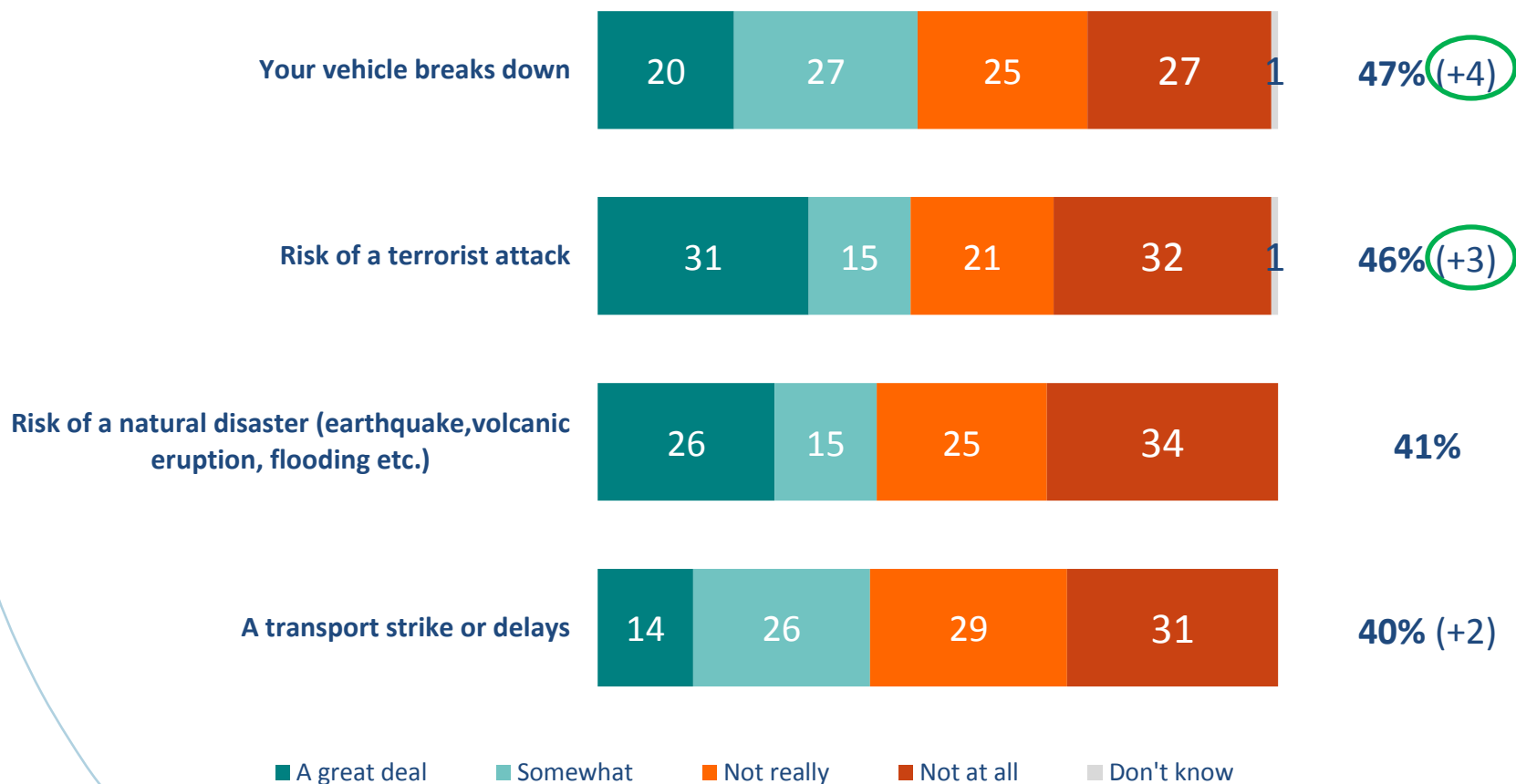
# Likewise, among subjects of lesser concern, vehicle breakdown and risks of a terrorist attack have risen a little this year

For each one of the following incidents, tell me whether it is something that worries you personally a great deal, somewhat, not really or not at all when leaving for your holidays:

Base: People claiming they will go on holiday in summer 2014

Single answer

S/T "Worried"



# The Spanish are responsible for raising the average level of concern: They showed themselves to be particularly anxious this year, with concern rising on all subjects

Base: People claiming they will go on holiday in summer 2014

% Worried "a great deal"

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>You or a member of your family who is accompanying you has a health problem while on holiday</b>	<b>45%</b>	<b>43%</b>	<b>52%</b>	<b>27%</b>	<b>76% ↗</b>	<b>42%</b>	<b>35%</b>	<b>42%</b>
2013	44%	49%	48%	26%	62%	47%	32%	49%
2012	46%	55%	44%	34%	60%	40%	45%	41%
2011	47%	45%	47%	36%	65%	47%	42%	47%
<b>Illness amongst family or friends who are staying behind</b>	<b>42%</b>	<b>42%</b>	<b>48%</b>	<b>19%</b>	<b>62% ↗</b>	<b>48%</b>	<b>33%</b>	<b>38%</b>
2013	41%	45%	44%	22%	48%	49%	32%	45%
2012	44%	55%	42%	25%	54%	45%	39%	31%
2011	42%	46%	39%	29%	56%	47%	40%	40%
<b>Loss of your personal belongings</b>	<b>36%</b>	<b>31%</b>	<b>44%</b>	<b>24%</b>	<b>53% ↗</b>	<b>33%</b>	<b>23%</b>	<b>29%</b>
2013	35%	37%	45%	22%	42%	34%	22%	36%
2012	36%	36%	35%	35%	45%	35%	33%	25%
2011	33%	31%	31%	27%	50%	32%	26%	35%
<b>A plane, train, car accident etc.</b>	<b>36% ↗</b>	<b>28%</b>	<b>41%</b>	<b>25%</b>	<b>61% ↗</b>	<b>40%</b>	<b>20%</b>	<b>34%</b>
2013	33%	33%	42%	19%	37%	39%	21%	35%
2012	33%	33%	34%	28%	40%	32%	27%	33%
2011	36%	29%	36%	26%	53%	41%	27%	39%
<b>A problem concerning your home</b>	<b>32%</b>	<b>35%</b>	<b>31%</b>	<b>21%</b>	<b>50% ↗</b>	<b>32%</b>	<b>23%</b>	<b>28%</b>
2013	32%	40%	35%	18%	44%	28%	19%	32%
2012	31%	38%	26%	25%	42%	29%	31%	22%
2011	29%	32%	24%	20%	47%	27%	27%	29%

# The Spanish are responsible for raising the average level of concern: They showed themselves to be particularly anxious this year, with concern rising on all subjects

Base: People claiming they will go on holiday in summer 2014

% Worried "a great deal"

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>Risk of a terrorist attack</b>	<b>31%</b>	<b>28%</b>	<b>32%</b>	<b>26%</b>	<b>53% ↗</b>	<b>26%</b>	<b>23% ↗</b>	<b>31%</b>
2013	30%	34%	34%	23%	32%	27%	15%	27%
2012	29%	33%	27%	25%	42%	24%	23%	26%
2011	33%	28%	31%	30%	57%	28%	27%	26%
<b>Risk of a natural disaster</b>	<b>26%</b>	<b>19% ↘</b>	<b>28%</b>	<b>19%</b>	<b>48% ↗</b>	<b>25%</b>	<b>16% ↗</b>	<b>24%</b>
2013	25%	28%	29%	16%	32%	24%	11%	21%
2012	24%	24%	23%	21%	37%	21%	18%	17%
2011	25%	21%	22%	19%	48%	25%	17%	27%
<b>Your vehicle breaks down</b>	<b>20%</b>	<b>22%</b>	<b>13%</b>	<b>13%</b>	<b>43% ↗</b>	<b>23%</b>	<b>17%</b>	<b>8%</b>
2013	19%	27%	14%	9%	32%	22%	16%	11%
2012	18%	24%	10%	11%	27%	23%	23%	10%
2011	19%	22%	10%	12%	35%	23%	20%	9%
<b>A transport strike or delays</b>	<b>14%</b>	<b>17%</b>	<b>11%</b>	<b>15%</b>	<b>25%</b>	<b>12%</b>	<b>9%</b>	<b>9%</b>
2013	13%	14%	10%	10%	26%	13%	6%	10%
2012	16%	17%	14%	14%	28%	15%	13%	8%
2011	15%	14%	8%	16%	29%	15%	14%	7%

**On the whole, Europeans' concerns remain at stable levels and have maintained their hierarchies.**

Health problems are still the major subject of concern among Europeans (70%). Note a slight increase in concerns linked to the loss of personal belongings or the risk of accidents (65% and 57%, respectively +4 pts). Likewise, among subjects of lesser concern, vehicle breakdowns and risks of a terrorist attack have gone back up a little this year (47% and 46%, +4 and +3pts).

The main development concerns the attitude of the Spanish, who are particularly anxious about travel-related risks. Their concern has increased in relation to all aspects, which is revealing in terms of the economic and social climate the country has been experiencing for several years, and which is particularly difficult.

## **Risk coverage, a cultural fact rather than an economic fact?**

Among the insurance policies that Europeans take out the most, car insurance has shown an increase this year, in line with the claimed rise in worry on this subject. As concerns the other risks, we noticed a downward trend as concerns coverage. In 2014, there was a further small increase in the gap between declared level of concern and actually taking out insurance policies.

While the relationship with risk and the fact of arming oneself against risk vary greatly between countries, it would seem that they don't depend only on the population's financial resources, but also on a national culture that incites people to use insurance more or less. Hence, the populations of countries that are less subject to the repercussions of the economic crisis (Austria, Germany) are not necessarily better covered – or they may even be less covered – than the populations of countries more lastingly affected (like Spain, for example).

# Among the insurance policies that Europeans take out the most, car insurance is showing an increase this year, in line with the increase in declared worry on this subject

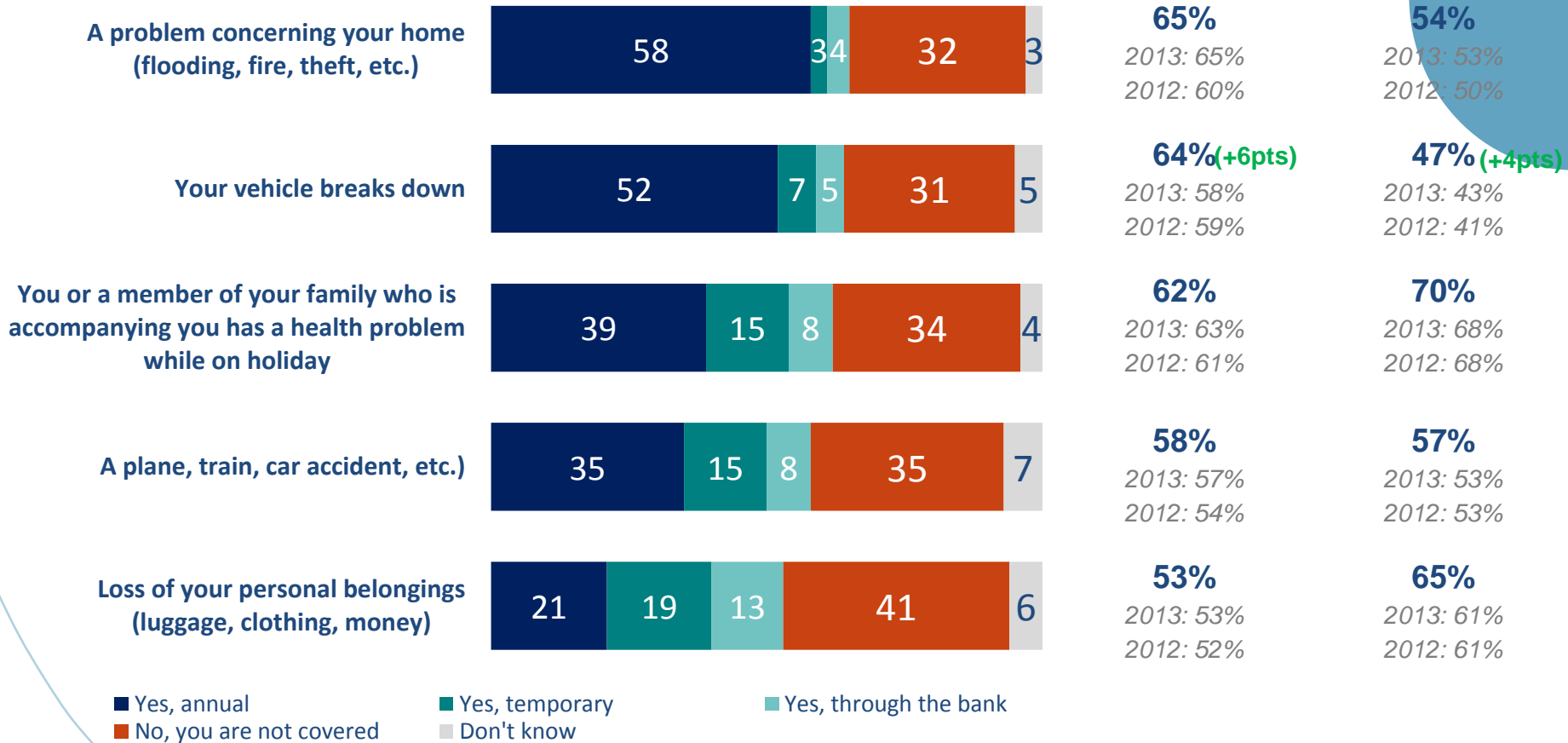
When you go on holiday, are you usually covered by an insurance or assistance policy for the following risks?

Base: People claiming they will go on holiday in summer 2014

Single answer

S/T "Covered"

S/T "Worried"



# Concerning the other risks, note a downward trend in coverage, including coverage relating to the health of family members not travelling with them

When you go on holiday, are you usually covered by an insurance or assistance policy for the following risks?

Base: People claiming they will go on holiday in summer 2014

Single answer

S/T "Covered"

S/T "Worried"

Illness among family or friends who are staying behind



26% (-6 pts)

2013: 32%  
2012: 31%

68%

2013: 68%  
2012: 66%

Risk of a natural disaster (earthquake, volcanic eruption, flooding etc.)



25% (-5 pts)

2013: 31%  
2012: 26%

41%

2013: 40%  
2012: 38%

A transport strike or delays



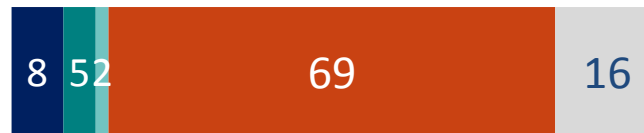
23% (-4 pts)

2013: 27%  
2012: 26%

40%

2013: 38%  
2012: 39%

Risk of a terrorist attack



15% (-5 pts)

2013: 20%  
2012: 18%

46%

2013: 43%  
2012: 42%

■ Yes, annual     
 ■ Yes, temporary     
 ■ Yes, through the bank  
■ No, you are not covered     
 ■ Don't know



# By far, the Italians are the least covered, whereas the British and French are the best covered. Note that coverage against the risk of a vehicle breakdown has increased in Austria, Germany and Italy, with the latter two countries traditionally displaying a lower level of car insurance coverage

Base: People claiming they will go on holiday in summer 2014

% "Covered"

	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>A problem concerning your home</b>	<b>65%</b>	<b>84%</b> ↓	<b>52%</b>	<b>85%</b>	<b>87%</b>	<b>27%</b>	<b>76%</b>	<b>61%</b> ↑
2013	65%	91%	48%	85%	86%	25%	78%	41%
2012	60%	90%	41%	80%	79%	22%	76%	37%
2011	65%	94%	59%	72%	77%	32%	79%	62%
<b>Your vehicle breaks down</b>	<b>64%</b> ↑	<b>81%</b>	<b>55%</b> ↑	<b>74%</b>	<b>81%</b>	<b>39%</b> ↑	<b>82%</b> ↑	<b>53%</b>
2013	58%	82%	42%	76%	76%	20%	74%	47%
2012	59%	77%	47%	73%	83%	29%	72%	53%
2011	64%	84%	50%	71%	75%	48%	77%	55%
<b>You or a member of your family who is accompanying you has a health problem while on holiday</b>	<b>62%</b>	<b>83%</b>	<b>50%</b>	<b>79%</b>	<b>79%</b> ↑	<b>27%</b>	<b>87%</b> ↑	<b>56%</b>
2013	63%	84%	51%	85%	65%	27%	82%	50%
2012	61%	87%	52%	78%	65%	22%	82%	54%
2011	65%	86%	55%	81%	68%	38%	84%	59%
<b>A plane, train or car accident, etc.</b>	<b>58%</b>	<b>72%</b>	<b>47%</b>	<b>74%</b>	<b>65%</b>	<b>34%</b> ↑	<b>72%</b>	<b>55%</b> ↑
2013	57%	75%	45%	79%	63%	25%	66%	44%
2012	54%	77%	36%	75%	64%	23%	76%	44%
2011	58%	78%	44%	73%	62%	39%	72%	47%
<b>Loss of your personal belongings</b>	<b>53%</b>	<b>60%</b>	<b>41%</b>	<b>86%</b>	<b>56%</b>	<b>26%</b>	<b>56%</b> ↑	<b>56%</b>
2013	53%	62%	39%	89%	57%	25%	45%	50%
2012	52%	68%	36%	87%	50%	24%	51%	52%
2011	53%	66%	35%	90%	57%	32%	44%	54%

Base: People claiming they will go on holiday in summer 2014

% "Covered"

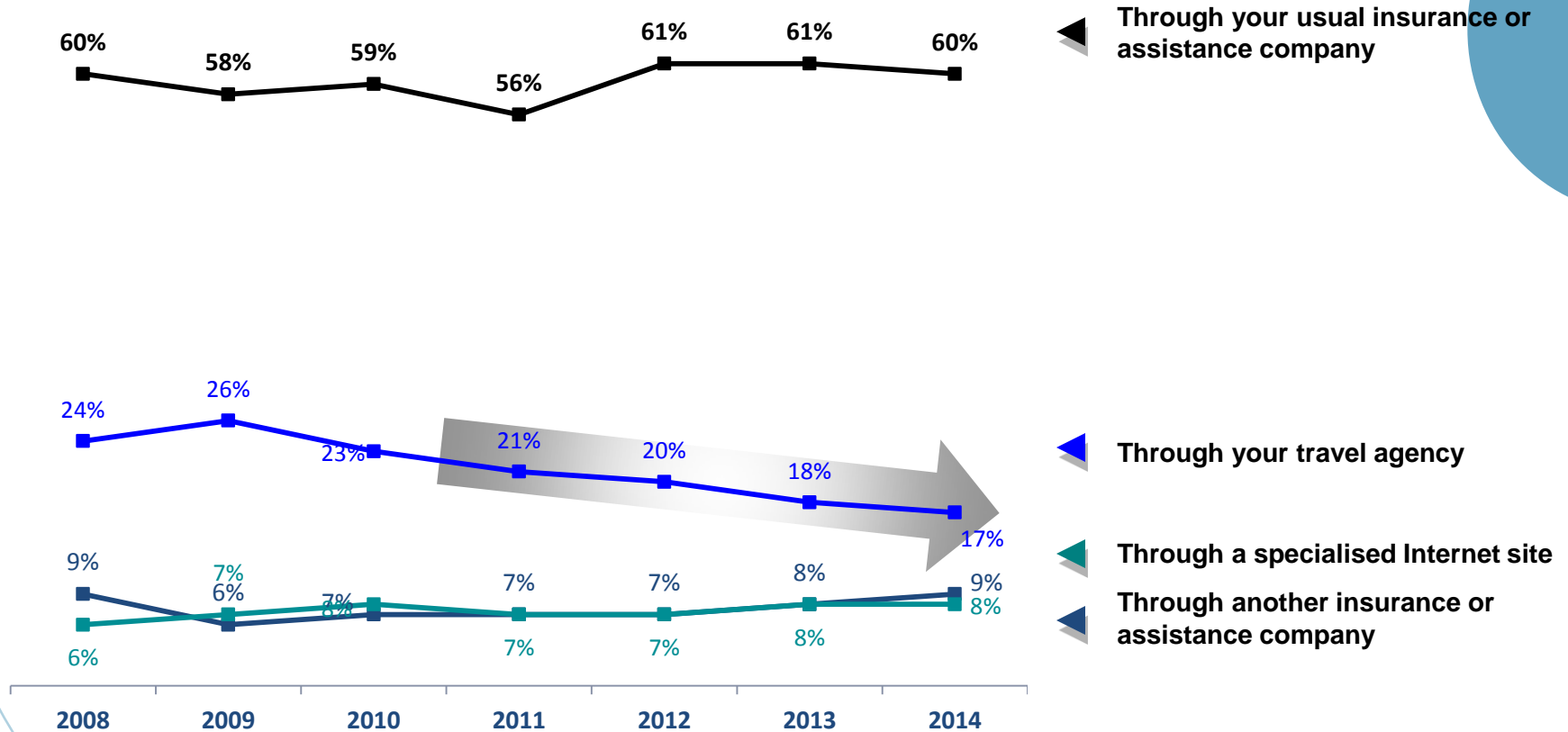
	All							
	Holidaymakers	n=290	n=283	n=273	n=211	n=260	n=235	n=337
<b>Illness amongst family or friends who are staying behind</b>	<b>26% ↓</b>	<b>34%</b>	<b>19% ↓</b>	<b>24% ↓</b>	<b>51%</b>	<b>14%</b>	<b>42%</b>	<b>31%</b>
2013	32%	32%	30%	39%	52%	16%	43%	31%
2012	31%	43%	18%	38%	48%	15%	47%	25%
2011	32%	38%	23%	36%	49%	23%	40%	32%
<b>Risk of a natural disaster</b>	<b>25% ↓</b>	<b>50%</b>	<b>13%</b>	<b>32% ↓</b>	<b>19%</b>	<b>9%</b>	<b>27%</b>	<b>19%</b>
2013	31%	54%	14%	51%	27%	12%	26%	21%
2012	26%	53%	8%	38%	23%	10%	36%	14%
2011	27%	51%	8%	42%	26%	17%	32%	21%
<b>A transport strike or delays</b>	<b>23% ↓</b>	<b>24%</b>	<b>14%</b>	<b>44% ↓</b>	<b>25% ↓</b>	<b>14%</b>	<b>17%</b>	<b>19%</b>
2013	27%	25%	9%	63%	37%	16%	15%	19%
2012	26%	31%	11%	54%	33%	12%	20%	22%
2011	26%	23%	8%	61%	28%	19%	19%	20%
<b>Risk of a terrorist attack</b>	<b>15% ↓</b>	<b>30%</b>	<b>8%</b>	<b>17% ↓</b>	<b>13%</b>	<b>6%</b>	<b>11%</b>	<b>11%</b>
2013	20%	31%	11%	31%	14%	11%	13%	11%
2012	18%	35%	4%	28%	16%	7%	18%	11%
2011	17%	26%	5%	29%	15%	15%	16%	8%

# Insurance with their usual company remains the norm, while the share of Europeans getting insurance from a travel agency is constantly going down

By what means did you take out an insurance or assistance policy?

Base: People claiming they will go on holiday in summer 2014 and claiming to have taken out an insurance or assistance policy

Several answers possible



None of these: 5%

DK : 3%

# This year a decrease in taking out policies with the usual company can be noted among the French. As concerns taking out policies with a travel agency, this has dropped the most in Germany and Spain.

Base: People claiming they will go on holiday in summer 2014 and claiming to have taken out an insurance or assistance policy

	All							
Subscribers		n=286	n=225	n=265	n=204	n=155	n=228	n=300
<b>Through your usual insurance or assistance company</b>	<b>60%</b>	<b>81% ↓</b>	<b>68%</b>	<b>41%</b>	<b>40%</b>	<b>55%</b>	<b>67%</b>	<b>56%</b>
2013	61%	90%	63%	39%	48%	53%	61%	51%
2012	61%	90%	58%	35%	69%	36%	69%	47%
2011	56%	87%	61%	27%	41%	50%	71%	56%
<b>Through your travel agency</b>	<b>17%</b>	<b>9%</b>	<b>16% ↓</b>	<b>9%</b>	<b>33% ↓</b>	<b>30%</b>	<b>17%</b>	<b>29%</b>
2013	18%	8%	21%	10%	42%	26%	18%	31%
2012	20%	7%	21%	12%	28%	49%	17%	36%
2011	21%	6%	18%	15%	34%	39%	22%	31%
<b>Through another insurance or assistance company</b>	<b>9%</b>	<b>5%</b>	<b>14%</b>	<b>11%</b>	<b>6%</b>	<b>6%</b>	<b>10%</b>	<b>9%</b>
2013	8%	4%	13%	9%	3%	4%	10%	10%
2012	7%	3%	14%	5%	7%	3%	7%	10%
2011	7%	2%	13%	6%	10%	5%	4%	13%
<b>Through a specialised Internet site</b>	<b>8%</b>	<b>1%</b>	<b>1%</b>	<b>25%</b>	<b>2%</b>	<b>11%</b>	<b>2%</b>	<b>5%</b>
2013	8%	0%	3%	24%	4%	7%	3%	5%
2012	7%	1%	3%	24%	5%	5%	2%	5%
2011	7%	1%	5%	21%	3%	5%	1%	3%

6

# Country fact sheets

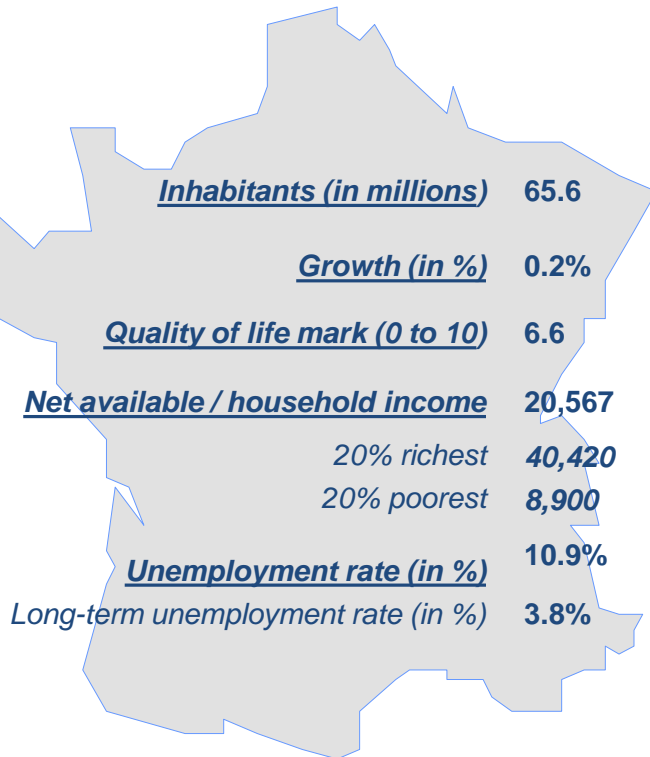


\* Vous vivez, nous veillons.

Source : OECD (2013)

	COUNTRY							
	EU							
<b>Inhabitants (in millions)</b>	504 741	8.4	81	65.6	62.2	11.2	60.3	4.1
<b>Growth (in %)</b>	0.4%	0.4%	0.4%	0.2%	1.9%	0.5%	-1.9%	nc
2012	-0.2%	2.9	0.7	0.0	0.1	-0.1	-2.5	-1.6
2011	1.6	0.9	3.3	2.2	1.1	1.8	0.5	0.1
<b>Inflation (in %)</b>	2.9	2.1%	1.6%	1.0%	2.6%	1.2%	1.3%	1.5%
2012		2.5	2.0	2.0	2.8	2.8	3.0	2.4
2011		3.3	2.1	2.1	4.5	3.5	2.8	3.2
<b>Quality of life mark (0 to 10)</b>	6.6	7.4	6.7	6.6	6.8	6.9	5.8	6.3
<b>Net available / household income</b>	16 743	31 039	21 000	20 567	19 600	19 600	17 657	16 650
20% richest		38 200	39 363	40 420	40 818	34 307	34 088	32 900
20% poorest		9 855	9 148	8 900	7 233	8 803	6 525	5 100
<b>Average salary (in euros)</b>	25 137	31 856	28 873	27 532	32 600	32 307	24 753	25 340
20% richest		40 834	37 250	33 000	41 807	39 050	29 580	34 377
20% poorest		18 964	17 228	16 607	17 802	22 537	17 713	15 360
<b>Unemployment rate (in %)</b>	10.6%	4.9%	5.0%	10.9%	7.2%	8.5%	12.9%	25.8%
2012		4.4	5.0	10.2	7.9	7.6	10.7	25.1
2011		4.1	6.0	9.6	8.0	7.2	8.4	21.6
<b>Long-term unemployment rate (in %)</b>	3.1	1.1	2.8	3.8	2.6	3.5	4.4	9
<b>Employment rate 15-24 years (in %)</b>	66%	72%	73%	64%	70%	62%	57%	58%

## France in a few figures

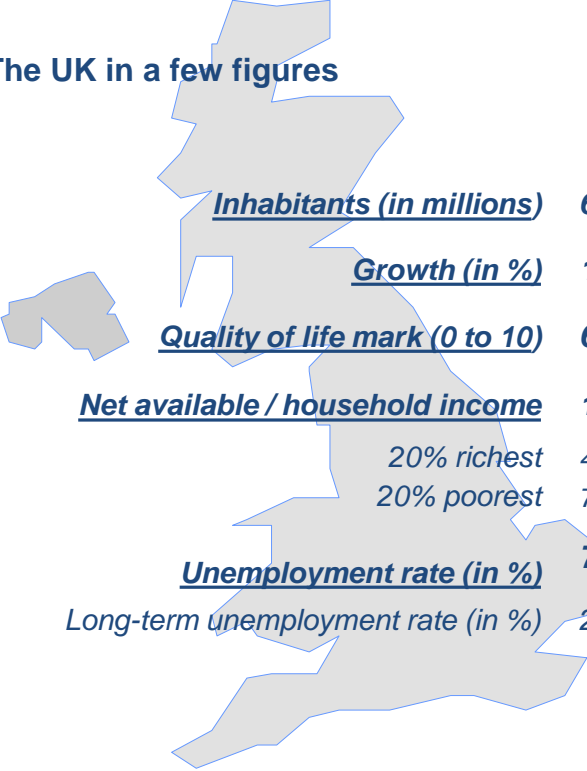


Source : OECD, data 2014

- France loses its 1<sup>st</sup> place in intentions to go on holiday and comes in 2<sup>nd</sup>: 58% of French people intend to leave (- 12 pts vs. 2012)
- The average **budget** for French people is **2,227 €** (5<sup>th</sup> country, +87€): it is holding up well over time but is still lower than the average (2,313 €).
- Always a favourite, **France** must nevertheless share the **1<sup>st</sup> place with Italy** (17% equal place) as preferred destination of Europeans.
- 64\*% will spend their holidays in France: they are the most likely to stay at home, along with their transalpine cousins.
- They have more of a desire for a change of scenery (30\*%, +4pts) and are returning to the mountains (24\*%, +9 pts) even if rest (60\*%, -3 pts) and the seaside still prevail (61\*%, -4 pts).
- 2<sup>nd</sup> for last-minute organisation (32\*%, +10 pts), they are 6<sup>th</sup> in terms of organising in advance (67\*%, -9 pts).
- Moreover, they are the 1<sup>st</sup> not to make reservations (12\*%) and the last to go to a travel agency (13\*%).
- And they are the champions when it comes to organising holidays themselves (73\*%)
- Of all countries, they prioritise holidays in second homes or with friends the most (30\*%) or in camping-caravanning sites (22\*%, +1 pt).

\* base: French people planning to go on holiday in 2014

## The UK in a few figures



<u>Inhabitants (in millions)</u>	<b>62.2</b>
<u>Growth (in %)</u>	<b>1.9%</b>
<u>Quality of life mark (0 to 10)</u>	<b>6.8</b>
<u>Net available / household income</u>	<b>19,600</b>
20% richest	40,818
20% poorest	7,233
<u>Unemployment rate (in %)</u>	<b>7.2%</b>
Long-term unemployment rate (in %)	2.6%

Source : OECD, data 2014

- **54%** of Britons think they will go on holiday this year: It is the 4<sup>th</sup> country, with a share equal to the average. **1<sup>st</sup> for multiple departures (26%\*)**, they are the last in terms of taking one holiday in the year (28%\*)
- **1<sup>st</sup> average budget** of the 7 countries, reaching **2,932€ (+5%)**, and therefore continuously on the rise.
- 1<sup>st</sup> in terms of wanting to be with the family or with friends during the holidays for 43\*% (+14 pts), their desire for rest is increasing (+7 pts), among the highest levels in Europe (66\*%). They are the last in terms of wanting to go to the seaside (51\*%, -4 pts) and have much less of a desire to go to the town than before (-7 pts). Only 33\*% of them view the climate (-12 pts) and the budget (at 27\*% i.e. -13 pts since 2011) as “vital”: they are the last in terms of these two criteria. Only 21\*% plan to go on holiday in their own country (-8 pts vs. 2011) or in Europe (-10 pts).
- **1<sup>st</sup> in terms of reserving their holidays on the Internet, with 72\*%** (+6 pts), 1<sup>st</sup> for all channels: 38\*% use provider websites, 27\*% (+7 pts) go to a travel agency website, 21\*% to websites such as Opodo or Expédia. And **1<sup>st</sup> in taking out a holiday insurance policy online: 25\*%** (+4 pts vs 2011).
- Being less worried, they are among the best insured, although this coverage is dropping: - 2 pts for their vehicle, - 6 pts for their health or transport accidents, -3 pts for the loss of personal belonging...

\* base: Britons planning to go on holiday in 2014



## Spain in a few figures

**Inhabitants (in millions)** 46.1

**Growth (in %)**

**Quality of life mark (0 to 10)** 6.3

**Net available / household income** 16,650

20% richest 32,900

20% poorest 5,100

**Unemployment rate (in %)** 25.8%

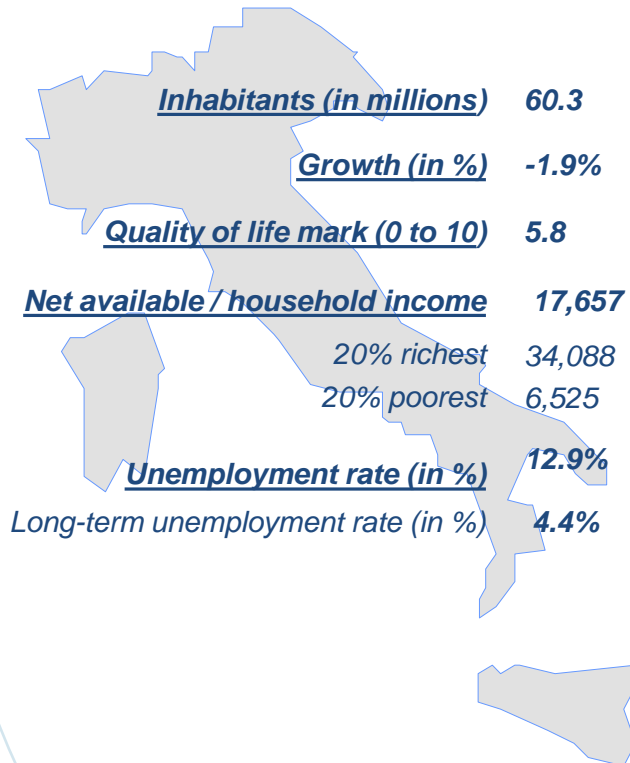
**Long-term unemployment rate (in %)** 9%

Source : OECD, data 2014

- As in 2013, only **42% of Spaniards are planning to go on holiday this summer**. These departure intentions have **dropped 9 points compared to 2012**, and 23 pts compared to 2011.
- **More than 1 Spanish person out of 2 (53\*)** is not intending to go on holiday this summer.
- Increasing by 7%, **the average budget has reached 1,723€**, but it is still **the lowest** of the 7 European countries tested.
- They have a very strong desire to rest this summer, **primarily for peace and quiet (39%, +6 pts, vs. 26% on average)**.
- **Very sensitive to health risks**, 47\*% (+10 pts) of Spaniards think this criterion is vital when choosing their holidays.
- Only **1 Spanish person out of 2\*** intending to go on holiday this summer **will reserve over the Internet**: the lowest score of all countries.
- They are the first to be “very worried” in relation to the 9 risks proposed by the study: risks to their health (76\*% vs. 45% on average), of a vehicle breakdown (43\*% vs. 20% on average).

\* base: Spanish people planning to go on holiday in 2014

## Italy in a few figures

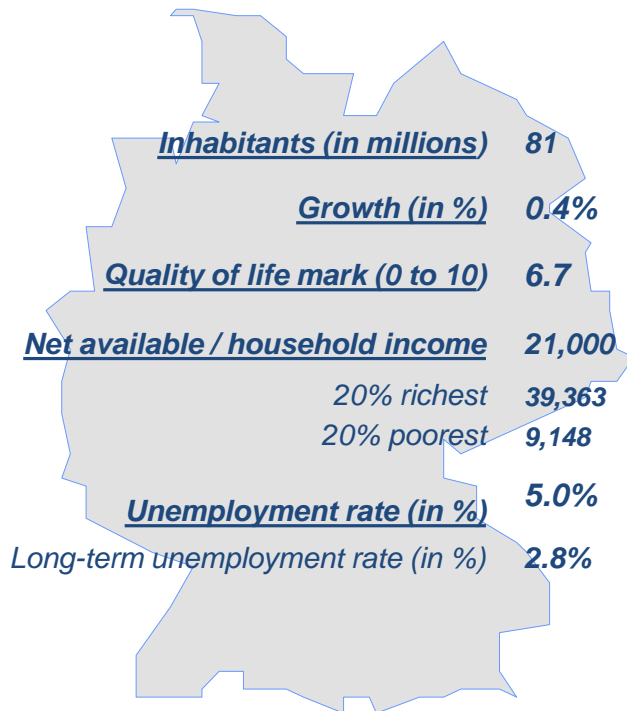


Source : OECD, data 2014

- **52% of Italians plan to go on holiday this summer:** that's less than in 2013 (-1pt) and represents a 24-point drop since 2009.
- The **average budget** for Italian holidaymakers is on average **1,798 €**, (+2%), which is still one of the lowest in Europe with Spain, well under the average at 2,313€ (+3%). Moreover, they are the **first** to view the **budget criterion as "vital"** (55\*% vs. 38% on average) in the choice of their holidays.
- The impression of **being forced to give up their holidays** is one of the strongest (with Spain) and concerns **38\*%** of Italians (+6 pts).
- **First in terms of a desire for "discovery" (40%)** and notably a "complete change of scenery" for 1 out of 3\* Italians (+4 pts).
- Still **1<sup>st</sup> in their desire to be by the sea (70\*%)** and among the most "stay-at-home" with the French: **64\*% (-4pts) go on holiday in Italy.**
- **Champions of last-minute reservation for 44\*%** of them (+13 pts since 2011) and organising holidays themselves (73\*%).
- They are among the **worst covered** for the 9 risks tested: 27\*% are insured for their health (vs. 62% on average) and 39\*% are insured for their vehicle (vs. 64%)

\* base: Italians planning to go on holiday in 2014

## Germany in a few figures



Source : OECD, data 2014

- 56% of Germans intend to go on holiday this summer, a level that is identical to the 2009 level after a series of increases and decreases.
- The average budget for German holidaymakers has progressed slightly (+2%), reaching **2,397€**, which is still above the average (2,313€).
- 1<sup>st</sup> in terms of seeking rest (67%\*), they are also equal first with the Austrians in choosing the countryside as their holiday place (25%\*, +10 pts).
- 80%\* leave for destinations in Europe (-5 pts), although that ranks them among the top 3 European countries for this destination.
- 36%\* (+10 pts) go straight to the website of a provider to reserve their holidays and are generally among the most enthusiastic users of the Internet (58%\*).
- Although among the 1<sup>st</sup> to organise their holidays themselves (73%\*), they are however among those who buy all-inclusive packages most often (31%\*, +4 pts).

\* base: Germans planning to go on holiday in 2014

## Austria in a few figures

<u>Inhabitants (in millions)</u>	<b>8.4</b>
<u>Growth (in %)</u>	<b>0.4</b>
<u>Quality of life mark (0 to 10)</u>	<b>7.4</b>
<u>Net available / household income</u>	<b>31,039</b>
20% richest	<b>38,200</b>
20% poorest	<b>9,855</b>
<u>Unemployment rate (in %)</u>	<b>4.9%</b>
Long-term unemployment rate (in %)	<b>1.1%</b>

Source : OECD, data 2014

- **68% (+11 pts) of Austrians think they will leave this summer: they are in 1<sup>st</sup> place for the 1<sup>st</sup> time.**
- Still 3<sup>rd</sup>, the **average budget reaches 2,542 € (+3%)**.
- **1<sup>st</sup> in terms of going to the mountains** (25%\*, +2 pts), their plans are remarkably equally split between countryside (25%\*, +8 pts), touring (25%\*, +7 pts) and town (23%\*, +5 pts).
- **1<sup>st</sup> to go on holiday in Europe** (85%\*), but not in Austria (71%\*, +9 pts)
- **1<sup>st</sup> in terms of anticipation**, 81%\* of Austrians (+3 pts) have already started preparing their holiday. 1<sup>st</sup> in terms of physically visiting a travel agency (35%\*, +1 pts)
- **Equal 1<sup>st</sup> with the British** for using websites such as Opendo/Expédia (21%\*, -3 pts), they are the first in terms of buying all-inclusive packages (35%\*) and in giving priority to rentals (77%\*)
- 1<sup>st</sup> in terms of judging criteria such as the risk of a terrorist attack (56%\*, +5 pts) or social unrest (54%\*, +7 pts), the range of activities and leisure pursuits (46%\*) and the travel time (26%\*) as vital
- **They will be better covered this year for risks concerning: their home (61%\*, +20 pts), their vehicle (53%\*, +6 pts), their health (56%\*, +6 pts), transport accidents (55%\*, +11 pts), loss of personal belongings (56%\*, +6 pts)**

\* base: Austrians planning to go on holiday in 2014

## Belgium in a few figures

**Inhabitants (in millions)** 11.2

**Growth (in %)** 0.5%

**Quality of life mark (0 to 10)** 6.9

**Net available / household income** 19,600

20% richest 34,307

20% poorest 8,803

**Unemployment rate (in %)** 8.5%

**Long-term unemployment rate (in %)** 3.5%

- **47% of Belgians will go on holiday this summer:** one of the lowest scores in Europe (-12 pts since 2012).
- Still the **2<sup>nd</sup> biggest budget** in Europe, it is stable and reaches **2,577€ (+3%)**.
- Their desire to not sacrifice their holiday, despite the crisis, is the strongest (36%\*) for all countries.
- 1<sup>st</sup> in terms of viewing the climate as “vital” in choosing their destination (54%\*, +8 pts vs. 2011) along with the quality of tourist infrastructures (39%\*, +6pts)
- 1<sup>st</sup> in terms of holidays abroad (11%\*, +3 pts)
- They are the last to reserve their holidays on specialised websites such as Expédia (10%\*, -5 pts) or to organise them themselves (68%\*)
- Last in terms of worries about: loss of personal belongings (23%\*), terrorist attacks (23%\*), transport accidents (20%), natural disasters (16%\*), transport strikes or delays (9%\*)
- 1<sup>st</sup> to get health (87%\*, +5pts) and car (82%\*, +8pts) insurance

\* base: Belgians planning to go on holiday in 2014

Source : OECD, data 2014