



# Barometer: Europeans and their Holidays 12<sup>th</sup> report

Presentation of findings – 2012, May the 24<sup>th</sup>





## A set-up that is...

### 1. European



Nationally representative samples interviewed over the phone

### 2. Barometric

precedence enables us to outline strong trends and spot emerging trends

### ... 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 their coverage.**





- Study undertaken from February 13 to March 26, 2012

- Study conducted among a sample of **3,523 people residing in Europe:**

	France: 510
	Spain: 500
	Belgium: 500
	Austria: 500
	UK: 513
	Germany: 500
	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"*

# To leave or not to leave on summer holiday ? An increasingly marked split

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- Europeans' Holiday plans sharply declining for summer 2012
- Holidays, a budget item subject to reductions

# 1. TO LEAVE OR NOT TO LEAVE ON SUMMER HOLIDAY? An increasingly marked split

1.1. Europeans' Holiday plans for summer 2012 have hit record lows: the significant reduction in multiple departures is not offset by single departures



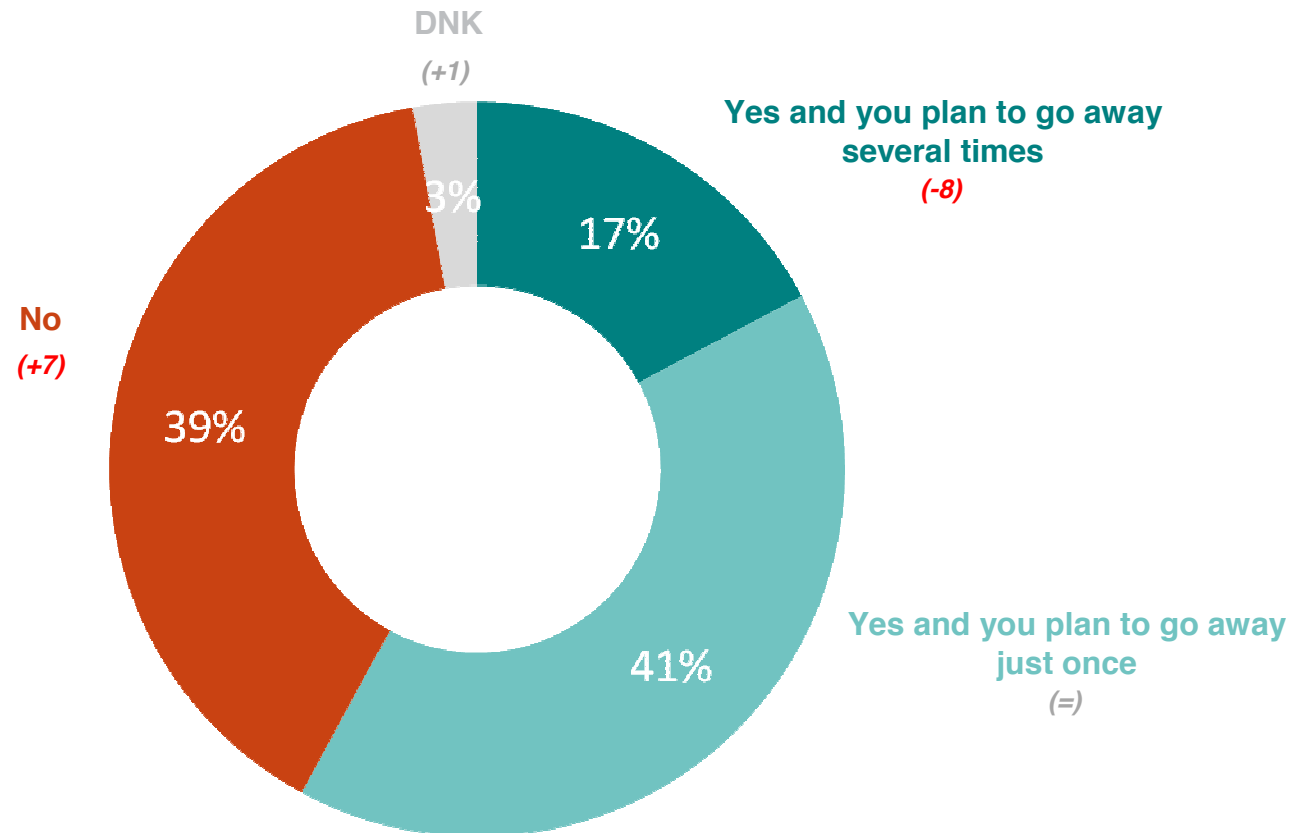
Do you plan to go away on holiday this summer, in other words between June and September inclusive?

Base: All (3,523 respondents)

One answer only

S/T "NO" 39%  
(+7)

S/T "YES" 58%  
(-8)

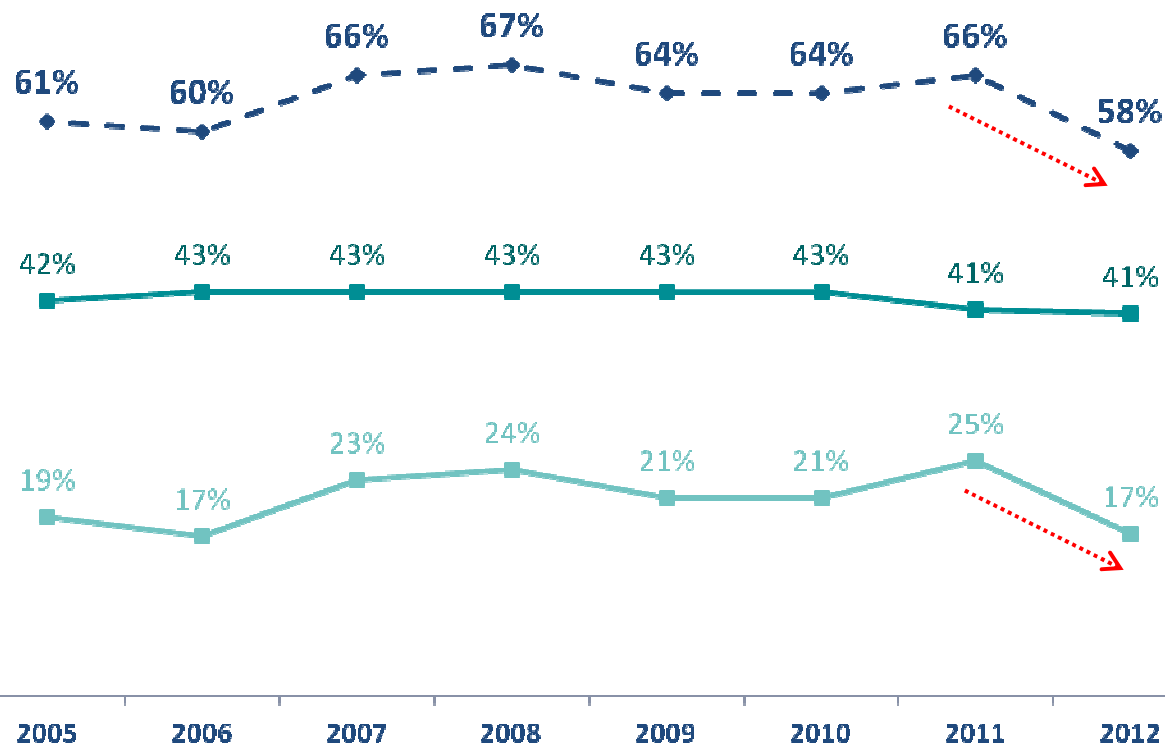




Do you plan to go away on holiday this summer, in other words between June and September inclusive?

Base: All (3,523 respondents)

One answer only



S/T "YES"

Yes and you plan to go away just once

Yes and you plan to go away several times

DK: 3%

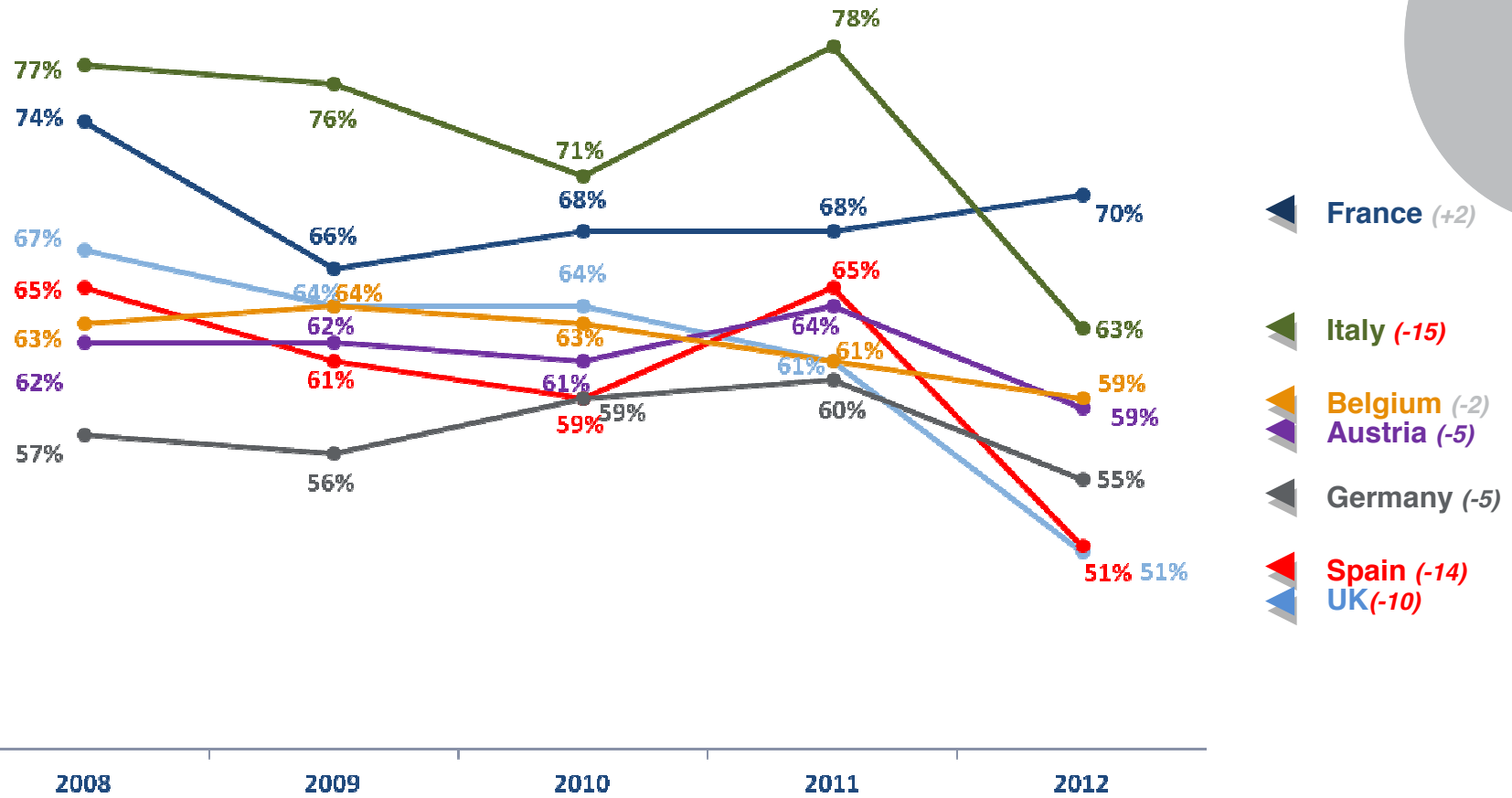
-10   -14   -15

Base: All	Total							
	N=3,523	n=510	n=500	n=513	n=500	n=500	n=500	n=500
<b>Yes and you plan to go away several times</b>	<b>17% ↓</b>	<b>15% ↓</b>	<b>15%</b>	<b>26% ↓</b>	<b>10% ↓</b>	<b>18% ↓</b>	<b>16%</b>	<b>18%</b>
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%
2008	24%	32%	12%	42%	16%	23%	18%	21%
<b>Yes and you plan to go away just once</b>	<b>41%</b>	<b>54%</b>	<b>39% ↓</b>	<b>25%</b>	<b>41%</b>	<b>45%</b>	<b>44%</b>	<b>40%</b>
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%
2008	43%	42%	45%	25%	49%	54%	45%	41%
<b>S/T "YES"</b>	<b>58% ↓</b>	<b>70%</b>	<b>55% ↓</b>	<b>51% ↓</b>	<b>51% ↓</b>	<b>63% ↓</b>	<b>59%</b>	<b>59% ↓</b>
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%
2008	67%	74%	57%	67%	65%	77%	63%	62%
<b>No</b>	<b>39%</b>	<b>26%</b>	<b>41%</b>	<b>48%</b>	<b>48%</b>	<b>36%</b>	<b>39%</b>	<b>40%</b>
<b>DK</b>	<b>3%</b>	<b>4%</b>	<b>5%</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>2%</b>	<b>2%</b>

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

Base: All (3,523 respondents)

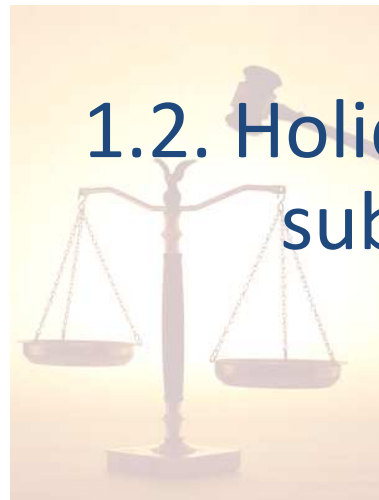
ST "YES"



- 3 in 5 Europeans (58%) said they will go away on holiday this summer (between June and September inclusive): the lowest level reached
- Multiple departures are the most affected: 17% of Europeans declared they will go away several times this summer, i.e. 8 fewer points than last year (25% in 2011). This decrease is not offset by an increase in single departures which remain stable this year (41%).
- In more detail:
  - The **French** are the most likely to go away on holiday
  - **Belgians**, whose holiday plans have been down slightly since 2009, are about average (59% versus 58% for all Europeans)
  - Holiday plans in **Italy**, which historically have been the highest, have fallen sharply this year; multiple holidays are declining (18% versus 37%)
  - **Spanish** and **UK** residents go away less than other Europeans
  - And **Austrians** and **Germans**, whose levels had mostly been stable since 2008, also have declining holiday plans this year (-5 points)



# 1. TO LEAVE OR NOT TO LEAVE ON SUMMER HOLIDAY? An increasingly marked split



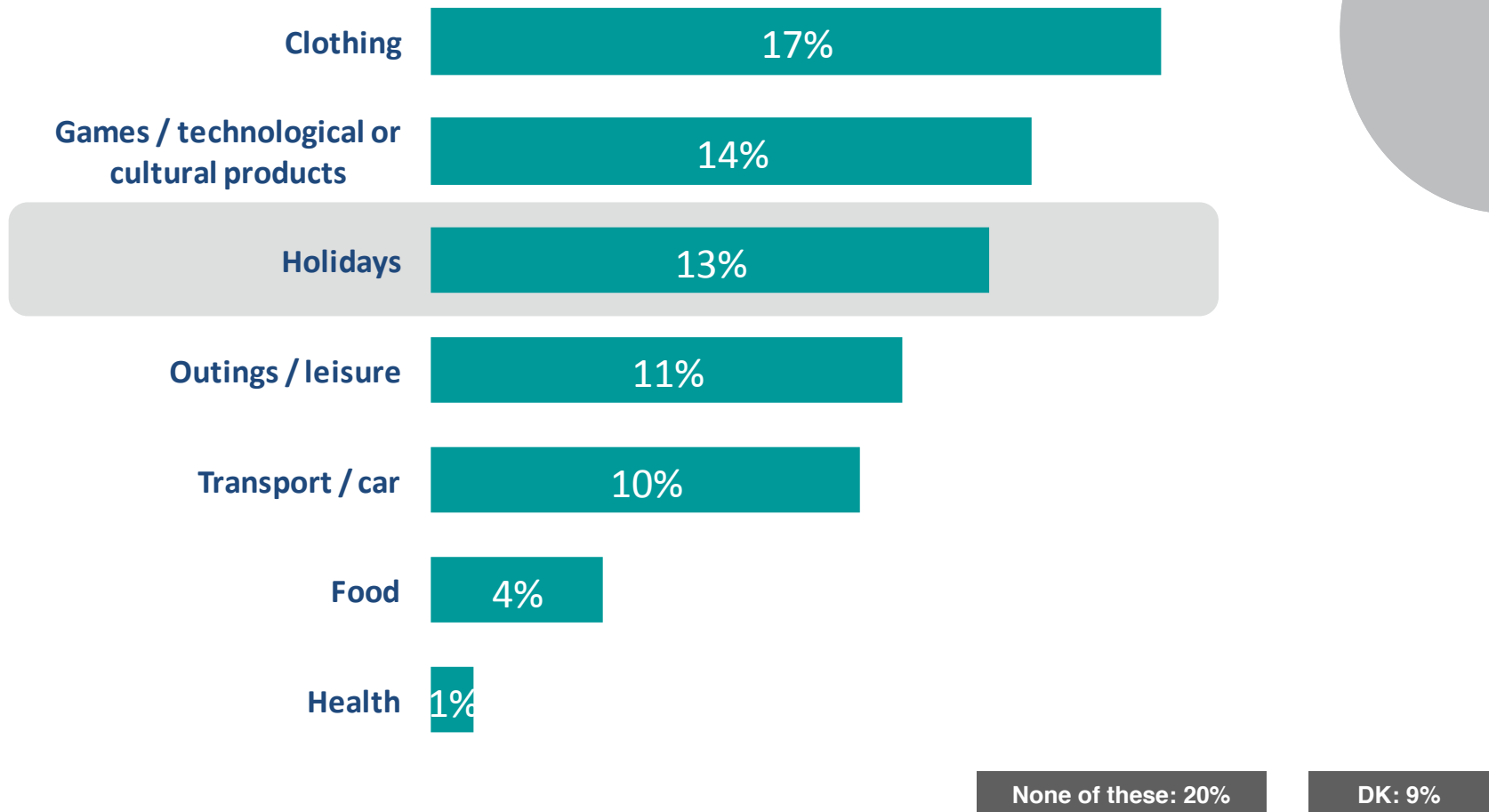
## 1.2. Holidays are not the only budget item subject to restrictions in Europe

# Europeans are cutting costs in most budget categories

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

Base: All (3,523 respondents)

First answer



# Europeans are cutting back costs in most budget categories. Only food and health appear to be irreducible items.

Base: All (3,523 respondents)

First answer	Total							
	n=3,523	n=510	n=500	n=513	n=500	n=500	n=500	n=500
Clothing	17%	17%	14%	12%	20%	24%	16%	17%
Games / technological or cultural products	14%	19%	13%	6%	12%	22%	16%	10%
Holidays	13%	10%	8%	14%	20%	17%	13%	12%
Outings / leisure	11%	12%	6%	9%	23%	12%	15%	5%
Transport / car	10%	12%	11%	10%	5%	8%	7%	10%
Food	4%	5%	4%	7%	2%	1%	3%	5%
Health	1%	0%	1%	1%	1%	1%	1%	1%

Which of the following statements do you most identify with?

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

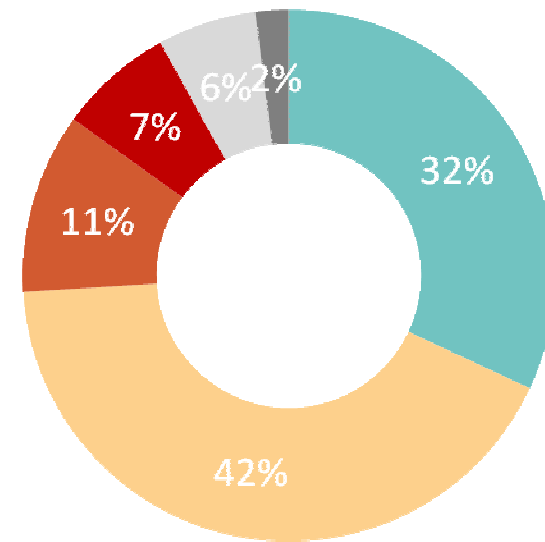
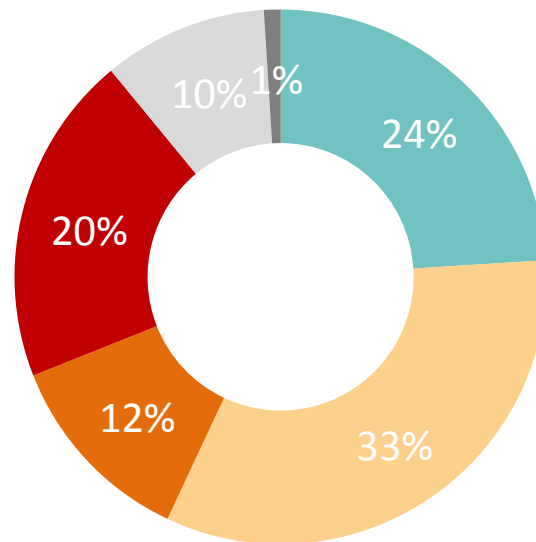
**S/T On which you will make savings  
45%**

All (3,523 respondents)

**S/T On which you will make savings  
53%**

People who intend to go on holiday this summer (2,043 respondents)

- On which you definitely don't want to save on
- On which you will make some slight savings
- On which you will make significant savings
- Which you will stop
- None of these
- Don't know





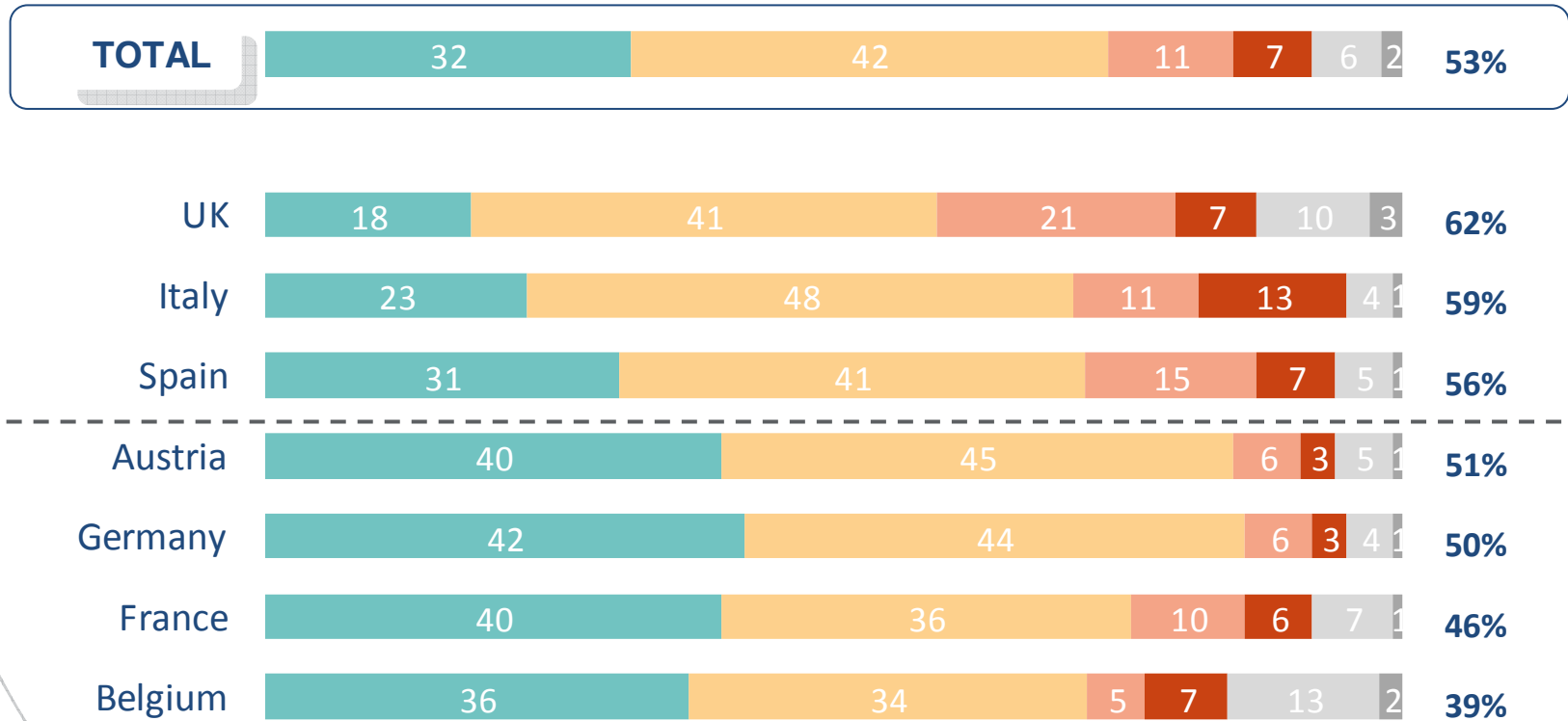
## Which of the following statements do you most identify with?

Base: People who intend to go on holiday this summer (2,043 respondents)

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

- On which you definitely don't want to save on
- On which you want to make slight savings
- On which you want to make significant savings
- Which you will stop
- None of these
- Don't know

**S/T On which you will make savings**



- In a crisis period, summer holidays are a budget category in which Europeans intend to cut costs...and essentially make limited savings. The level of planned restrictions testifies to both cultural specificities and the effects of the economic and financial crisis:
- Most **UK** residents said that holidays are a category in which they intend to make mostly limited savings;
  - **Austrian, German, French** and **Belgian** residents appear to be more optimistic: a higher percentage of them do not consider this category to be negotiable;
  - However, more **Spanish** and particularly **Italian** residents consider it to be a category that they should / will need to give up, which is fairly logical, considering the crisis.

**On average, the 2012  
holiday budget in  
Europe remains stable**

**2**



## For future European holiday makers, the 2012 holiday-budget is similar to the one devoted in 2011



Base: People who intend to go on holiday in summer 2012



Compared to 2011

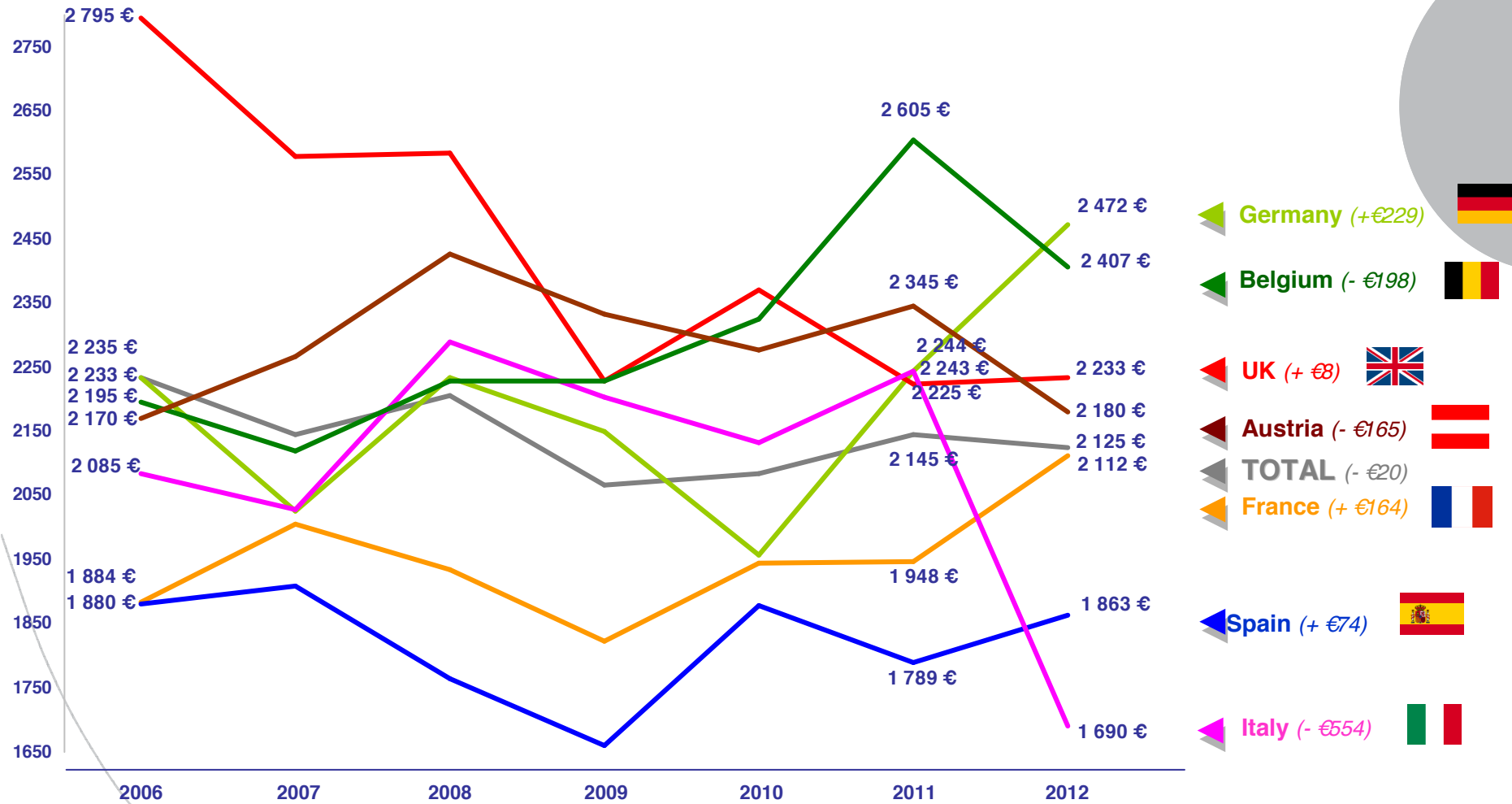
- €20

- 1%

# However, there are sharp differences between countries

What total budget are you thinking of devoting to your summer holidays in 2012 (when you accumulate transport, accommodation, food, leisure activities, etc.)?

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)



Base: People who intend to go on holiday in summer 2012

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>Average budget</b>	<b>2 125€</b>	<b>2 112€</b>	<b>2 472€</b>	<b>2 233€ *</b>	<b>1 863€</b>	<b>1 690€</b>	<b>2 407€</b>	<b>2 180€</b>
<b>Rank</b>	-	5th	1st	3rd	6th	7th	2nd	4th
<b>Versus 2011</b>	- 20 €	+ 164 €	+ 229€	+ 8€	+ 74€	- 554€	- 198€	- 165€
<b>Versus 2011 (in %)</b>	-0.9%	+8.4%	+10.2%	+0.4%	+4.1%	-24.7%	-7.6%	-7.0%
<i>Average budget 2011</i>	<i>2 145€</i>	<i>1 948 €</i>	<i>2 243 €</i>	<i>2 225 €</i>	<i>1 789 €</i>	<i>2 244 €</i>	<i>2 605 €</i>	<i>2 345 €</i>
<i>Average budget 2010</i>	<i>2 083 €</i>	<i>1 945 €</i>	<i>1 956 €</i>	<i>2 372 €</i>	<i>1 879 €</i>	<i>2 132 €</i>	<i>2 325 €</i>	<i>2 278 €</i>

\* 1£ = 1.202€

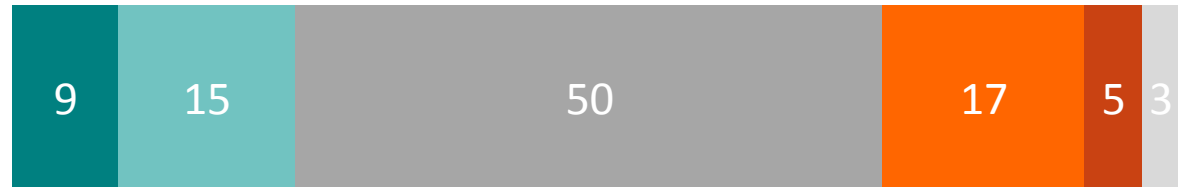
Still thinking about the total budget you intend to spend on your 2012 summer holidays, which of the following statements best suits your intention ?

Base: People who intend to go on holiday in summer 2012

- You plan to spend much more than in 2011
- You plan to spend more than in 2011
- You plan to spend as much as in 2011
- You plan to spend less than in 2011
- You plan to spend much less than in 2011
- Don't know

**S/T**  
**Spend more 24%**

**S/T**  
**Spend less 22%**



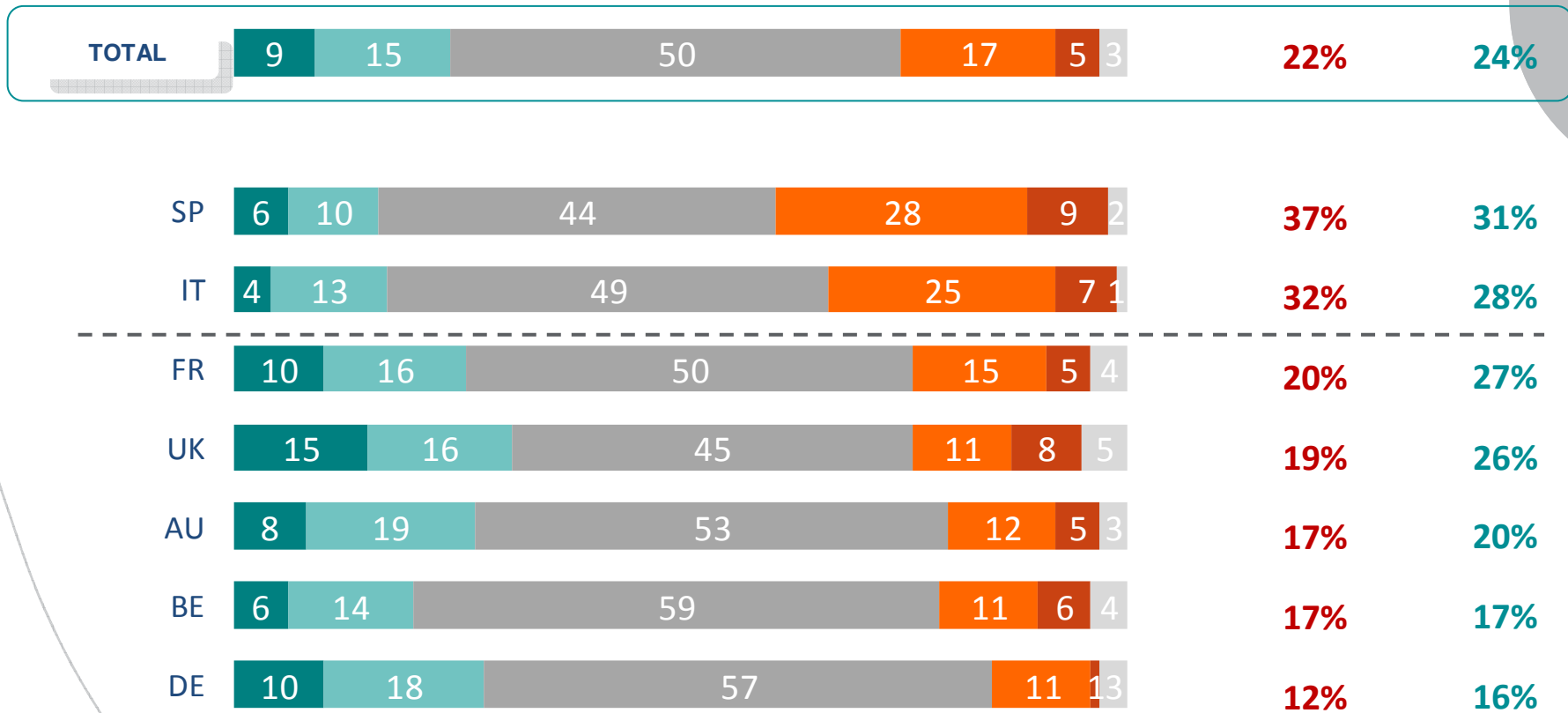
# Italians and Spaniards tend to anticipate less spending than their neighbours

Still thinking about the total budget you intend to spend on your 2012 summer holidays, which of the following statements best suits your intention ?

Base: People who intend to go on holiday in summer 2012

■ Spend much more     ■ Spend more     ■ Spend as much  
■ Spend less     ■ Spend much less     ■ Don't know

S/T Spend less     S/T Spend more







## Key points...



- The major question for Europeans is: to go away or not to go away
- But, for those who are planning to go away, they intend to spend as much as last year in 2012

**However, there is no fundamental change in the behaviour of the holidaymakers**

**3**

- Destinations closely linked to current events as well as habits, which are deeply rooted in Europe
- The purpose of holidays and their organisation have not altered: ideal holidays, method of preparation, form of holidays, etc.

### 3. However, there is no fundamental change in the behaviour of the holidaymakers

#### 3.1. Destinations closely linked to current events as well as habits, which are deeply rooted in Europe



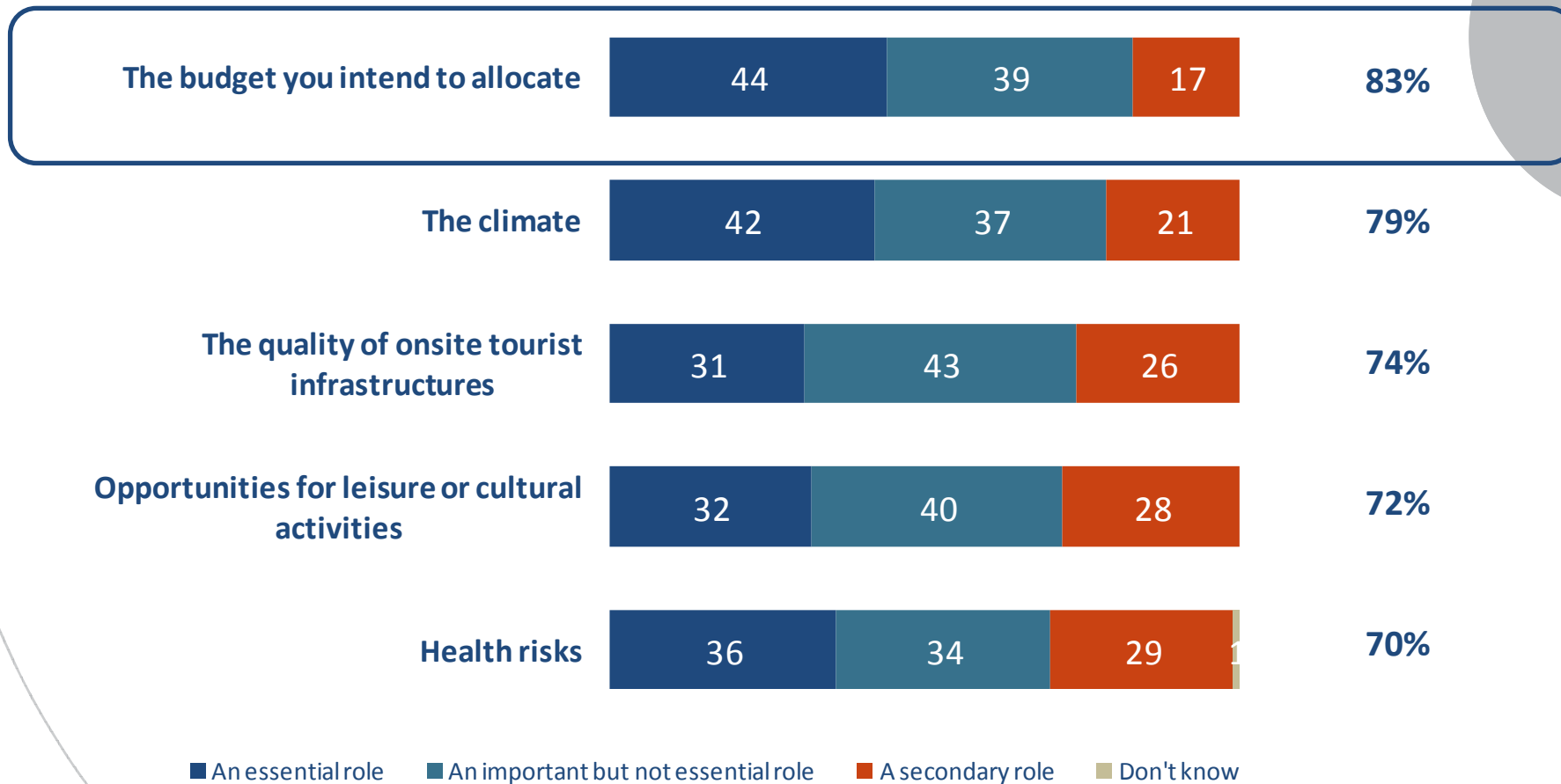
# The budget dedicated to holidays is still the main factor when choosing a destination, ahead of the climate

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 who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T "Essential" + "Important"



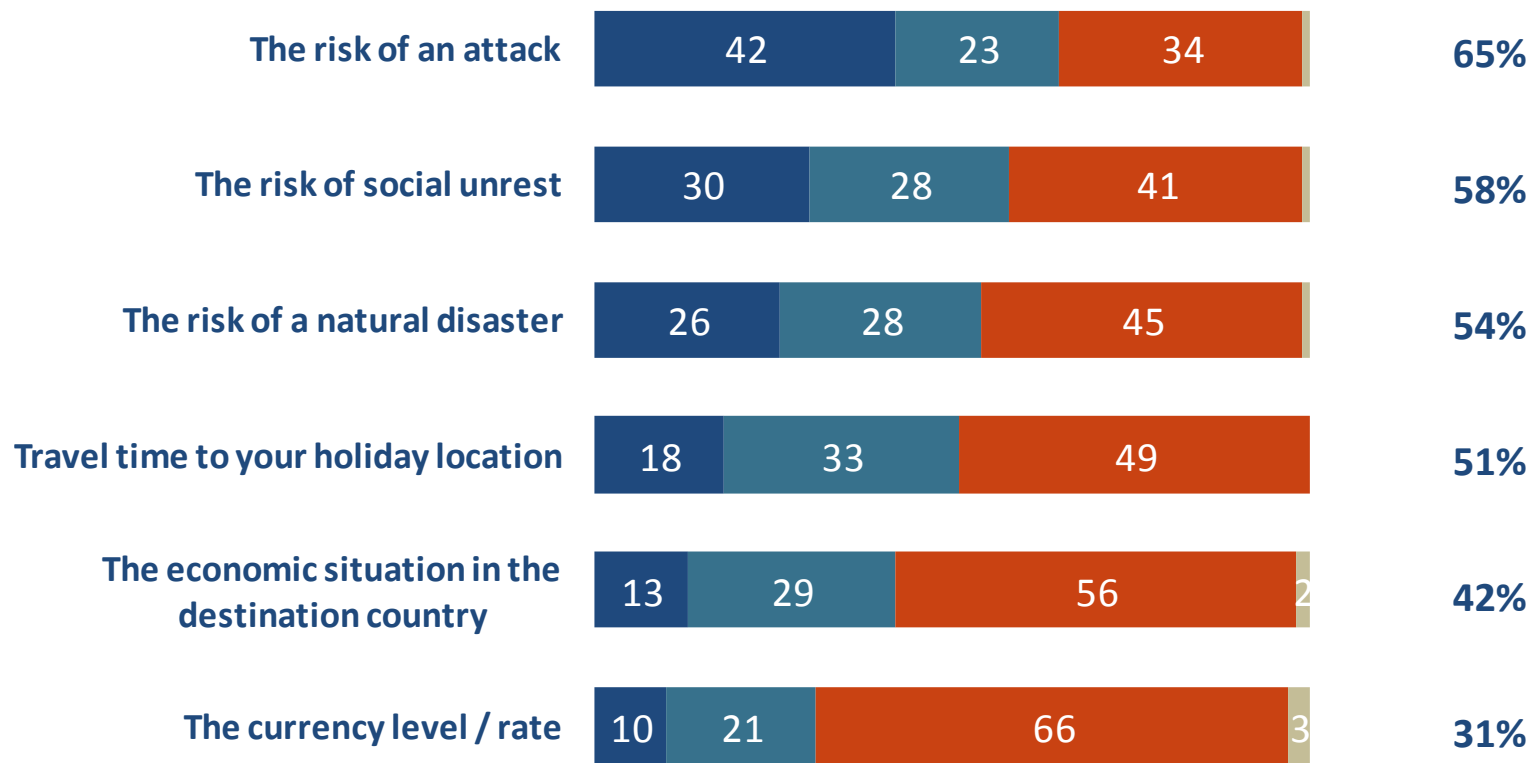
# The budget dedicated to holidays is still the main factor when choosing a destination, ahead of the climate

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 who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T "Essential" + "Important"

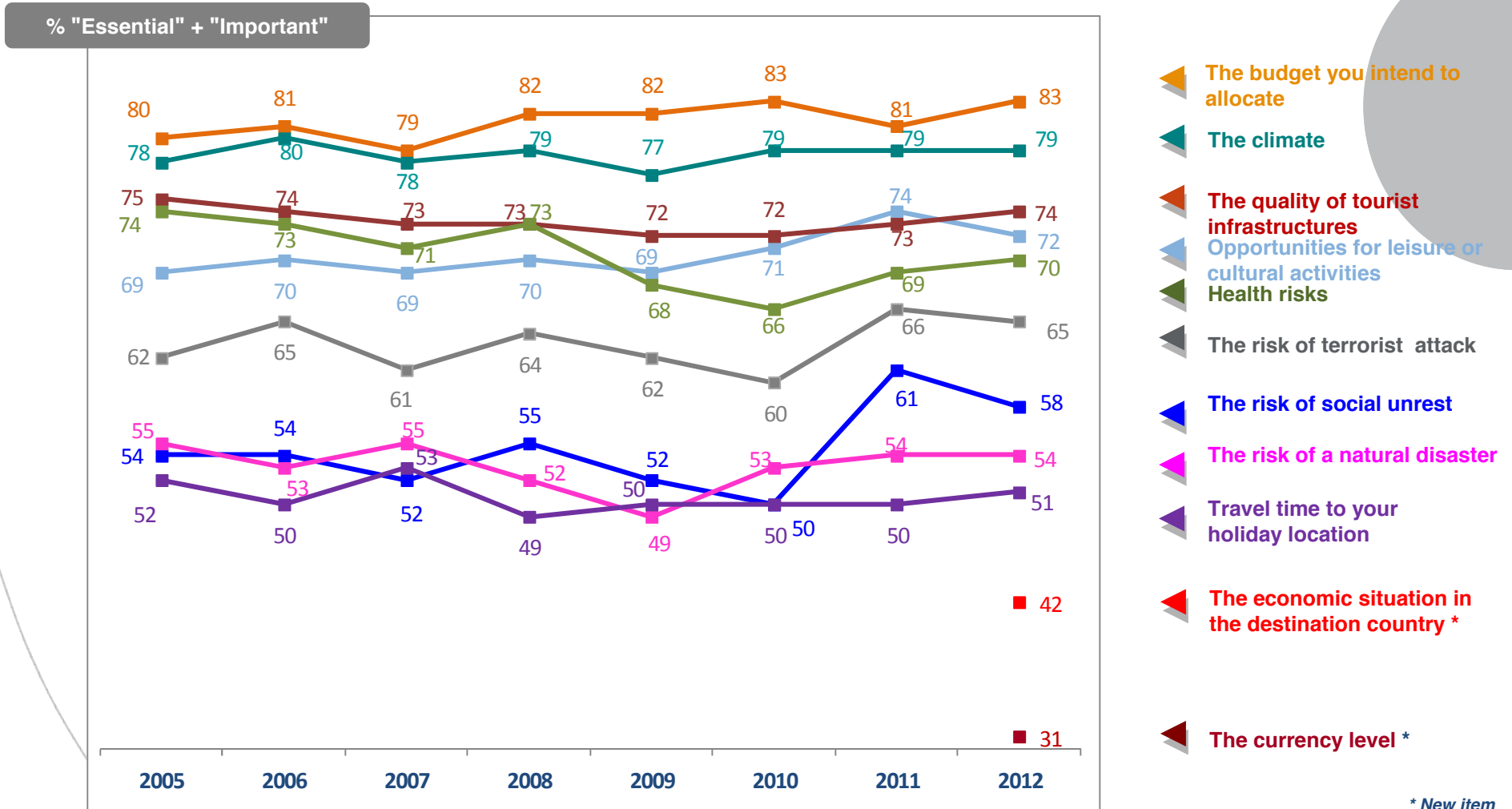


■ An essential role   ■ An important but not essential role   ■ A secondary role   ■ Don't know

# The budget dedicated to holidays is still the main decision-making factor but sensitivity to risk remains high

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 who intend to go on holiday in summer 2012 (2,043 respondents)



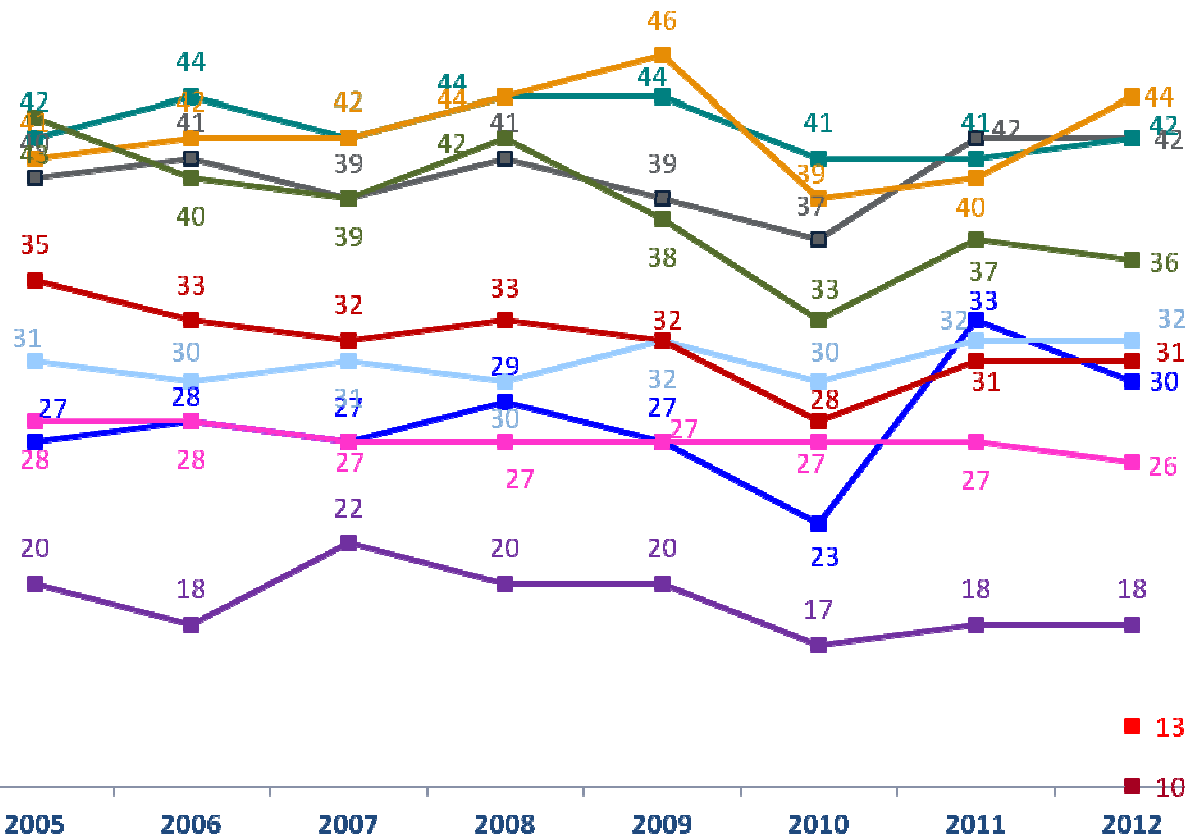
\* New item

# The budget dedicated to holidays is still the main decision-making factor but sensitivity to risk remains high

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 who intend to go on holiday in summer 2012 (2,043 respondents)

% "Essential"



- The budget you intend to allocate
- The climate
- The risk of terrorist attack
- 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 \*
- The currency level \*

\* New item

Base: People who intend to go on holiday in summer 2012

% "Essential"

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>The budget you intend to allocate</b>	<b>44%</b>	<b>40%</b> ↗	<b>49%</b> ↗	<b>36%</b>	<b>38%</b>	<b>52%</b>	<b>34%</b> ↗	<b>47%</b> ↗
2011	40%	26%	44%	40%	43%	48%	24%	37%
2010	39%	32%	39%	38%	36%	52%	28%	37%
2009	46%	54%	44%	37%	45%	50%	34%	35%
<b>The risk of terrorist attack</b>	<b>42%</b>	<b>38%</b> ↗	<b>50%</b>	<b>34%</b> ↘	<b>41%</b> ↘	<b>40%</b>	<b>42%</b> ↗	<b>50%</b>
2011	42%	29%	49%	44%	54%	39%	35%	53%
2010	37%	28%	42%	37%	44%	35%	30%	45%
2009	39%	31%	44%	34%	53%	37%	44%	45%
<b>The climate</b>	<b>42%</b>	<b>35%</b>	<b>47%</b>	<b>45%</b>	<b>32%</b>	<b>43%</b>	<b>48%</b>	<b>51%</b>
2011	41%	36%	42%	39%	35%	50%	46%	43%
2010	41%	40%	44%	37%	36%	46%	44%	45%
2009	44%	54%	45%	36%	34%	45%	57%	47%
<b>Health risks</b>	<b>36%</b>	<b>31%</b>	<b>42%</b>	<b>29%</b>	<b>40%</b> ↘	<b>35%</b>	<b>39%</b>	<b>44%</b>
2011	37%	23%	39%	39%	47%	38%	32%	45%
2010	33%	25%	39%	26%	44%	35%	32%	43%
2009	38%	38%	41%	28%	54%	36%	36%	39%
<b>Opportunities for leisure or cultural activities</b>	<b>32%</b>	<b>34%</b>	<b>44%</b>	<b>23%</b> ↘	<b>21%</b> ↘	<b>24%</b>	<b>30%</b>	<b>50%</b>
2011	32%	25%	43%	30%	27%	28%	24%	49%
2010	30%	28%	49%	19%	24%	22%	29%	49%
2009	32%	39%	43%	23%	26%	22%	38%	41%



Base: People who intend to go on holiday in summer 2012

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>% "Essential"</b>								
<b>The quality of onsite tourist infrastructures</b>	<b>31%</b>	<b>25%</b>	<b>36%</b>	<b>26%</b> ↓	<b>28%</b> ↓	<b>35%</b>	<b>37%</b>	<b>31%</b>
2011	31%	20%	31%	32%	36%	38%	33%	37%
2010	28%	23%	27%	21%	28%	41%	36%	38%
2009	32%	30%	31%	25%	35%	38%	36%	35%
<b>The risk of social unrest</b>	<b>30%</b>	<b>18%</b>	<b>48%</b>	<b>25%</b> ↓	<b>28%</b> ↓	<b>25%</b>	<b>27%</b>	<b>48%</b>
2011	33%	15%	45%	41%	42%	26%	24%	50%
2010	23%	13%	35%	25%	22%	20%	20%	39%
2009	27%	18%	36%	25%	36%	23%	24%	36%
<b>The risk of a natural disaster</b>	<b>26%</b>	<b>24%</b>	<b>30%</b>	<b>24%</b>	<b>32%</b> ↓	<b>25%</b>	<b>21%</b>	<b>28%</b> ↓
2011	27%	16%	32%	27%	43%	23%	21%	35%
2010	27%	19%	31%	27%	38%	24%	19%	26%
2009	27%	21%	30%	20%	48%	26%	26%	30%
<b>Travel time to your holiday location</b>	<b>18%</b>	<b>11%</b>	<b>25%</b>	<b>19%</b>	<b>9%</b>	<b>21%</b>	<b>20%</b>	<b>23%</b>
2011	18%	9%	21%	20%	21%	22%	9%	20%
2010	17%	13%	19%	15%	16%	21%	14%	20%
2009	20%	13%	23%	18%	16%	26%	17%	19%
<b>The economic situation in the destination country *</b>	<b>13%</b>	<b>10%</b>	<b>18%</b>	<b>11%</b>	<b>10%</b>	<b>11%</b>	<b>13%</b>	<b>15%</b>
<b>The currency level *</b>	<b>10%</b>	<b>9%</b>	<b>9%</b>	<b>15%</b>	<b>8%</b>	<b>9%</b>	<b>5%</b>	<b>8%</b>

\* New item

Base: People who intend to go on holiday in summer 2012

% "Essential"		No. 1 factor	No. 2 factor	No. 3 factor
<b>Total</b>	n=2,043	2012 : The budget you intend to allocate 2011: The risk of terrorist attack	2012: The risk of an attack 2011: The climate	2012: The climate 2011: The budget you intend to allocate
	n=354	2012: The budget you intend to allocate 2011: The climate	2012: The risk of an attack 2011: The risk of terrorist attack	2012: The climate 2011: The budget you intend to allocate
	n=273	2012: The risk of an attack 2011: The risk of terrorist attack	2012: The budget you intend to allocate 2011: The risk of social unrest	2012: The risk of social unrest 2011: The budget you intend to allocate
	n=260	2012: The climate 2011: The risk of terrorist attack	2012: The budget you intend to allocate 2011: The risk of social unrest	2012: The risk of an attack 2011: The budget you intend to allocate
	n=255	2012: The risk of an attack 2011: The risk of terrorist attack	2012: Health risks 2011: Health risks	2012: The budget you intend to allocate 2011: The risk of a natural disaster / The budget you intend to allocate
	n=314	2012: The budget you intend to allocate 2011: The climate	2012: The climate 2011: The budget you intend to allocate	2012: The risk of an attack 2011: The risk of terrorist attack
	n=295	2012: The climate 2011: The climate	2012: The risk of an attack 2011: The risk of terrorist attack	2012: Health risks 2011: The quality of onsite tourist infrastructures
	n=292	2012: The climate 2011: The risk of terrorist attack	2012: The risk of an attack 2011: The risk of social unrest	2012: Opportunities for leisure or cultural activities 2011: Opportunities for leisure or cultural activities

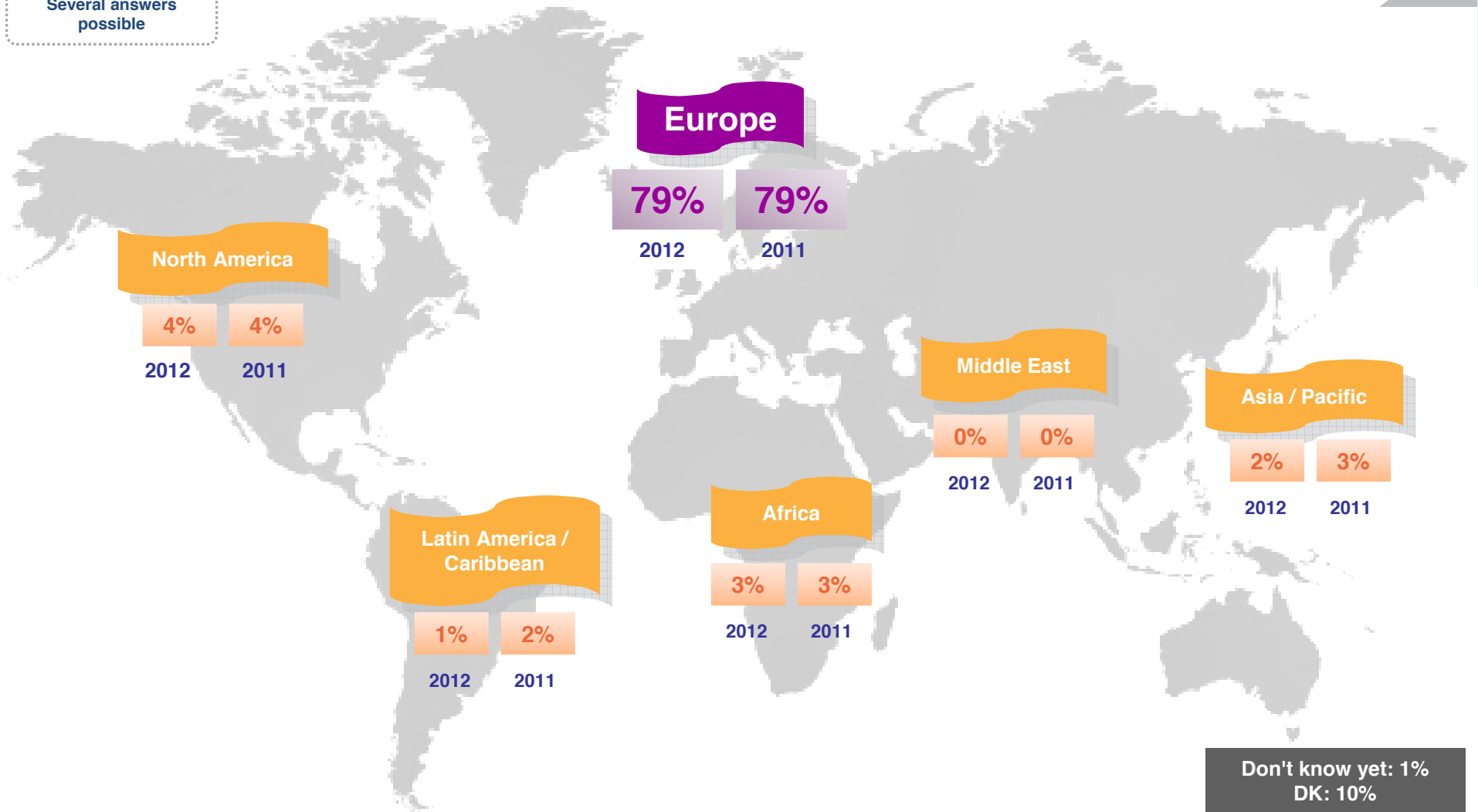
Decision-making criteria closely related to current events:

- The budget is once again the main factor for Europeans when choosing a destination (44%), ahead of the climate and the risk of an attack (both 42%).
- **German, French and Belgian** residents are increasingly sensitive to the budget allocated to holidays and the risk of an attack.
- For the **Spanish**, the main factors when choosing a destination remain the risk of an attack and health risks but there is a downward trend for all factors.

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

Several answers possible

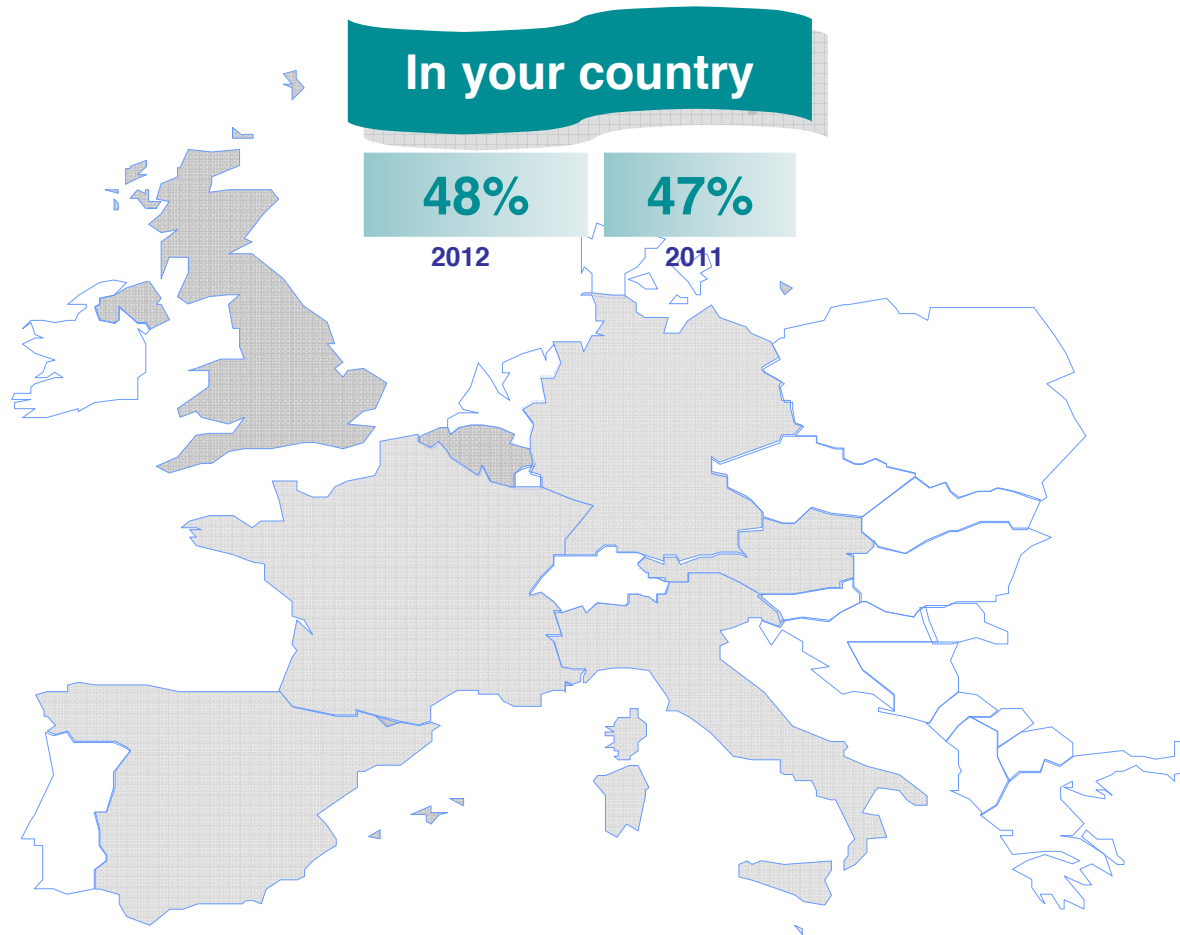


# Nearly half of respondents prefer remaining in their country for the summer holidays

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

Several answers possible



Don't know yet: 1%  
DK: 10%

Base: People who intend to go on holiday in summer 2012

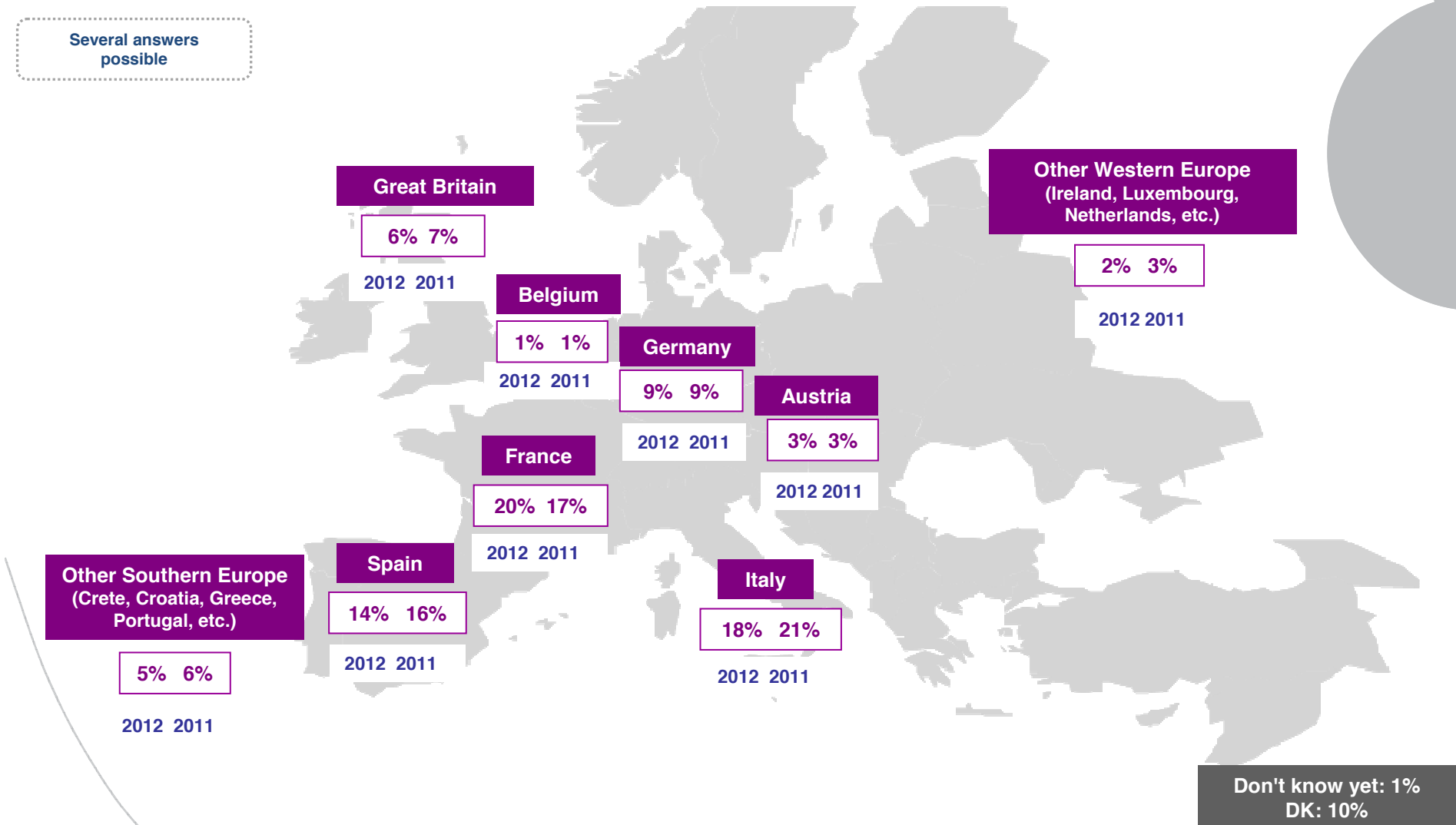
	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>TOTAL EUROPE</b>	<b>79%</b>	<b>82%</b>	<b>81%</b>	<b>71%</b>	<b>69%</b>	<b>83%</b>	<b>80%</b>	<b>83%</b>
<i>2011</i>	<i>80%</i>	<i>81%</i>	<i>82%</i>	<i>73%</i>	<i>75%</i>	<i>82%</i>	<i>83%</i>	<i>82%</i>
<i>2010</i>	<i>80%</i>	<i>79%</i>	<i>86%</i>	<i>72%</i>	<i>79%</i>	<i>80%</i>	<i>84%</i>	<i>87%</i>
<i>2009</i>	<i>78%</i>	<i>72%</i>	<i>82%</i>	<i>71%</i>	<i>83%</i>	<i>81%</i>	<i>79%</i>	<i>81%</i>
<b>In your own country</b>	<b>48%</b>	<b>67% ↗</b>	<b>33%</b>	<b>27%</b>	<b>53%</b>	<b>70%</b>	<b>11%</b>	<b>26% ↗</b>
<i>2011</i>	<i>47%</i>	<i>60%</i>	<i>32%</i>	<i>29%</i>	<i>59%</i>	<i>69%</i>	<i>10%</i>	<i>20%</i>
<i>2010</i>	<i>48%</i>	<i>60%</i>	<i>39%</i>	<i>28%</i>	<i>59%</i>	<i>66%</i>	<i>11%</i>	<i>34%</i>
<i>2009</i>	<i>46%</i>	<i>54%</i>	<i>35%</i>	<i>26%</i>	<i>67%</i>	<i>68%</i>	<i>12%</i>	<i>27%</i>

# Chosen destinations: among preferred European destinations, France takes back the lead, to the detriment of Italy

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

Several answers possible



Base: People who intend to go on holiday in summer 2012

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>TOTAL EUROPE</b>	<b>79%</b>	<b>82%</b>	<b>81%</b>	<b>71%</b>	<b>69%</b> ↓	<b>83%</b>	<b>80%</b>	<b>83%</b>
2011	80%	81%	82%	73%	75%	82%	83%	82%
2010	80%	79%	86%	72%	79%	80%	84%	87%
2009	78%	72%	82%	71%	83%	81%	79%	81%
<b>Including In your own country</b>	<b>48%</b>	<b>67%</b> ↑	<b>33%</b>	<b>27%</b>	<b>53%</b> ↓	<b>70%</b>	<b>11%</b>	<b>26%</b> ↑
2011	47%	60%	32%	29%	59%	69%	10%	20%
2010	48%	60%	39%	28%	59%	66%	11%	34%
2009	46%	54%	35%	26%	67%	68%	12%	27%
<b>Including Europe outside of your country</b>	<b>33%</b>	<b>18%</b> ↓	<b>53%</b>	<b>45%</b> ↓	<b>19%</b>	<b>14%</b>	<b>70%</b>	<b>66%</b>
2011	35%	25%	54%	50%	15%	16%	74%	64%
2010	36%	23%	52%	48%	20%	18%	76%	63%
2009	35%	20%	52%	48%	18%	21%	69%	57%
<b>Including Western Europe</b>	<b>38%</b>	<b>69%</b> ↑	<b>48%</b>	<b>39%</b>	<b>10%</b>	<b>4%</b>	<b>54%</b>	<b>39%</b> ↑
2011	36%	63%	49%	40%	9%	7%	50%	31%
2010	37%	62%	51%	37%	10%	6%	55%	45%
2009	35%	58%	47%	38%	10%	9%	47%	39%
<b>Germany</b>	<b>9%</b>	<b>1%</b>	<b>33%</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>3%</b>	<b>7%</b>
2011	9%	-	32%	2%	1%	1%	4%	5%
2010	10%	-	39%	-	2%	1%	3%	7%
2009	9%	1%	35%	1%	2%	1%	2%	3%
<b>Austria</b>	<b>3%</b>	<b>-</b>	<b>7%</b>	<b>1%</b>	<b>-</b>	<b>-</b>	<b>3%</b>	<b>26%</b> ↑
2011	3%	1%	7%	-	-	1%	3%	20%
2010	3%	1%	7%	0%	-	1%	3%	34%
2009	2%	-	6%	1%	1%	1%	2%	27%
<b>Belgium</b>	<b>1%</b>	<b>-</b>	<b>1%</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>11%</b>	<b>-</b>
2011	1%	1%	-	-	1%	-	10%	-
2010	1%	-	-	1%	-	-	11%	-
2009	1%	-	-	-	-	-	12%	-



# Chosen destinations – By country

Base: People who intend to go on holiday in summer 2012

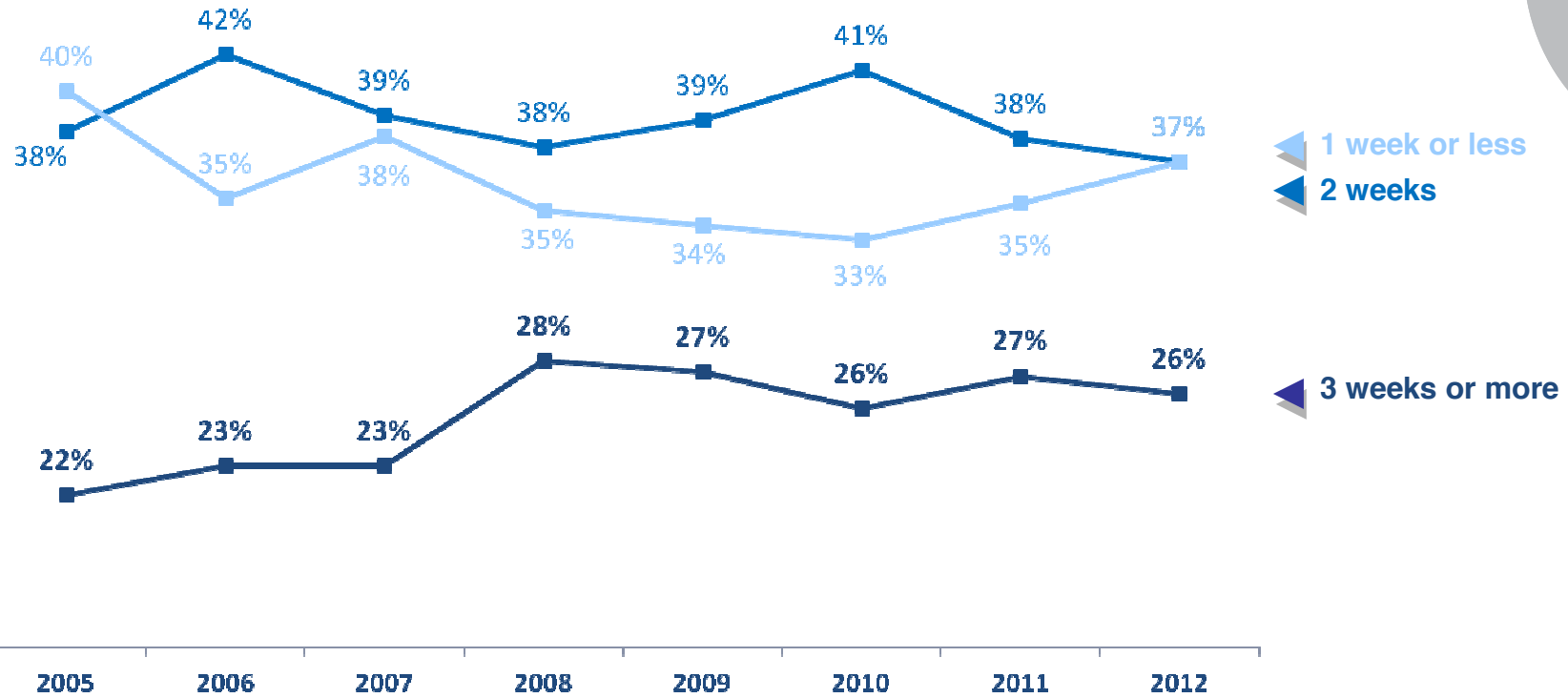
	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>France</b>	<b>20%</b>	<b>67%</b> ↗	<b>6%</b>	<b>7%</b>	<b>7%</b>	<b>1%</b>	<b>34%</b>	<b>5%</b>
2011	17%	60%	4%	11%	5%	2%	34%	4%
2010	16%	60%	3%	7%	3%	1%	40%	2%
2009	16%	54%	3%	9%	4%	6%	28%	6%
<b>Great Britain</b>	<b>6%</b>	<b>1%</b>	<b>1%</b>	<b>30%</b>	<b>1%</b>	<b>-</b>	<b>1%</b>	<b>2%</b>
2011	7%	2%	3%	29%	1%	2%	3%	2%
2010	7%	1%	3%	28%	3%	2%	2%	2%
2009	6%	3%	1%	26%	2%	1%	2%	1%
<b>Including Southern Europe</b>	<b>39%</b>	<b>13%</b>	<b>31%</b>	<b>32%</b>	<b>59%</b>	<b>76%</b>	<b>26%</b> ↘	<b>48%</b>
2011	43%	19%	30%	32%	63%	76%	34%	52%
2010	43%	20%	31%	36%	66%	73%	35%	45%
2009	45%	15%	34%	35%	74%	75%	35%	43%
<b>Spain</b>	<b>14%</b>	<b>7%</b>	<b>11%</b>	<b>15%</b>	<b>53%</b> ↘	<b>3%</b>	<b>7%</b>	<b>5%</b>
2011	16%	7%	11%	15%	59%	5%	12%	8%
2010	16%	9%	11%	15%	59%	6%	14%	6%
2009	17%	6%	12%	16%	67%	6%	11%	6%
<b>Italy</b>	<b>18%</b>	<b>3%</b>	<b>9%</b>	<b>4%</b>	<b>2%</b>	<b>70%</b>	<b>8%</b>	<b>17%</b>
2011	20%	5%	11%	5%	3%	69%	11%	20%
2010	19%	6%	9%	7%	4%	66%	13%	20%
2009	21%	4%	12%	7%	4%	68%	13%	16%
<b>Including Central Europe</b>	<b>2%</b>	<b>2%</b>	<b>4%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>4%</b>
2011	2%	2%	4%	2%	1%	1%	2%	3%
2010	2%	1%	5%	2%	2%	2%	2%	5%
2009	2%	2%	3%	2%	1%	1%	3%	3%
<b>Including Northern Europe</b>	<b>2%</b>	<b>1%</b>	<b>4%</b>	<b>2%</b>	<b>1%</b>	<b>2%</b>	<b>3%</b>	<b>4%</b>
2011	2%	0%	7%	1%	-	1%	1%	1%
2010	2%	0%	6%	2%	1%	1%	2%	3%
2009	2%	1%	5%	-	-	1%	1%	3%

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>TOTAL NORTH AMERICA</b>	<b>4%</b>	<b>4%</b>	<b>6%</b>	<b>10%</b>	<b>2%</b>	<b>1%</b>	<b>2%</b>	<b>5%</b>
2011	4%	3%	4%	9%	1%	1%	2%	3%
2010	4%	1%	5%	8%	2%	2%	2%	3%
2009	4%	2%	5%	10%	1%	2%	1%	3%
<b>TOTAL LATIN AMERICA, CARIBBEAN</b>	<b>1%</b>	<b>2%</b>	<b>-</b>	<b>2%</b>	<b>4%</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>
2011	2%	1%	3%	2%	5%	1%	2%	3%
2010	2%	1%	1%	5%	4%	1%	1%	2%
2009	3%	2%	2%	3%	6%	2%	2%	2%
<b>TOTAL AFRICA</b>	<b>3%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>	<b>3%</b>	<b>-</b>	<b>6%</b>	<b>3%</b>
2011	3%	6%	2%	4%	2%	2%	5%	3%
2010	5%	10%	4%	4%	2%	4%	4%	4%
2009	5%	11%	5%	6%	1%	1%	7%	4%
<b>TOTAL ASIA/PACIFIC</b>	<b>2%</b>	<b>3%</b>	<b>2%</b>	<b>3%</b>	<b>3%</b>	<b>1%</b>	<b>-</b>	<b>3%</b>
2011	3%	2%	3%	4%	3%	1%	2%	3%
2010	2%	1%	3%	4%	2%	1%	1%	2%
2009	2%	2%	1%	7%	2%	1%	2%	2%
<b>TOTAL MIDDLE EAST</b>	<b>0%</b>	<b>-</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>-</b>	<b>1%</b>	<b>-</b>
2011	0%	-	1%	1%	1%	-	0%	-
2010	1%	1%	1%	1%	1%	1%	-	1%
2009	1%	1%	1%	1%	-	1%	1%	1%

# A tendency towards "relative proximity" partly related to declining lengths of stay

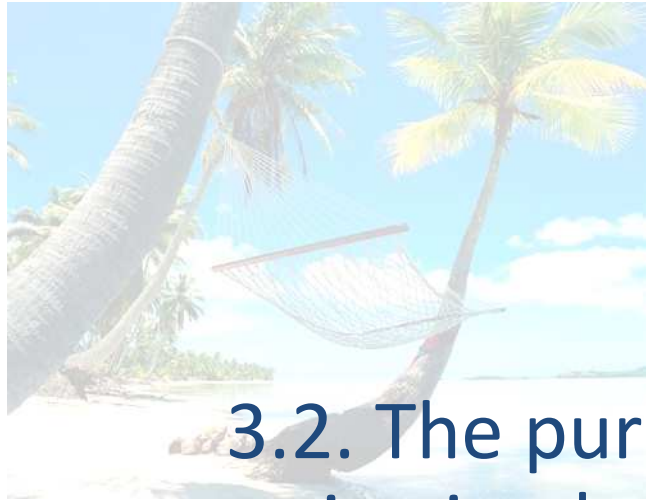
In total, how long do you plan to go on holiday this summer?

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)



- Ultimately, the choice of destination is impacted by current events but especially by Europeans' habits: Europe remains the preferred destination for summer holidays
- **French** residents, who are increasingly sensitive to their holiday budget and the risk of an attack, are even more likely to privilege national tourism this year.
- **Belgian** and **Austrian** residents, who historically have been the most willing to leave their countries, are staying at home this year to the detriment of Southern Europe.

### 3. However, there is no fundamental change in the behaviour of the holidaymakers



3.2. The purpose of holidays and their organisation have not altered: ideal holidays, method of preparation, form of holidays, etc.

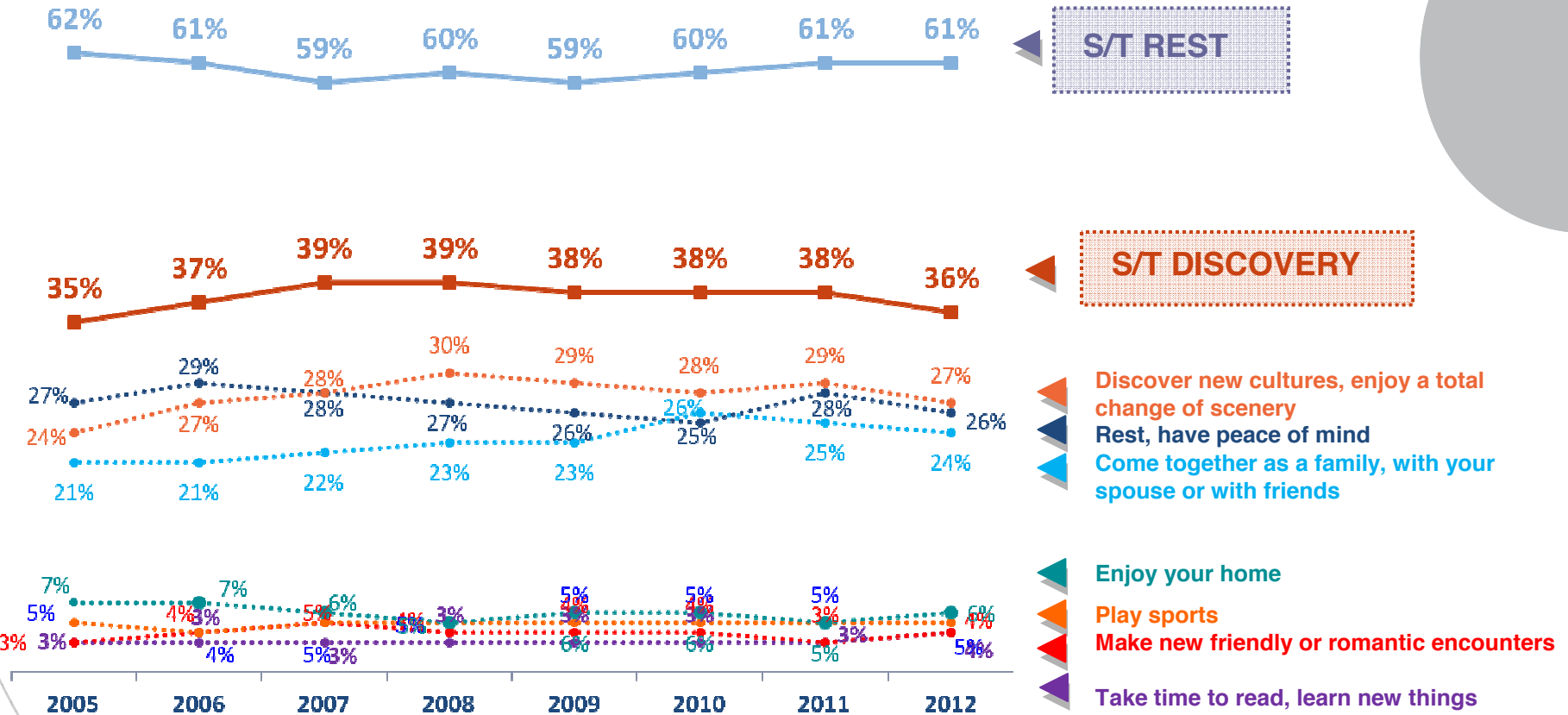
# For most Europeans, an ideal holiday remains a relaxing holiday

When you think of what, for you, would be the ideal summer holiday in 2012, what would you primarily want?

Base: All (3,523 respondents)

First answer

2 answers possible



DK: 1%

None of these: 2%

**First answer**

Base: All

	Total							
	n=3,523	n=510	n=500	n=513	n=500	n=500	n=500	n=500
<b>S/T REST</b>	<b>61%</b>	<b>56%</b>	<b>65%</b>	<b>62%</b>	<b>53%</b>	<b>60%</b>	<b>65%</b>	<b>64%</b>
2011	61%	53%	67%	60%	60%	62%	66%	60%
2010	60%	53%	65%	64%	61%	56%	66%	64%
2009	59%	54%	68%	55%	54%	59%	59%	65%
<b>Relax, have peace of mind</b>	<b>26%</b>	<b>20%</b>	<b>26%</b>	<b>20%</b>	<b>33%</b>	<b>34%</b>	<b>25%</b>	<b>23%</b>
2011	28%	21%	26%	17%	36%	41%	29%	24%
2010	25%	22%	26%	16%	34%	28%	28%	21%
2009	26%	22%	28%	14%	34%	33%	23%	24%
<b>Come together as a family, with your spouse or with friends</b>	<b>24%</b>	<b>27%</b>	<b>24%</b>	<b>36%</b>	<b>14%</b>	<b>16%</b>	<b>25%</b>	<b>25%</b>
2011	25%	22%	27%	37%	17%	16%	25%	21%
2010	26%	23%	27%	42%	16%	20%	24%	26%
2009	23%	22%	25%	34%	13%	18%	25%	24%
<b>Enjoy your home</b>	<b>6%</b>	<b>6%</b>	<b>9%</b>	<b>3%</b>	<b>3%</b>	<b>6%</b>	<b>9%</b>	<b>14%</b>
2011	5%	5%	8%	3%	4%	2%	7%	10%
2010	6%	5%	8%	3%	6%	5%	8%	11%
2009	6%	6%	11%	2%	5%	4%	5%	13%
<b>Take time to read, learn new things</b>	<b>4%</b>	<b>4%</b>	<b>4%</b>	<b>3%</b>	<b>2%</b>	<b>5%</b>	<b>5%</b>	<b>2%</b>
2011	3%	4%	5%	2%	3%	2%	4%	4%
2010	3%	3%	4%	3%	2%	2%	4%	4%
2009	3%	4%	4%	3%	2%	3%	5%	3%

**First answer**

Base: All

	Total							
	n=3,523	n=510	n=500	n=513	n=500	n=500	n=500	n=500
<b>S/T DISCOVERY</b>	<b>36%</b>	<b>43%</b>	<b>32%</b>	<b>35%</b>	<b>35%</b>	<b>37%</b>	<b>33%</b>	<b>34%</b>
2011	38%	46%	32%	39%	38%	38%	33%	38%
2010	38%	46%	34%	35%	36%	43%	33%	34%
2009	38%	44%	27%	43%	42%	39%	41%	34%
<b>Discover new cultures, enjoy a total change of scenery</b>	<b>27%</b>	<b>36%</b>	<b>21%</b>	<b>22%</b>	<b>31%</b>	<b>29%</b>	<b>24%</b>	<b>21%</b>
2011	29%	38%	22%	28%	34%	28%	27%	26%
2010	28%	37%	23%	23%	30%	31%	26%	25%
2009	29%	36%	19%	35%	36%	26%	35%	23%
<b>Play sports</b>	<b>5%</b>	<b>4%</b>	<b>7%</b>	<b>5%</b>	<b>2%</b>	<b>3%</b>	<b>6%</b>	<b>9%</b>
2011	5%	4%	6%	4%	3%	6%	4%	8%
2010	5%	5%	6%	4%	3%	4%	5%	7%
2009	5%	5%	7%	4%	5%	5%	5%	9%
<b>Make new friendly or romantic encounters</b>	<b>4%</b>	<b>3%</b>	<b>4%</b>	<b>7%</b>	<b>2%</b>	<b>5%</b>	<b>3%</b>	<b>3%</b>
2011	3%	3%	3%	6%	1%	4%	1%	3%
2010	4%	3%	3%	7%	2%	8%	2%	2%
2009	4%	3%	2%	5%	2%	7%	2%	2%



# Resting at the seaside is still the leading holiday goal

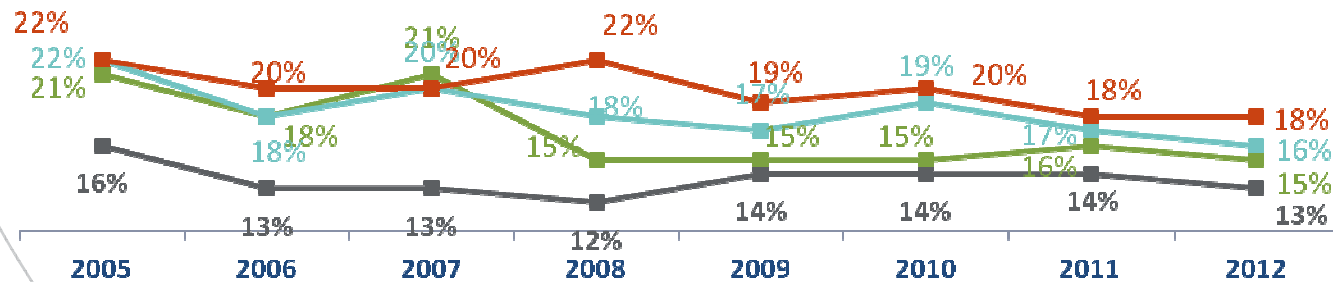
For your summer holiday, do you intend to go mainly...

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

Several answers possible



▶ To the seaside



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

DK: 1%

Base: People who intend to go on holiday in summer 2012

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>At the seaside</b>	<b>62%</b>	<b>56%</b> ↓	<b>71%</b>	<b>45%</b> ↓	<b>57%</b>	<b>75%</b>	<b>54%</b> ↓	<b>62%</b>
2011	65%	63%	69%	53%	60%	74%	61%	65%
2010	62%	60%	65%	50%	65%	73%	53%	60%
2009	64%	59%	66%	57%	62%	75%	54%	60%
<b>On a tour, discovering things</b>	<b>18%</b>	<b>20%</b>	<b>22%</b>	<b>26%</b>	<b>2%</b>	<b>10%</b>	<b>27%</b>	<b>23%</b>
2011	18%	22%	19%	29%	2%	11%	25%	21%
2010	20%	14%	25%	29%	5%	20%	23%	25%
2009	19%	18%	21%	32%	5%	12%	28%	20%
<b>In the mountains</b>	<b>16%</b>	<b>18%</b>	<b>18%</b>	<b>6%</b>	<b>16%</b>	<b>17%</b>	<b>20%</b>	<b>27%</b> ↑
2011	17%	22%	20%	10%	12%	19%	20%	21%
2010	19%	19%	24%	12%	15%	24%	20%	23%
2009	17%	18%	16%	10%	20%	20%	27%	21%
<b>In the countryside</b>	<b>15%</b>	<b>15%</b>	<b>21%</b>	<b>22%</b>	<b>9%</b>	<b>3%</b>	<b>19%</b>	<b>23%</b>
2011	16%	17%	24%	21%	14%	4%	20%	20%
2010	15%	15%	19%	19%	9%	7%	21%	23%
2009	15%	14%	19%	19%	12%	6%	25%	22%
<b>In the city</b>	<b>13%</b>	<b>10%</b>	<b>12%</b>	<b>13%</b>	<b>21%</b>	<b>11%</b>	<b>12%</b>	<b>18%</b>
2011	14%	8%	14%	17%	18%	14%	12%	18%
2010	14%	9%	16%	15%	23%	13%	15%	18%
2009	14%	10%	15%	17%	15%	14%	13%	15%

## Which holiday formula(s) will you opt for during these summer 2012 holidays?

Base: People who intend to go on holiday in summer 2012

Several answers possible

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>You will organise your trip yourself, purchasing separate services</b>	<b>69%</b>	<b>74%</b>	<b>69%</b>	<b>69%</b>	<b>65%</b>	<b>62% ↘</b>	<b>66%</b>	<b>72%</b>
2011	71%	78%	69%	68%	66%	69%	68%	71%
2010	70%	73%	71%	68%	71%	66%	71%	70%
2009	70%	78%	69%	68%	66%	69%	64%	74%
<b>You will purchase an all-inclusive package, including transport and accommodation</b>	<b>26%</b>	<b>17%</b>	<b>30%</b>	<b>29% ↘</b>	<b>28%</b>	<b>27%</b>	<b>31%</b>	<b>31%</b>
2011	27%	16%	30%	35%	31%	26%	32%	28%
2010	27%	20%	28%	33%	25%	29%	29%	32%
2009	28%	17%	27%	32%	30%	33%	34%	27%
None of these	4%	6%	1%	1%	4%	8%	3%	1%
DK	2%	1%	2%	3%	2%	2%	1%	1%

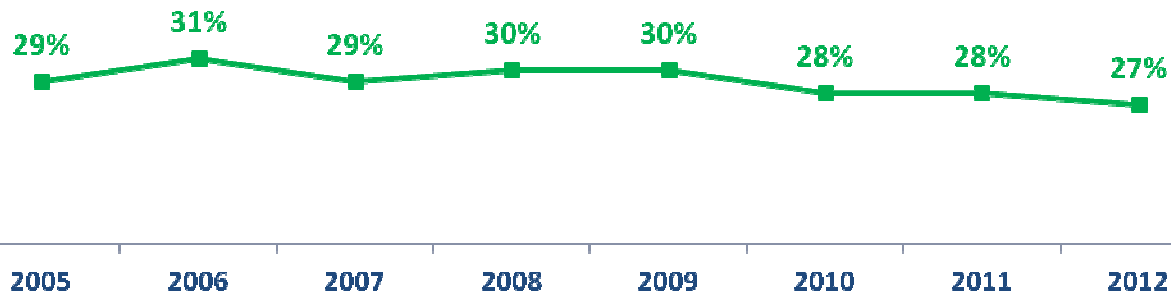
## Which of these two situations comes closest to your own?

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only



You started preparing your holidays ahead of time



You will decide on your destination at the last minute

DK: 2%

Base: People who intend to go on holiday in summer 2012

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>You started preparing your holidays ahead of time</b>	<b>71%</b>	<b>71%</b> ↗	<b>81%</b>	<b>75%</b> ↗	<b>66%</b> ↘	<b>57%</b> ↘	<b>77%</b>	<b>79%</b>
2011	71%	66%	77%	69%	71%	68%	77%	77%
2010	71%	66%	80%	69%	75%	61%	85%	78%
2009	69%	66%	78%	67%	68%	62%	74%	75%
<b>You will decide on your destination at the last minute</b>	<b>27%</b>	<b>28%</b>	<b>18%</b> ↗	<b>25%</b>	<b>31%</b>	<b>41%</b> ↗	<b>21%</b>	<b>19%</b>
2011	28%	32%	23%	29%	27%	31%	22%	22%
2010	28%	32%	19%	28%	24%	38%	13%	22%
2009	30%	33%	22%	30%	31%	37%	24%	25%
<b>DK</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>-</b>	<b>3%</b>	<b>3%</b>	<b>2%</b>	<b>3%</b>
2011	1%	2%	-	2%	2%	1%	1%	1%
2010	1%	2%	0%	3%	1%	1%	2%	0%
2009	1%	1%	-	3%	1%	1%	2%	-

## What type(s) of accommodation will you choose for these summer 2012 holidays?

Base: People who intend to go on holiday in summer 2012

Several answers possible

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>You will rent a house, hotel room or bed-and-breakfast room</b>	<b>69%</b>	<b>57%</b>	<b>76%</b>	<b>68%</b>	<b>70%</b>	<b>72% ↘</b>	<b>77% ↘</b>	<b>77%</b>
2011	71%	56%	76%	70%	71%	77%	82%	78%
2010	69%	59%	75%	63%	69%	73%	73%	78%
2009	71%	58%	75%	72%	73%	74%	73%	78%
<b>You will go to your second home or the home of friends</b>	<b>21%</b>	<b>32% ↘</b>	<b>16%</b>	<b>14%</b>	<b>26%</b>	<b>21%</b>	<b>11%</b>	<b>19%</b>
2011	23%	39%	18%	19%	23%	17%	15%	17%
2010	21%	30%	16%	21%	31%	16%	13%	17%
2009	22%	32%	15%	20%	24%	22%	19%	19%
<b>You will go camping-caravanning</b>	<b>11%</b>	<b>15%</b>	<b>10%</b>	<b>17%</b>	<b>5%</b>	<b>6%</b>	<b>14%</b>	<b>9%</b>
2011	12%	17%	12%	15%	6%	8%	11%	8%
2010	14%	17%	14%	22%	4%	10%	12%	9%
2009	12%	17%	11%	14%	9%	9%	14%	9%
<b>None of these</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>-</b>	<b>2%</b>	<b>3%</b>	<b>1%</b>	<b>-</b>
2011	1%	0%	1%	-	0%	1%	1%	1%
2010	0%	-	1%	-	-	-	1%	0%
2009	1%	1%	1%	-	-	1%	-	1%
<b>DK</b>	<b>1%</b>	<b>2%</b>	<b>-</b>	<b>-</b>	<b>2%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>
2011	1%	1%	1%	2%	1%	1%	0%	1%
2010	1%	2%	1%	0%	2%	2%	1%	-
2009	1%	2%	1%	1%	1%	1%	1%	-

The behaviour of future holiday-makers remains similar to that of previous years:

→ Holidays still mainly driven by a desire for rest...

→ ... by the sea

→ Holidays still organised in advance, in spite of economic and social uncertainty, primarily with rental accommodation (house, hotel room or bed-and-breakfast room)

# Risks and risk coverage

4

- In a crisis context, Europeans appear less and less concerned about risks
- Europeans are less concerned and have slightly less coverage



### 4.1. In a crisis context, Europeans appear less and less concerned about risks





# Europeans' concerns remain essentially focused on physical damage

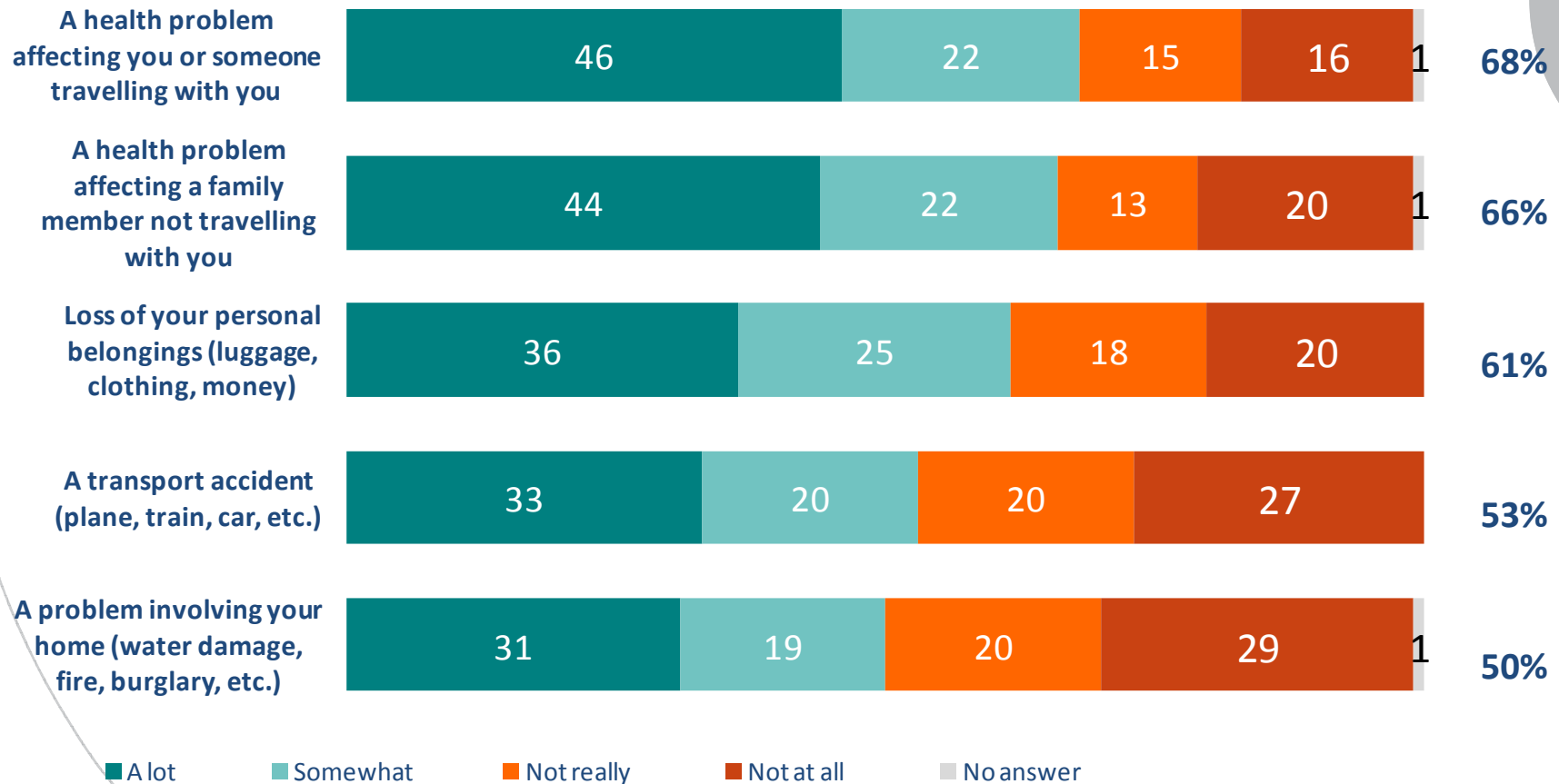


Please tell me, for each of these events, if it is something that personally concerns you a lot, somewhat, not really or not at all when you go on holiday:

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T  
"Concerned"



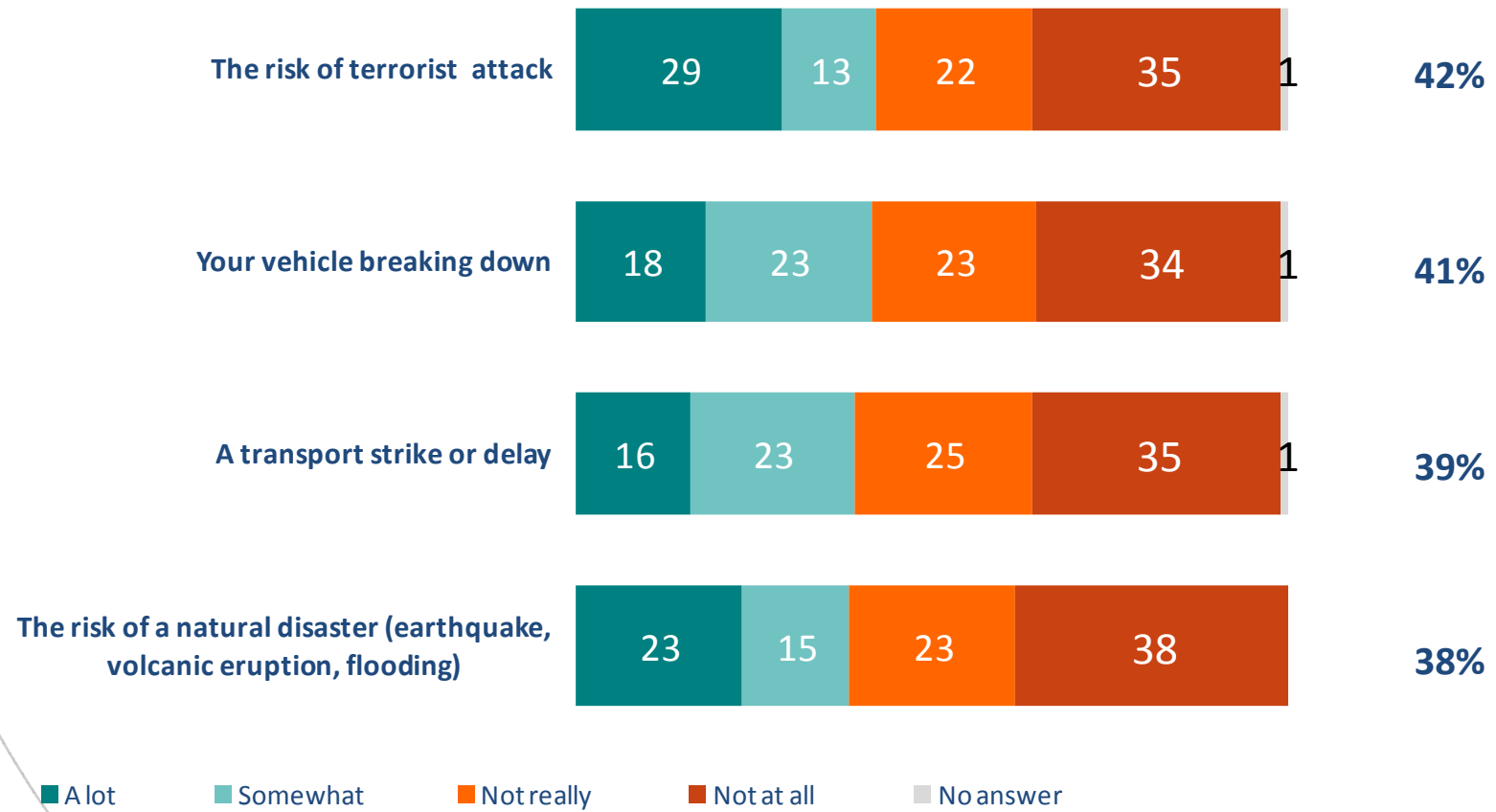
# Europeans' concerns remain essentially focused on physical damage

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T  
"Concerned"

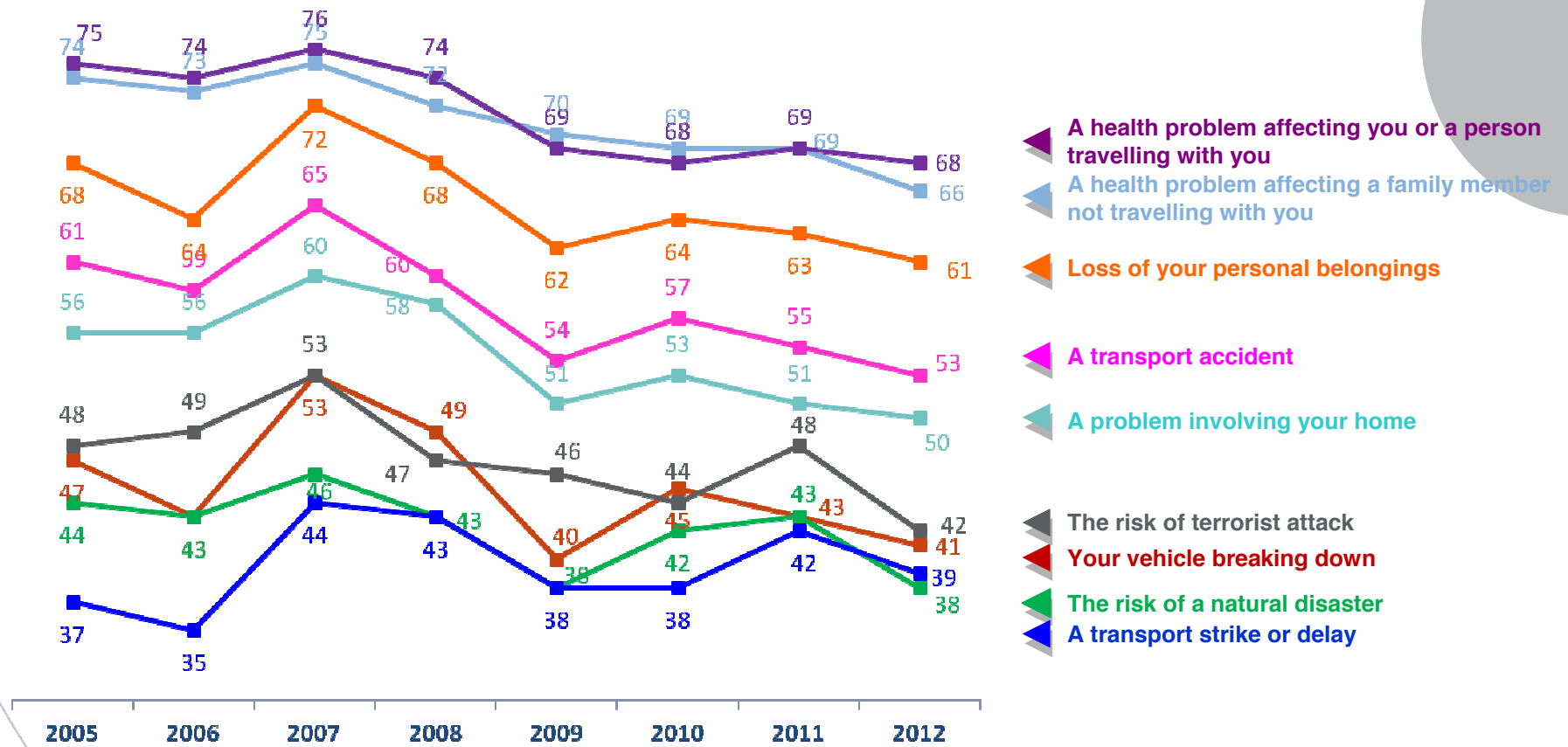


# Europeans slightly less concerned than in previous years

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

% "A lot" + "Somewhat" concerned



Base: People who intend to go on holiday in summer 2012

% "A lot" concerned

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>A health problem affecting you or a person travelling with you</b>	<b>46%</b>	<b>55% ↗</b>	<b>44%</b>	<b>34%</b>	<b>60%</b>	<b>40%</b>	<b>45%</b>	<b>41%</b>
2011	47%	45%	47%	36%	65%	47%	42%	47%
2010	49%	53%	46%	31%	74%	55%	34%	41%
2009	47%	46%	51%	26%	77%	47%	42%	45%
<b>A health problem affecting a family member not travelling with you</b>	<b>44%</b>	<b>55% ↗</b>	<b>42%</b>	<b>25%</b>	<b>54%</b>	<b>45%</b>	<b>39%</b>	<b>31% ↘</b>
2011	42%	46%	39%	29%	56%	47%	40%	40%
2010	46%	47%	49%	24%	62%	56%	31%	37%
2009	46%	45%	46%	21%	73%	54%	33%	42%
<b>A transport accident</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>28%</b>	<b>40% ↘</b>	<b>32% ↘</b>	<b>27%</b>	<b>33%</b>
2011	36%	29%	36%	26%	53%	41%	27%	39%
2010	38%	31%	42%	24%	51%	51%	21%	28%
2009	36%	24%	41%	23%	56%	44%	21%	32%
<b>Loss of your personal belongings</b>	<b>36%</b>	<b>36%</b>	<b>35%</b>	<b>35% ↗</b>	<b>45%</b>	<b>35%</b>	<b>33% ↗</b>	<b>25% ↘</b>
2011	33%	31%	31%	27%	50%	32%	26%	35%
2010	37%	27%	44%	28%	57%	42%	20%	28%
2009	35%	30%	40%	22%	55%	35%	22%	34%
<b>The risk of terrorist attack</b>	<b>29%</b>	<b>33%</b>	<b>27%</b>	<b>25%</b>	<b>42% ↘</b>	<b>24%</b>	<b>23%</b>	<b>26%</b>
2011	33%	28%	31%	30%	57%	28%	27%	26%
2010	30%	22%	31%	26%	46%	36%	14%	24%
2009	30%	21%	34%	20%	58%	28%	22%	26%

Base: People who intend to go on holiday in summer 2012

% "A lot" concerned

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>A problem involving your home</b>	<b>31%</b>	<b>38%</b>	<b>26%</b>	<b>25%</b>	<b>42%</b>	<b>29%</b>	<b>31%</b>	<b>22%</b>
2011	29%	32%	24%	20%	47%	27%	27%	29%
2010	33%	33%	35%	21%	48%	40%	19%	25%
2009	32%	29%	37%	20%	51%	34%	24%	26%
<b>The risk of a natural disaster</b>	<b>24%</b>	<b>24%</b>	<b>23%</b>	<b>21%</b>	<b>37% ↓</b>	<b>21%</b>	<b>18%</b>	<b>17% ↓</b>
2011	25%	21%	22%	19%	48%	25%	17%	27%
2010	27%	18%	29%	21%	45%	33%	12%	20%
2009	25%	15%	28%	15%	53%	24%	17%	22%
<b>Your vehicle breaking down</b>	<b>18%</b>	<b>24%</b>	<b>10%</b>	<b>11%</b>	<b>27% ↓</b>	<b>23%</b>	<b>23%</b>	<b>10%</b>
2011	19%	22%	10%	12%	35%	23%	20%	9%
2010	23%	27%	13%	16%	40%	28%	20%	9%
2009	20%	22%	10%	14%	37%	27%	18%	11%
<b>A transport strike or delay</b>	<b>16%</b>	<b>17%</b>	<b>14%</b>	<b>14%</b>	<b>28%</b>	<b>15%</b>	<b>13%</b>	<b>8%</b>
2011	15%	14%	8%	16%	29%	15%	14%	7%
2010	15%	16%	8%	19%	26%	14%	10%	7%
2009	14%	12%	9%	16%	30%	11%	12%	9%

### 4.2. Europeans are less concerned and have slightly less coverage



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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T "Covered"

S/T "Concerned"

A health problem affecting you or a person travelling with you



**61%**

2011 : 65%  
2010 : 61%

**68%**

2011 : 69%  
2010 : 68%

A problem involving your home (water damage, fire, burglary, etc.)



**60%**

2011 : 65%  
2010 : 62%

**50%**

2011 : 51%  
2010 : 53%

Your vehicle breaking down



**59%**

2011 : 64%  
2010 : 57%

**41%**

2011 : 43%  
2010 : 45%

A transport accident



**54%**

2011 : 58%  
2010 : 54%

**53%**

2011 : 55%  
2010 : 57%

Loss of your personal belongings



**52%**

2011 : 53%  
2010 : 51%

**61%**

2011 : 63%  
2010 : 64%

■ Yes, annual ■ Yes, temporary ■ Yes, through a bank ■ No, you are not covered ■ No answer

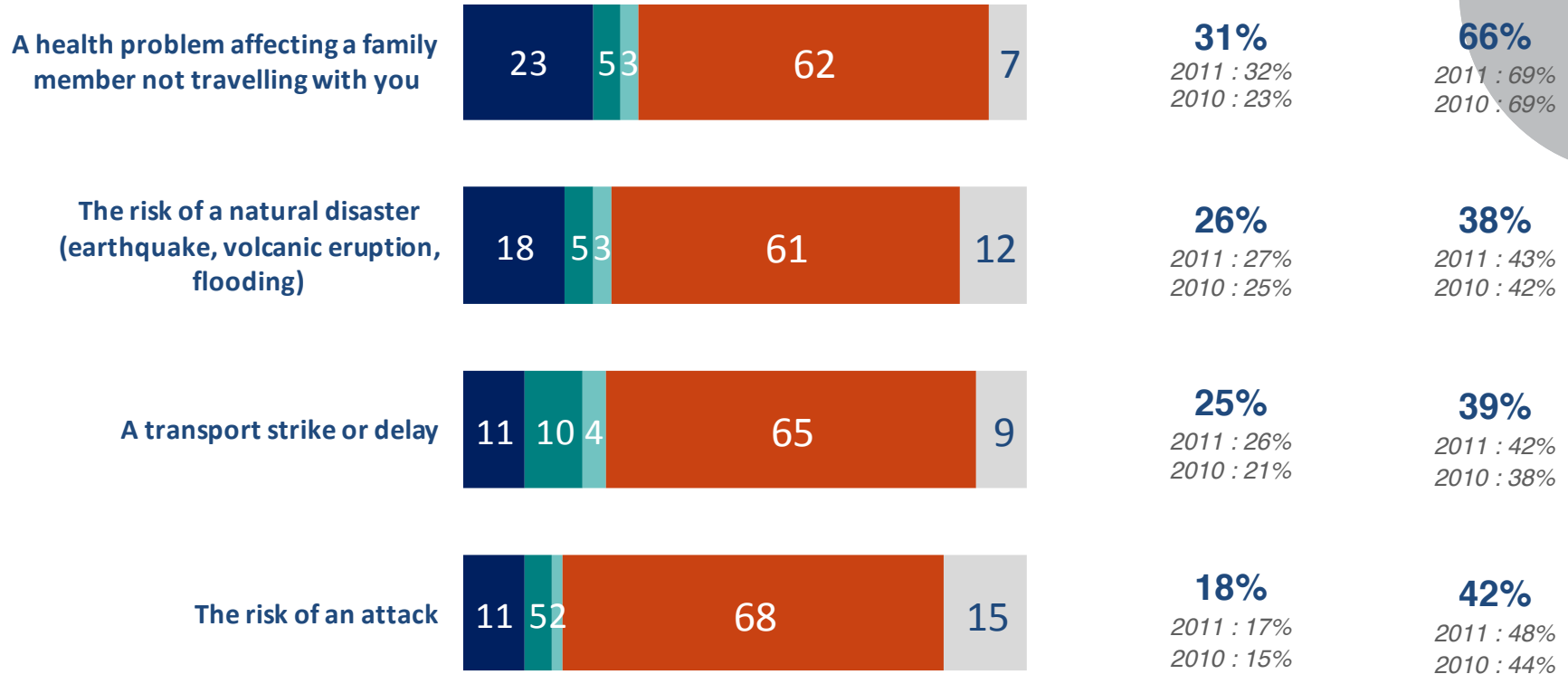


When you go away on holiday, are you usually covered by an insurance or assistance policy for the following risks?

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

One answer only

S/T "Covered"      S/T "Concerned"

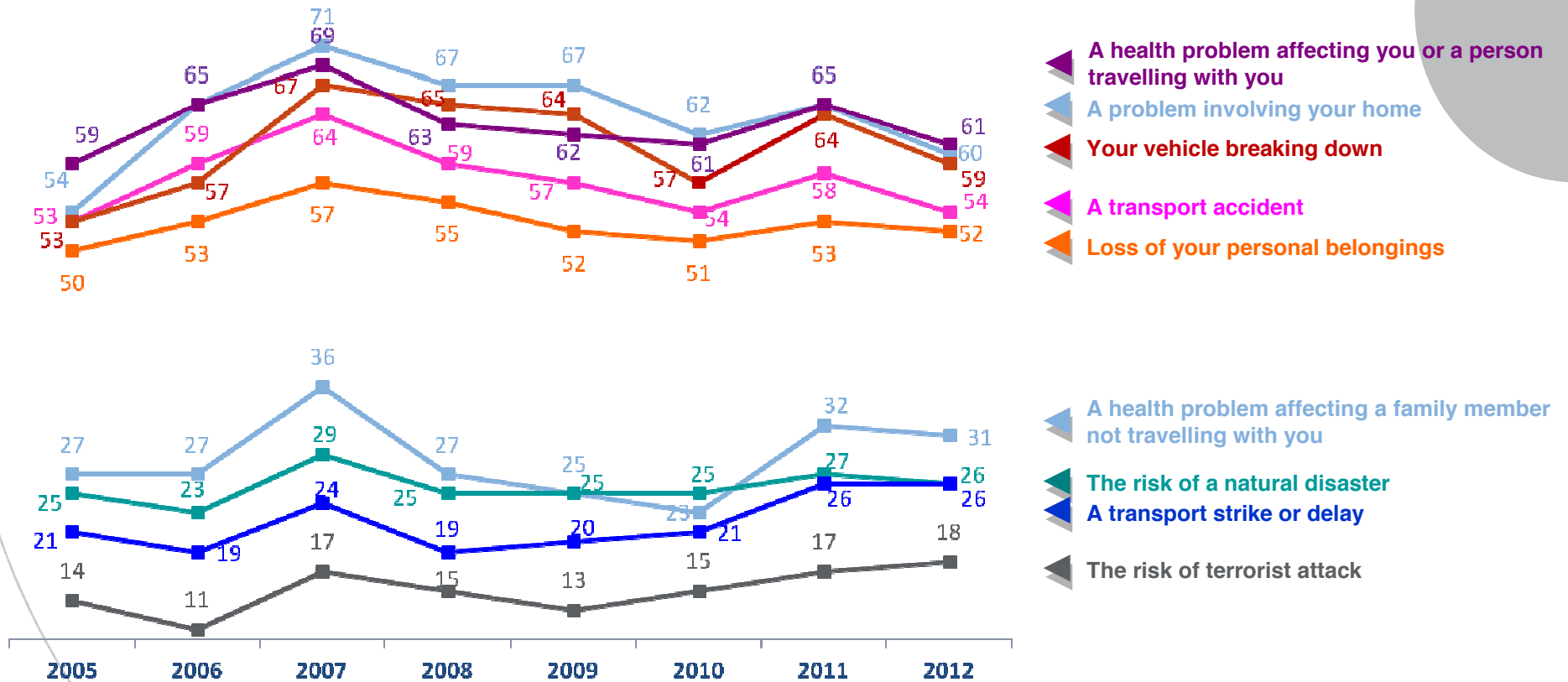


■ Yes, annual ■ Yes, temporary ■ Yes, through a bank ■ No, you are not covered ■ No answer

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

Base: People who intend to go on holiday in summer 2012 (2,043 respondents)

S/T "Covered"



Base: People who intend to go on holiday in summer 2012

% "Covered"

	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>A health problem affecting you or a person travelling with you</b>	<b>61%</b>	<b>87%</b>	<b>52%</b>	<b>78%</b>	<b>65%</b>	<b>22% ↓</b>	<b>82%</b>	<b>54%</b>
2011	65%	86%	55%	81%	68%	38%	84%	59%
2010	61%	85%	45%	80%	69%	27%	85%	49%
2009	62%	82%	51%	83%	72%	31%	80%	49%
<b>A problem involving your home</b>	<b>60%</b>	<b>90%</b>	<b>41% ↓</b>	<b>80% ↑</b>	<b>79%</b>	<b>22% ↓</b>	<b>76%</b>	<b>37% ↓</b>
2011	65%	94%	59%	72%	77%	32%	79%	62%
2010	62%	90%	42%	87%	81%	23%	86%	33%
2009	67%	90%	46%	83%	85%	43%	76%	45%
<b>Your vehicle breaking down</b>	<b>59%</b>	<b>77% ↓</b>	<b>47%</b>	<b>73%</b>	<b>83% ↓</b>	<b>29% ↓</b>	<b>72%</b>	<b>53%</b>
2011	64%	84%	50%	71%	75%	48%	77%	55%
2010	57%	79%	35%	73%	81%	31%	82%	31%
2009	64%	78%	42%	70%	78%	60%	72%	48%
<b>A transport accident</b>	<b>54%</b>	<b>77%</b>	<b>36% ↓</b>	<b>75%</b>	<b>64%</b>	<b>23% ↓</b>	<b>76%</b>	<b>44%</b>
2011	58%	78%	44%	73%	62%	39%	72%	47%
2010	54%	72%	34%	71%	63%	37%	79%	38%
2009	57%	66%	42%	71%	72%	43%	67%	44%
<b>Loss of your personal belongings</b>	<b>52%</b>	<b>68%</b>	<b>36%</b>	<b>87%</b>	<b>50% ↓</b>	<b>24% ↓</b>	<b>51% ↑</b>	<b>52%</b>
2011	53%	66%	35%	90%	57%	32%	44%	54%
2010	51%	68%	30%	87%	53%	27%	46%	48%
2009	52%	62%	40%	87%	54%	25%	45%	49%

# Risk coverage - breakdown by country

## Italians, more likely to cut costs this year, have less coverage

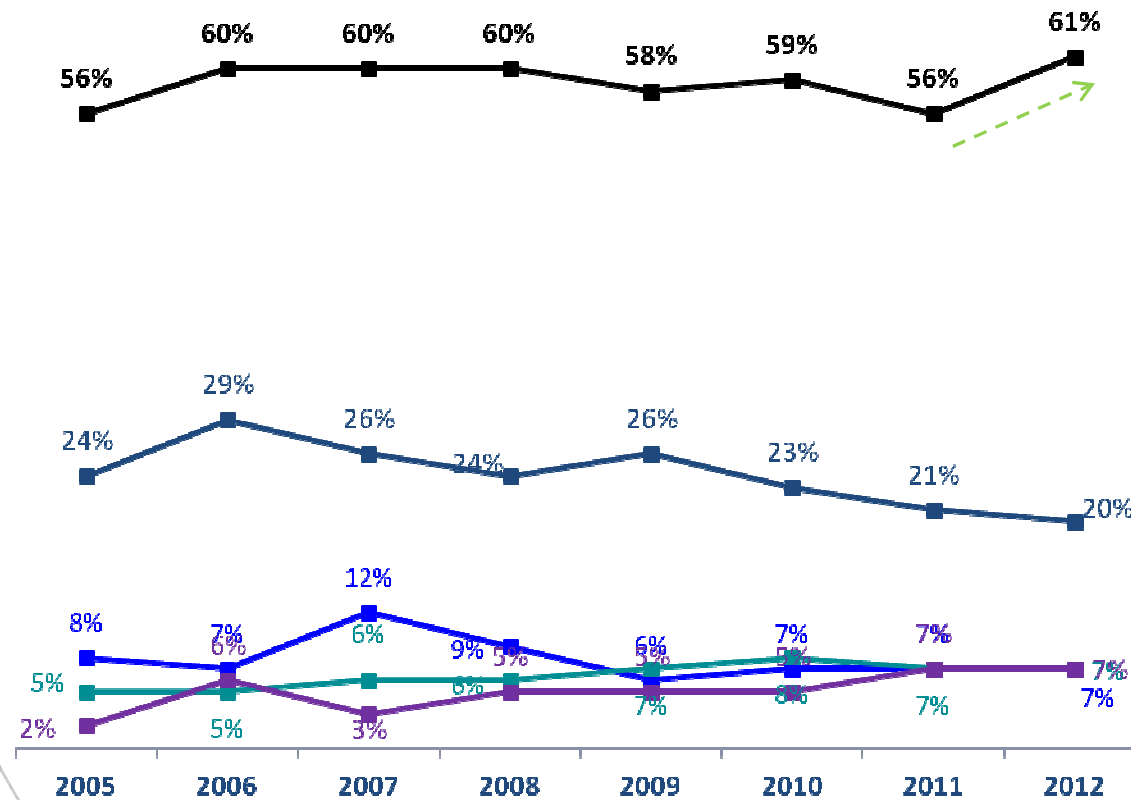
Base: People who intend to go on holiday in summer 2012

% "Covered"	Total							
	n=2,043	n=354	n=273	n=260	n=255	n=314	n=295	n=292
<b>A health problem affecting a family member not travelling with you</b>	<b>31%</b>	<b>43%</b>	<b>18%</b>	<b>38%</b>	<b>48%</b>	<b>15% ↓</b>	<b>47%</b>	<b>25% ↓</b>
2011	32%	38%	23%	36%	49%	23%	40%	32%
2010	23%	34%	15%	26%	37%	8%	39%	19%
2009	25%	28%	21%	32%	43%	10%	38%	26%
<b>The risk of a natural disaster</b>	<b>26%</b>	<b>53%</b>	<b>8%</b>	<b>38%</b>	<b>23%</b>	<b>10% ↓</b>	<b>36%</b>	<b>14%</b>
2011	27%	51%	8%	42%	26%	17%	32%	21%
2010	25%	50%	8%	32%	22%	11%	39%	11%
2009	25%	48%	10%	35%	26%	10%	28%	15%
<b>A transport strike or delay</b>	<b>26%</b>	<b>31% ↑</b>	<b>11%</b>	<b>54% ↓</b>	<b>33%</b>	<b>12% ↓</b>	<b>20%</b>	<b>22%</b>
2011	26%	23%	8%	61%	28%	19%	19%	20%
2010	21%	21%	9%	50%	22%	9%	14%	13%
2009	20%	19%	9%	49%	21%	9%	14%	12%
<b>The risk of terrorist attack</b>	<b>18%</b>	<b>35% ↑</b>	<b>4%</b>	<b>28%</b>	<b>16%</b>	<b>7% ↓</b>	<b>18%</b>	<b>11%</b>
2011	17%	26%	5%	29%	15%	15%	16%	8%
2010	15%	30%	6%	20%	14%	6%	14%	4%
2009	13%	25%	9%	17%	13%	5%	12%	5%

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

Base: People who intend to go on holiday in summer 2012 and have taken out an insurance or assistance policy (1,693 respondents)

Several answers possible



With your usual insurance or assistance company

With your travel agency

With a specialised website

With another insurance or assistance company

Through your bank card

None of these: 4%

DK: 2%

Base: People who intend to go on holiday in summer 2012 and have taken out an insurance or assistance policy

	Total							
	n=1,693	n=336	n=205	n=250	n=241	n=144	n=280	n=237
<b>With your usual insurance or assistance company</b>	<b>61%</b>	<b>90%</b>	<b>58%</b>	<b>35%</b>	<b>69%</b>	<b>36%</b>	<b>69%</b>	<b>47%</b>
2011	56%	87%	61%	27%	41%	50%	71%	56%
2010	59%	87%	61%	39%	50%	46%	71%	47%
2009	58%	79%	64%	33%	42%	64%	66%	51%
<b>With your travel agency</b>	<b>20%</b>	<b>7%</b>	<b>21%</b>	<b>12%</b>	<b>28%</b>	<b>49%</b>	<b>17%</b>	<b>36%</b>
2011	21%	6%	18%	15%	34%	39%	22%	31%
2010	23%	9%	22%	14%	39%	43%	20%	38%
2009	26%	17%	26%	16%	42%	34%	25%	38%
<b>With a specialised website</b>	<b>7%</b>	<b>1%</b>	<b>3%</b>	<b>24%</b>	<b>5%</b>	<b>5%</b>	<b>2%</b>	<b>5%</b>
2011	7%	1%	5%	21%	3%	5%	1%	3%
2010	8%	0%	4%	28%	1%	5%	1%	4%
2009	7%	-	3%	26%	3%	5%	1%	3%
<b>With another insurance or assistance company</b>	<b>7%</b>	<b>3%</b>	<b>14%</b>	<b>5%</b>	<b>7%</b>	<b>3%</b>	<b>7%</b>	<b>10%</b>
2011	7%	2%	13%	6%	10%	5%	4%	13%
2010	7%	3%	9%	13%	5%	6%	6%	9%
2009	6%	4%	9%	10%	4%	4%	8%	8%
<b>Through your bank card</b>	<b>7%</b>	<b>7%</b>	<b>3%</b>	<b>19%</b>	<b>2%</b>	<b>-</b>	<b>2%</b>	<b>3%</b>
2011	7%	10%	-	22%	1%	1%	2%	0%
2010	5%	5%	3%	13%	2%	1%	3%	2%
2009	5%	6%	1%	14%	2%	-	3%	2%

- In an increasingly difficult socio-economic context for households, Europeans' concerns appear to be vaguer
- However, health problems remain a core concern in Europe, and particularly in **France**. And risks of an attack and social unrest are at the same level as in 2011
- Risk coverage is fairly stable: problems related to homes, health and vehicles still have the most coverage
- However, **Italians**, more likely to cut costs, claim to have less coverage this year



### 4.3. On the whole, Europeans are divided regarding the recent events in North Africa and the Middle East

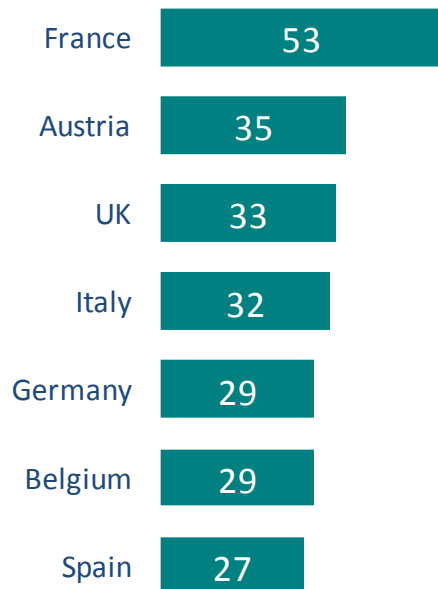
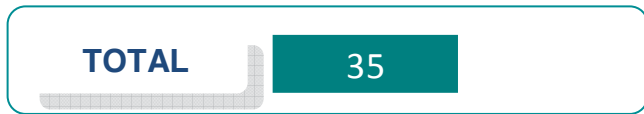


# Germans and Austrians are more sensitive to the events in North Africa and the Middle East

Have you ever been to or have you had the intention to go to North Africa or the Middle East for a holidays?

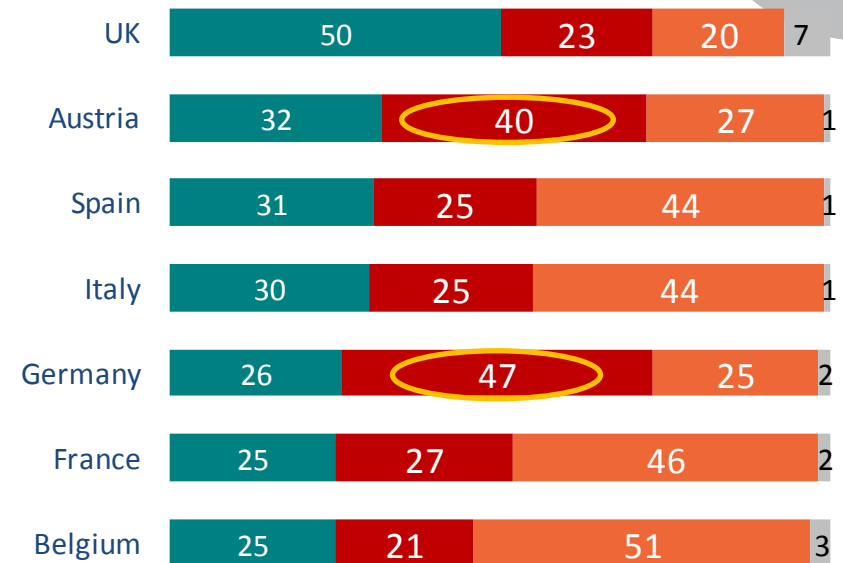
Base: All (3,523 respondents)

% Yes



Generally speaking, to what extent would you be willing to go to North Africa or the Middle East for your summer holidays ?

Base: Has been or has the intention to go to North Africa or the Middle East for a holiday (1,201 respondents)



■ Yes, definitely ■ No, due to the current events ■ No, for other reasons ■ Don't know

The 3 main lessons from the 2012 edition of the Barometer:

- The crisis now has highly visible effects on Europeans' behaviour in terms of holidays. After levels and projections were "back to normal" last year, Europeans' holiday plans have hit a particularly low level.
- However, for fortunate holiday-makers, there are no major changes in practices, despite a willingness to cut costs: rest and the sea remain ideals, independence in travel reservations is solidly established, and types of accommodation and holiday destinations remain unchanged.
- However, sensitivity to current events is not at issue this year. That said, Europeans appear less concerned about risks and are also less vigilant and have less coverage.



**Thank you for  
your attention**



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