

Summer holiday plans among Europeans and Americans

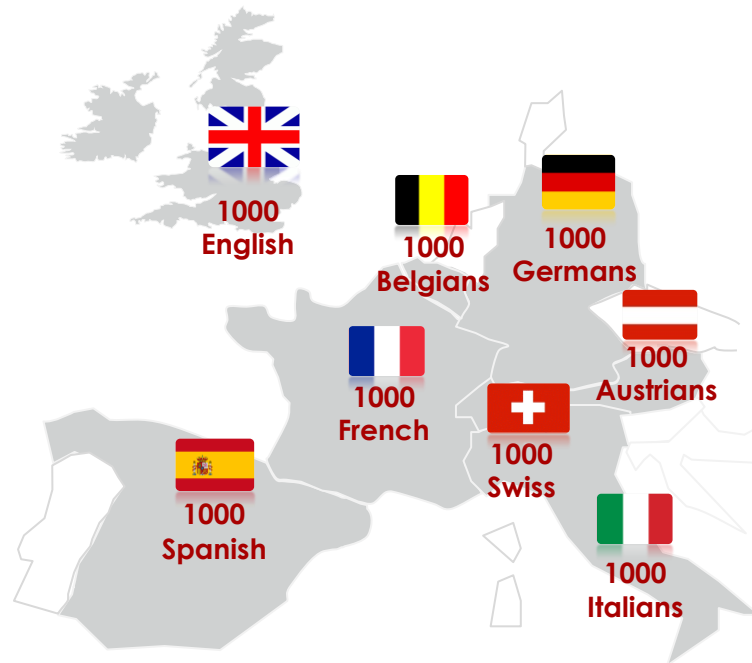
IPSOS/EUROP ASSISTANCE SURVEY
17TH EDITION

SCOPE OF THE 2017 SURVEY

American scope



European scope



THE METHODOLOGY



Samples

In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older (aged 16 and up in Brazil), put together using the quota method (gender, age, profession) after stratification by region and by city size.



Timeline

The field studies were carried out between 28 March and 21 April 2017



Method of data collection

Online survey in the 10 countries

CONTENTS

1

SUMMER HOLIDAY PLANS

P.5

2

FAVOURITE DESTINATIONS AND ACTIVITIES OF HOLIDAYMAKERS

P.13

3

**TRAVEL LODGING:
BETWEEN OLD RELIABLES AND NEW EXPERIENCES**

P.23

4

CONSIDERATION OF RISKS

P.38

5

CITIES OF DREAMS, DREAMS OF CITIES

P.41

6

COUNTRY FACT SHEETS

P.46



1. SUMMER HOLIDAY PLANS

A DISTINCT INCREASE IN SUMMER HOLIDAY PLANS AMONG AMERICANS AND EUROPEANS

SUMMER HOLIDAY PLANS

U.S.

66%

↑ (+5 versus 2016)

EUROPE

63%

↑ (+9 versus 2016)

BRAZIL

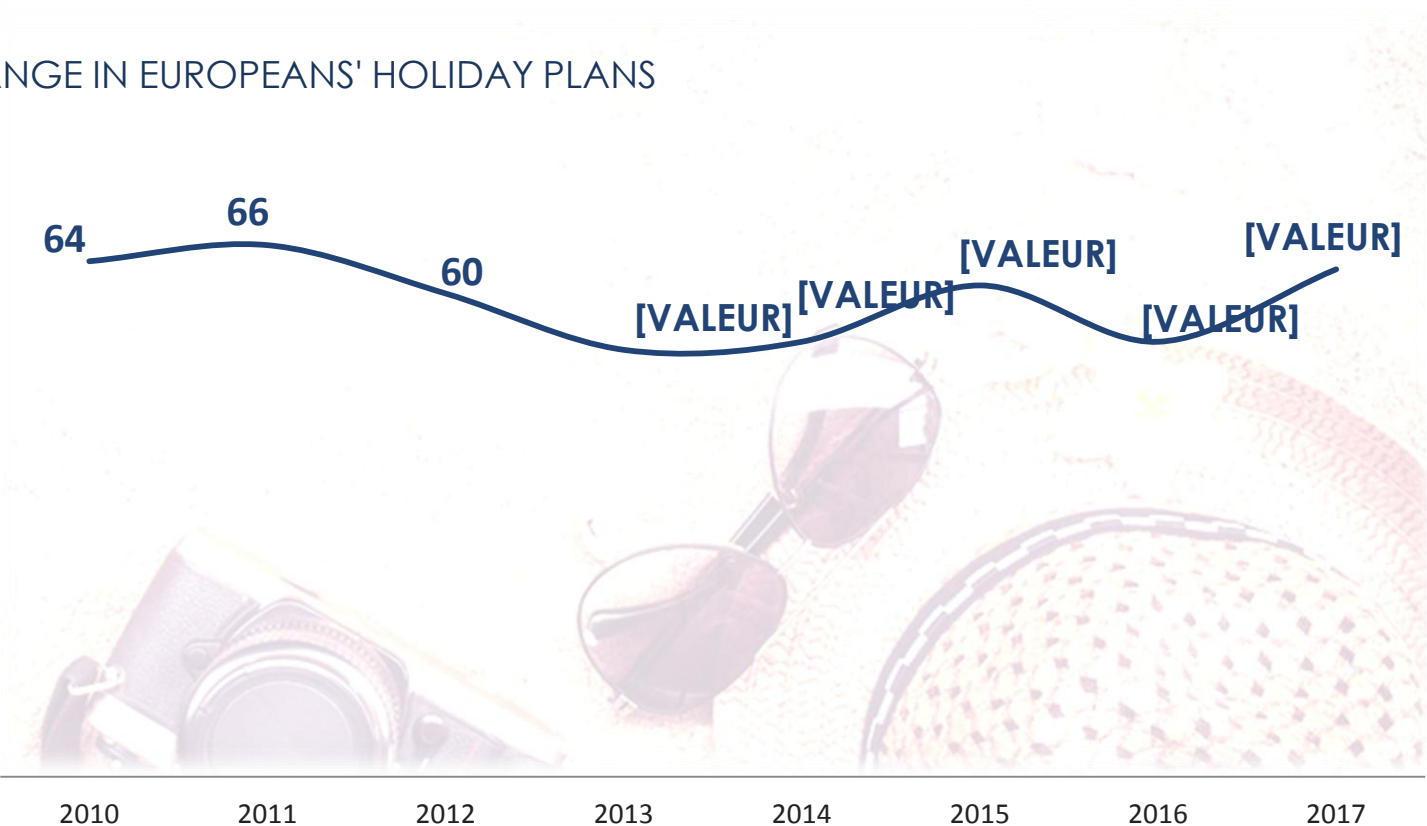
66%

= (+2 versus 2016)



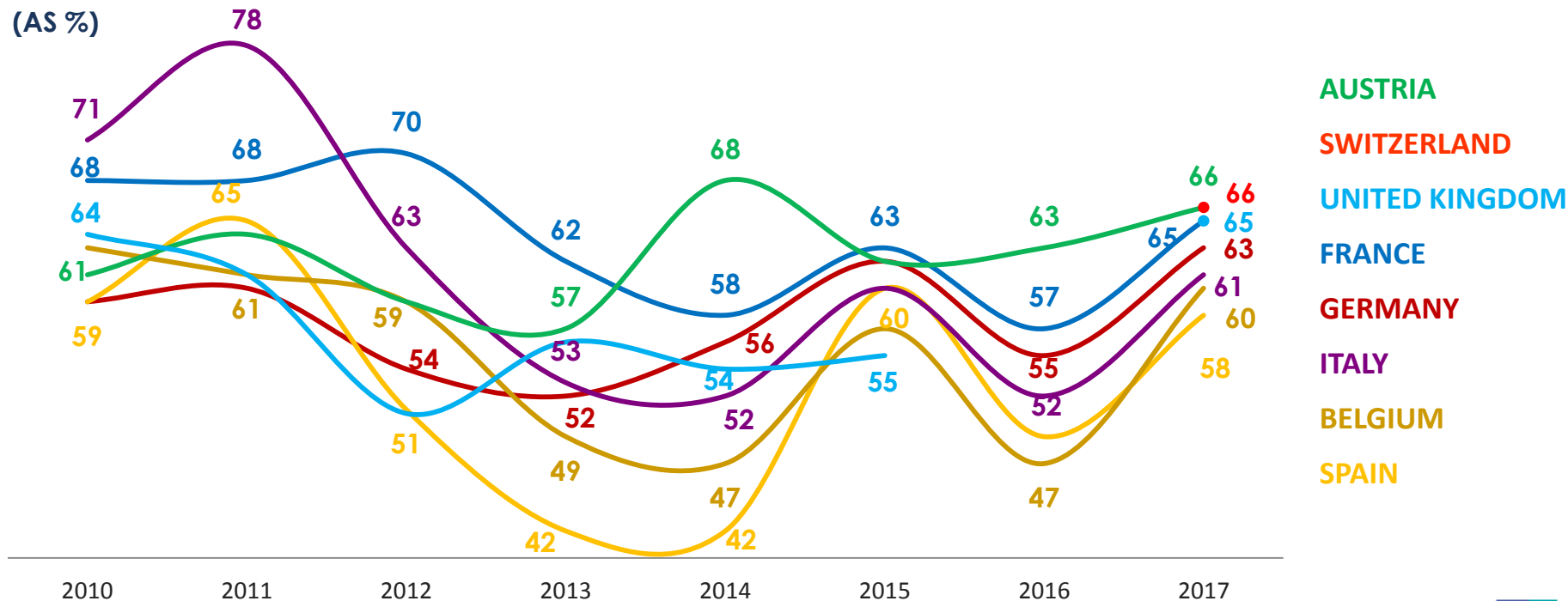
THE RETURN OF LEVELS RECORDED IN 2010-2011

CHANGE IN EUROPEANS' HOLIDAY PLANS
(AS %)



AN INCREASE THAT APPLIES TO ALL COUNTRIES IN VARIABLE PROPORTIONS

SUMMER HOLIDAY PLANS BY EUROPEAN COUNTRY (AS %)



IN MANY EUROPEAN COUNTRIES, THE GROWTH APPLIES ABOVE ALL TO SHORT BREAKS (1 WEEK OR LESS)



Less than 1 week



8% **+4**



12%



6%



14% **+1**



13%



8%



12%



5%

1 week

29% **+13**

33%

30% **+2**

33% **+5**

40%

37% **+18**

34%

25%

2 weeks

35%

32%

44% **-5**

30% **-5**

29%

35% **-13**

33%

44%

3 weeks

18%

16%

13% **-2**

11%

9%

13%

14%

18%

4 or more weeks

10% **-10**

8%

7%

13% **-3**

9%

7%

7%

8%

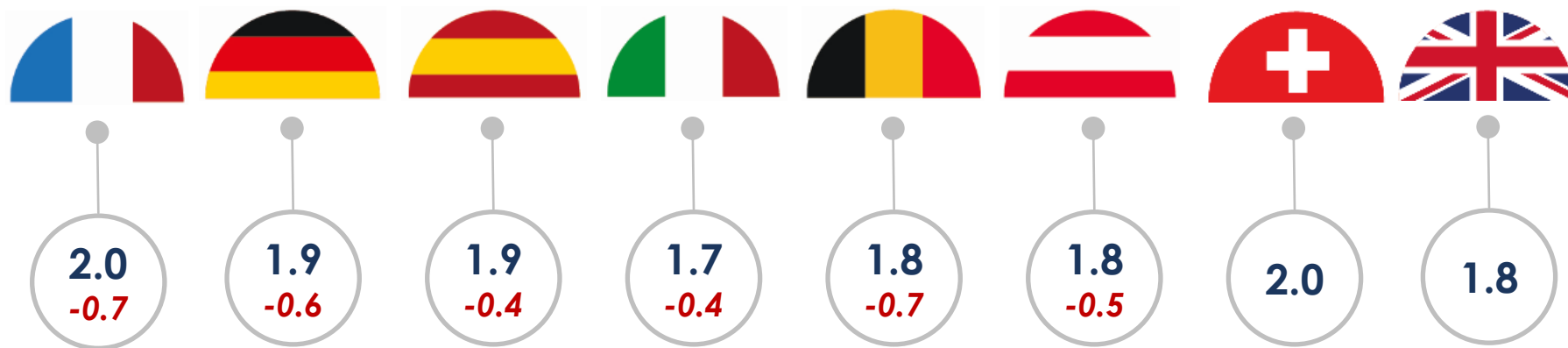
+ xx / - xx : change versus 2016

GAME CHANGERS

A GENERALISED DROP IN THE DURATION OF HOLIDAYS

Weeks on average

EUROPE: 1.9 week on average (-0.5)



U.S. & BRAZIL



THE AVERAGE BUDGET IS DOWN VERSUS 2016, WHICH IS MAINLY ATTRIBUTABLE TO SHORTER BREAKS

Europeans' holiday budget

€1,989

HOLIDAY BUDGET IN THE EURO ZONE
(Excluding United Kingdom and Switzerland)

€1,988 -12% VS 2016

AMERICANS' AND BRAZILIANS' BUDGET

U.S.

\$ 2,679 -20%
(€2,491)

BRAZIL

R\$ 4,407 -23%
(€1,322)

Exchange rate applied

1 GBP = €1.19 1 USD = €0.93
1 CHF = €0.94 1 BRL = €0.30

THE AVERAGE BUDGET IS DOWN VERSUS 2016, WHICH IS MAINLY ATTRIBUTABLE TO SHORTER BREAKS

EUROPEANS' BUDGETS

SWITZERLAND

CHF 2,981

(€2,802)

BELGIUM

€2,179 -10%

UNITED KINGDOM

AUSTRIA

€2,423 -11%

£1,587

(€1,888)

GERMANY

€2,297 -7%

ITALY

€1,737 -15%

FRANCE

€1,982 -11%

SPAIN

€1,651 -12%

Exchange rate applied

1 GBP = €1.19

1 USD = €0.93

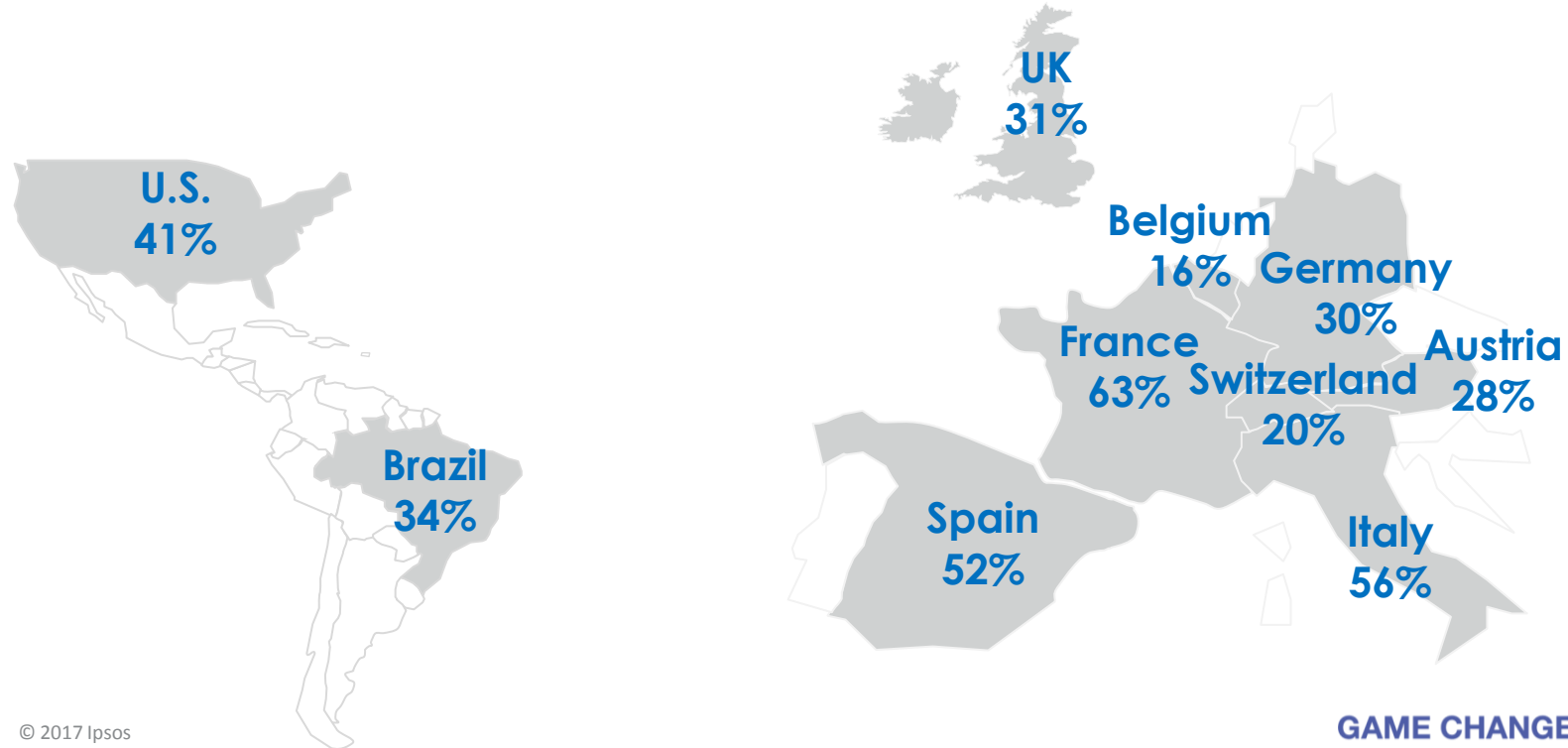
1 CHF = €0.94

1 BRL = €0.30

2. FAVOURITE DESTINATIONS AND ACTIVITIES OF HOLIDAYMAKERS

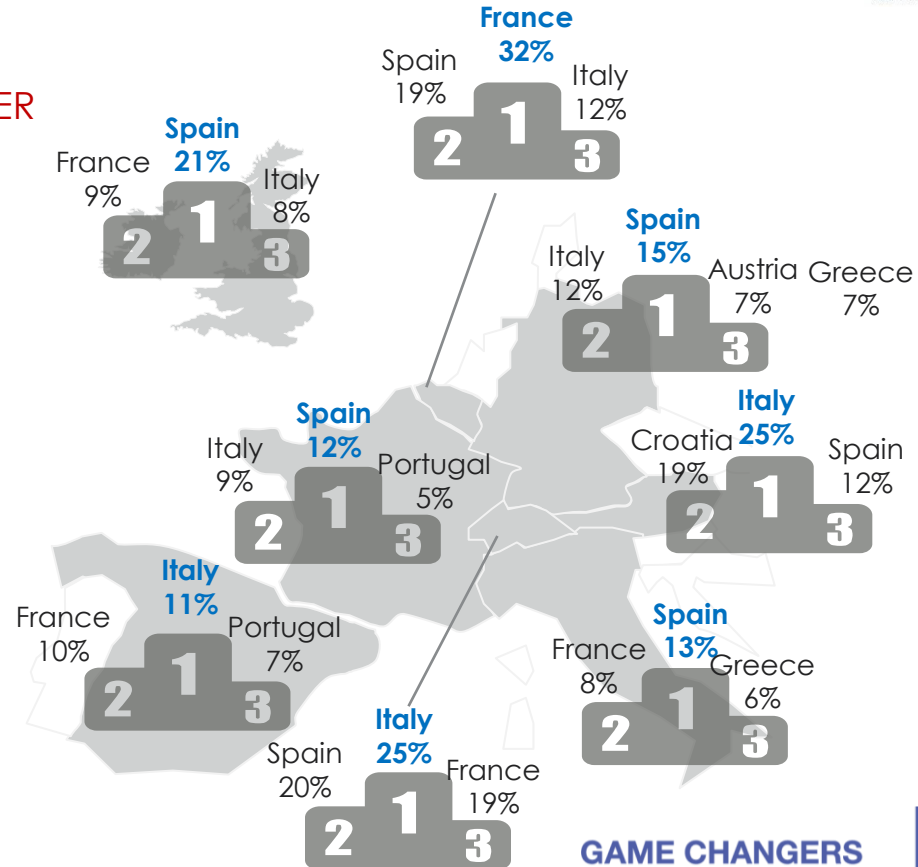
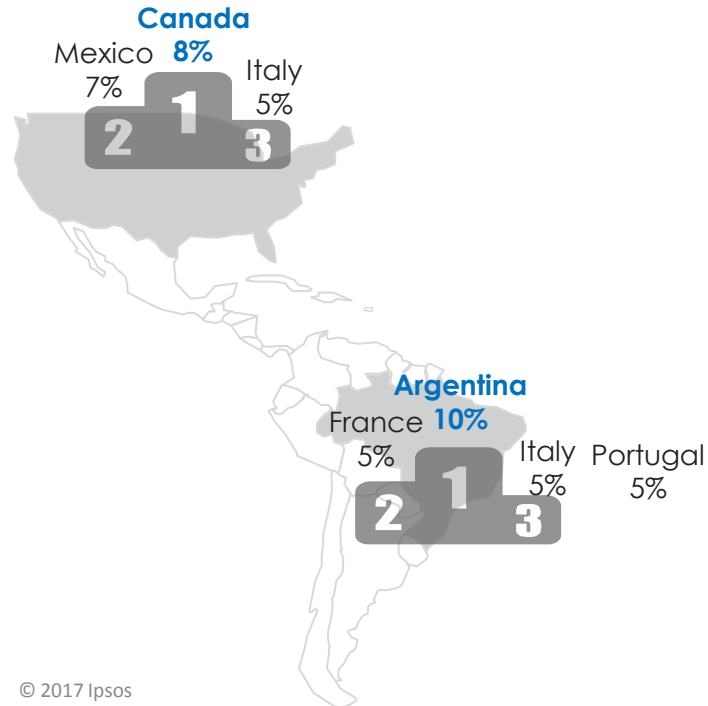
HOLIDAYS IN ONE'S OWN COUNTRY CONTINUE TO DOMINATE, ESPECIALLY IN THE LATIN EUROPEAN COUNTRIES

HOLIDAY PLANS IN ONE'S OWN COUNTRY THIS SUMMER



HOLIDAYS IN ONE'S OWN COUNTRY PREDOMINATE, ESPECIALLY IN THE LATIN COUNTRIES

FOREIGN DESTINATIONS PLANNED THIS SUMMER



THE SEASIDE IS STILL THE FAVOURITE DESTINATION OF ALL EUROPEANS...

SUMMER HOLIDAY PREFERENCES

EUROPE



63%



58%



64%



62%



72%



56%



64%

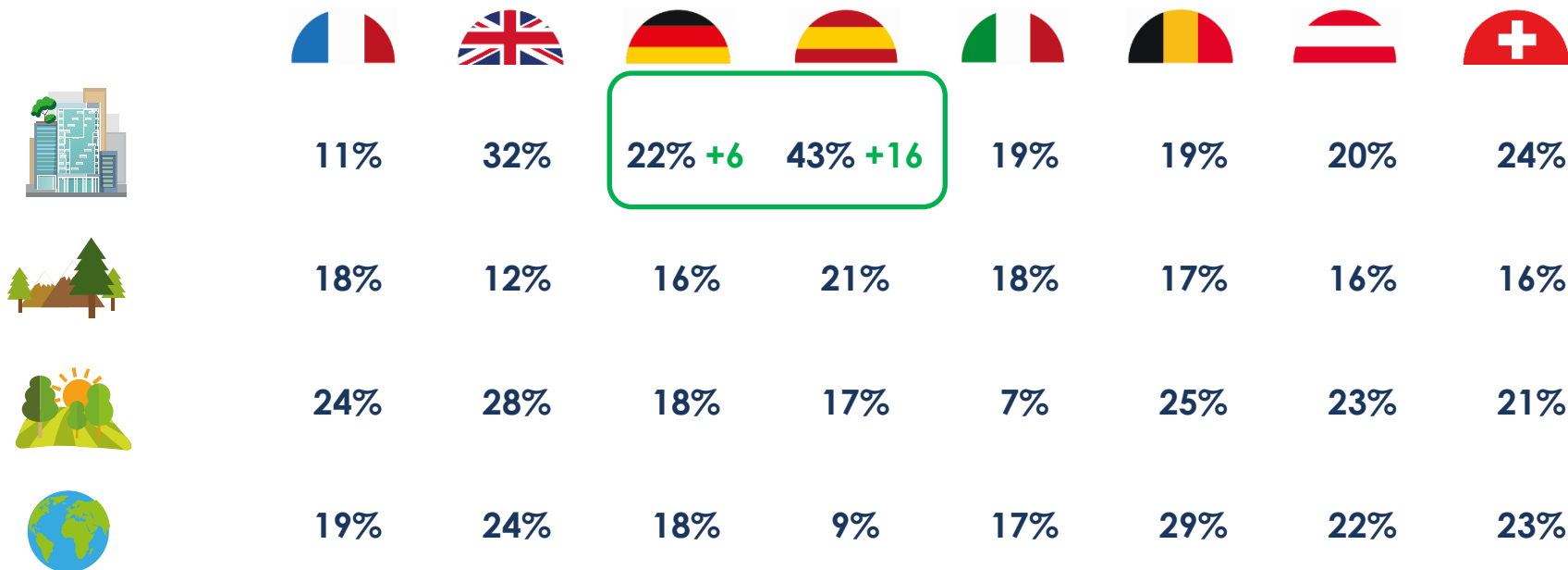


65%



THIS YEAR, SOME COUNTRIES SAW A RENEWED INTEREST IN URBAN DESTINATIONS

SUMMER HOLIDAY PREFERENCES



IN THE U.S. AND BRAZIL, URBAN DESTINATIONS ARE ALMOST AS WELL LIKED AS THE SEASIDE

HOLIDAY PREFERENCES FOR JUNE TO SEPTEMBER



MORE THAN EVER, EUROPEANS ARE EXPRESSING THE DESIRE TO DO NOTHING OTHER THAN RELAX AND ENJOY THEIR FRIENDS AND FAMILY DURING THEIR LEAVE

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS

EUROPE



54%



Relax, have peace of mind

43%



Come together as a family, with your spouse or with friends

41%



Discover new cultures, enjoy a total change of scenery



17%



Enjoy your home

12%



Take time to read, learn new things

10%



Make new friendly or romantic acquaintances

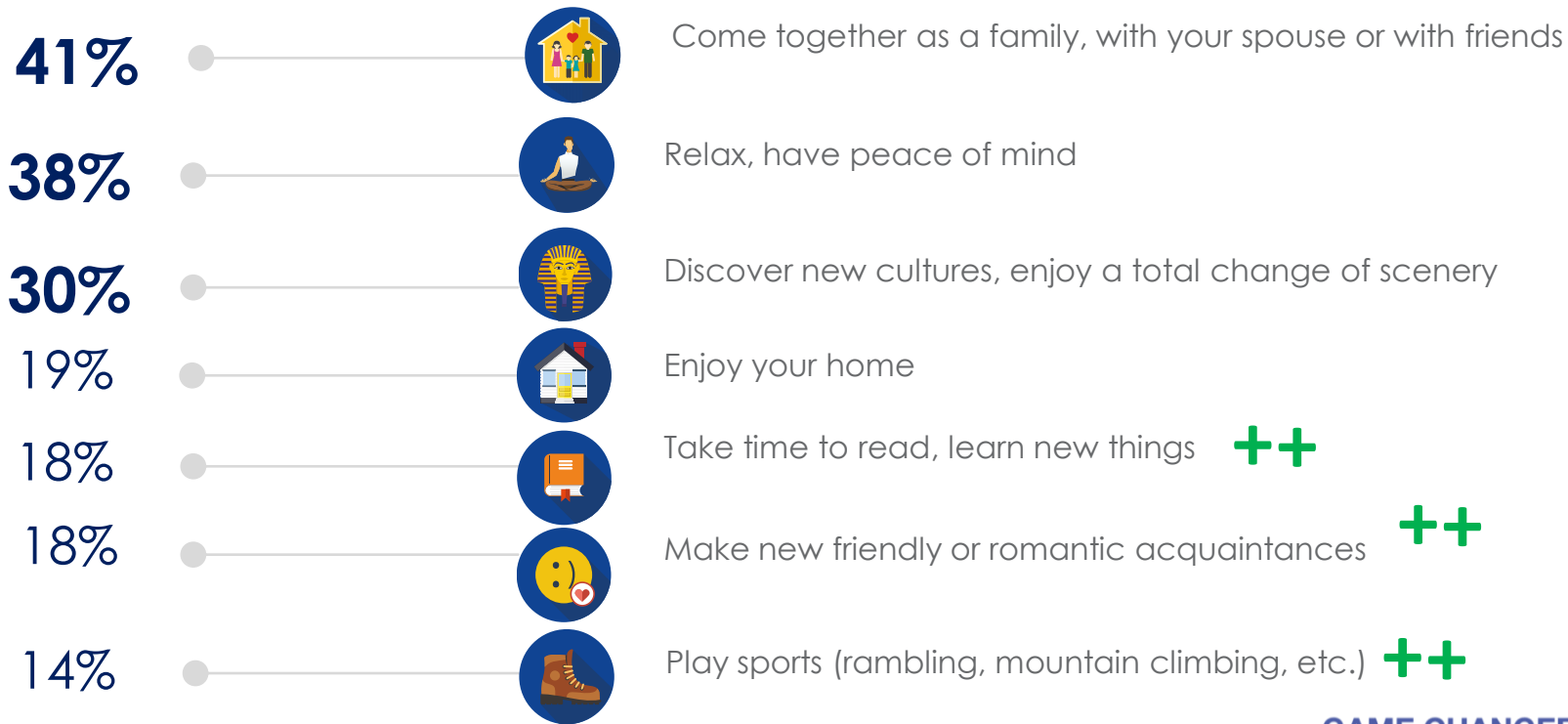
9%



Play sports (rambling, mountain climbing, etc.)

BRAZILIANS ARE DISTINCTIVE FOR HAVING A MORE ACTIVE APPROACH TO THEIR HOLIDAYS

ACTIVITIES PLANNED DURING SUMMER HOLIDAYS



EUROPEANS ARE HAVING A HARDER TIME DISCONNECTING FROM WORK

EUROPE

Concerning your work, do you think that during your holidays...?

Among those concerned

68% -5



You will completely unplug from your job

20% +8



You will still check your emails, but will not necessarily respond to them

9% -2



You will answer emails and/or calls

4% -2



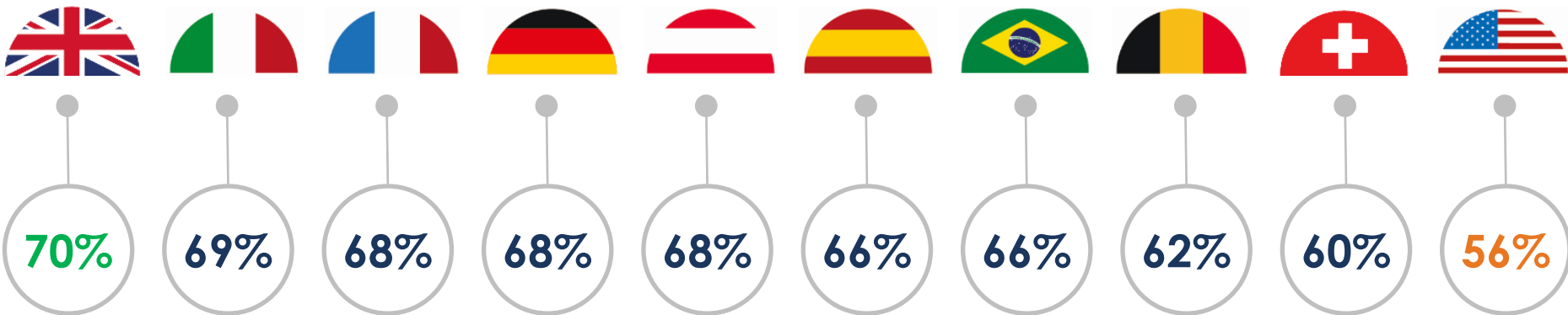
You will continue to work, even if only from time to time

WHEN ON HOLIDAY, AMERICANS ARE MORE CONNECTED TO THEIR WORK THAN EUROPEANS, AND ESPECIALLY MORE THAN THE BRITISH

Among the people concerned



YOU WILL COMPLETELY UNPLUG FROM YOUR JOB



4. TRAVEL LODGING: BETWEEN OLD RELIABLES AND NEW EXPERIENCES

HOTELS ARE STILL THE PREFERRED FORM OF ACCOMMODATION FOR THE MAJORITY OF HOLIDAYMAKERS FOR SUMMER HOLIDAYS...

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS

EUROPE

47%



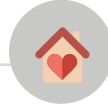
Hotel

35%



Rental of a house or apartment

22%



Free of charge with at friends'/family's houses or in your holiday home

14%



A bed & breakfast

10%



Camping

5%



Boat (e.g. cruise)

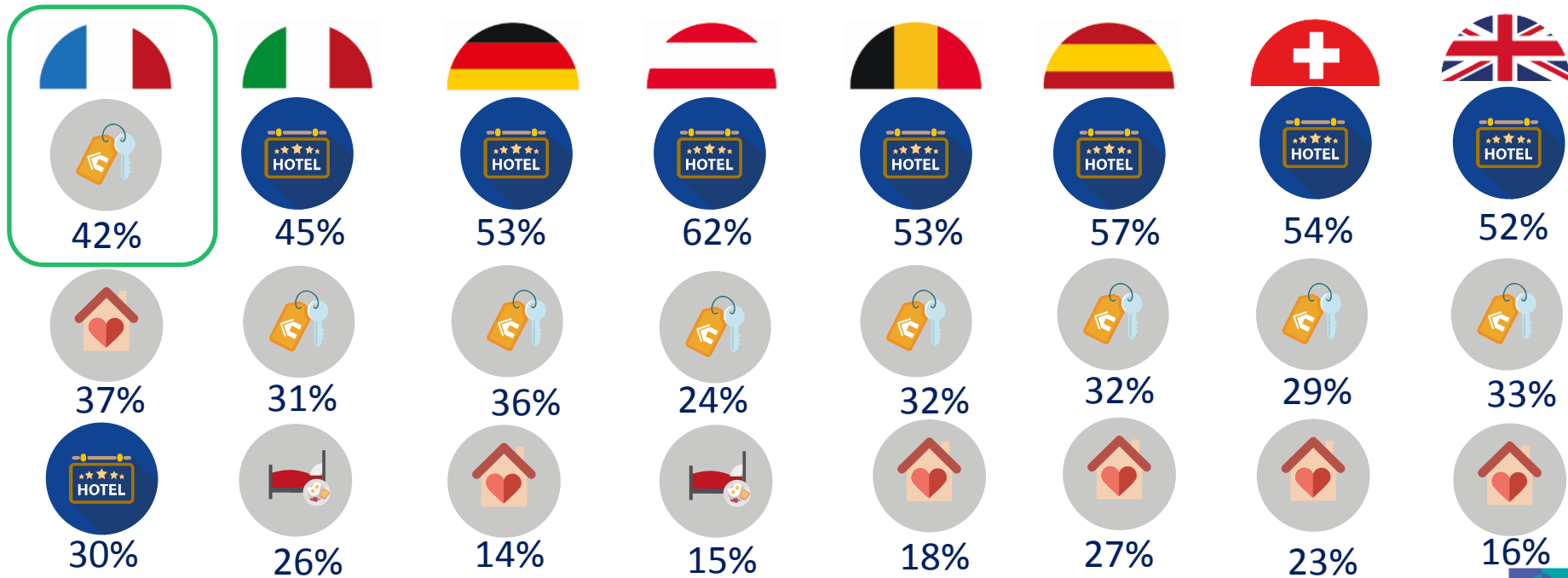
4%



A motor home, camping trailer or mobile home

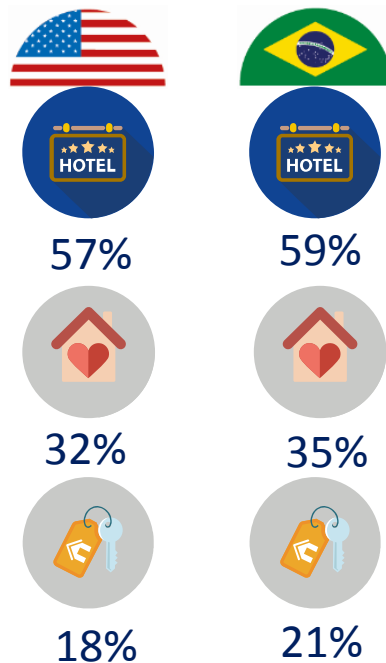
FRANCE IS AN OUTLIER BECAUSE THE MAJORITY OF HOLIDAYMAKERS OPT FOR SEASONAL RENTALS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS



AMERICANS AND YOUNG PEOPLE ARE MORE LIKELY TO SPEND HOLIDAYS WITH THEIR FAMILY OR FRIENDS THAN EUROPEANS

TYPE OF ACCOMMODATION PREFERRED FOR SUMMER HOLIDAYS



ALTHOUGH THEY STILL PREFER HOTELS, EUROPEANS ARE NEVERTHELESS INCREASINGLY INTERESTED IN THE CONCEPT OF RENTALS/EXCHANGES BETWEEN PRIVATE INDIVIDUALS

EUROPE

INTEREST IN EACH OF THE PRACTICES



THE COUNTRIES MOST INTERESTED IN THESE PRACTICES

Rental of a private house
or apartment from an
individual



 55%

 49%

 47%

 46%

EUROPE 45%

Rental of a room in a private
home



 34%

 28%

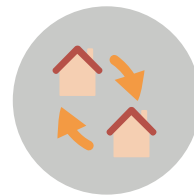
 28%

 23%

 23%

EUROPE 19%

Free home exchange
between individuals



 19%

 19%

 15%

 15%

EUROPE 12%

ALONGSIDE THE CLASSIC ACCOMMODATIONS, HOLIDAYMAKERS ARE LOOKING FOR NEW EXPERIENCES

When travelling, have you ever:

Done at least one of the following
kinds of activities:

- Been camping in the wilderness
- Stayed at a local's home
- Stayed in a cabin in the middle of nature
- Home exchange between individuals
- Hosted travellers in your home
- Eco-tourism
- Socially responsible tourism
- Travelled around the world



50%



39%



37%



50%



65%



65%



53%



55%



55%



73%

AMERICANS AND BRAZILIANS ARE MORE DARING THAN THE AVERAGE EUROPEANS, ESPECIALLY WITH REGARD TO WILDERNESS CABINS

Has already done

When travelling, have you ever:

	EUROPE		
Stayed at a local's home	24	30	41
Been camping in the wilderness	23	48	26
Stayed in a cabin in the middle of nature	18	40	41
Home exchange between individuals	5	12	13
Hosted travellers in your home	7	14	18
Eco-tourism	13	20	39
Socially responsible tourism	12	19	23
Travelled around the world	15	15	18

TOP 3 NEW PRACTICES BY COUNTRY

When travelling, have you ever:

Has already done

#1



Stayed at a local's
home
28%



Camping in the
wilderness
21%



Stayed at a local's
home
19%



Stayed at a local's
home
30%



Camping in the
wilderness
48%

#2

Travel around the
world
25%

Stayed at a local's
home
18%

Stayed in a cabin
in the middle of
nature
17%

Camping in the
wilderness
24%

Stayed in a cabin
in the middle of
nature
40%

#3

Camping in the
wilderness
21%

Stayed in a cabin
in the middle of
nature
16%

Camping in the
wilderness
16%






Travel around the
world
17%

Stayed at a local's
home
30%

TOP 3 NEW PRACTICES BY COUNTRY



When travelling, have you ever:

Has already done

					
#1	Stayed at a local's home 36%	Stayed in a cabin in the middle of nature 30%	Stayed at a local's home 30%	Camping in the wilderness 36%	Stayed at a local's home 41%
#2	Camping in the wilderness 32%	Stayed at a local's home 25%	Camping in the wilderness 27%	Eco-tourism 23%	Stayed in a cabin in the middle of nature 41%
#3	Stayed in a cabin in the middle of nature 32%	Camping in the wilderness 24%	Stayed in a cabin in the middle of nature 26%	Stayed in a cabin in the middle of nature 21%	Eco-tourism 39%

ONLINE REVIEWS: 3RD DECISION-MAKING FACTOR IN LODGING, AFTER VALUE AND LOCATION

Which factors are the most important when you are choosing your holiday lodging?

	EUROPE		
Value for money	67	56	58
Location, setting	53	60	39
Reviews by other travellers	31	31	28
Services (WiFi, breakfast)	24	28	30
Photos of the place	22	23	15
Promotional offers	13	21	30
Reputation of the hotel chain	13	25	24
Your trust in the hotel	11	7	7

ONLINE REVIEWS: 3RD DECISION-MAKING FACTOR IN LODGING, IN MANY COUNTRIES



ONLINE REVIEWS: A MORE FREQUENT PRACTICE AMONG AMERICANS AND BRAZILIANS THAN WITH EUROPEANS

Has posted a review of these services after the holiday

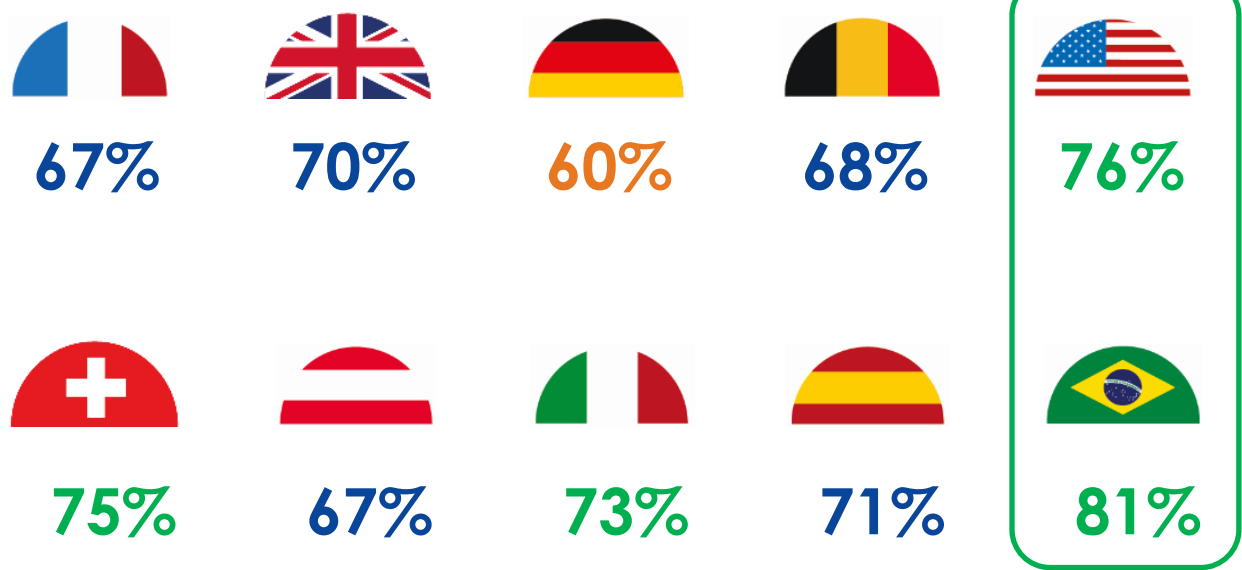
- 
- A hotel

A rental

A tourist attraction



A restaurant

An airline



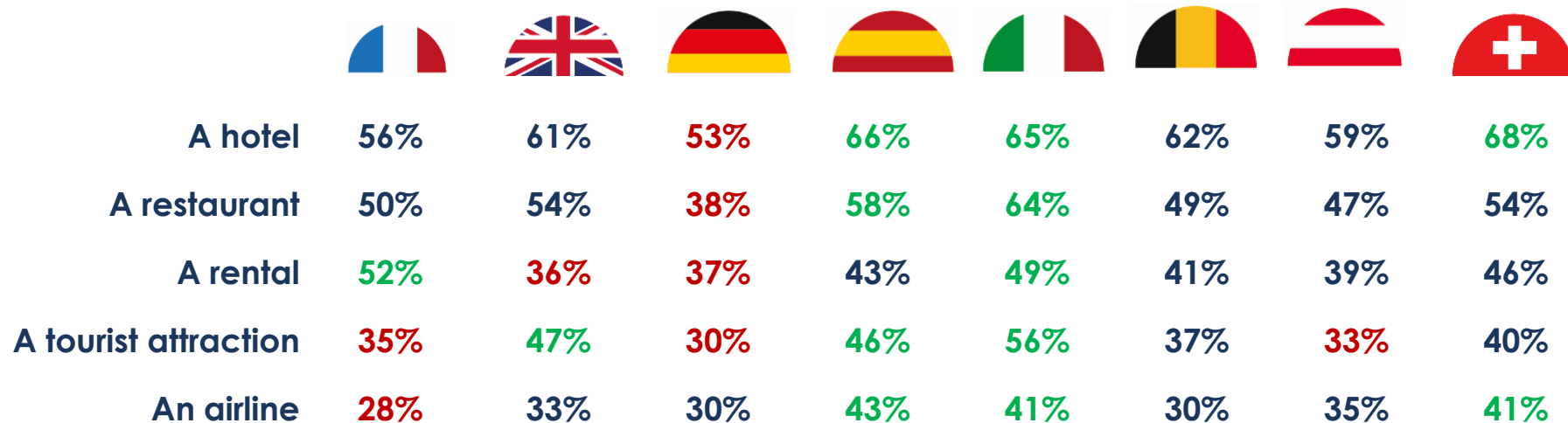
ONLINE REVIEWS: A MORE FREQUENT PRACTICE AMONG AMERICANS AND BRAZILIANS THAN WITH EUROPEANS

Has posted a review of these services after the holiday

	EUROPE		
A hotel	60%	68%	71%
A restaurant	51%	67%	70%
A rental	43%	47%	54%
A tourist attraction	41%	56%	68%
An airline	34%	52%	59%

ONLINE REVIEWS: IN EUROPE, THE SPANISH AND THE ITALIANS ENGAGE IN THE PRACTICE THE MOST WHILE THE GERMANS ARE THE MOST RESTRAINED

Has posted a review of these services after the holiday



6. CONSIDERATION OF RISKS

IN 2017 THE RISK OF AN ATTACK IS A CONSTANT CRITERION IN CHOOSING A DESTINATION FOR SUMMER HOLIDAYS

FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION

			EUROPE	RANK VS 2016
		The budget you intend to allocate	55%	+2
		The risk of an attack	48%	=
		Climate	44%	-2
		The risk of personal attacks (theft, assault, etc.)	41%	+3
		Opportunities for leisure or cultural activities	40%	-1
		Health risks	38%	-1
		The political situation in your destination country	37%	

IN 2017 THE RISK OF AN ATTACK IS A CONSTANT CRITERION IN CHOOSING A DESTINATION FOR SUMMER HOLIDAYS

FACTORS THAT PLAY AN 'ESSENTIAL' ROLE IN CHOOSING A DESTINATION





3. CITIES OF DREAMS, DREAMS OF CITIES

A SHARED FASCINATION AMONG EUROPEANS AND AMERICANS WITH CITIES

CITIES THAT **EUROPEANS** WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

27%

NEW YORK



16%

PARIS



14%

ROME



12%

LONDON



14%

18%

11%

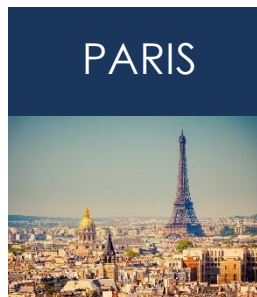
14%

CITIES THAT **AMERICANS** WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE

IN BRAZIL, PARIS ENJOYS THE STRONGEST POWER OF ATTRACTION FOR BRAZILIANS, WHO ALSO DREAM OF VISITING THE LEGENDARY CITIES OF THEIR OWN COUNTRY



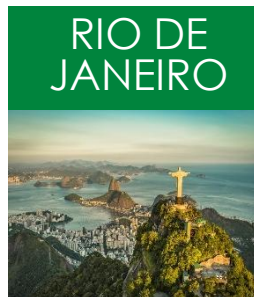
CITIES THAT BRAZILIANS WOULD LIKE TO VISIT AT LEAST ONCE IN THEIR LIFE



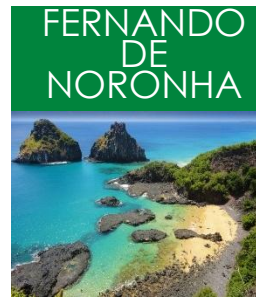
16%



12%



11%



9%



9%



8%

TOP CITIES THAT PEOPLE DREAM OF VISITING IN EACH COUNTRY

as %



New York 25

Rome 16

Venice 11

Tokyo 10

London 9

Sydney 8

Paris 6

Barcelona 5

Los Angeles 5



New York 26

Rome 15

Sydney 15

Paris 14

Tokyo 11

Venice 7

Barcelona 7

Berlin 5

San Francisco 5



New York 27

Paris 18

London 14

Rome 13

Sydney 11

Tokyo 6

Barcelona 6

Vienna 6

Moscow 6

Stockholm 6

Berlin 5

San Francisco 5

Los Angeles 5



New York 29

Paris 22

Rome 19

London 15

Tokyo 11

Sydney 6

Venice 6

Berlin 5

Prague 5



New York 31

Paris 23

London 18

Tokyo 11

Rome 9

Sydney 7

Los Angeles 6

Vienna 5

Moscow 5

Barcelona 5



New York 22

Rome 17

Barcelona 12

London 10

Paris 9

Sydney 9

Venice 6

Tokyo 5

Berlin 5

Prague 5



New York 25

London 18

Paris 18

Rome 16

Sydney 10

Barcelona 9

Tokyo 6

Berlin 6

Moscow 5

San Francisco 5

Lisbon 5



New York 24

Paris 13

London 12

Tokyo 12

Sydney 10

Rome 9

Berlin 6

Stockholm 6

Barcelona 5

Moscow 5

Rio de Janeiro 5

TOP 15 CITIES THAT PEOPLE DREAM OF VISITING IN EACH COUNTRY

as %



Paris	18
New York	14
London	14
Rome	11
Las Vegas	7
Los Angeles	6
Sydney	5
Seattle	5



Paris	17
New York	12
Rio de Janeiro	11
London	9
Fernando de Noronha	9
Rome	8
Fortaleza	8
Gramado	6
Natal	5
Salvador	5

6. COUNTRY FACT SHEETS

GERMANY

Holiday plans **63%** Budget **€2,297**

Holidays in their own country **30%**

Preferred foreign destination **Spain**

Check online reviews when choosing
lodging **26%**



- **63% of Germans plan to go away on holiday this summer**; this level is slightly higher than that of last year (55%). The increase in holiday plans is consistent with an overarching trend in Europe (63%, +9 pts).
- There will be more German holidaymakers, but on average, they will go away for less time: **1.9 week** this summer (versus 2.5 in 2016). There are quite a few Germans who only want to take a week-long holiday (30%, +2 pts), while the numbers of people who want to go away for two or three weeks are lower than last year (44%, -5 pts and 13%, -2 pts). The percentage of Germans who wish to take four weeks of holiday is stable at 7%.
- As is the case each year, **the majority of holidaymakers will stay in Germany** for their summer leave (30%).
- Those who will go abroad especially prefer **Spain** (15%) and Italy (12%), followed by Austria and Greece (7%).
- Because more Germans are going on holiday and the average duration of their trips is shorter, **the average budget is down 7%** compared to last year, coming in at €2,297 per household in 2017.
- Just like the majority of the other countries surveyed, **Germans prefer to stay in hotels** (53%). However, the seasonal rentals have seen a sharp rise, jumping from 28% to 36% (+8 pts).
- While the value for the money (80%) and location of the lodging site (42%) are the main selection criteria, online reviews are also important: **26% of Germans take them under advisement when deciding on their lodging** (versus 31% of Europeans)
- **Compared to the European average, Germans post online reviews less frequently** (60% compared to 68%). For example, only 53% have posted a review of a hotel (versus 60% of Europeans), 38% have published a comment on a restaurant (versus 51%) and just 30% have left a review of a tourist attraction (versus 14%).

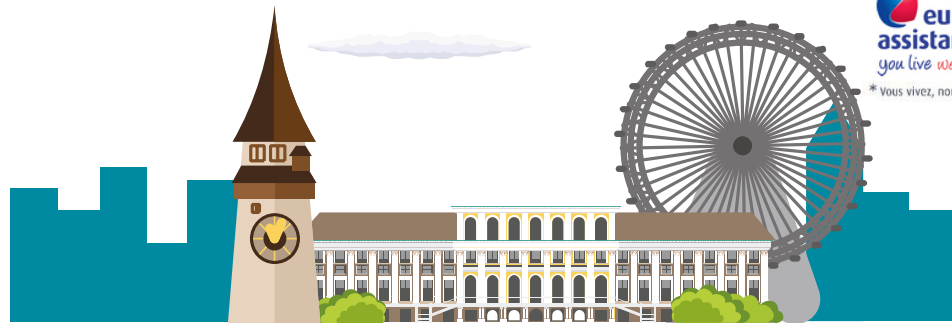
AUSTRIA

Holiday plans **66%** Budget **€2,423**

Holidays in their own country **28%**

Preferred foreign destination **Italy**

Check online reviews when choosing
lodging **29%**



- **66% of Austrians intend to go on holiday** this summer (+3 pts). That is the second highest percentage in Europe.
- More Austrians will go away on holiday, but for less time since the average duration of their leave fell from 2.3 weeks in 2016 to **1.8 week in 2017. Shorter holidays dominate**, with 12% of holidaymakers leaving for just a few days and 34% taking only 1 week.
- **28% of Austrians will stay in Austria** for their holiday, but 25% of them plan to go to Italy, while **19% will go to Croatia** and 12% to Spain.
- The average holiday budget is €2,423. **Despite an 11% drop from 2016, the average Austrian budget is still one of the highest** among the countries surveyed.

- **Austrians are the Europeans who most heavily favour the comfort of hotels over other forms of lodging (62%, +4 pts).** Still, 24% will rent a house or an apartment (+5 pts) and 18% will stay free of charge with friends, family or in their holiday home.
- The tendency to **check online reviews when choosing their lodging** has become standard practice for 1/3 of Austrian holidaymakers: after value for money (81%) and the location (37%), it is the third decision-making criterion (29%).
- Like the rest of Europeans, **Austrian holidaymakers are now in the habit of sharing their opinions online: 59%** have reviewed a hotel, 47% a restaurant, 39% a seasonal rental, 35% an airline and 33% of a tourist attraction.

BELGIUM

Holiday plans **60%** Budget **€2,179**

Holidays in their own country **16%**

Preferred foreign destination **France**

Check online reviews when choosing
lodging **27%**



- **This year, 60% of Belgians plan to go on holiday**, which is a 13-pt increase over last year. That growth is on par with the upward trend observed for all Europeans (63%, +9 pts).
- There will be more Belgian holidaymakers, but on average, they will go away for less time: **1.8 week** this summer versus 2.5 in 2016. **Short breaks are on the rise**: 37% will only go away for a week (or an 18-pt increase), whereas the percentage of holidaymakers who will go away for 2 weeks is in decline (35%, -13 pts). The share of holidaymakers who will only go away for a few weeks is stable (8%), as is the proportion of Belgians who will take extended holidays (3 weeks 13%; 4 or more weeks, +7%).
- Because more Belgians are going on holiday and the average duration of their trips is shorter, **the average budget is down 10% compared** to last year, coming in at **€2,179** per household in 2017.
- Like each year, **the majority of Belgian holidaymakers will go abroad** for their summer leave (16% will remain in Belgium).
- **France** is still in the good graces of the Belgians (32%), followed by Spain (19%) and Italy (12%).
- In terms of lodging, **Belgians have a clear preference for hotels (53%)**, ahead of seasonal rentals (32%) and staying with friends or family (18%).
- The reflex of **checking online reviews when choosing lodging** has become a common practice for nearly one-third of Belgian holidaymakers: after value for money (75%) and location (51%), it is the third deciding factor (27%).
- **Finally, 69% of Belgian holidaymakers have posted an online review**: 62% about a hotel, 49% about a restaurant, 41% about a seasonal rental, 37% about a tourist attraction and 30% about an airline.

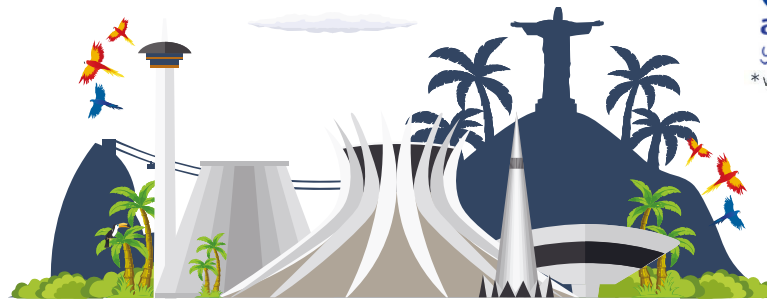
BRAZIL

Holiday plans **66%** Budget **\$R4,407**

Holidays in their own country **34%**

Preferred foreign destination **Argentina**

Check online reviews when choosing
lodging **28%**



- This year, **66% (+2 pts)** of Brazilians intend to go on holiday between June and September.
- Brazil has the longest holiday duration (**2.2 weeks on average**), although it is down slightly from **2.5 weeks in 2016**. The percentage of Brazilians who are leaving for one week (24%) and less than one week (13%). The share of those who will go away for 2 weeks is in decline (26%, -5 pts), while the percentage of those who will take 3 weeks is on the rise (16%, +3 pts). Finally, there will be just as many Brazilians opting for a long stay (4 or more weeks) than in 2016 (16%).
- This year, the average budget is **\$R4,407 (= €1,322)**, which is **down from last year** (-23% compared to 2016), which is partially explained by the reported reduction in holiday duration.
- With regard to destination, 34% of Brazilians will stay in their country for summer holiday and 66% will go abroad.

- Brazilians are favouring the South American continent for their holidays. **Argentina is now the preferred destination for those who are going abroad (10%)**, ahead of France, Italy and Portugal, each of which earned 5%. As for the United States, the second most popular destination for Brazilians in 2016, it lost 8 points as an intended destination this year, dropping from 9% to 1%.
- **59% of Brazilians plan to book a hotel room**, whereas 35% prefer to stay for free with friends, family or in their second home. Note that Brazilians are the most interested in the **possibility of renting a room in a private home (34%)**.
- Finally, **checking online reviews when choosing accommodation is a common practice among 28% of Brazilians**. Also, they post the most online reviews (81% have submitted an online review): 71% of a hotel, 70% of a restaurant, 68% of a tourist attraction and 59% of an airline.

SPAIN

Holiday plans **58%** Budget **€1,651**

Holidays in their own country **52%**

Preferred foreign destination **Italy**

Check online reviews when choosing
lodging **33%**



- **This year, 58% of the Spanish plan to go on holiday, which is a 9-pt increase over last year.** This growth aligns with the average observed for all Europeans (63%, +9 pts).
- **More of the Spanish will go on holiday, but for shorter periods.** On average, they will have **1.9 week** of holiday in 2017 versus 2.3 in 2016. 14% of them will only leave for a few days and 33% for 1 week (+5 pts). On the other hand, 30% of Spanish people will take two weeks of leave (-5 pts), while 11% will go away for 3 weeks and 13% for 4 or more weeks (-3 pts).
- The majority of the Spanish **will stay in their own country** (52%). Nevertheless, when they decide to go abroad, they prefer Italy (11%), France (10%) and Portugal (7%).
- Because more Spanish people are going on holiday and the average duration of their trips is shorter, **the average budget is down 12%** compared to last year, coming in at €1,651 per household in 2017, which is lower than the average of the other European countries surveyed.
- **Most Spanish people still like to stay in hotels** (57%, -5 pts) but they are leaning more and more toward seasonal lodging (32%, +5 pts) and also sometimes stay with friends or family (27%).
- The reflex of **checking online reviews when choosing lodging has become a common practice for 1/3 of Spanish holidaymakers**: after value for money (76%) and location (52%), it is the third deciding factor (33%).
- **Spanish holidaymakers are all too willing to post their opinions on the Internet**: 71% have submitted a review. For example, 66% of them have posted an online review for a hotel, 58% for a restaurant and 43% about an airline, which is the highest rate among Europeans.

UNITED STATES

Holiday plans **66%** Budget **\$2,679**

Holidays in their own country **41%**

Preferred foreign destination **Canada**

Check online reviews when choosing lodging **31%**



- **This year, 66% of Americans plan to go on holiday**, which is a 5-pt increase over last year.
- There will be more American holidaymakers, but on average, **they will go away for less time: 1.4 week** this summer versus 1.7 in 2016.
- Given the increase in the number of holidaymakers and the diminishing length of their trips, **the average American holiday is 20% shorter** than last year: \$2,679 (= €2,491) per household in 2017.
- **This year, 41% of Americans will stay in the United States** for their holiday. Americans who plan to travel abroad prefer Canada (8%), Mexico (7%) and Italy (5%).
- Whereas **57% plan to book a hotel room**, 32% prefer to stay for free with friends, family or in their second home and 18% intend to rent an apartment or house.
- At the same time, Americans are especially fond of **less "traditional" types of accommodations**: in particular, 48% report they have done **primitive camping**, which is nearly double the percentage for Europeans (23%) and Brazilians (26%).
- **Checking online reviews to help choose lodging** has become a common practice for 1/3 of Americans holidaymakers: after location (60%), and value for money (56%), it is the third decision-making criterion (31%).
- Furthermore, **posting online reviews** is a far more common practice among Americans than Europeans. Some 76% have already submitted an online review: 68% of a hotel, 67% of a restaurant, 56% of a tourist attraction and 33% of an airline.

FRANCE

Holiday plans **65%** Budget **€1,982**

Holidays in their own country **63%**

Preferred foreign destination **Spain**

Check online reviews when choosing lodging **27%**



- **This year, 65% of the French plan to go on holiday**, which is an 8-pt increase over last year. This growth aligns with the average observed for all Europeans (63%, +9 pts).
- There will be more French holidaymakers, but on average, they will go away for less time: **2 weeks** this summer, versus 2.7 in 2016. **Short breaks are also on the rise**: 8% of holidaymakers will only leave for a few days (+4 pts versus 2016) and 29% will go for a week (+13 pts). There is a simultaneous drop in the share of French holidaymakers who will take 4 or more weeks of leave (10%, -10 pts), while the percentage of the French who will leave for 2 or 3 weeks is stable overall (respectively 35% and 18%).
- Because more French people are going on holiday and the average duration of their trips is shorter, **the average budget is down 11% compared** to last year, coming in at €1,982 per household in 2017.
- As is the case each year, **the majority of holidaymakers will stay in France** for their summer leave (63%).
- **Spain** is still the favourite among those who go abroad (12%), followed by Italy (9%) and Portugal (5%).
- With regard to lodging, **the French are still the kings of seasonal rentals**: 42% of holidaymakers plan to use the option this summer, which is 7 pts above the European average. However, hotels rose sharply over last year (30%, +12 pts), as did staying with family or friends (37%, +7 pts).
- The reflex of **checking online reviews when choosing lodging** has become a common practice for 1/3 of French holidaymakers: after value for money (71%), and location (54%), it is the 3rd factor in decision-making (27%), equal in importance to looking at photos of the place (27%).
- **67% of French holidaymakers have also posted a review online**: 56% about a hotel, 52% about a seasonal rental, 50% about a restaurant, 35% about a tourist attraction and 28% about an airline.

ITALY

Holiday plans **61%** Budget **€1,737**

Holidays in their own country **56%**

Preferred foreign destination **Spain**

Check online reviews when choosing lodging **40%**



- **61% of Italians plan to go on holiday this summer versus 52% last year.** The increase in holiday plans is consistent with an overarching trend in Europe (63%, +9 pts).
- **More Italians will go on holiday, but for shorter periods.** They will go away for **1.7 week** this summer, versus 2.1 weeks last year. Shorter holidays dominate, with 13% of holidaymakers taking just a few days and 40% leaving for only 1 week.
- Many Italians **stay in their own country** (56%). Nevertheless, when they decide to go abroad, they prefer Spain (13%), France (8%) and Greece (6%).
- Because more Italians are going on holiday and the average duration of their trips is shorter, **the average holiday budget is down 15%** compared to last year, coming in at €1,737 per household. That is still lower than the average of the other European countries surveyed.
- **While on holiday, Italians prefer to lodge in hotels** (45%, +1 pt), but they are increasingly turning toward seasonal housing (31%, +7 pts) and bed & breakfasts (26%, +8 pts).
- Although Italians deem location (55%) and value for money (41%) to be important, **online recommendations are also an essential factor in their choice of accommodation** (40%). That is the highest rate of all the countries surveyed.
- **Finally, Italian holidaymakers are the most likely to post a review on the Internet:** 73% have submitted a review. For example, 65% have posted online about a hotel, 64% about a restaurant and 56% about a tourist attraction.

SWITZERLAND

Holiday plans **66%** Budget **CHF 2,981**

Holidays in their own country **20%**

Preferred foreign destination **Italy**

Check online reviews when choosing lodging **28%**



- **In 2017, 66% of Swiss citizens will go on holiday**, which is the highest percentage measured in our survey, on par with the Austrians (versus 63% on average For Europeans).
- The Swiss will take **2 weeks** of leave, slightly above the European average (1.9). Only 5% of Swiss holidaymakers will limit themselves to a few days of holiday this summer; 25% will take a week and a large share will take 2 full weeks (44%). 18% will leave for 3 weeks and 8% will treat themselves to an extended holiday of 4 or more weeks more.
- The average budget is **CHF 2,981** (= €2,802), which is the highest in Europe (versus the average of €1,989).
- Switzerland, like Belgium, is one of the rare European countries where the majority of holidaymakers go beyond their own borders. Indeed, just **20% of the Swiss will spend their holiday within the country**, while **25% will go to Italy, 20% to Spain and 19% to France**.
- Although 54% of the Swiss plan to **book a hotel room**, 29% will rent an apartment or house and 23% will stay with family, friends or in their second home.
- When choosing their lodging, Swiss holidaymakers are particularly attentive to value for money (72%), location (45%), services offered (32%) and the opinions of other travellers (28%).
- **75% of Swiss holidaymakers have posted online reviews**: 68% of a hotel, 54% of a restaurant, 46% of a seasonal rental, 41% of an airline and 40% of a tourist attraction.

UNITED KINGDOM

Holiday plans **65%** Budget **£1,587**

Holidays in their own country **31%**

Preferred foreign destination **Spain**

Check online reviews when choosing lodging **39%**



- **This year, 65% of British people plan to take a holiday**, which aligns with the average measured for all Europeans (63%).
- On average, Britons will take **1.8 week** of leave, in line with the European average (1.9). One-third of the British will leave for 1 week and another third for 2 weeks. 12% of holidaymakers will only leave for a few days, while 16% will take 3 weeks and just 8% will take 4 or more weeks.
- The average budget is **£1,587** (= €1,888), which is near the European average (€1,989).
- **31% of Britons will stay in their own country** for their summer holiday. For those who go abroad, **Spain** is by far the most popular destination (21%), followed by France (9%) and Italy (8%).
- While the British are especially fond of holidays **by the sea** (58%), the percentage of them planning to spend their summer holiday **in a city** is higher than the European average (32% versus 24%). The same is also true for **countryside holidays** (28% compared to 20%).
- Although 52% of Britons plan to **book a hotel room**, 33% will rent an apartment or house and 16% will stay with family, friends or in their second home.
- The reflex of **checking online reviews when choosing lodging** has become a common practice for nearly 4 out of 10 holidaymakers: after location (68%), and value for money (58%), it is the third decision-making criterion (39%).
- **Moreover, 70% of British holidaymakers have posted online reviews:** 61% of a hotel, 54% for a restaurant, 47% of a tourist attraction, 36% of a seasonal rental and 33% of an airline.

The background image shows a panoramic view from a rooftop terrace. In the foreground, there are two lounge beds with dark and light striped cushions and folded white towels. The terrace overlooks a city with several tall buildings, nestled at the base of a large, rugged mountain range under a blue sky with wispy clouds.

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