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PRESS RELEASE

EHG study on “Caravanning Cultures”: how Europe camps

Bad Waldsee, 24th August 2018 - The Erwin Hymer Group (EHG) wanted to find out precisely: What are the similarities and differences between the caravanning cultures across Europe’s camping nations? What are the preferences, habits and wishes in the key markets? The company surveyed over 3,800 campers from nine countries in the spring of 2018 to find out. The results were published for the first time at the 2018 Caravan Salon in Düsseldorf.

On the one hand you have the Dutch, who go on a two-week holiday to a single destination to stay and relax in their own caravans – then you have Italians, who hire a caravan for a mini break and travel from site to site to enjoy a range of activities from sport to culture. These are the opposites revealed by the Caravanning Cultures study.

The online survey, which was carried out in the spring of 2018 by the Erwin Hymer Group, questioned both caravanners and campers who travel with a motorhome. And there are clear differences: while above all Brits (72%), the Dutch (56%) and Swedes (53%) like to tow their caravan, Italians like to do the exact opposite. 83% of Italian camping fans love holidays in a camper van or motorhome. Across Europe, the ratio is almost equal. And only 15% of Italians travel in their own vehicle, whilst 37% of Dutch people do.

The age of campers is almost identical: the average European camper is 39 years old, lives in a three-person household and is employed.

Stefan von Terzi, head of marketing & communications at the Erwin Hymer Group: “We wanted to know what makes Europe’s campers tick; where there are similarities and where there are differences. The results of the study will help us to better align our future offers with the needs and wishes of our target audiences.”

Destinations: the common dream of the Mediterranean

One clear result: Europe’s dream destination is the Mediterranean (53%) – it is the number one in almost all countries. This even applies to Swedish campers; despite the distance of at least 1,500 kilometres. The Brits are the only nation to prefer to camp in their own country. In addition to the Adriatic and the Riviera (69%), Italians also prefer the large inland lakes (35%). By contrast, Germans love the North Sea and Baltic Sea (45%); a trait which no other nation shared to the same degree. The longing of the Dutch for mountains (31%) as a contrast to their flat homeland is also striking.

Large differences emerged regarding the duration of the trip: while the Dutch, the French and the Swiss travel for an average of just under 14 days, Brits tend to holiday for just seven days; whilst Italians, Norwegians and Swedes holiday for around ten days. Long-term holidaymakers can be found amongst the French: 37% have been on a camping holiday lasting over 15 days during the last three years.

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When it comes to choosing a campsite, cleanliness (90%) is key. The neighbours should also not be too close (82%) – it is predominantly the older holidaymakers who find crowding and noise stressful. Leisure and sport options (57%) and entertainment (47%) are deemed to be less important. The exception: the Brits, Dutch and Italians like to make the most of entertainment offers. A cheap price is mainly important for the French; whilst Austrians, the Swiss and Germans value an on-site shop.

Once arrived: relax and unwind – but in a variety of ways

When it comes to holiday activities, relaxing and unwinding is at number one (89%), followed by local daytrips (83%) and visiting the sights (77%). Italians in particular do not like to get bored and are interested in trips, as well as spas, sporting activities and culture, including trips to museums. They also enjoy travelling with friends or join guided tours. They share a passion for cycling with the French. By contrast, Brits, Swedes, the Swiss and Austrians like to relax.

Spending time with family or friends is typical for camping in Europe. Over 81% cite this as their main pastime – directly followed by cooking or barbecuing on the campsite (76%). Reading (61%) is more common than surfing the web (50%) or watching TV (40%), and the TV only really seems to be important to the Brits. Computer games (29%) haven't yet become an established camping pastime, although this varies greatly between age groups: 40% of those under 29 years like to play computer games at the campsite.

The Dutch and Italians are most likely to interact with their neighbours on the campsite, whilst Austrians and the Swiss are less likely to do so. Overall, people behave as follows: contact is actively sought or just happens. 66% of those surveyed agreed with this statement.

A stress-free holiday – as a couple or with family

61% of those surveyed believe that joint camping holidays bring people together – whether it be couples or families. The French (71%) and Italians (69%) agreed with this statement the most. The crew varies greatly: at least one child is present for 52% of all campers – especially for the French, Brits (both 60%) and Italians (55%). 11% of British campers even travel with two or more children. By contrast, 31% of those surveyed travel as a couple – Germans, Austrians and the Swiss particularly enjoy travelling by caravan or motorhome as a pair.

Not just in summertime

Even though camping is primarily associated with summer and sunshine, winter camping is becoming more and more popular. 35% of Europe's campers have already tried it – and 80% say they would like to go again. Camping in the snow is more for younger campers and is far more popular amongst the French and Swedes than Austrians or the Swiss – after all, they have ski resorts right on their doorsteps. 42% of those asked who haven't yet travelled by caravan or motorhome during the winter are interested in trying winter camping. Italians and Brits are especially interested.

Types: a market that is about to turn?

At present, Europe's campers go on holiday in caravans and motorhomes in equal measure. The results of the study show that this trend may soon change. 41% of those asked would like to buy a motorhome as their next vehicle and almost the same number (38%) would love a camper van. By

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contrast, only 21% would choose to have their own caravan – only a third of those who have already used this type of vehicle would buy one as their next vehicle.

Important features for a new vehicle include good insulation and a comfortable seating area (83% each). Plenty of storage space (79%) is also high on the list. But tastes differ here: the French value a microwave. This is also true of the English and Swedes, but both also have an oven on their wishlist. For Italians, a kitchen that is as large as possible, air conditioning and a large double bed are all more important than for other nationalities.

Speaking of beds: opinions differ regarding the style. A queen-size bed that can be accessed on both sides is most popular across Europe (45%), except amongst Germans, where the transversal bed is preferred. However, while longitudinal single beds are also accepted in Sweden (25%) and Austria (23%), this arrangement is not popular in France (12%) and Italy (14%). Austrians and the Swiss want a bed that is as large as possible.

Peer-to-peer rental: the new trend?

Almost a quarter of those surveyed could imagine renting their new or current vehicle commercially; 11% already have experience of this. The French are especially fond of renting vehicles out; whilst Germans, Austrians and the Swiss would generally only lend their vehicles to family or friends. The willingness to rent is very age-dependent: 17% of under 29s have already rented out their own vehicle and 31% could imagine doing so. For the campers of tomorrow, sharing could become even more significant.

Stefan von Terzi: “A market analysis like the Caravanning Culture study has never been undertaken before. The main conclusion that we can draw from the study is this: caravanning has established itself across all age groups across the breadth of our society. And trends that can be seen in other social contexts will have an increasing influence on our industry, too.”

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Erwin Hymer Group

The Erwin Hymer Group unites the leading motorhome and caravan manufacturers as well as motorhome and caravan accessory specialists, hire and financing services under one roof. The 2017/18 financial year saw the Group sell around 62,000 recreational vehicles and generate a turnover of approx. 2.5 billion euros with its 7,300 members of staff across the globe. The motorhome and caravan brands American Fastbacks, Buccaneer, Bürstner, Carado, Cliffride, Compass, Dethleffs, Elddis, Eriba, Etrusco, Hymer, Niesmann+Bischoff, Laika, LMC, Roadtrek, Sunlight and Xplore; motorhome hire companies Best Time RV, McRent and rent easy; the chassis specialist Goldschmitt; the accessories specialist Movera; the trailer tent manufacturer 3DOG camping and the touring portal freeontour all belong to the Erwin Hymer Group.

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The study

The ift Freizeit- und Tourismusberatung GmbH, with its headquarters in Cologne and Potsdam, was commissioned by the Erwin Hymer Group to survey 3,800 people between the age of 18 and 69 online, with an equal split between men and women. Participants were from Germany, Austria, Switzerland, France, Italy, the Netherlands, Norway, Sweden and the United Kingdom.

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