



* You live, we care.

15th Europeans and Holidays barometer

June 2015



1

European

Nationally representative samples interviewed over the phone



2

Barometric

Precedence enables us to outline strong trends and spot emerging trends

3




and whose **objectives** are to

- evaluate the holiday plans of European residents;
- explore their motivations, desires, plans in terms of destination and type of stay;
- ascertain in what way holidays are decided upon and prepared;
- and assess levels of concern, sensitivity to risk and risk coverage.



- Study undertaken from **9 February to 23 March 2015**

- Study conducted in a sample of **3,510 people residing in Europe:**

	France: 503
	Spain: 502
	Belgium: 503
	Austria: 500
	United Kingdom: 500
	Germany: 502
	Italy: 500

Nationally representative samples of each country's population, aged **18 years and older**, put together using the **quota method** (gender, age, profession of head of household) after stratification by region and by city size.

- Interviews conducted by **phone**, in the interviewees' homes, on the basis of contact lists taken randomly from telephone directories.

(As for any quantitative survey, this study includes results which are subject to margins of error that are inherent to statistical laws)
This report has been produced in accordance with international standard ISO 20252 "Market, opinion and

social research".

In 2015, an upturn in holiday plans, but greater concern about the risk of an attack

1. For the first time in three years, summer holiday plans have picked up
2. Warm, sunny Europe remains the top summer destination
3. Easy holidays: Europeans preparing their holidays in just a few clicks
4. But holidays not as carefree: Europeans are more concerned about the risk of an attack
5. Country sheets

p.5

p.20

p.34

p.46

p.62

1

**For the first time in
three years, summer
holiday plans have
picked up**



**europ
assistance**
*you live we care**

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In 2015, the summer holiday plans of Europeans have increased, after a several-year decline and stagnation in 2014

Holiday plans in 2015

60%



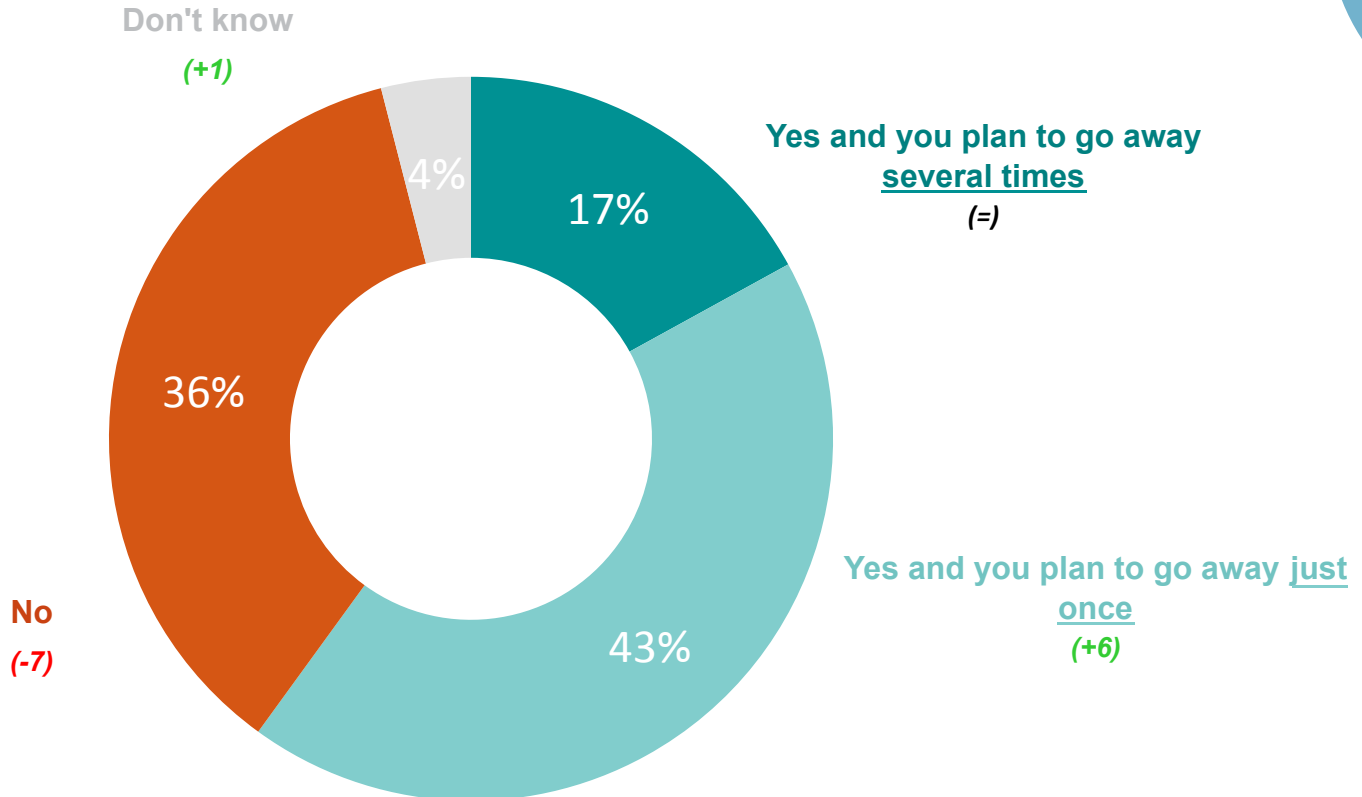
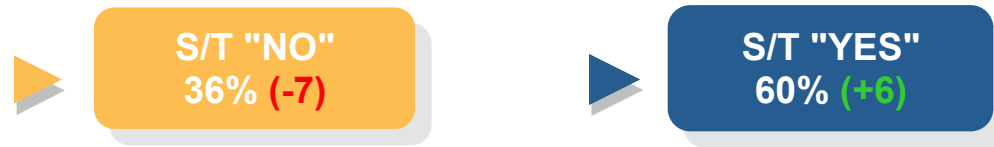
Compared to 2014 and 2013:
+ 6 points

This increase is related to holiday-makers who could not leave these last years because of the crisis. The share of holiday-makers who are used to going away several times in the summer remains stable.

Do you plan to go away on holiday this summer, in other words between June and September inclusive?

Base: Everyone (4,010 respondents)

Select one answer only

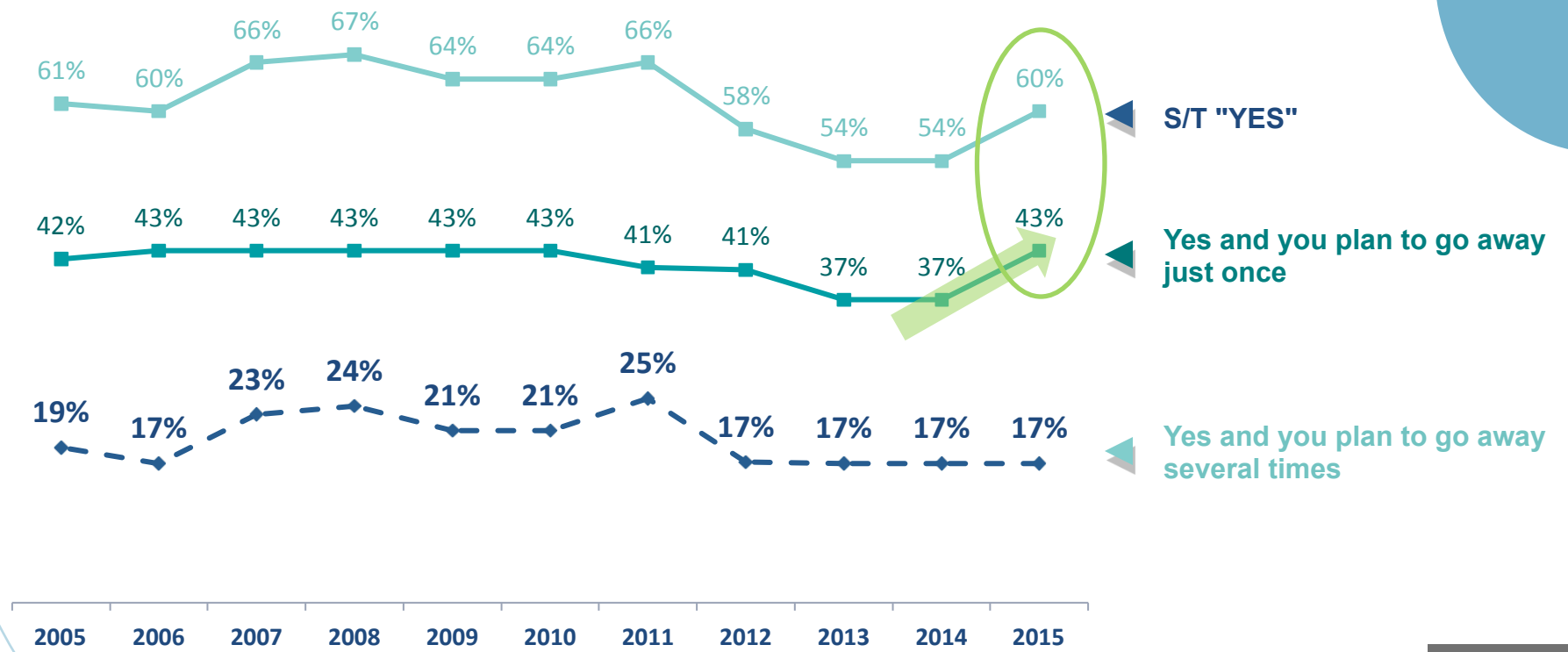


This increase is related to holiday-makers who could not leave these last years because of the crisis. The share of holiday-makers who are used to going away several times in the summer remains stable.

Do you plan to go away on holiday this summer, in other words between June and September inclusive?

Base: Everyone (4,010 respondents)

Select one answer only



DNK: 4%

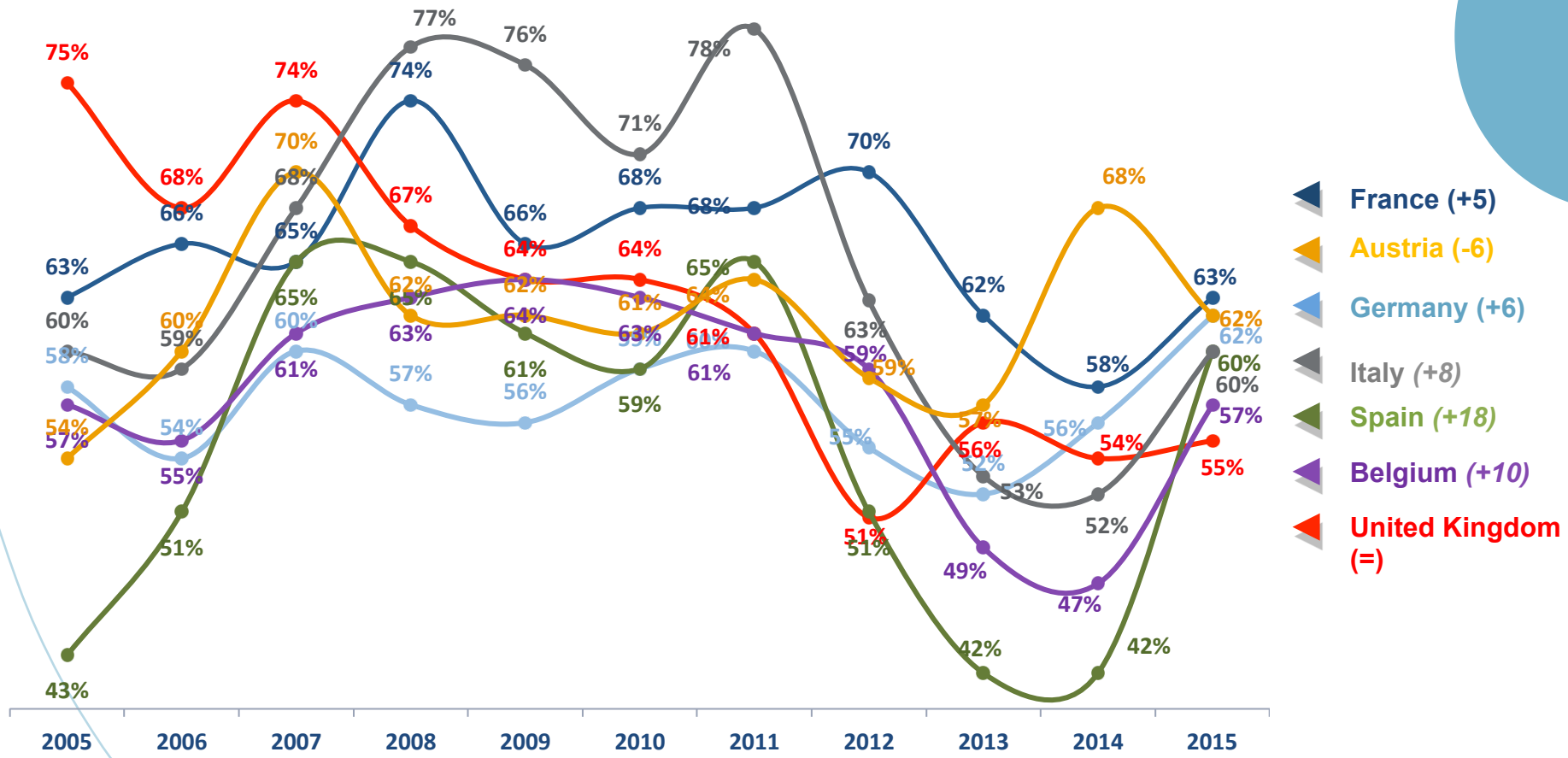
After several years in which the gap between countries widened, holiday plans are more consistent across Europe in 2015.

With the exception of Austria which is down slightly after a sharp increase in 2014 and the United Kingdom which is stagnating, holiday plans have increased in all countries, with varying levels of intensity

Do you plan to go away on holiday this summer, in other words between June and September inclusive?

Base: Everyone (4,010 respondents)

ST "YES"



After steadily declining for years, summer holiday plans have picked up, particularly in Belgium and Spain

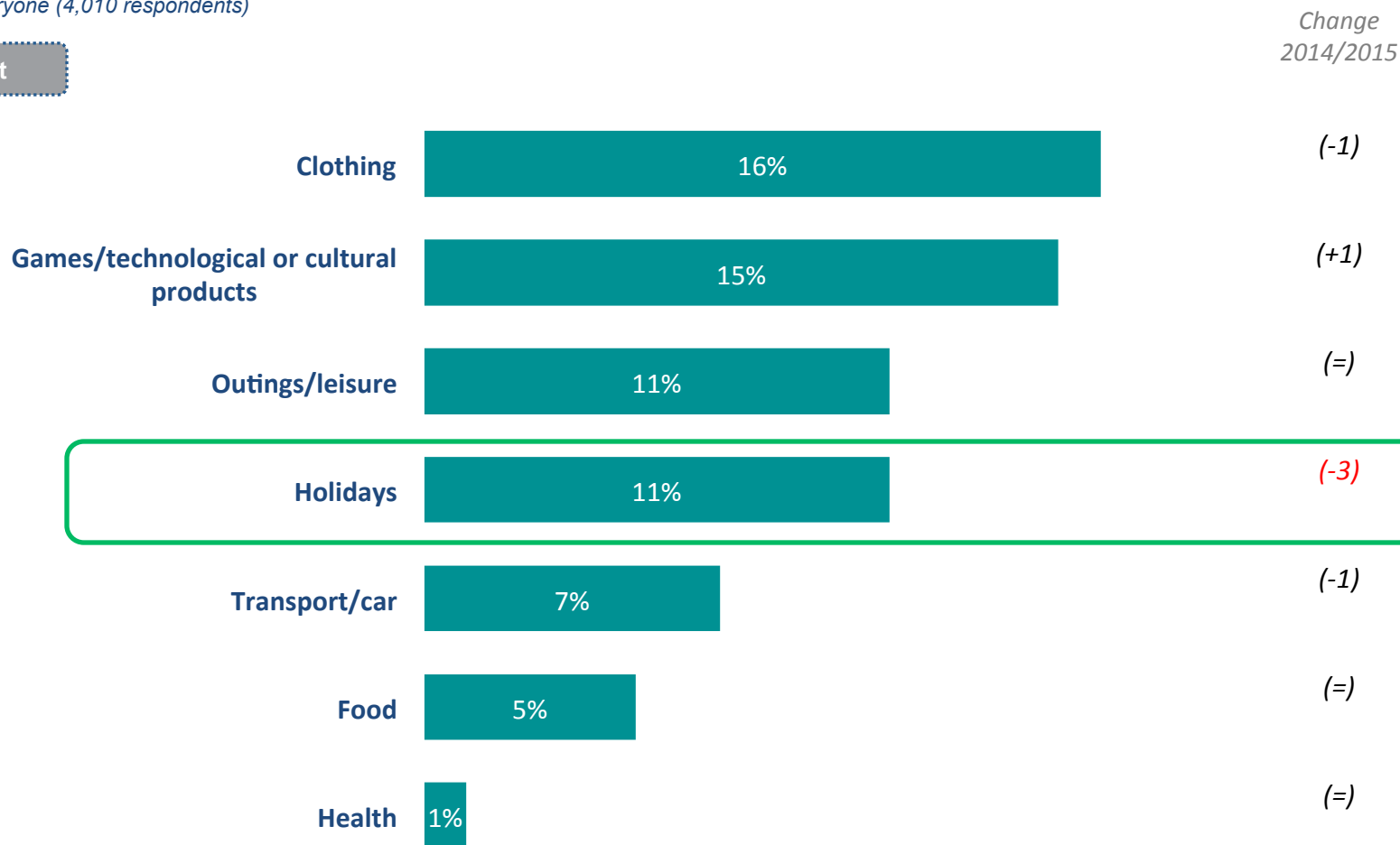
	Total							
Base: All	n=4010	n=503	n=502	n=500	n=502	n=500	n=1003	n=500
Yes and you plan to go away several times	17%	17%	16%	22%	18% ↗	12% ↘	17% ↗	16% ↘
2014	17%	14%	15%	26%	11%	18%	13%	22%
2013	17%	17%	13%	26%	6%	18%	16%	22%
2012	17%	15%	15%	26%	10%	18%	16%	18%
2011	25%	20%	16%	33%	26%	37%	14%	22%
2010	21%	19%	13%	34%	13%	25%	19%	18%
2009	21%	15%	14%	37%	18%	23%	18%	18%
Yes and you plan to go away just once	43% ↗	46% ↗	46% ↗	33% ↗	42% ↗	48% ↗	40% ↗	46%
2014	37%	44%	41%	28%	31%	34%	34%	46%
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%
S/T "YES"	60% ↗	63%	62%	55%	60% ↗	60% ↗	57% ↗	62%
2014	54%	58%	56%	54%	42%	52%	47%	68%
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%
No	36%	33%	37%	38%	38%	37%	40%	35%
Don't know	4%	4%	1%	7%	2%	3%	3%	3%

In this more favourable context, European holiday-makers are less likely to plan to cut back their summer holiday costs this year

Please tell me in which of the following categories you are already cutting back costs or plan to cut back costs.

Base: Everyone (4,010 respondents)

First



None of these: 25%

DNK: 6%

In this more favourable context, European holiday-makers are less likely to cut back their holiday costs

"First choice"

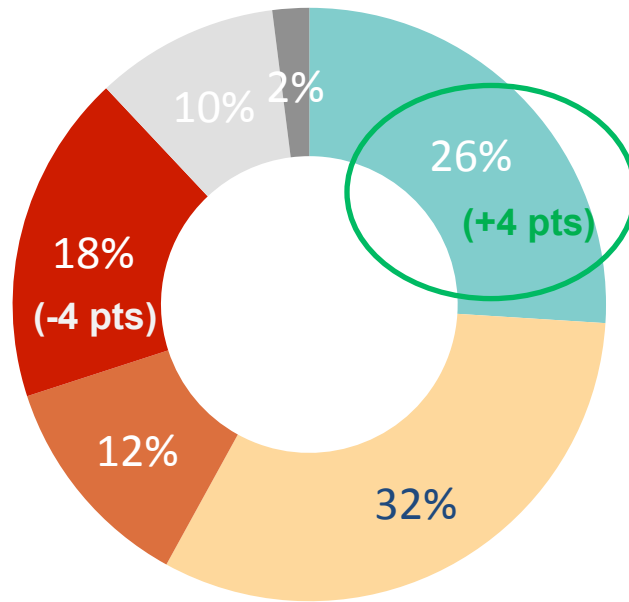
Base: Everyone (4,010 respondents)

	Total							
	n=4010	n=503	n=502	n=500	n=502	n=500	n=1003	n=500
Clothing	16%	15%	15%	10%	17%	26%	11%	18%
2014	17%	16%	17%	11%	15%	27%	10%	18%
Games / technological or cultural products	15%	18%	14%	4%	15%	24%	15% ↗	17%
2014	14%	20%	12%	5%	13%	23%	11%	16%
Outings / leisure	11%	14%	6%	8%	18%	14%	16% ↗	6%
2014	11%	13%	6%	8%	22%	14%	11%	4%
Holidays	11% ↘	9%	6%	11%	21% ↘	14%	10%	10%
2014	14%	13%	8%	13%	27%	15%	11%	7%
Transport / car	7%	11%	7% ↘	6%	2%	7%	6%	9%
2014	8%	12%	11%	6%	2%	6%	5%	10%
Food	5%	5%	5%	8%	2%	2%	4%	6%
2014	5%	6%	4%	8%	2%	3%	3%	6%
Health	1%	1%	1%	0%	0%	2%	1%	1%
2014	1%	1%	1%	1%	1%	2%	2%	1%

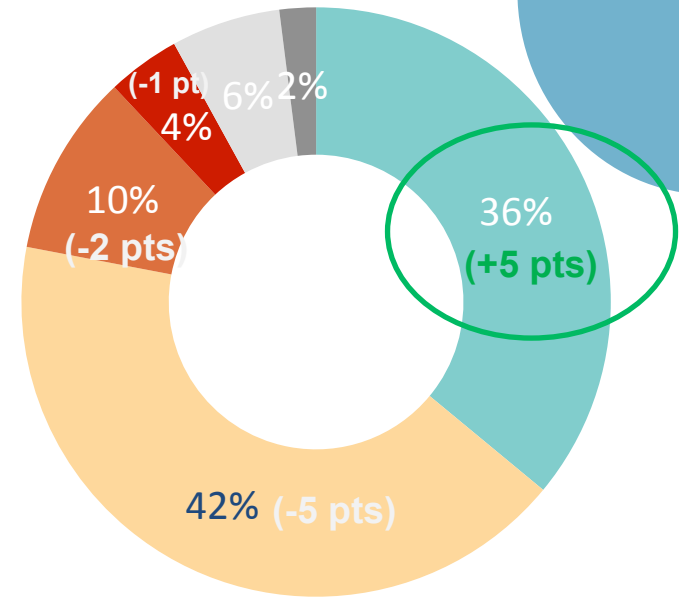
Currently, in this crisis period, summer holidays are a category...

- You do not want to touch
- Where you want to slightly cut costs
- Where you want to significantly cut costs
- You will do without
- None of these
- No answer

Everyone (4,010 respondents)



Those who plan to go away on holiday this summer (2,386 respondents)



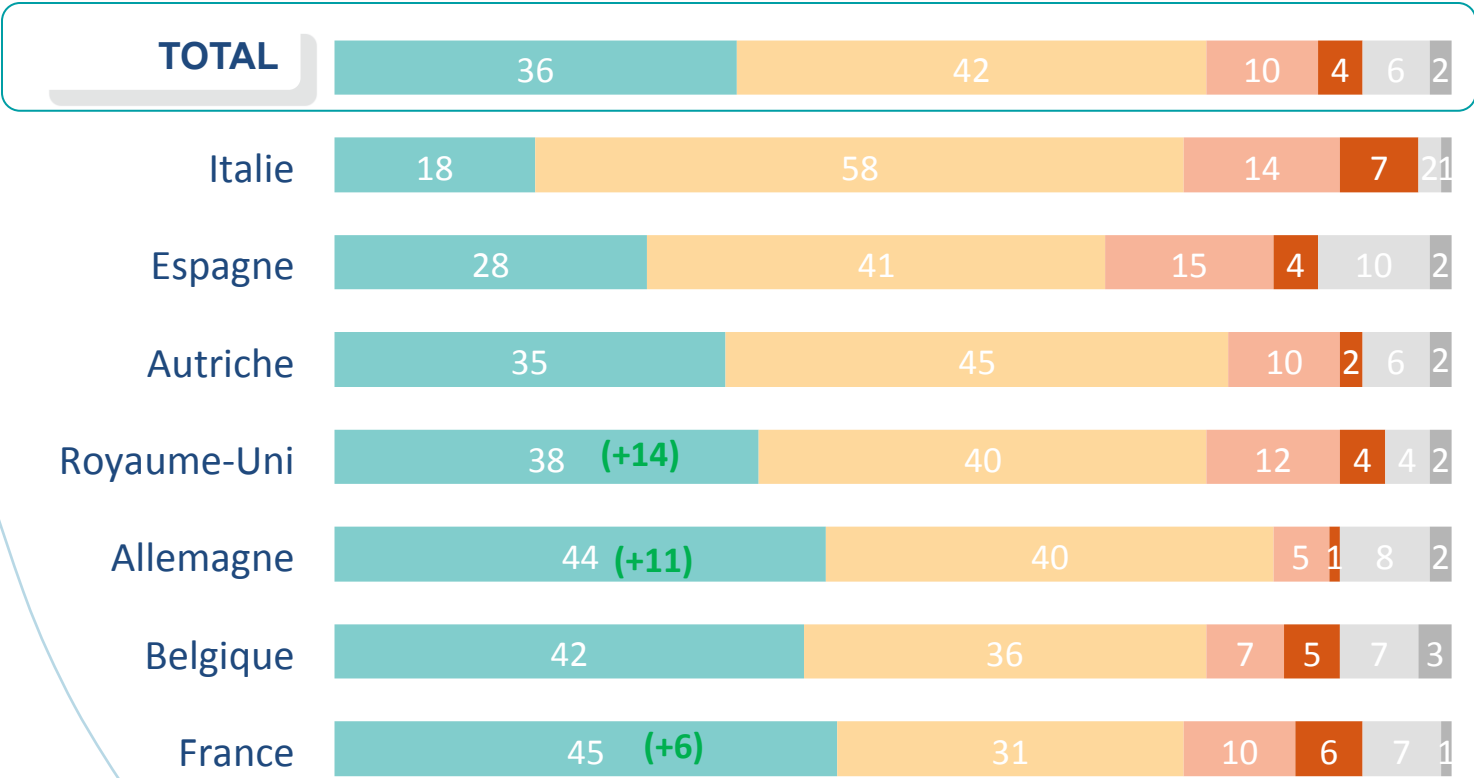
French, German and British people are particularly more likely to set aside money for summer holidays than last year.

Currently, in this crisis period, summer holidays are a category...

Base: Plan to go away on holiday this summer (2,386 respondents)

- You do not want to touch
- Where you want to slightly cut costs
- Where you want to significantly cut costs
- You will do without
- None of these
- Don't know

S/T Cut costs



52% (-7)

72% (+4)

56% (-6)

55% (+5)

52% (-14)

45% (-14)

43% (+2)

41% (-9)



Average budget for euro zone countries:

Spain, Italy, France, Belgium, Germany and Austria



Compared to 2014:

+ €180

+ 8%

Average budget for the 7 countries

Euro zone countries and the United Kingdom



Compared to 2014:

+ €114

+ 4.6%

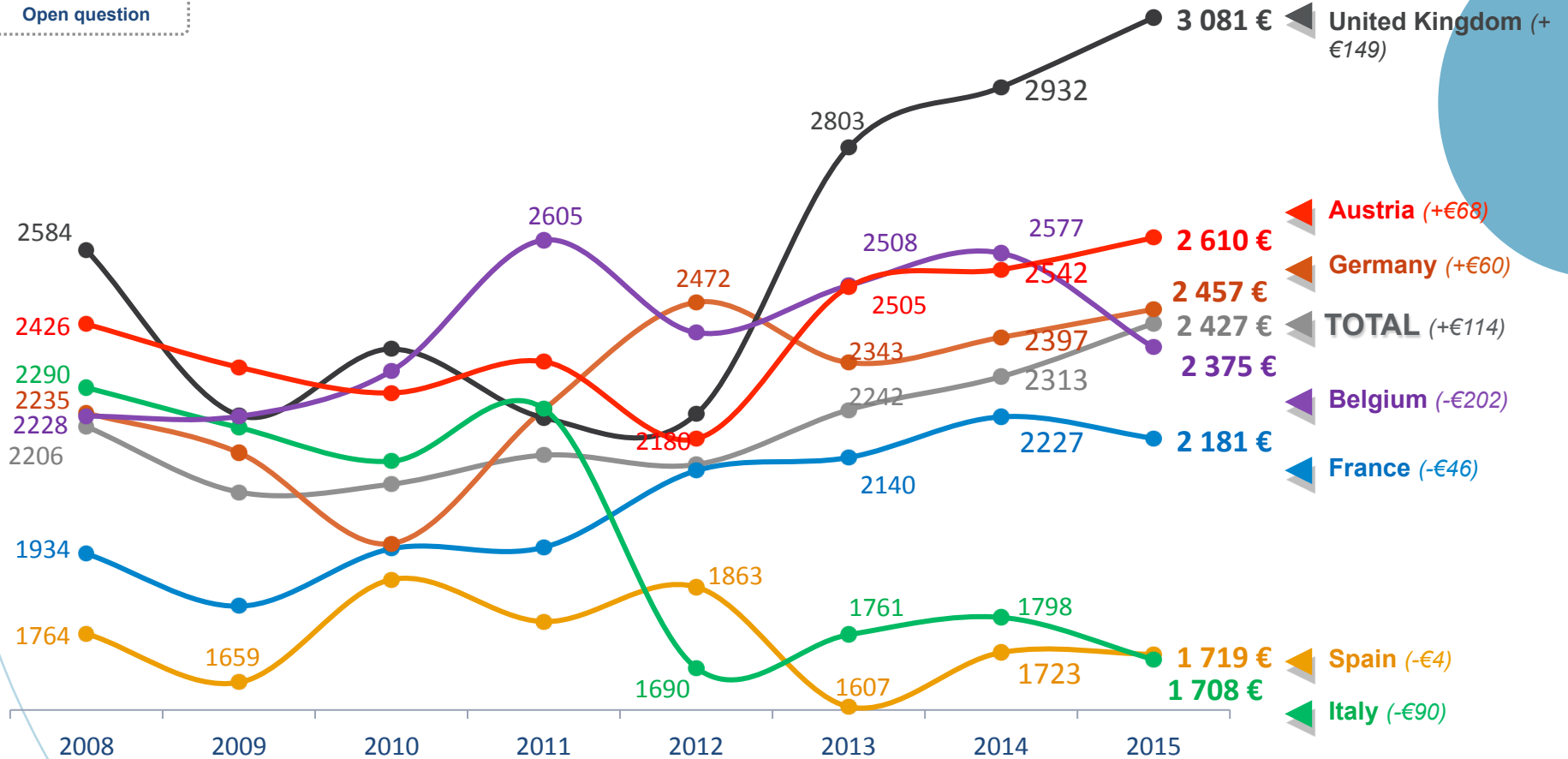
EU
7
countries

A budget tending to increase in Northern European countries (Austria, Germany and especially UK) and staying the same or decreasing very slightly in Southern European countries (France, Italy, Spain)

What total budget are you thinking of devoting to your summer holidays in 2014 (when you accumulate transport, accommodation, food, leisure activities, etc.)?

Base: Plan to go away on holiday this summer

Open question



** 2015 exchange rate: €1 = + £0.735
 2014 exchange rate: €1 = + £0.835
 2013 exchange rate: €1 = + £0.853

Summary of 2014 average budgets:

The average budget has decreased the most in Belgium, but with a decline that remains limited

Base: Plan to go away on holiday this summer

Open question

	Total	EURO ZONE							
	Holiday-makers	(6 countries)	n=318	n=312	n=273	n=298	n=301	n=572	n=311
Average budget	€2427	€2390	€2181	€2457	€3081*	€1719	€1708	€2375	€2610
Rank	-	-	5 th	3 rd	1 st	6 th	7 th	4 th	2 nd
Versus 2014	+€114	+€180	+€46	+€60	+€149*	+€4	+€90	+€202	+€68
Versus 2014 (in %)	4.6	7.5	2.1	2.4	4.8	0.2	5.3	8.5	2.6
<i>Average budget 2014</i>	€2,313	€2,210	€2,227	€2,397	€2,932*	€1,723	€1,798	€2,577	€2,542
<i>Average budget 2013</i>	€2,242	€2,100	€2,140	€2,343	€2,803*	€1,607	€1,761	€2,508	€2,505
<i>Average budget 2012</i>	€2,125	€2104	€2,112	€2,472	€2,233	€1,863	€1,690	€2,407	€2,180

** 2014 exchange rate: €1 = + £0.735
 2013 exchange rate: €1 = + £0.853
 2012 exchange rate: €1 = + £0.832

An increase in the number of holiday-makers...

- After several years of deprivation due to the crisis, the share of Europeans that may go away on holiday has considerably picked up: **60% say they will leave this summer, i.e. 6 points more than in 2014 and 2013.** This increase involves Europeans who will go away just once, indicating that those who had to stay home are slightly more likely to be able to leave this year.

- **In 2015, gaps between countries are tending to shrink, with more homogeneity in the holiday plans of Europeans:**
 - ⇒ Holiday plans have sharply risen in the countries most affected these last years: Spain (+18 pts, 60%), Italy (+8 pts to 60%) and Belgium (+10 pts, 57%)
 - ⇒ France and Germany, which had decreased to a lesser extent, have also returned to higher levels (respectively +5 pts, 63% and +6 pts to 62%)
 - ⇒ The United Kingdom remains at 55% (+1 pt) whereas Austria has lost a few points after a peak in 2014 (-6 pts, 62%)

...And a holiday budget that promises to be less tight on average for Europeans, with large differences between countries

- In tandem with this rise in holiday plans, **Europeans have somewhat increased their holiday budget.** The average budget for Europeans in the euro zone will be €2,390, i.e. a €180 increase versus last year.
- **The slight upward trend especially involves Europeans in the countries that already have the highest budgets:** Germany (€2457, +€60) and Austria (€2,610, +€68). Outside of the euro zone, the increase is sharpest in the United Kingdom: €3,081, +€149.
- However, **in Latin countries, the budget is generally stable or slightly declining:** France (€2,181, -€46), Spain (€1719, =), Italy (€1708, -€90)
- For Europeans in Latin countries who will resume their holidays this year, they will remain limited by a tight budget.

2

**Warm, sunny Europe
remains the top
summer destination**



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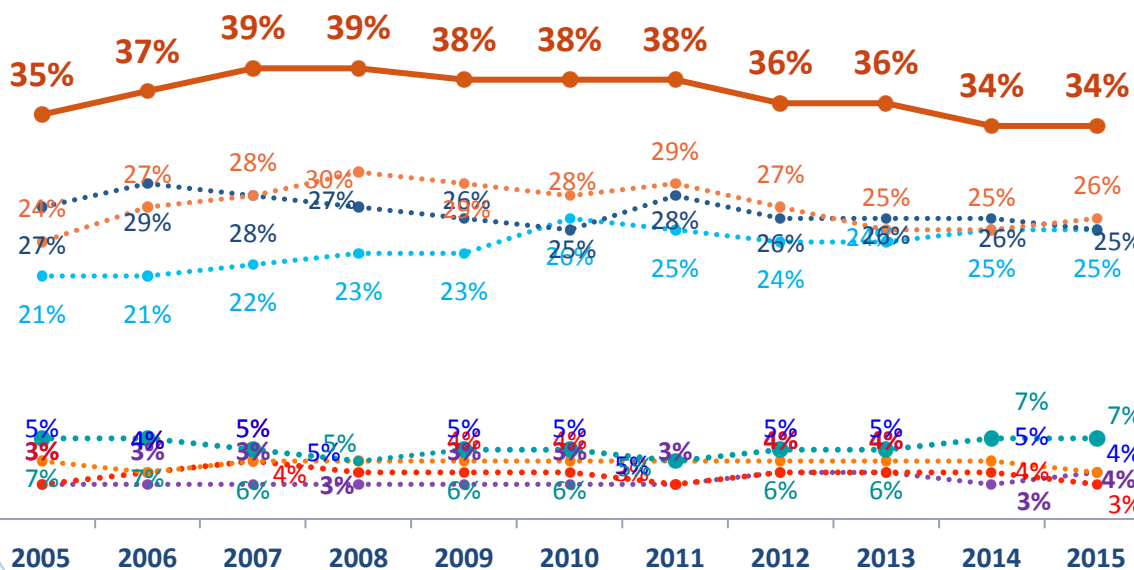
Thinking of the ideal summer holidays for you in 2015, what would you primarily want?

Base: All

First answer



RELAXATION



DISCOVERY

- Discover new cultures, enjoy a total change of scenery
- Relax, have peace of mind
- Come together as a family, with your spouse or with friends
- Enjoy your home
- Play sports
- Make new friendly or romantic encounters
- Take time to read, learn new things

DNK: 1.4%

None of these:

Family time: Spanish and especially French people are more likely to plan to spend their summer holiday with family members this year

First answer

Base: All

	Total							
	n=4010	n=503	n=502	n=500	n=502	n=500	n=1003	n=500
S/T RELAXATION	60% ↘	63%	66%	59% ↘	54% ↘	56%	59%	59%
2014	63%	60%	67%	66%	62%	57%	60%	62%
2013	62%	63%	65%	59%	57%	61%	61%	63%
2012	61%	56%	65%	62%	53%	60%	65%	64%
Relax, have peace of mind	25%	20%	26%	17%	33%	32%	25%	22%
2014	26%	24%	25%	18%	39%	32%	26%	20%
2013	26%	22%	25%	20%	33%	35%	23%	23%
2012	26%	20%	26%	20%	33%	34%	25%	23%
Come together as a family, with your spouse or with friends	25%	32% ↗	28%	34% ↘	13%	15%	21% ↗	22%
2014	25%	24%	27%	43%	15%	15%	17%	25%
2013	24%	30%	25%	29%	17%	16%	23%	25%
2012	24%	27%	24%	36%	14%	16%	25%	25%
Enjoy your home	7%	8%	8%	3%	6%	6%	10%	10%
2014	7%	6%	10%	3%	5%	6%	11%	10%
2013	6%	6%	7%	3%	5%	5%	10%	9%
2012	6%	6%	9%	3%	3%	6%	9%	14%
Take time to read, learn new things	4% ↗	3%	4%	5% ↗	2%	3%	3% ↘	5%
2014	3%	4%	4%	1%	3%	4%	5%	5%
2013	4%	4%	3%	4%	2%	4%	4%	4%
2012	4%	4%	4%	3%	2%	5%	5%	2%

First answer

Base: All

	Total							
	n=4010	n=503	n=502	n=500	n=502	n=500	n=1003	n=500
S/T DISCOVERY	34%	31%	30%	38% ↗	33%	38%	35%	35%
2014	34%	37%	31%	32%	32%	40%	34%	36%
2013	36%	35%	31%	40%	40%	37%	35%	35%
2012	36%	43%	32%	35%	35%	37%	33%	34%
Discover new cultures, enjoy a total change of scenery	26%	27%	20%	29% ↗	29%	30%	26%	23%
2014	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%
Play sports	4% ↘	3%	7%	2%	2%	3%	5%	10%
2014	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%
Make new friendly or romantic encounters	3% ↘	2%	3%	6%	2%	5%	4%	2%
2014	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%

While most Europeans continue to dream of a holiday by the sea, the share of holiday-makers enchanted by the prospect of a stay in the mountains has increased a few points this year

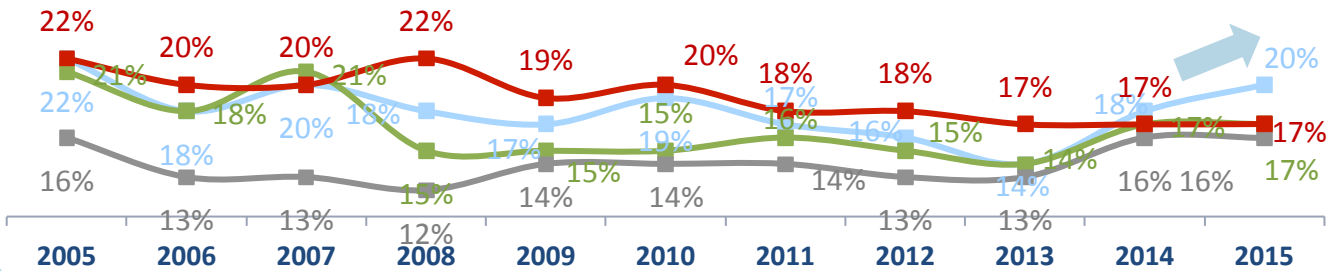
For your summer holiday, do you intend to go mainly...

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible



▶ To the seaside



▶ To the mountains
 ▶ On a tour, discovering things
 ▶ To the countryside
 ▶ To a city

DNK: 2%

French, German and Austrian holiday-makers remain most attracted to the mountains. This year, Spanish people are more interested in holidays in the mountains and in the countryside.

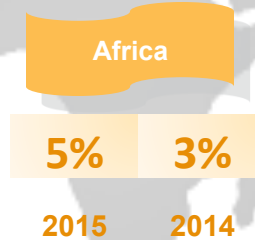
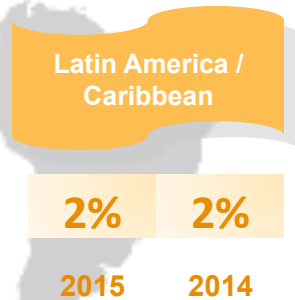
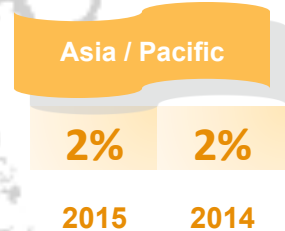
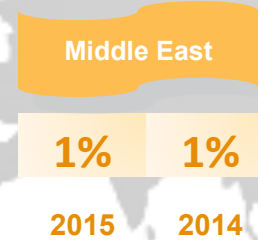
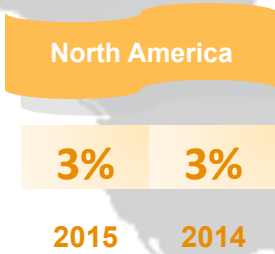
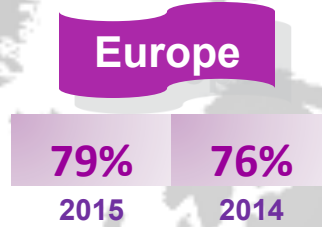
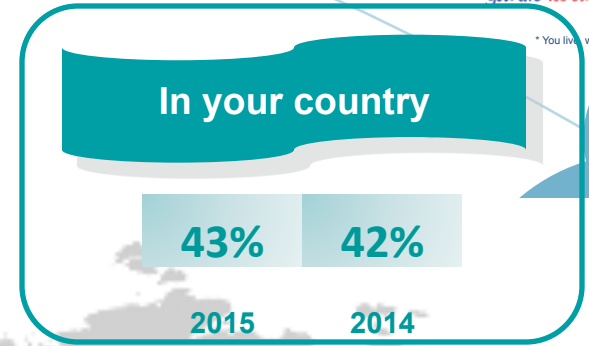
Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
To the seaside	62%	59%	66%	52%	62%	71%	49% ↓	59%
2014	62%	61%	69%	51%	54%	70%	59%	66%
2013	64%	65%	66%	55%	63%	72%	50%	61%
2012	62%	56%	71%	45%	57%	75%	54%	62%
To the mountains	20%	25%	25%	8%	21% ↑	16%	19%	23%
2014	18%	24%	23%	10%	12%	15%	18%	25%
2013	14%	15%	18%	7%	16%	15%	21%	23%
2012	16%	18%	18%	6%	16%	17%	20%	27%
To the countryside	17%	20%	21%	17%	18% ↑	4%	18%	21%
2014	17%	19%	25%	19%	8%	6%	16%	25%
2013	14%	15%	15%	19%	7%	6%	25%	17%
2012	15%	15%	21%	22%	9%	3%	19%	23%
On a tour, discovering things	17%	17%	20%	27%	8%	9%	23%	18% ↓
2014	17%	14%	22%	23%	6%	10%	20%	25%
2013	17%	17%	15%	25%	5%	13%	25%	18%
2012	18%	20%	22%	26%	2%	10%	27%	23%
To a city	16%	10%	15%	17%	22%	20% ↑	18%	21%
2014	16%	9%	21%	15%	22%	11%	18%	23%
2013	13%	8%	10%	22%	17%	11%	19%	18%
2012	13%	10%	12%	13%	21%	11%	12%	18%

Where do you plan to go away on holiday this summer?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible



Don't yet know: 1%
DNK: 11%

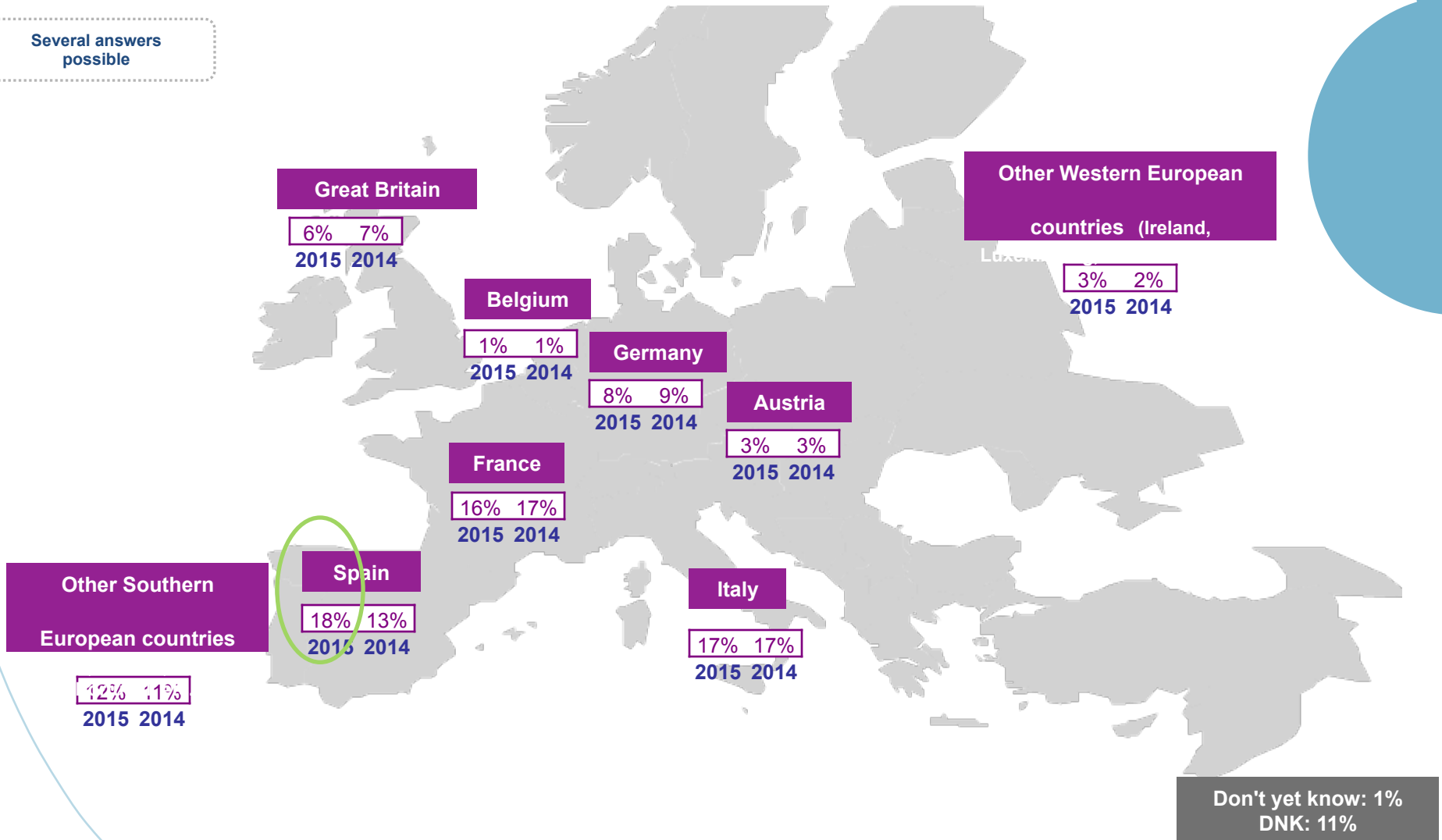
Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
TOTAL EUROPE	79%	72%	81%	80%	81%	79%	79%	86%
2014	76%	80%	80%	71%	67%	76%	78%	85%
2013	81%	79%	85%	81%	78%	80%	79%	85%
2012	79%	82%	82%	71%	69%	83%	80%	83%
Including in your own country	43%	56%	27%	24%	65%	62%	10%	24%
2014	42%	64%	28%	21%	51%	64%	11%	25%
2013	46%	60%	33%	24%	65%	70%	9%	30%
2012	48%	67%	33%	27%	53%	70%	11%	26%

Where do you plan to go away on holiday this summer?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible



Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
TOTAL EUROPE	79%	72%	81%	80%	81%	79%	79%	86%
2014	76%	80%	80%	71%	67%	76%	78%	85%
2013	81%	79%	85%	81%	78%	80%	79%	85%
2012	79%	82%	81%	71%	69%	83%	80%	83%
In your own country	43%	56%	27%	24%	65%	62%	10%	24%
2014	42%	64%	28%	21%	51%	64%	11%	25%
2013	46%	60%	33%	24%	65%	70%	9%	30%
2012	48%	67%	33%	27%	53%	70%	11%	26%
Europe outside of your country	40%	20%	59%	61%	19%	21%	71%	67%
2014	37%	22%	55%	53%	15%	13%	68%	71%
2013	37%	21%	58%	57%	14%	10%	72%	62%
2012	33%	18%	53%	45%	19%	14%	70%	66%
Western Europe	34%	57%	41%	40%	8%	7%	48%	42%
2014	37%	65%	46%	40%	9%	3%	49%	39%
2013	37%	61%	45%	42%	6%	3%	50%	44%
2012	38%	69%	48%	39%	10%	4%	54%	39%
Germany	8%	1%	27%	2%	1%	1%	3%	9%
2014	9%	1%	28%	2%	2%	-	2%	7%
2013	9%	0%	33%	1%	2%	1%	3%	6%
2012	9%	1%	33%	1%	2%	1%	3%	7%
Austria	3%	0%	6%	1%	1%	1%	3%	24%
2014	3%	-	7%	1%	1%	0%	2%	25%
2013	2%	1%	3%	1%	-	-	3%	30%
2012	3%	-	7%	1%	-	-	3%	26%
Belgium	1%	0%	0%	1%	0%	0%	10%	1%
2014	1%	-	1%	0%	-	-	10%	-
2013	1%	-	1%	1%	-	-	9%	0%
2012	1%	-	1%	-	-	-	11%	-

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
France	16%	57%	3%	8%	3%	3%	30%	6%
2014	17%	64%	6%	8%	2%	1%	30%	5%
2013	18%	60%	5%	10%	1%	1%	34%	4%
2012	20%	67%	6%	7%	7%	1%	34%	5%
Great Britain	6%	0%	3%	27%	2%	2%	1%	2%
2014	7%	1%	3%	27%	4%	1%	2%	3%
2013	6%	-	2%	26%	1%	1%	1%	3%
2012	6%	1%	1%	30%	1%	-	1%	2%
Southern Europe	44%	16%	36%	42%	71%	70%	32%	46%
2014	39%	19%	30%	34%	55%	71%	35%	58%
2013	41%	17%	34%	35%	70%	74%	33%	47%
2012	39%	13%	31%	32%	59%	76%	26%	48%
Spain	18%	7%	11%	23%	65%	4%	12%	6%
2014	13%	8%	8%	15%	51%	2%	14%	7%
2013	14%	7%	12%	12%	65%	2%	14%	7%
2012	14%	7%	11%	15%	53%	3%	7%	5%
Italy	17%	4%	11%	6%	4%	62%	10%	16%
2014	17%	5%	12%	4%	1%	64%	10%	19%
2013	17%	3%	8%	4%	2%	70%	11%	18%
2012	18%	3%	9%	4%	2%	70%	8%	17%
Central Europe	3%	1%	5%	4%	3%	1%	3%	3%
2014	2%	1%	4%	2%	1%	2%	2%	4%
2013	3%	2%	6%	3%	2%	2%	3%	3%
2012	2%	2%	4%	2%	1%	1%	2%	4%
Northern Europe	3%	1%	6%	1%	1%	2%	2%	4%
2014	2%	0%	5%	1%	1%	1%	0%	3%
2013	2%	1%	7%	1%	1%	-	1%	3%
2012	2%	1%	4%	2%	1%	2%	3%	4%

Europeans wanting to consume local food products to support the economy and culture of the region or country they are visiting

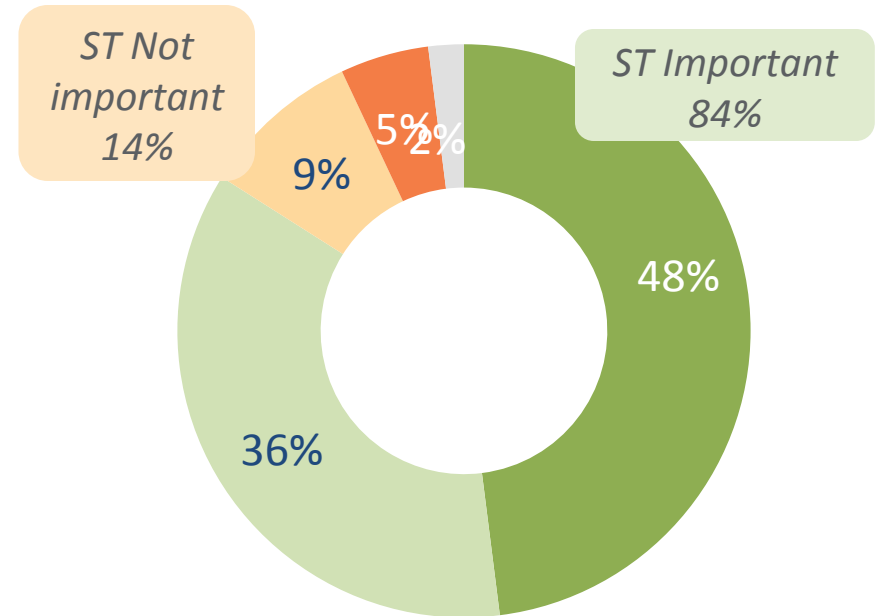
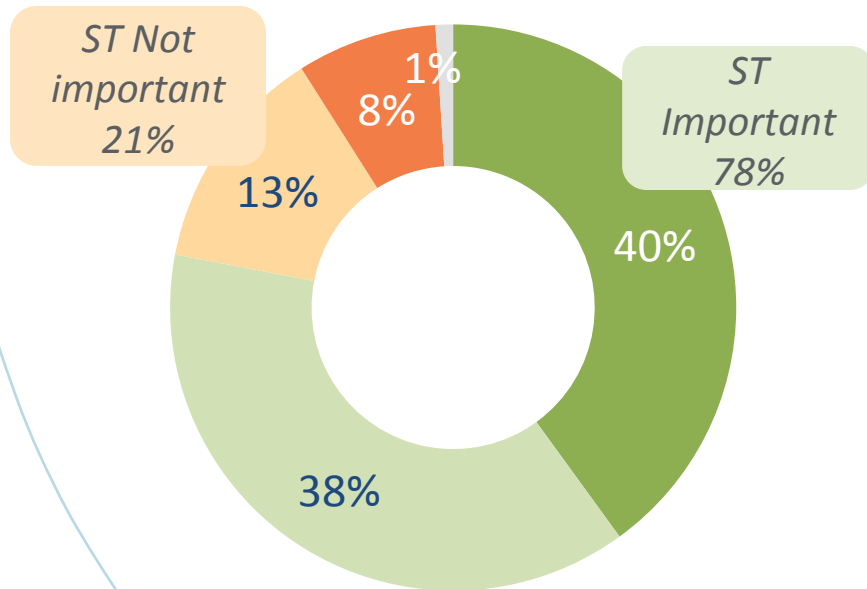
For you, is consuming food products from the region or country where you are on holiday important or not important in order to...?

Base: Everyone (4,010 respondents)

Support the local economy

Discover and support the local culture

- Very important
- Somewhat important
- Not very important
- Not at all important
- DNK

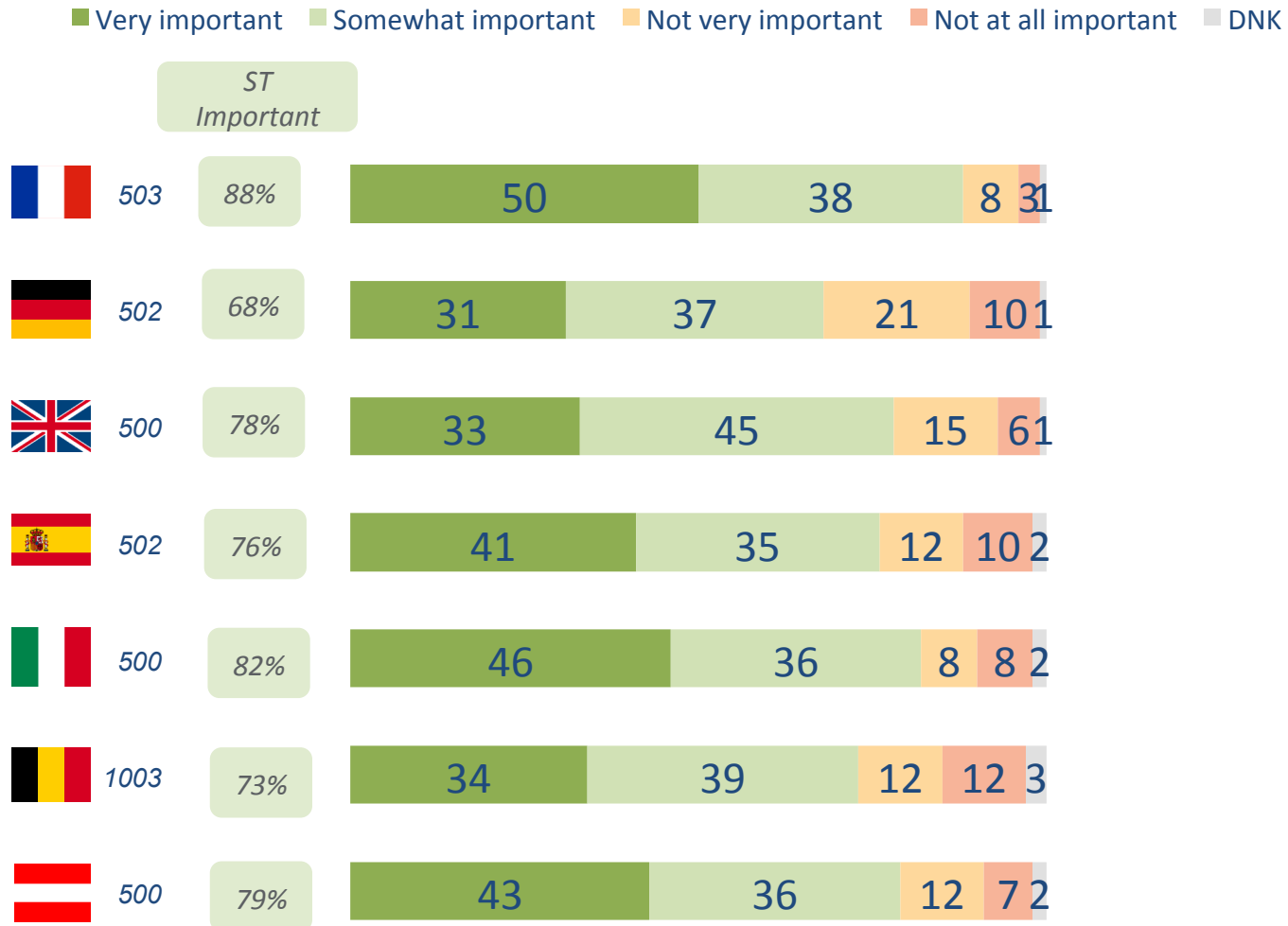


French and Italian people are even more likely than average to want to support the local economy and culture through their food purchases

For you, is consuming food products from the region or country where you are on holiday important or not important in order to...?

Support the local economy

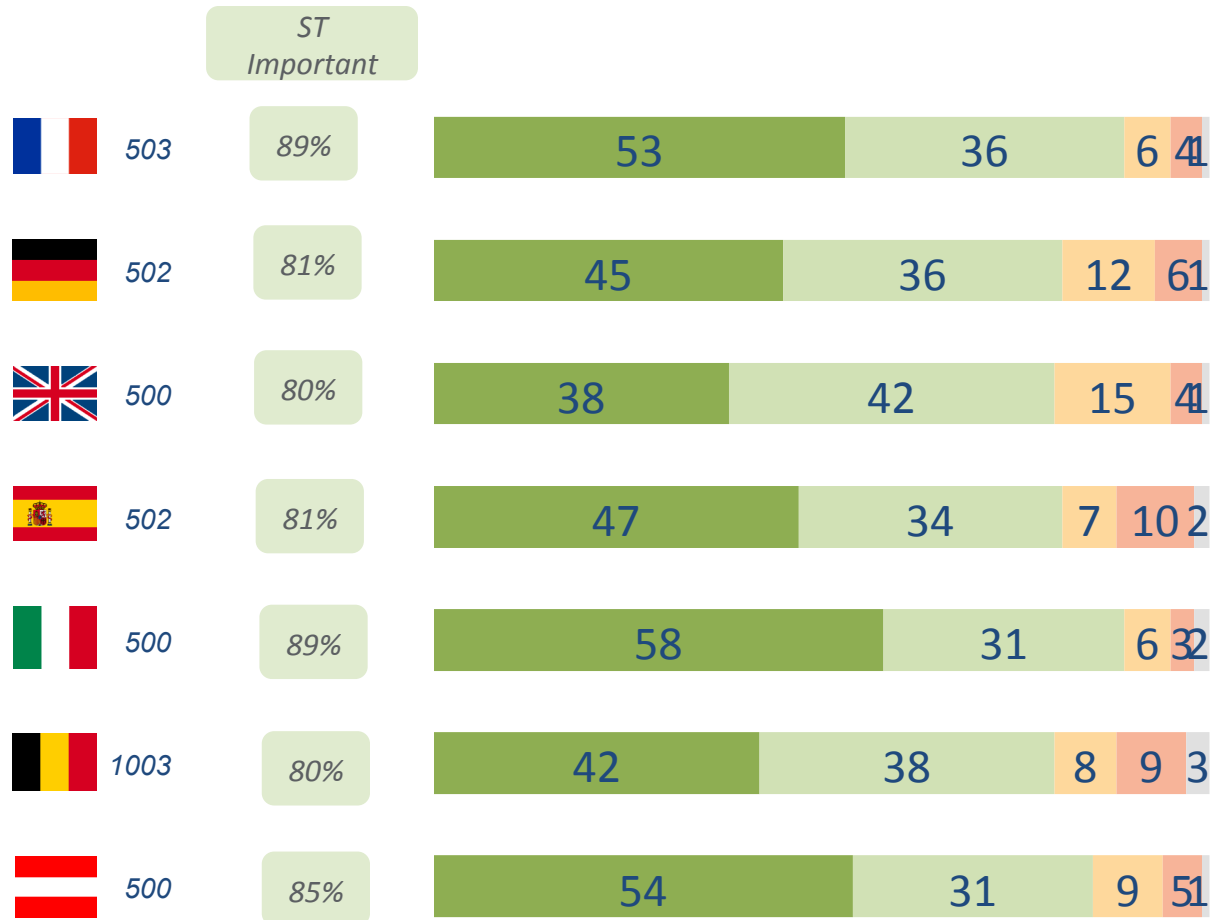
Base: By country (In %)



For you, is consuming food products from the region or country where you are on holiday important or not important in order to...?

Base: By country (In %)

Discover and support the local culture



3

**Easy holidays:
Europeans preparing
their holidays in just a
few clicks**



**europ
assistance**
*you live we care**

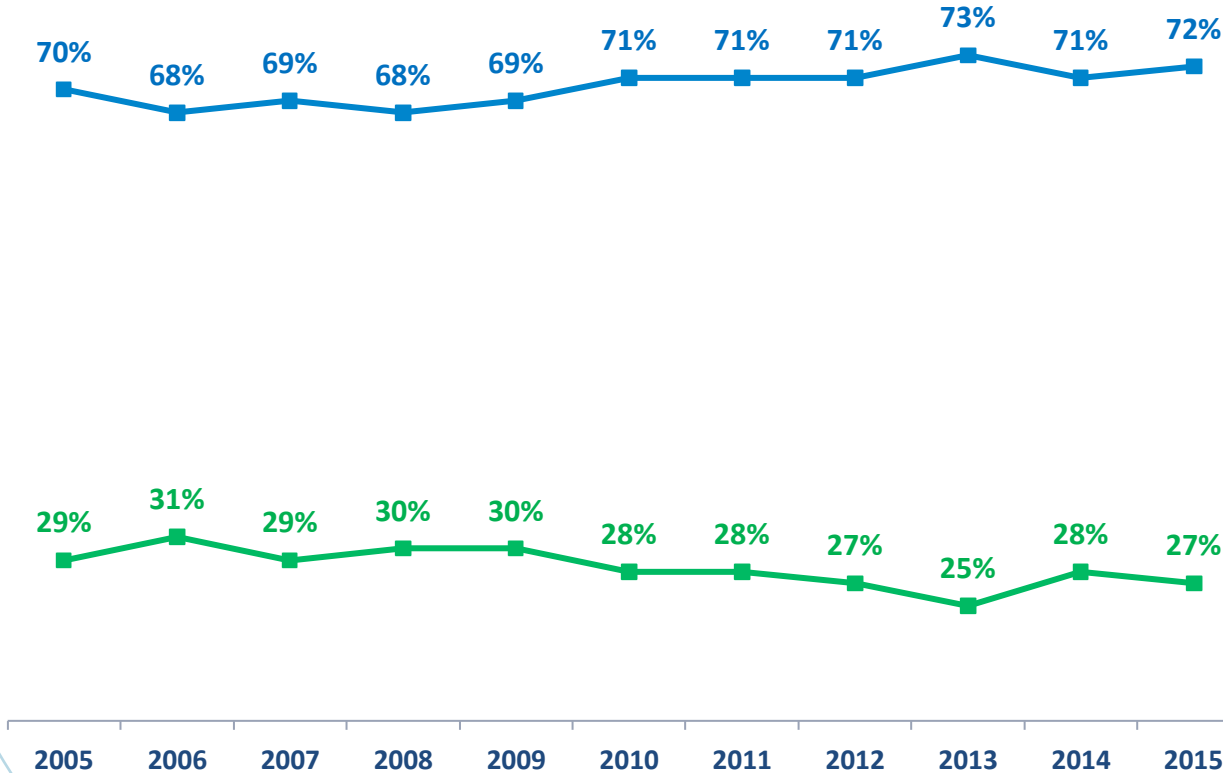
* You live, we care.

Regarding the organisation of summer holidays, anticipation remains the norm for most Europeans

Which of these two situations comes closest to your own?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Select one answer only



You have started preparing your holidays ahead of time

You will decide on your destination at the last minute

DNK: 1%

Preferring last-minute holidays, Italians are less likely to say they will improvise this year

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

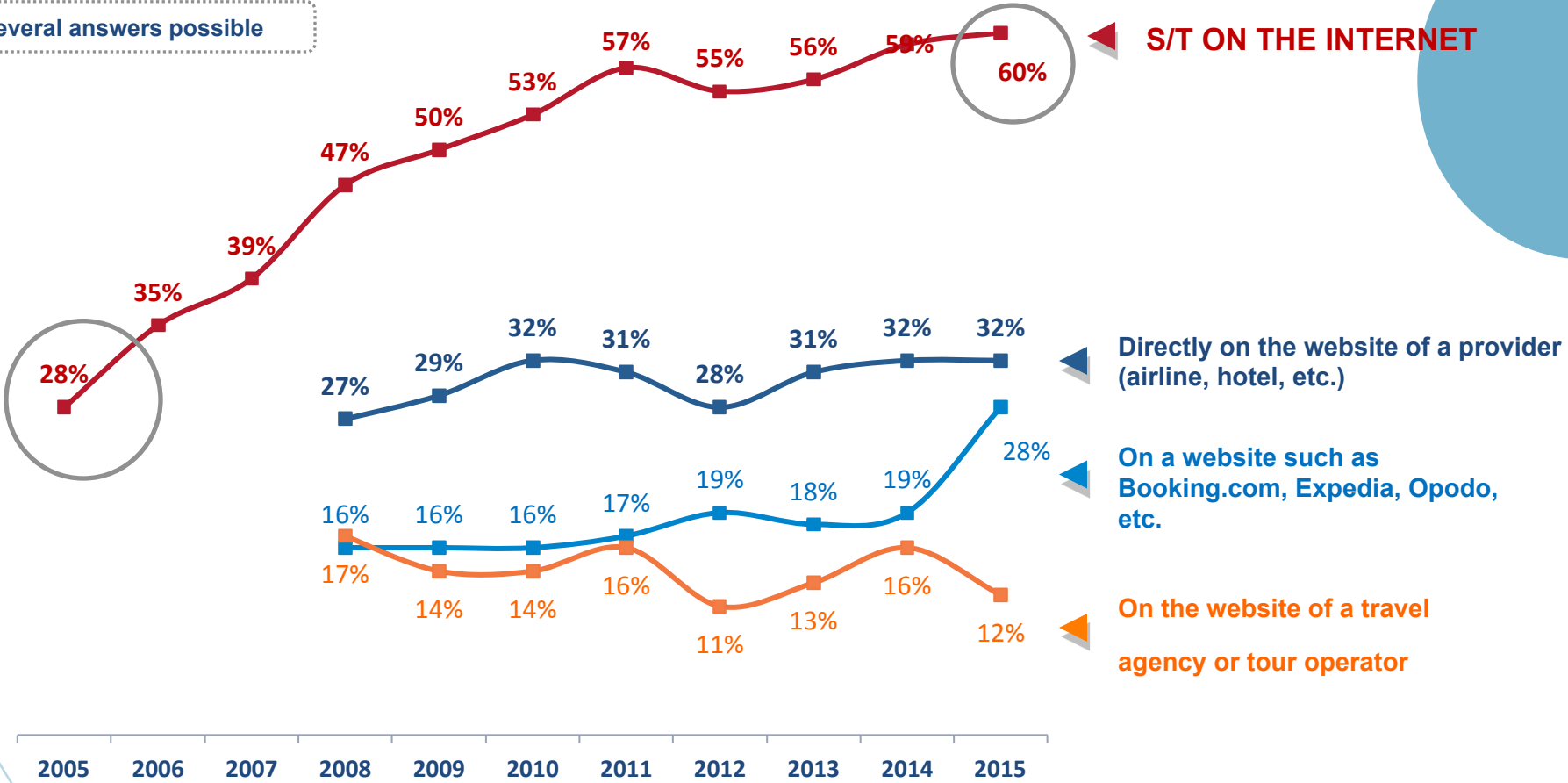
	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
You will decide on your destination at the last minute	27%	34%	20%	24%	28%	34% ↓	25%	21%
2014	28%	32%	19%	24%	27%	44%	22%	18%
2013	25%	22%	17%	25%	24%	40%	18%	21%
2012	27%	28%	18%	15%	31%	41%	21%	19%
You have started preparing your holidays ahead of time	72%	64%	79%	74%	71%	65% ↑	73%	78%
2014	71%	67%	80%	74%	73%	56%	77%	81%
2013	73%	76%	81%	71%	75%	57%	79%	79%
2012	71%	71%	81%	75%	66%	57%	77%	79%
Don't know	1%	2%	1%	2%	1%	1%	2%	1%
2014	1%	1%	1%	2%	0%	0%	1%	1%
2013	2%	2%	2%	4%	1%	3%	3%	0%
2012	2%	2%	1%	-	3%	3%	2%	3%

Within the last 10 years, the percentage of Europeans saying they make their reservations on the Internet has doubled. Booking sites have also gained ground, to the detriment of tour operators.

How do you plan to make your reservations (plane, train, hotel, club)?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible



DNK: 8%

Most Europeans continue to directly book with transport and accommodation providers, but these are challenged by reservations on booking sites.

How do you plan to make your reservations (plane, train, hotel, club)?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
Directly on the website of a provider (airline, hotel, etc.)	32%	36%	29%	44%	18%	32% ↗	23% ↘	29%
2014	32%	35%	36%	38%	16%	24%	32%	32%
2013	31%	37%	26%	37%	24%	29%	29%	28%
2012	28%	38%	26%	32%	21%	21%	28%	26%
On a website such as Expedia, Opodo, etc.	28% ↗	19%	34% ↗	30% ↗	28% ↗	25%	19% ↗	33% ↗
2014	19%	20%	19%	21%	18%	20%	10%	21%
2013	18%	11%	24%	21%	12%	17%	17%	24%
2012	19%	14%	21%	21%	12%	25%	14%	19%
On the website of a travel agency or tour operator	12% ↘	8%	14%	17% ↘	11%	9%	16%	12% ↘
2014	16%	11%	16%	27%	15%	9%	15%	18%
2013	13%	8%	12%	20%	11%	11%	14%	14%
2012	11%	6%	12%	15%	11%	10%	18%	17%
S/T INTERNET	60%	59%	59%	71%	52%	60% ↗	54%	56%
2014	59%	61%	58%	72%	50%	51%	56%	54%
2013	56%	57%	55%	66%	47%	49%	58%	54%
2012	55%	57%	51%	67%	45%	51%	57%	54%

How do you plan to make your reservations (plane, train, hotel, club)?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
Physically in a travel agency or with a tour operator	22%	10%	32%	19%	25%	20%	24%	28%
2014	22%	13%	27%	18%	29%	22%	23%	35%
2013	23%	12%	33%	19%	29%	20%	23%	34%
2012	24%	12%	33%	19%	28%	26%	21%	33%
Physically on the site of a provider (airline, hotel, etc.)	9%	8%	14%	9%	8%	4% ↓	5%	13%
2014	10%	9%	15%	10%	6%	9%	7%	13%
2013	8%	5%	13%	7%	5%	7%	4%	12%
2012	9%	6%	5%	15%	6%	9%	7%	12%
You do not make any reservations	8%	15%	5%	1% ↓	13% ↑	11%	10%	5%
2014	8%	12%	7%	4%	7%	11%	11%	7%
2013	10%	16%	5%	3%	11%	17%	10%	6%
2012	11%	15%	5%	2%	17%	17%	8%	9%
Don't know	8%	11%	6%	9%	7%	9%	11%	9%
2014	3%	3%	2%	4%	6%	4%	2%	2%
2013	4%	2%	4%	4%	7%	4%	3%	2%
2012	2%	3%	1%	2%	2%	2%	2%	2%

Custom holiday preparation continues to be preferred over packs and all-inclusive packages, with gaps that remain strong depending on the country and cultural habits (French people are the least captive/interested in relation to these options)

Which type(s) of holiday will you opt for during these summer 2015 holidays?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
You will purchase an all-inclusive package, including transport and accommodation	25%	14%	26%	37%	28%	22%	34% ↑	31%
2014	26%	20%	31%	33%	20%	21%	26%	35%
2013	25%	15%	27%	33%	25%	21%	26%	35%
2012	26%	17%	30%	29%	28%	27%	31%	31%
You will organise your trip yourself, purchasing separate services	70%	74%	69%	69%	66%	72%	60% ↓	70%
2014	72%	73%	73%	69%	71%	73%	68%	70%
2013	71%	75%	73%	67%	71%	68%	72%	66%
2012	69%	74%	69%	69%	65%	62%	66%	72%
None of these	2%	3%	2%	0%	5%	4%	3%	0%
Don't know	1%	2%	1%	0%	1%	1%	1%	0%

What type(s) of accommodation will you choose for these summer 2015 holidays?

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Several answers possible

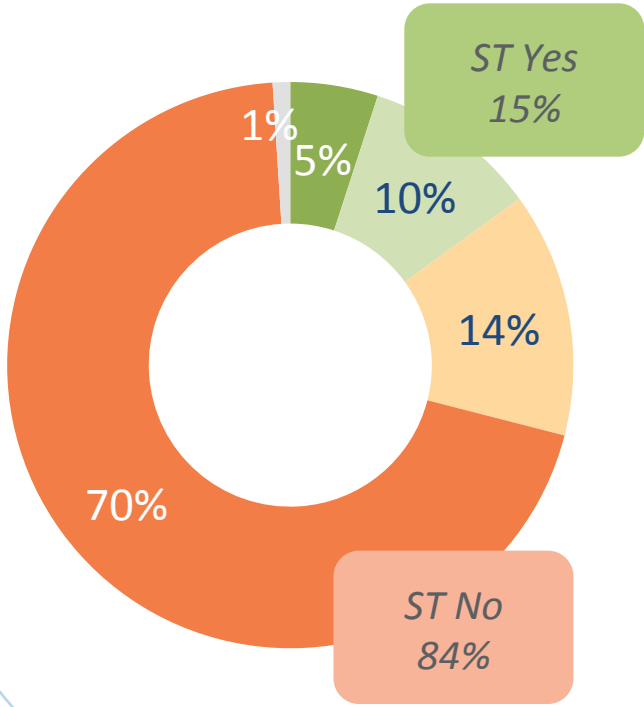
	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
You will rent a house, hotel room or bed-and-breakfast room	70% ↗	53%	77% ↗	73%	71%	76%	69%	77%
2014	67%	56%	70%	72%	68%	70%	73%	77%
2013	67%	53%	71%	71%	71%	68%	72%	83%
2012	69%	57%	76%	68%	70%	72%	77%	77%
You will go to your second home or the home of friends	20% ↘	32%	15% ↘	17%	21%	18%	16%	16%
2014	23%	30%	25%	21%	21%	18%	19%	18%
2013	23%	33%	19%	18%	26%	20%	19%	16%
2012	21%	32%	16%	14%	26%	21%	11%	19%
You will go camping-caravanning	12%	16%	12%	12%	9%	8%	16%	10%
2014	14%	22%	13%	14%	6%	11%	14%	13%
2013	13%	21%	11%	12%	4%	9%	14%	8%
2012	11%	15%	10%	17%	5%	6%	14%	9%
None of these	1%	-	0%	-	2%	1%	1%	0%
2014	1%	0%	1%	-	1%	0%	1%	1%
2013	1%	-	1%	1%	1%	2%	0%	1%
2012	1%	1%	0%	-	2%	3%	1%	-
Don't know	1%	3%	-	0%	2%	1%	1%	0%
2014	1%	0%	-	0%	5%	1%	1%	1%
2013	1%	1%	0%	0%	1%	0%	1%	0%
2012	1%	2%	-	-	2%	1%	0%	0%

For your holidays this year, are you personally interested in the following means of transport and accommodation?

Base: Everyone (4,010 respondents)

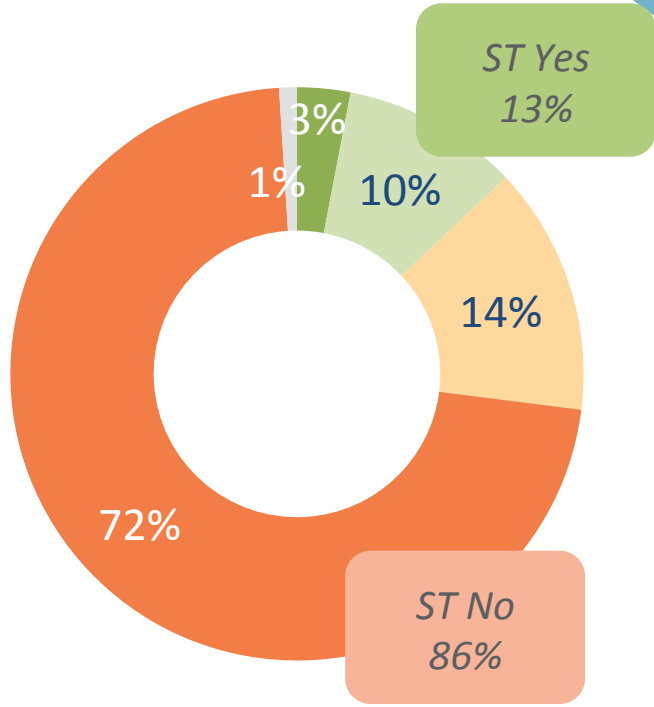
Car-sharing

■ Yes, very
 ■ Yes, a little
 ■ No, not really
 ■ No, not at all
 ■ DNK



Home exchange between individuals

■ Yes, very
 ■ Yes, a little
 ■ No, not really
 ■ No, not at all
 ■ DNK



For your holidays this year, are you personally interested in the following means of transport and accommodation?

Base: Everyone (4,010 respondents)

Car-sharing

Total: 15%



18-24 years: 29%

25-34 years: 24%



Not working: 24%



Holiday budget of less than

€1000: 29%

€1000 to €15000: 19%



Those who will decide on their destination at the last minute: 20%

Home exchange between individuals

Total: 13%



18-24 years: 23%

35-44 years: 19%



Families

2 children: 18%

3 children or more: 26%



Holiday budget of less than

€1000: 19%

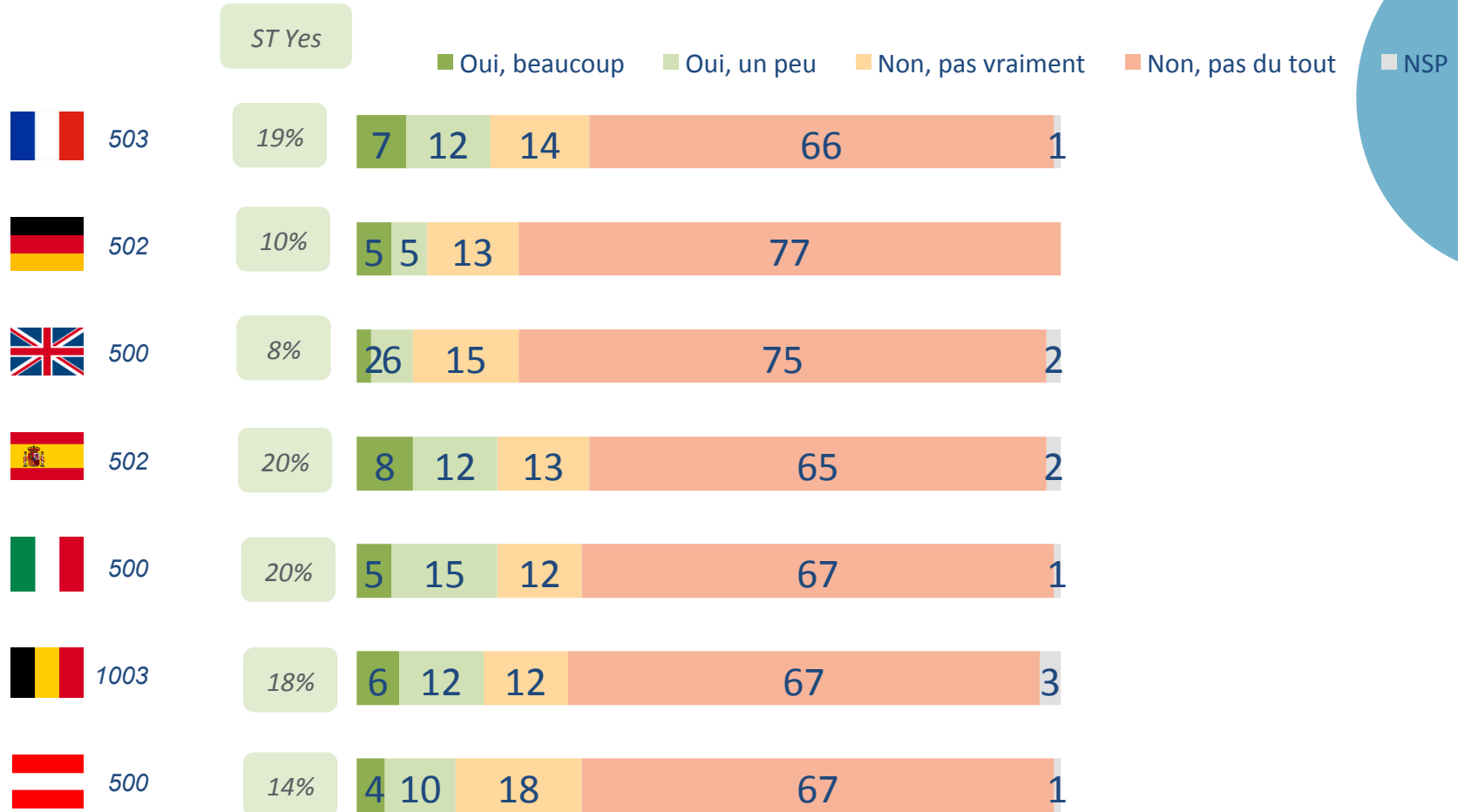


Those who plan to spend their holiday in a city: 19%

For your holidays this year, are you personally interested in the following means of transport and accommodation?

Base: By country (In %)

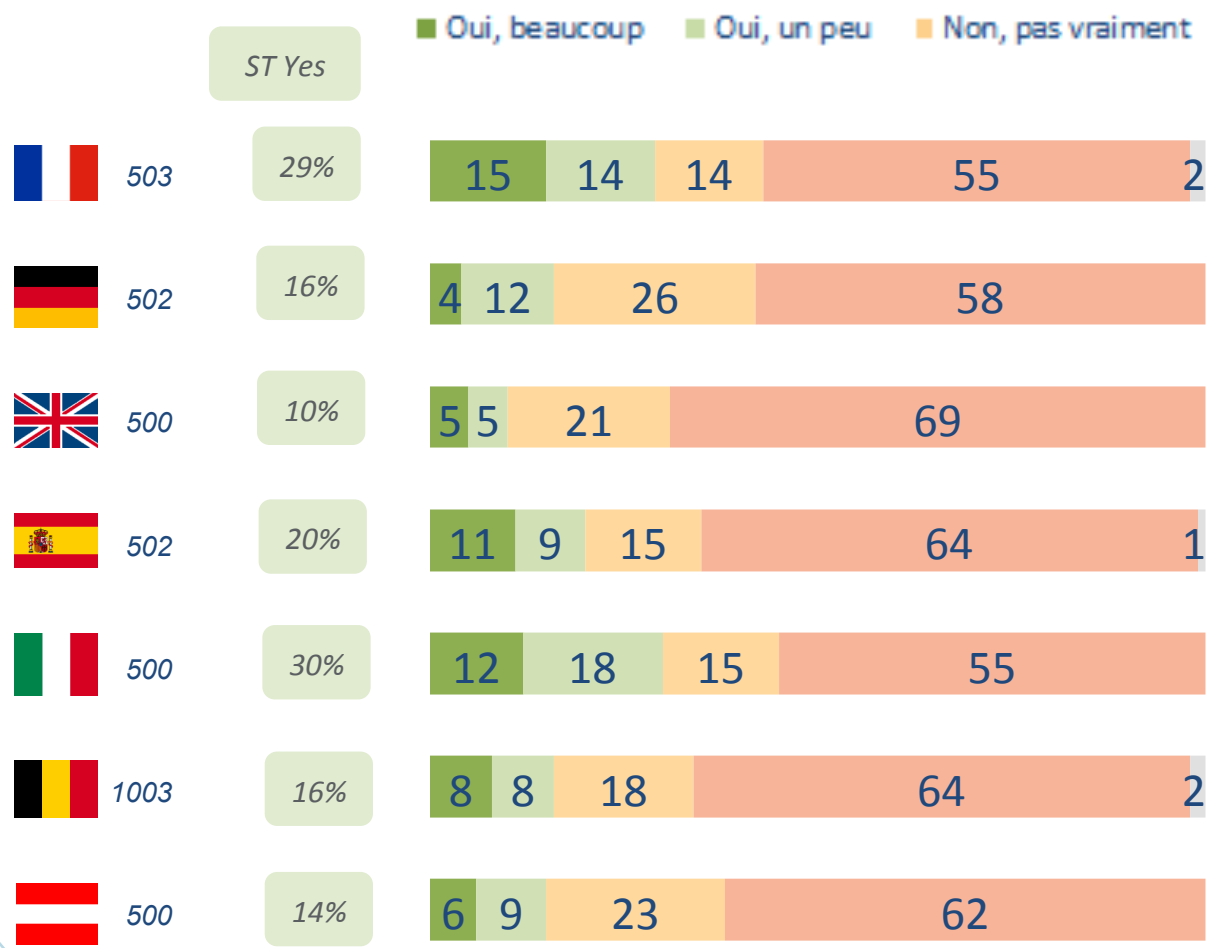
Car-sharing



For your holidays this year, are you personally interested in the following means of transport and accommodation?

Base: By country (In %)

Home exchange between individuals



4

But holidays not as carefree: Europeans are more concerned about the risk of an attack



**europ
assistance**
*you live we care**

* You live, we care.

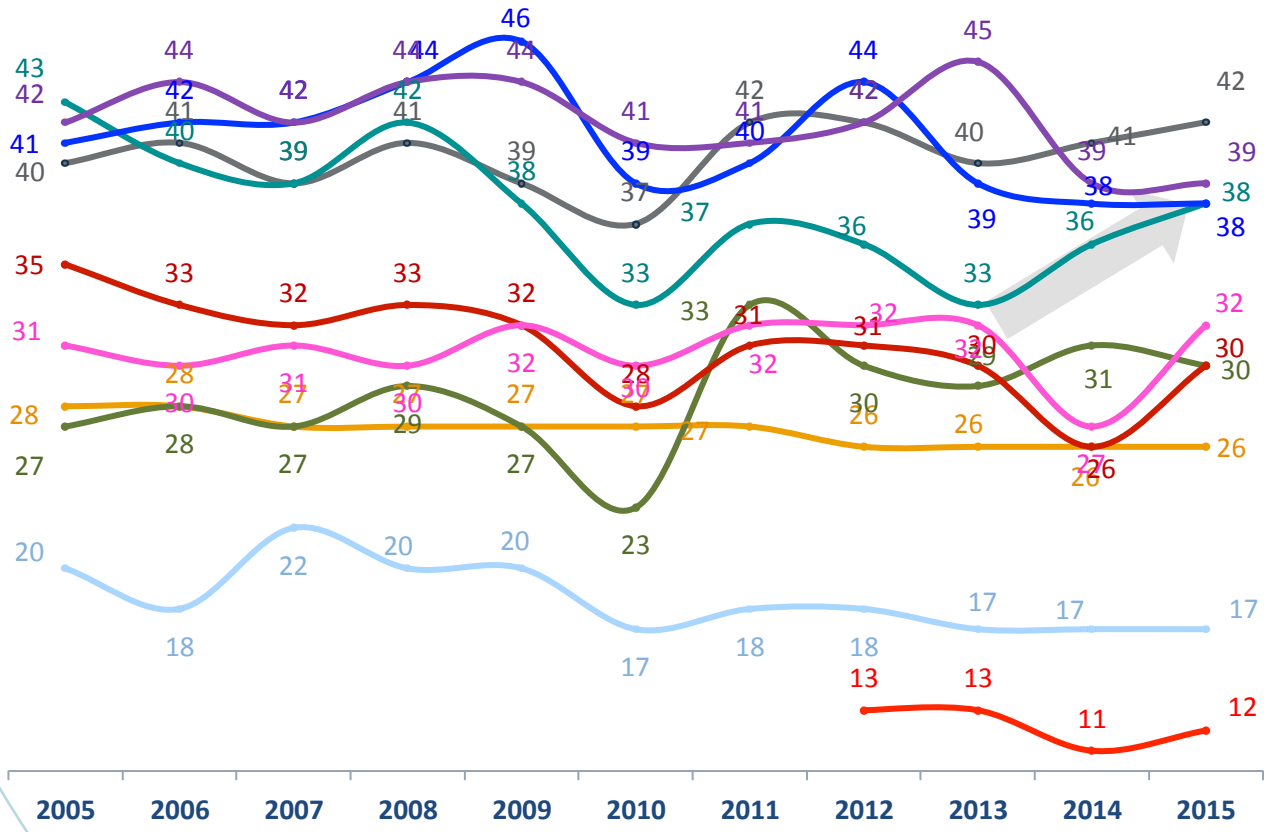
Like in 2014, most Europeans say the risk of an attack is an essential criterion to choose their holiday destination, ahead of climate and budget. Also note that consideration for health risks has risen in the last two years.

* You live, we care.

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

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Essential"



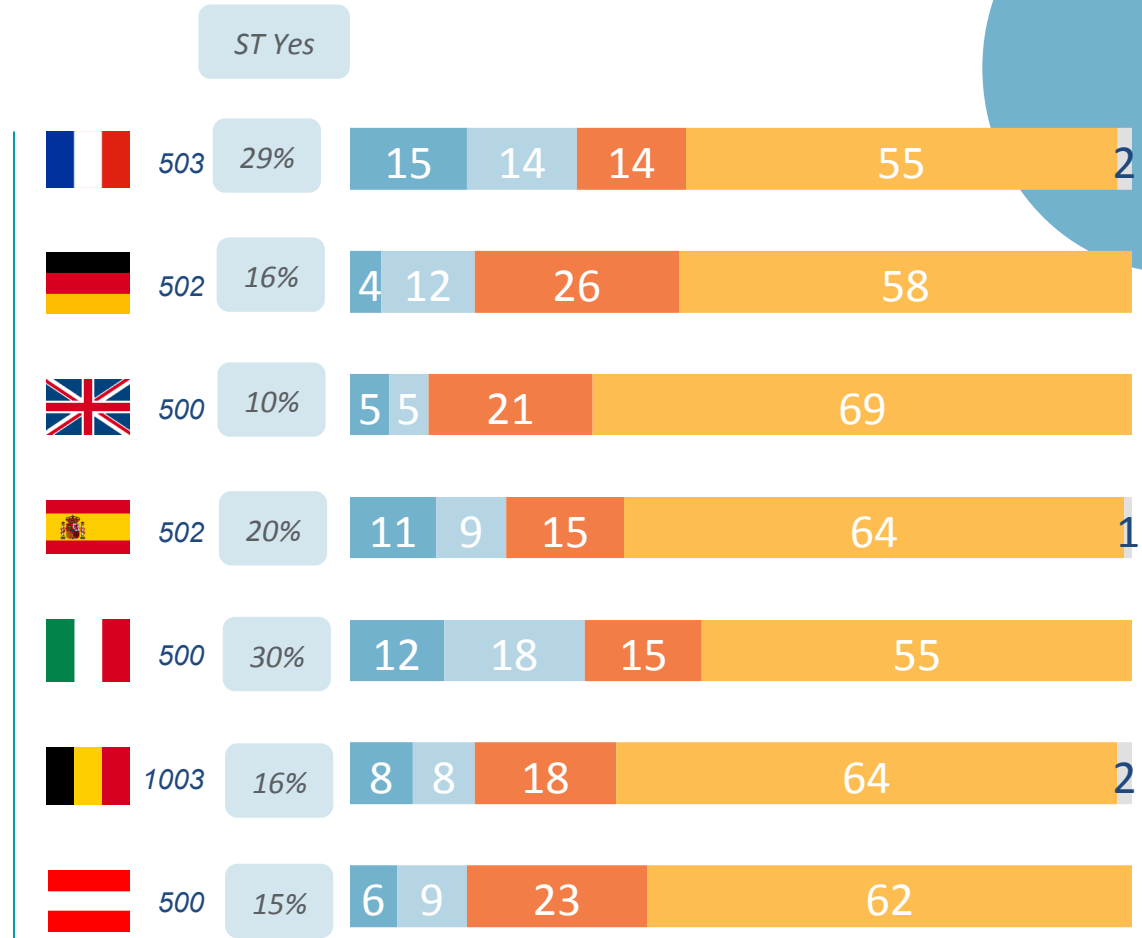
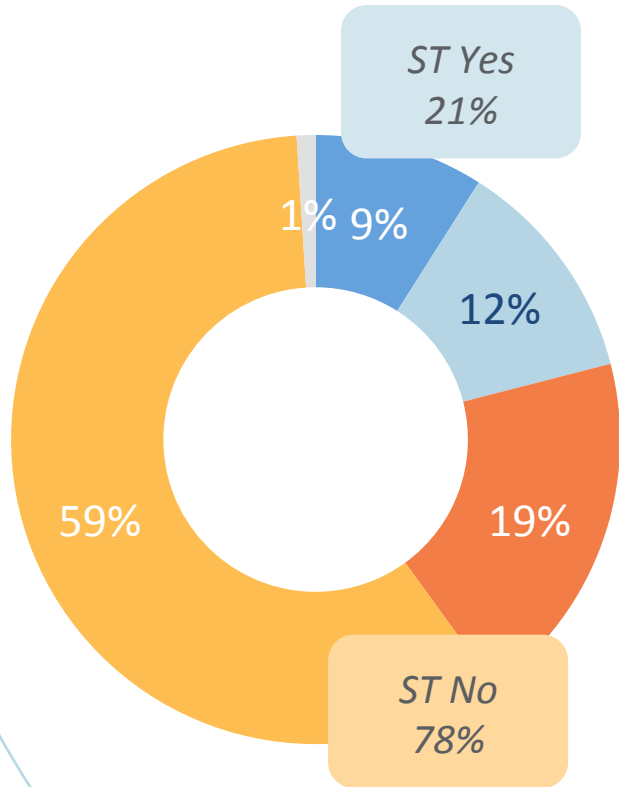
- The risk of an attack
- The climate
- The budget you intend to allocate
- Health risks
- Opportunities for leisure or cultural activities
- The quality of tourist infrastructures
- The risk of social unrest
- The risk of a natural disaster
- Travel time to your holiday location
- The economic situation in the destination country

Although most Europeans are not afraid of travelling because of the Ebola virus threat, French and Italian holiday-makers are the most concerned.

Are you personally afraid of travelling because of the Ebola virus threat?

Base: Everyone (4010 respondents) / By country (In %)

■ Yes, very
 ■ Yes, a little
 ■ No, not really
 ■ No, not at all
 ■ DNK



Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Essential"

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
The risk of an attack	42%	36%	49%	42%	45%	39%	30%	50%
2014	41%	32%	46%	45%	50%	33%	34%	56%
2013	40%	35%	51%	37%	42%	35%	26%	51%
2012	42%	38%	50%	34%	41%	40%	42%	50%
The climate	39%	38%	40%	37%	34%	40%	45% ↓	44%
2014	39%	37%	39%	33%	34%	45%	54%	46%
2013	45%	41%	50%	45%	39%	45%	53%	46%
2012	42%	35%	47%	45%	32%	43%	48%	51%
Health risks	38%	35% ↑	42%	37%	44%	33%	35% ↑	44%
2014	36%	28%	41%	31%	47%	33%	27%	42%
2013	33%	24%	43%	28%	37%	33%	30%	39%
2012	36%	31%	42%	29%	40%	35%	39%	44%
The budget you intend to allocate	38%	32%	37%	33%	37%	52%	34% ↑	42%
2014	38%	31%	38%	27%	43%	55%	28%	43%
2013	39%	30%	42%	32%	44%	49%	34%	41%
2012	44%	40%	49%	36%	38%	52%	34%	47%
Opportunities for leisure or cultural activities	32% ↑	28%	47% ↑	22%	26%	23%	33%	51%
2014	27%	21%	37%	17%	22%	25%	35%	46%
2013	32%	22%	45%	34%	18%	26%	32%	49%
2012	32%	34%	44%	23%	21%	24%	30%	50%

The quality of tourist infrastructures is an important criterion for a higher percentage of French and British people this year

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Essential"

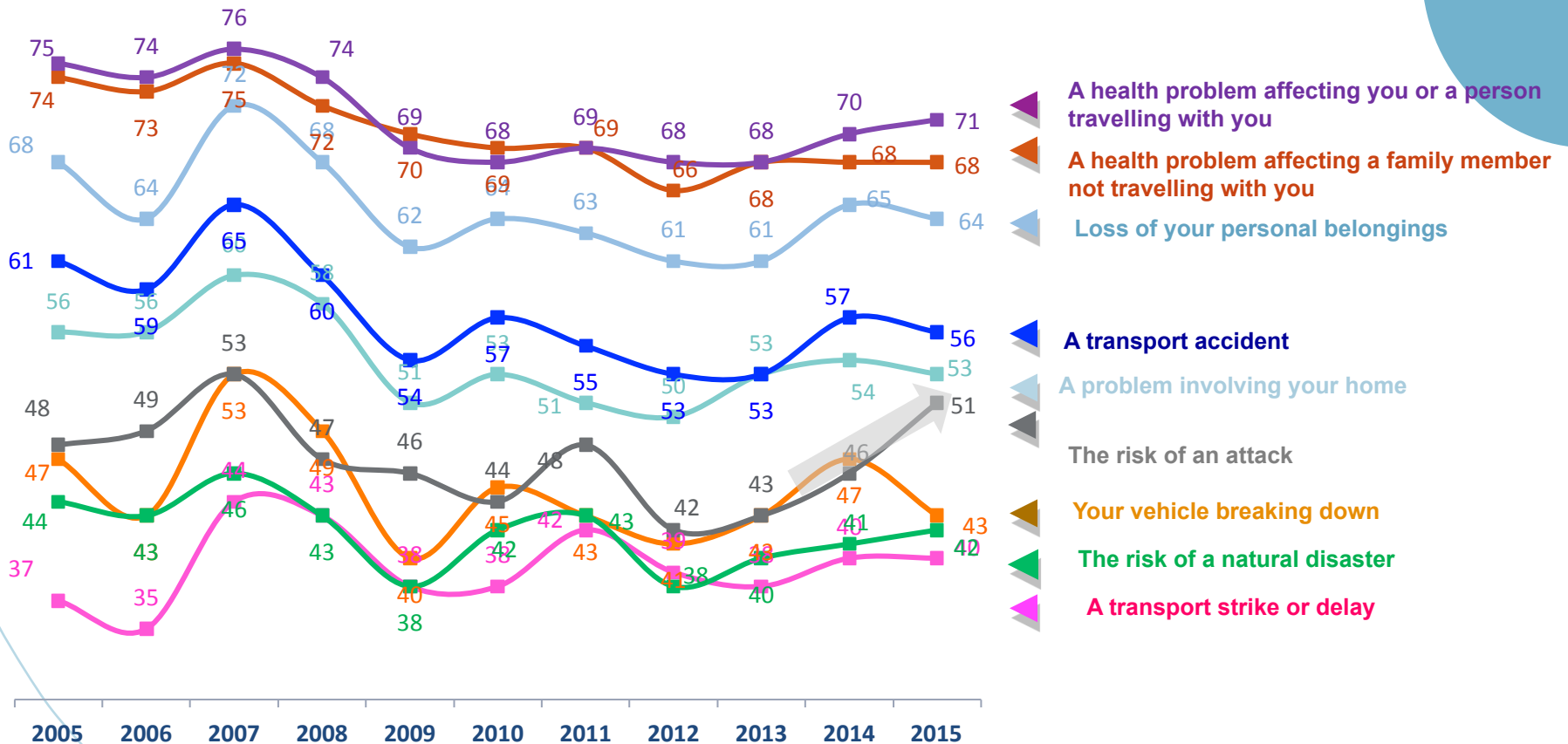
	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
The quality of onsite tourist infrastructures	30% ↗	30% ↗	27%	25% ↗	28%	37%	35%	32%
2014	26%	22%	27%	17%	29%	35%	39%	34%
2013	30%	22%	35%	27%	27%	38%	33%	39%
2012	31%	25%	36%	26%	28%	35%	37%	31%
The risk of social unrest	30%	19%	40%	27%	35%	28%	17%	50%
2014	31%	19%	44%	29%	31%	23%	18%	54%
2013	29%	17%	48%	23%	27%	25%	17%	47%
2012	30%	18%	48%	25%	28%	25%	27%	48%
The risk of a natural disaster	26%	21%	29%	24%	37%	23%	15%	33%
2014	26%	18%	27%	29%	36%	24%	17%	35%
2013	26%	20%	30%	22%	38%	27%	14%	28%
2012	26%	24%	30%	24%	32%	25%	21%	28%
Travel time to your holiday location	17%	13%	20%	15%	14%	20%	18%	20%
2014	17%	11%	20%	15%	14%	20%	16%	26%
2013	17%	8%	24%	13%	18%	20%	20%	28%
2012	18%	11%	25%	19%	9%	21%	20%	23%
The economic situation in the destination country	12%	12%	13%	13%	14%	9%	8%	15%
2014	11%	7%	12%	13%	13%	13%	9%	12%
2013	13%	10%	15%	13%	16%	12%	12%	16%
2012	13%	10%	18%	11%	10%	11%	13%	15%

During holidays, risks to personal and family health remain the primary concern, ahead of the risk of losing personal belongings. Note that the level of concern in relation to the risk of an attack has risen sharply this year.

Please tell me, for each of these events, if it personally concerns you a lot, somewhat, not really or not at all when you go on holiday:

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Very" + "Somewhat concerned"

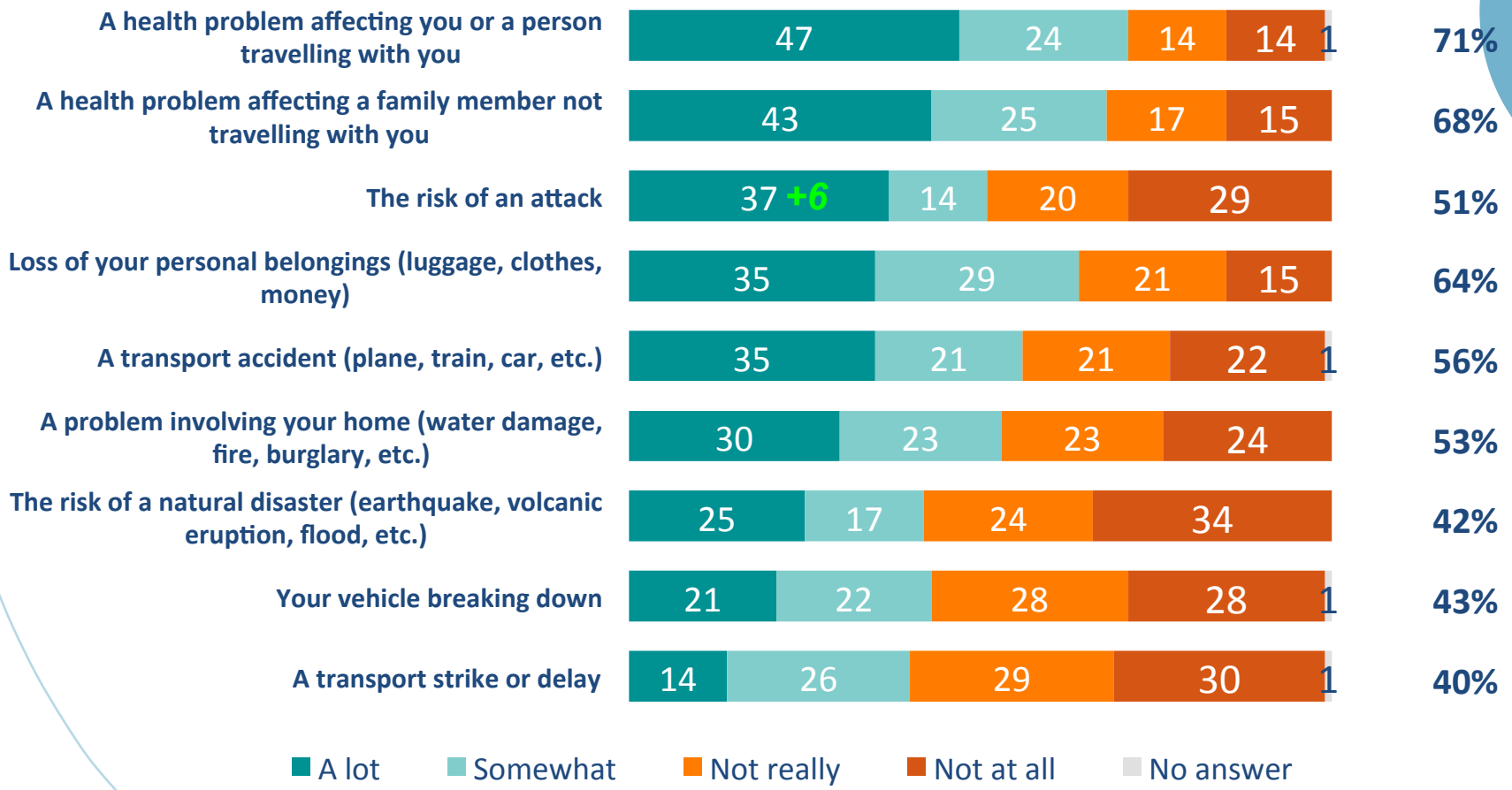


Please tell me, for each of these events, if it personally concerns you a lot, somewhat, not really or not at all when you go on holiday:

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Select one answer only

S/T
"Concerned"



Due to the events of January, French people are much more concerned about the risk of an attack than last year. This is also true for Italians.

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Very concerned"

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
A health problem affecting you or a person travelling with you	47%	53% ↗	46%	22%	68%	53% ↗	32%	42%
2014	45%	43%	52%	27%	76%	42%	35%	42%
2013	44%	49%	48%	26%	62%	47%	32%	49%
2012	46%	55%	44%	34%	60%	40%	45%	41%
A health problem affecting a family member not travelling with you	43%	53% ↗	40%	18%	62%	50%	28%	38%
2014	42%	42%	48%	19%	62%	48%	33%	38%
2013	41%	45%	44%	22%	48%	49%	32%	45%
2012	44%	55%	42%	25%	54%	45%	39%	31%
The risk of an attack	37% ↗	38% ↗	33%	28%	49%	44% ↗	21%	32%
2014	31%	28%	32%	26%	53%	26%	23%	31%
2013	30%	34%	34%	23%	32%	27%	15%	27%
2012	29%	33%	27%	25%	42%	24%	23%	26%
A transport accident	35%	31%	37%	18%	52%	43%	21%	34%
2014	36%	28%	41%	25%	61%	40%	20%	34%
2013	33%	33%	42%	19%	37%	39%	21%	35%
2012	33%	33%	34%	28%	40%	32%	27%	33%
Loss of your personal belongings	35%	35%	40%	19%	45%	40%	22%	34%
2014	36%	31%	44%	24%	53%	33%	23%	29%
2013	35%	37%	45%	22%	42%	34%	22%	36%
2012	36%	36%	35%	35%	45%	35%	33%	25%

Concerns about other types of risks remain stable overall

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Very concerned"

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
A problem involving your home	30%	35%	28%	16%	49%	32%	21%	25%
2014	32%	35%	31%	21%	50%	32%	23%	28%
2013	32%	40%	35%	18%	44%	28%	19%	32%
2012	31%	38%	26%	25%	42%	29%	31%	22%
The risk of a natural disaster	25%	23%	25%	12% ↓	46%	29%	13%	23%
2014	26%	19%	28%	19%	48%	25%	16%	24%
2013	25%	28%	29%	16%	32%	24%	11%	21%
2012	24%	24%	23%	21%	37%	21%	18%	17%
Your vehicle breaking down	21%	27%	15%	12%	30% ↓	30%	16%	8%
2014	20%	22%	13%	13%	43%	23%	17%	8%
2013	19%	27%	14%	9%	32%	22%	16%	11%
2012	18%	24%	10%	11%	27%	23%	23%	10%
A transport strike or delay	14%	14%	13%	9% ↓	25%	13%	10%	10%
2014	14%	17%	11%	15%	25%	12%	9%	9%
2013	13%	14%	10%	10%	26%	13%	6%	10%
2012	16%	17%	14%	14%	28%	15%	13%	8%

Most Europeans continue to have health, home and car insurance, despite an increase in those saying they are not covered.

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

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Select one answer only

S/T "Covered"

S/T "Concerned"

Un problème de santé vous concernant vous ou une personne vous accompagnant



60%

2014: 62%
2013: 63%

71%

2014: 70%
2013: 68%

Une panne de votre véhicule



60%

2014: 64%
2013: 58%

43%

2014: 47%
2013: 43%

Un problème concernant votre domicile (dégât des eaux, incendie, cambriolage, etc.)



59%

2014: 65%
2013: 65%

53%

2014: 54%
2013: 53%

La perte de vos effets personnels (bagages, vêtements, argent)



52%

2014: 53%
2013: 53%

64%

2014: 65%
2013: 61%

Un accident de transport (avion, train, voiture, etc.)



51%

2014: 58%
2013: 57%

56%

2014: 57%
2013: 53%

■ Yes, annual
■ Oui, temporaire
■ Oui, par l'intermédiaire de la banque

■ Oui, temporaire
■ Non, vous n'êtes pas couvert

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

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

Select one answer only

S/T "Covered"

S/T "Concerned"

Un problème de santé concernant un de vos proches qui ne vous accompagne pas



26%

2014: 26%
2013: 32%

68%

2014: 68%
2013: 68%

Le risque de catastrophe naturelle (tremblement de terre, irruption volcanique, inondation etc.)



25%

2014: 25%
2013: 31%

42%

2014: 41%
2013: 40%

Une grève ou un retard des transports



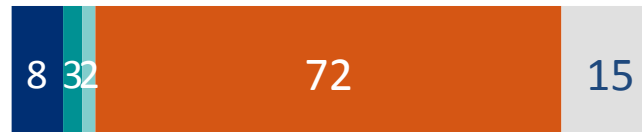
23%

2014: 23%
2013: 27%

40%

2014: 40%
2013: 38%

Les risques d'attentats



13%

2014: 15%
2013: 20%

51%

2014: 46%
2013: 43%

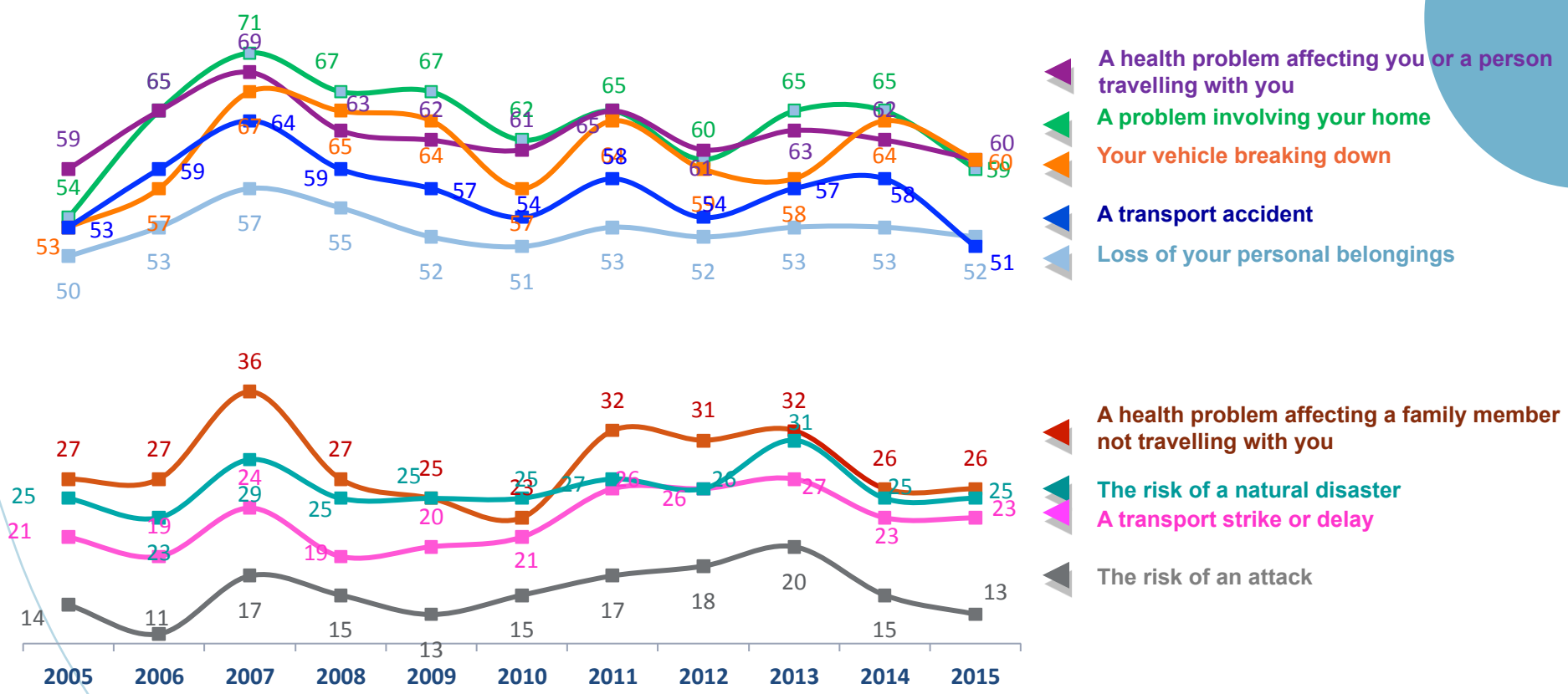
■ Oui, annuel
■ Oui, temporaire
■ Oui, par l'intermédiaire de la banque

■ Oui, temporaire
■ Non, vous n'êtes pas couvert

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

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

S/T "Covered"



Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Covered"

	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
A health problem affecting you or a person travelling with you	60%	87%	45%	80%	74%	23%	83%	39% ↓
2014	62%	83%	50%	79%	79%	27%	87%	56%
2013	63%	84%	51%	85%	65%	27%	82%	50%
2012	61%	87%	52%	78%	65%	22%	82%	54%
Your vehicle breaking down	60% ↓	86%	37% ↓	72%	78%	41%	76% ↓	36% ↓
2014	64%	81%	55%	74%	81%	39%	82%	53%
2013	58%	82%	42%	76%	76%	20%	74%	47%
2012	59%	77%	47%	73%	83%	29%	72%	53%
A problem involving your home	59% ↓	91% ↗	28% ↓	90%	86%	19% ↓	80%	29% ↓
2014	65%	84%	52%	85%	87%	27%	76%	61%
2013	65%	91%	48%	85%	86%	25%	78%	41%
2012	60%	90%	41%	80%	79%	22%	76%	37%
Loss of your personal belongings	52%	67%	34%	92% ↗	54%	27%	52%	39% ↓
2014	53%	60%	41%	86%	56%	26%	56%	56%
2013	53%	62%	39%	89%	57%	25%	45%	50%
2012	52%	68%	36%	87%	50%	24%	51%	52%
A transport accident	51% ↓	79%	29% ↓	69%	62%	25% ↓	70%	33% ↓
2014	58%	72%	47%	74%	65%	34%	72%	55%
2013	57%	75%	45%	79%	63%	25%	66%	44%
2012	54%	77%	36%	75%	64%	23%	76%	44%

Base: People stating they will go away on holiday in summer 2015 (2,386 respondents)

% "Covered"

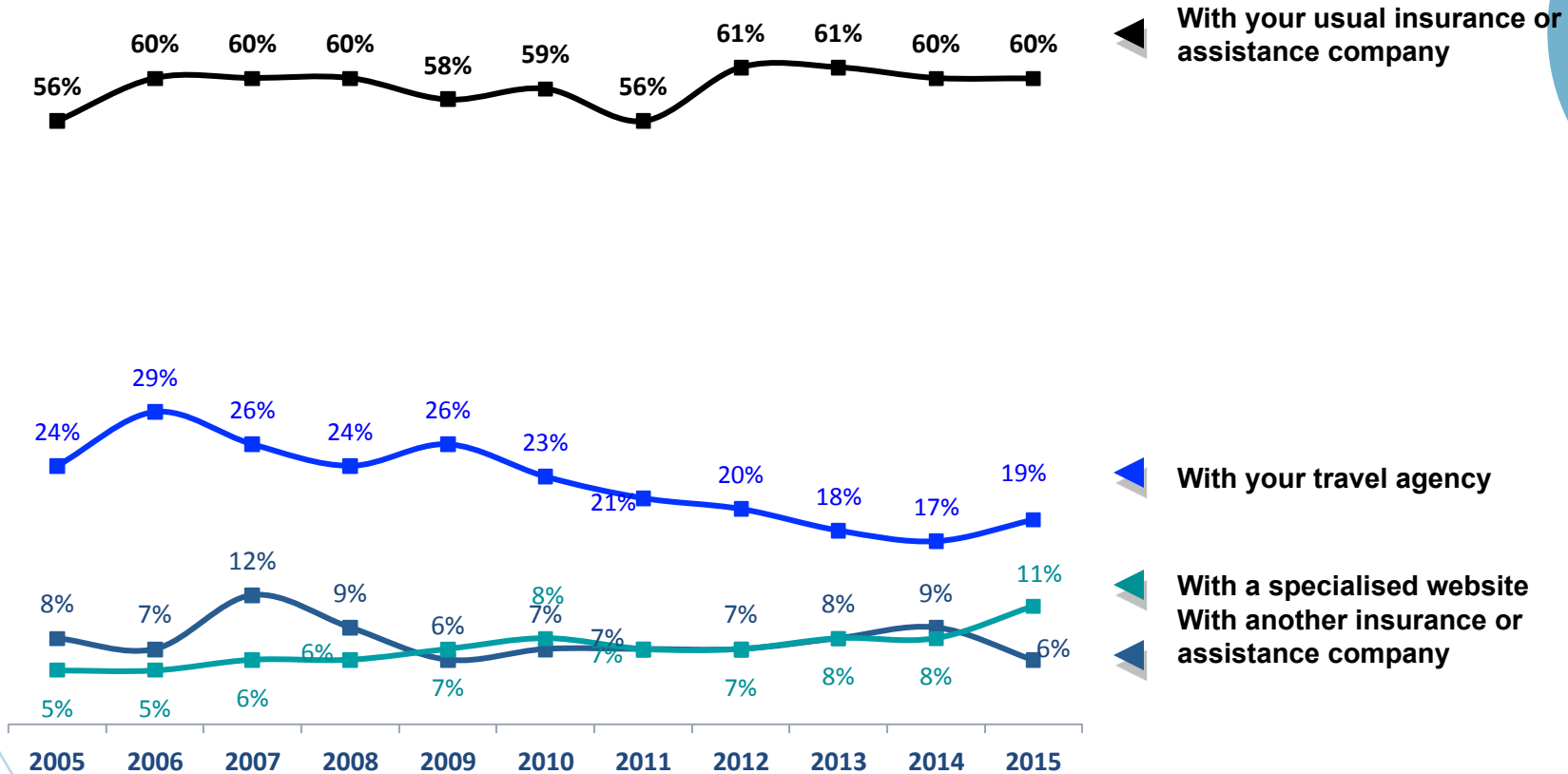
	Total							
	n=2386	n=318	n=312	n=273	n=298	n=301	n=572	n=311
A health problem affecting a family member not travelling with you	26%	40%	15%	31%	45%	9%	34% ↘	17% ↘
2014	26%	34%	19%	24%	51%	14%	42%	31%
2013	32%	32%	30%	39%	52%	16%	43%	31%
2012	31%	43%	18%	38%	48%	15%	47%	25%
The risk of a natural disaster	25%	57%	9%	33%	26%	6%	27%	13% ↘
2014	25%	50%	13%	32%	19%	9%	27%	19%
2013	31%	54%	14%	51%	27%	12%	26%	21%
2012	26%	53%	8%	38%	23%	10%	36%	14%
A transport strike or delay	23%	31%	10%	49%	27%	9%	16%	18%
2014	23%	24%	14%	44%	25%	14%	17%	19%
2013	27%	25%	9%	63%	37%	16%	15%	19%
2012	26%	31%	11%	54%	33%	12%	20%	22%
The risk of an attack	13%	30%	6%	15%	12%	5%	10%	6% ↘
2014	15%	30%	8%	17%	13%	6%	11%	11%
2013	20%	31%	11%	31%	14%	11%	13%	11%
2012	18%	35%	4%	28%	16%	7%	18%	11%

Insurance with the usual insurance company remains the norm, while the share of Europeans taking out insurance on a website has increased very slightly

With whom did you take out this insurance or assistance policy?

Base: People stating they will go away on holiday in summer 2015 and have taken out an insurance or assistance policy (2,035 respondents)

Several answers possible



None of these: 4%

DNK: 11%

Insurance with the usual insurance company remains the norm, while the share of Europeans taking out insurance on a website has increased very slightly

Base: People stating they will go away on holiday in summer 2015 and have taken out an insurance or assistance policy (2,035 respondents)

	Total							
	n=2035	n=313	n=222	n=271	n=276	n=181	n=551	n=220
With your usual insurance or assistance company	60%	87%	60%	37%	41%	68% ↗	65%	45% ↘
2014	60%	81%	68%	41%	40%	55%	67%	56%
2013	61%	90%	63%	39%	48%	53%	61%	51%
2012	61%	90%	58%	35%	69%	36%	69%	47%
With your travel agency	19%	9%	17%	9%	34%	34%	21%	32%
2014	17%	9%	16%	9%	33%	30%	17%	29%
2013	18%	8%	21%	10%	42%	26%	18%	31%
2012	20%	7%	21%	12%	28%	49%	17%	36%
With a specialised website	11% ↗	2%	7% ↗	32%	5%	8%	1%	5%
2014	8%	1%	1%	25%	2%	11%	2%	5%
2013	8%	0%	3%	24%	4%	7%	3%	5%
2012	7%	1%	3%	24%	5%	5%	2%	5%
With another insurance or assistance company	6% ↘	3%	10%	6%	5%	3%	9%	7%
2014	9%	5%	14%	11%	6%	6%	10%	9%
2013	8%	4%	13%	9%	3%	4%	10%	10%
2012	7%	3%	14%	5%	7%	3%	7%	10%

5

Country sheets



* You live, we care.

Sources: OECD and Eurostat 2015



	Austria	Germany	France	United Kingdom	Belgium	Italy	Spain
Inhabitants (in millions)	8.5	82.1	63.8	62.6	11.2	60.7	46.6
2014	8.4	81	65.6	62.2	11.2	60.3	46.1
Growth (in %)	0.3	1.6	0.4	2.8	1	-0.4	1.4
2014	0.4	0.4	0.2	1.9	0.5	-1.9	NA
2012	2.9	0.7	0.0	0.1	-0.1	-2.5	-1.6
2011	0.9	3.3	2.2	1.1	1.8	0.5	0.1
Inflation (in %)	NA	0.28	-0.06	0	-0.4	-0.09	-0.66
2014	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
Unemployment rate (in %)	5.6	5.0	9.9	6.1	8.5	12.7	24.4
2014	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

France: key figures

<u>Inhabitants (in millions)</u>	63.8
<u>Unemployment rate</u>	9.9%
<u>Inflation (% Annual growth rate)</u>	-0.06

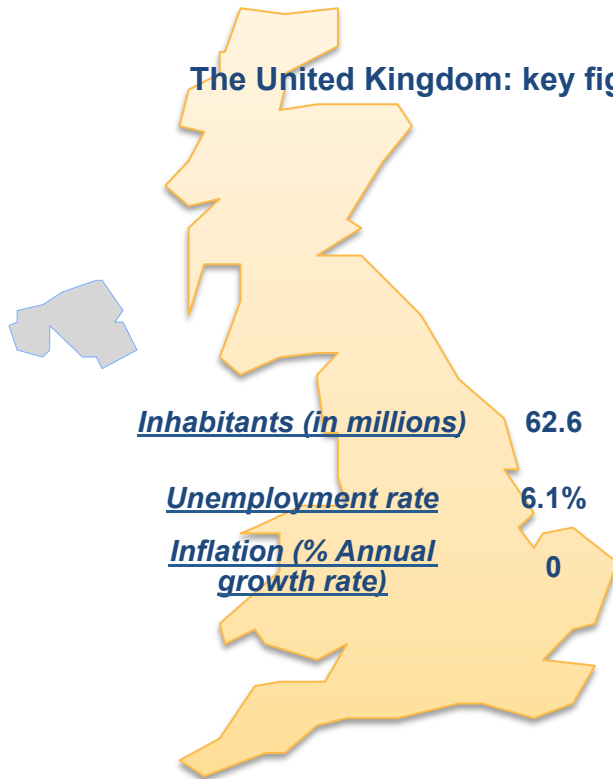
Source: OECD, 2015 data

- France is once again in 1st place for holiday plans with 63% of French people planning to leave (+5 pts vs. 2014).
- The average **budget** of French people is €2,181 (6th country, -€46): it is steady but below average (€2,427, up €114 this year).
- Ever favoured, **France** is now the 3rd most popular **destination** for Europeans, after Spain and Italy (16% versus respectively 18% and 17% of plans).
- 56*% (versus 64% last year) will spend their holiday in France: they are some of the most likely to stay at home, after Spanish and Italian people.
- They tend more to want to spend time with family or friends (32%; +8 pts) and the seaside remains their favourite destination, although it is down slightly this year (59% versus 61%).
- French people are more likely to decide on their destination at the last minute (34% versus 32%, tied for first place with Italy).
- Moreover, they are the most likely to not make reservations (15* %).
- French people are more concerned about attacks this year (38% versus 28% last year).
- They are also the most likely to say that consuming local products is important to support the local economy (88%).

* base: French people planning to go away on holiday in summer 2015



The United Kingdom: key figures

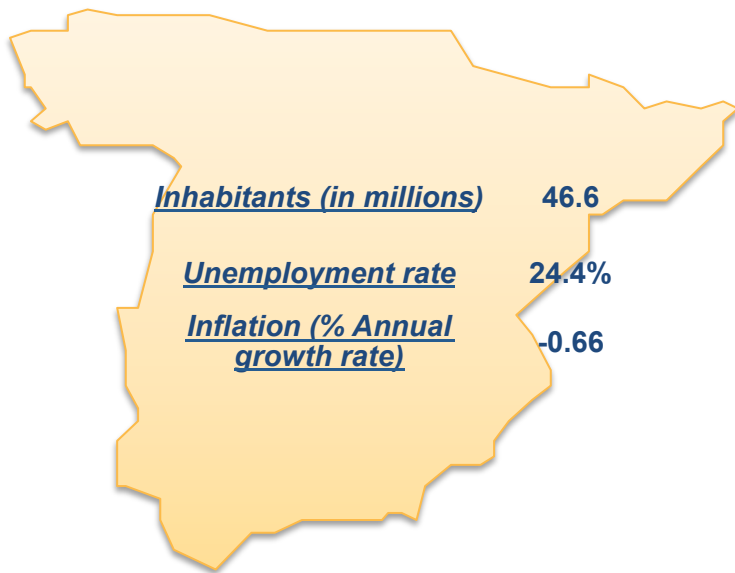


Source: OECD, 2015 data

- **Holiday plans are stable in the United Kingdom: 55% versus 54%** of British people think they will go away on holiday this summer. This is the lowest rate observed in the survey. However, they are still the most likely to go away multiple times (22% versus 26% in 2014).
- **Highest average budget** for the 7 countries last year and again this year. It has increased €149 on average, reaching a record of **€3081**.
- Although the level has significantly dropped, British people are still the most likely to want to **spend time with family or friends** during their holiday (**34*%; -9 pts**). Their desire for relaxation has decreased (59%; -7 pts). They are no longer the least likely to want to go to the sea (52*%).
- This year, they care more about the quality of onsite tourist infrastructures (25% versus 17% last year).
- **Like last year, British people are the most likely to reserve their holiday on the Internet (71*%)**. However, this year they are behind Austria and Germany for the use of sites such as Expedia and Opodo.
- They are still the least concerned about the various risks related to holidays. They are still some of the best insured, and the level of coverage is stable overall, with a significant increase in coverage related to the loss of personal belongings (92% vs. 86%).

* base: British people planning to go away on holiday in summer 2015

Spain: key figures

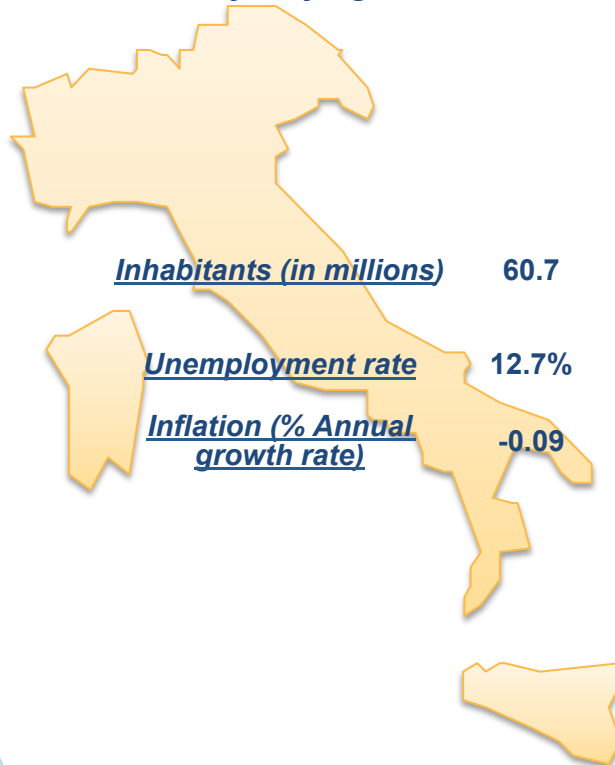


Source: OECD, 2015 data

- The **holiday plans** reported by Spanish people are the indicator that has **increased the most** for all of the tested European countries: **60% versus 42% last year**, back to a level comparable to the European average.
- Holidays are an area of spending that is **significantly less subject to the economy** this year (21% versus 27%).
- **The average budget is stable (€1,719)** but remains the **second lowest** of the 7 tested European countries after Italy.
- They say they want to be more active this year during their holidays, even though a majority still prefers relaxation (54% versus 62% last year).
- They still prefer the sea over the mountains and countryside. Note however that these two destinations have increased this year (respectively 21% vs. 21% and 18% vs. 8%).
- Still highly sensitive to health risks, 44*% (-3 pts) of Spanish people consider this criterion essential when choosing their holiday.
- They are systematically more concerned than the average for European countries about the various risks listed in the survey.

* base: Spanish people planning to go away on holiday in summer 2015

Italy: key figures



Source: OECD, 2015 data

- **60% of Italians (versus 52% last year) plan to go away on holiday** this summer: this is a return to the levels of 2009 and 2010.
- The **average budget** of Italian holiday-makers is **€1,708** (-5%). It is the lowest in Europe, far below the average of €2,427. They remain the **most likely** to consider the **budget** criterion as "**essential**" (52*% vs. 55% on average) in the choice of their holiday.
- **Still number one for the desire for "discovery"** (38%; -2 pts) and particularly to "enjoy a total change of scenery" for 33% of Italians* (stable).
- Still far **in the lead for their desire for the sea** (71*%) and of the most likely to stay at home with the Spanish this year: **62*% (-2 pts) will remain in Italy.**
- **They still book their holiday at the last minute** but this indicator is tending to line up with the levels of the other European countries: 34*% versus 44% last year.
- Italians are significantly more likely to say they are highly concerned about the **risk of an attack: 44%** versus 26% in 2014.
- They still have one of the **lowest coverage levels** for the 9 tested risks.
- People with insurance are more likely to use their **insurance company** this year (**68%** vs. 55% last year).

* base: Italian people planning to go away on holiday in summer 2015

Germany: key figures

Inhabitants (in millions) 82.1

Unemployment rate 5.0%

Inflation (% Annual growth rate) 0.28

- **62% of Germans plan to go away on holiday this summer**; this level is slightly higher than that of last year (56%).
- The **average budget** of German holiday-makers has risen another 2% in 2015 to **€2,457**. This makes it the country with the 3rd highest budget (equivalent to the average budget for all the countries: €2,427).
- **Still by far the most likely to seek relaxation (66%*)**, they are also the most likely to choose the mountains or countryside as a holiday destination (respectively 25%* versus 20% on average, and 21% versus 17% on average).
- **79% say they prepare their holiday in advance** versus 72% on average. One in 3 Germans (32%*) **physically go to an agency** versus 22% on average in Europe.
- They say they are not very concerned about the various risks related to holidays and think they have less coverage than last year overall for these various risks.

* base: German people planning to go away on holiday in summer 2015

Source: OECD, 2015 data



Austria: key figures

Inhabitants (in millions) 8.5

Unemployment rate 5.6%

Inflation (% Annual growth rate) NA

- The leaders last year in terms of holiday plans (68%), **Austrians are less likely to say the same this year (62%)**.
- The **average budget is €2,610 (+2.6%)**, which is the 2nd highest budget of the tested countries.
- **In particular, during their holidays, Austrians are more likely than average to say they want to play sports (10% versus 4% total)**.
- **Still the most likely to travel in Europe (86%*)** and particularly in Western Europe (42%), but not in Austria (76%*, +1 pt).
- **The vast majority (78%) say they organise in advance, particularly using websites such as Expedia and Opodo (33% versus 28% total and 21% in 2014)**.
- **Like last year, 77% prefer house, bed-and-breakfast or hotel rentals**, on the same level as the Germans.
- **Highly significant decreases are observed in reported coverage levels for the various risks listed in the study.**
-17 pts for health risks when travelling and vehicle breakdowns,
-32 pts for home-related problems...

Source: OECD, 2015 data

* base: Austrian people planning to go away on holiday in summer 2015



Belgium: key figures

<u>Inhabitants (in millions)</u>	11.2
<u>Unemployment rate</u>	8.5
<u>Inflation (% Annual growth rate)</u>	-0.4

Source: OECD, 2015 data

- **Holiday plans have taken an upturn in Belgium: 57% of Belgians will go away on holiday this summer (+10 pts).** This score remains one of the lowest in Europe but is much closer to the European average: 60%
- However, the **budget allocated** to holidays is on the decline: **€2,375** set aside on average, i.e. **8.5% less than last year**, which is the sharpest decrease observed this year.
- This year, Belgians are **the least attracted to the sea**. Less than half of them (**49%**) prefer touring holidays and discovery travels (23%) versus 17% on average.
- In any event, they still do not want to spend their holidays **in Belgium: 10% versus 43%** on average in Europe. They prefer bordering countries.
- This year, like for a large majority of European countries, there is a sharp increase in preparation using specialised sites such as Expedia and Opodo: 19% versus 10% last year. In addition, Belgians remain the least likely to use these sites.
- Still not very concerned about risks related to travelling and holidays, Belgians continue to have one of the best levels of coverage in Europe, particularly in relation to their health (83%, down 4 pts) versus 60% on average in Europe.

* base: Belgian people planning to go away on holiday in summer 2015