European Commission

Flash Eurobarometer 370

ATTITUDES OF EUROPEANS TOWARDS TOURISM

SUMMARY

Fieldwork: January 2013

Publication: March 2013

This survey has been requested by the European Commission, Directorate-General for Enterprise and Industry and co-ordinated by Directorate-General for Communication.

Flash Eurobarometer 370 - TNS Political & Social

Eurobarometer

Flash Eurobarometer 370

Attitudes of Europeans towards Tourism

Conducted by TNS Political & Social at the request of
the European Commission,
Directorate-General for Enterprise and Industry

Survey co-ordinated by the European Commission,
Directorate-General for Communication
(DG COMM “Research and Speechwriting” Unit)

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INTRODUCTION

This summary presents the results of the Flash Eurobarometer, "Attitudes of Europeans towards Tourism" (No 370), which was conducted at the request of the Directorate-General for Enterprise and Industry in the 27 EU Member States and in seven additional countries: Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Norway, Iceland, the Republic of Serbia and Israel. This wave is a follow up to the Flash Eurobarometer No 334 conducted in January 2012.

The survey was designed to explore a range of aspects surrounding holidays in 2012 and 2013, in particular:

- respondents' motivation for going on holiday in 2012
- information sources and tools used to research and organise holidays
- respondents' travel profile, preferred destinations and holiday types
- satisfaction with various aspects of holidays in 2012
- plans for holidays in 2013, including the potential impact of the current economic crisis on those plans

This survey was carried out by the TNS Political & Social network in the 27 Member States of the European Union and in Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Norway, Serbia and Israel between 24 and 30 January 2013. Some 30,628 respondents from different social and demographic groups were interviewed via telephone (landline and mobile phone) in their mother tongue on behalf of the European Commission, Directorate-General for Enterprise and Industry. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Research and Speechwriting" Unit)[1]. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Political & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals[2].

1 http://ec.europa.eu/public_opinion/index_en.htm

2 The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
CZ	Czech Republic	LU	Luxembourg
BG	Bulgaria	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Republic of Cyprus*	FI	Finland
LT	Lithuania	SE	Sweden
		UK	The United Kingdom
HR	Croatia		
TR	Turkey	EU27	European Union – 27 Member States
MK	Former Yugoslav Republic of Macedonia****		
IS	Iceland	EU15	BE, DK, DE, EL, ES, FR, IE, IT, LU, NL, AT, PT, FI, SE, UK**
NO	Norway	NMS12	BG, CZ, EE, CY, LT, LV, HU, MT, PL, RO, SI, SK***

* Cyprus as a whole is one of the 27 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average.

** EU15 refers to the 15 countries forming the European Union before the enlargements of 2004 and 2007.

*** The NMS12 are the 12 'new Member States' which joined the European Union during the 2004 and 2007 enlargements.

**** Provisional abbreviation which in no way prejudges the definitive name of this country, which will be agreed once the current negotiations at the United Nations have been completed.

* * * * *

We wish to thank all the people interviewed who took the time to participate in this survey.

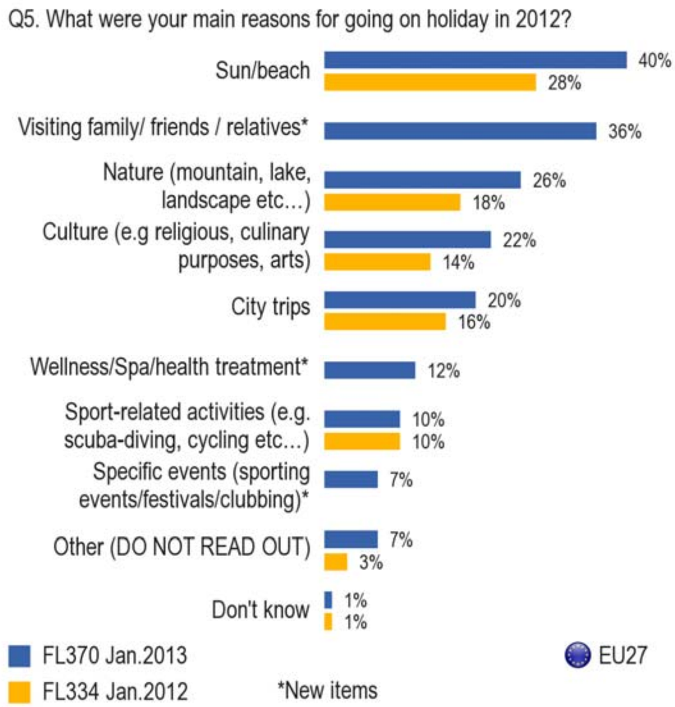
Without their active participation, this survey would not have been possible.

I. RESEARCHING AND PLANNING A HOLIDAY

- Spending time in the sunshine or at the beach was the main reason for holidaying in 2012, closely followed by visiting family, friends or relatives -

Respondents who went on holiday for a minimum of four consecutive nights in 2012 were asked the main reasons for going on holiday in that year.

They are most likely to say they went on holidays for sunshine or the beach (40%), while 36% took a vacation to visit family, friends or relatives. Just over one quarter (26%) went on holiday to visit nature, while 22% holidayed for cultural reasons and 20% visited a city. Around one in ten went for a wellness, spa or health treatment (12%) while 10% mentioned sports activities as the main reason for their holiday. Just over one in twenty (7%) said a specific event such as a festival was the main reason for their holiday in 2012.



Base: 69% from the total number of respondents
(Those who went on a personal holiday for a minimum of four consecutive nights during 2012)

The sun or the beach are more likely to have been the main reason for taking a holiday in 2012 compared to 2011 (+12 percentage points). Visiting nature and holidays for cultural reasons were also more popular in 2012 (both +8).

- Natural features are the most likely to make respondents consider visiting the same location for another holiday -

Just over four out of ten (44%) respondents say that the natural features of a holiday destination would make them return for another holiday - a decrease of six percentage points since the previous survey. Quality of accommodation comes a distant second (31%), followed by the general level of prices, cultural and historical attractions (both 26%) and how tourists are welcomed (22%). One in five (20%) would go back to the same place for a holiday because of the quality of the activities or services available, while for 7% accessible facilities for people with special needs would prompt them to return.

For respondents in 29 countries, **natural features** such as the landscape and the weather are the most mentioned reason to return to a destination for another holiday. This is particularly the case for Czech and Dutch respondents (both 55%), as well as those in Luxembourg (53%) and Denmark (50%). On the other hand, Macedonian respondents are the least likely to mention this as a reason to revisit a holiday destination (20%).

- Recommendations from friends, colleagues or relatives are considered most important when making decisions about travel plans -

Respondents were asked what sources of information they considered to be most important when making decisions about their travel plans. More than half (56%) say the recommendations of friends, family or colleagues, while 46% mention Internet websites. Just over one third (34%) consider personal experience important, while 21% say travel agencies and tourism offices and 11% mention free catalogues or brochures. Fewer than one in ten mention newspaper, radio or TV (9%), paid for guidebooks and magazines (8%) or social media sites (5%).

- The Internet remains the most common way to arrange holidays -

The Internet is still the most common way to arrange holidays, with 53% using it for this reason in 2012. Around one in five (21%) used someone they know, while 19% used the phone or visited a travel agency. Around one in ten (11%) made the arrangements on site, while 6% use the counter at a transport company and 3% made arrangements by post.

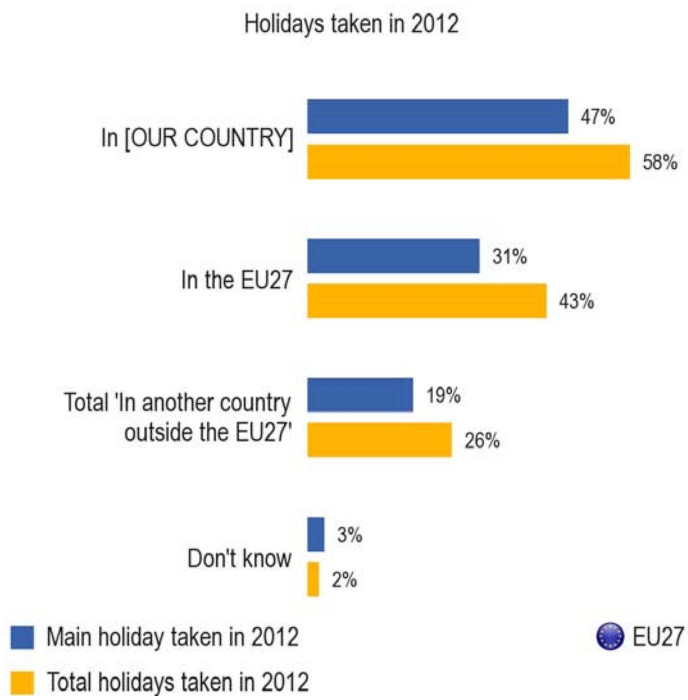
II. THE HOLIDAY EXPERIENCE

- Respondents are most likely to have holidayed in their own country in 2012[3] -

Respondents were asked where they went for their main holiday of at least four consecutive nights, where the main holiday was described as the one most important to them. Respondents were also asked what countries they went to for any other holidays of at least four consecutive nights in 2012. The chart below shows the results for respondents' main holiday, and for all the holidays taken in 2012 (including the main holiday).

Although not a majority, most respondents say they took their main holiday in their own country (47%), while 31% went to an EU country. Almost one in five (19%) took their main holiday in a country outside the EU[4].

Considering all holidays taken in 2012, the pattern is the same. Almost six out of ten (58%) holidayed in their own country, while 43% holidayed in an EU country, and 26% had a holiday in a country outside the EU.



Base: 69% from the total number of respondents
(Those who went on a personal holiday for a minimum of four consecutive nights during 2012)

3 When asking the question (OUR COUNTRY) is replaced by the name of the country where the interview is conducted (i.e. if a Belgian respondent has spent his/her holiday in Belgium, the answer is coded under 'In (OUR COUNTRY)').

4 The results for 'in the EU27' do not include domestic holidays taken by respondents living in an EU27 country: e.g. domestic holidays taken by Spanish respondents are not included in the "in the EU27" results. The results for 'in another country outside the EU27' do not include domestic holidays taken by respondents living in a country outside the EU27: e.g. domestic holidays taken by Israeli respondents are not included in the 'in another country outside the EU27' results.

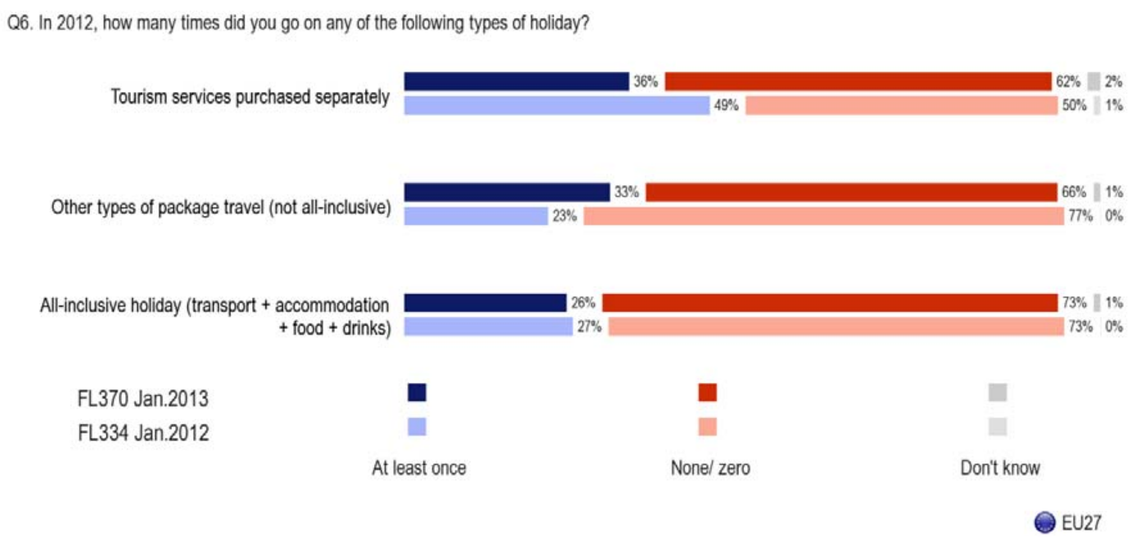
The majority of respondents in 16 countries took their holidays of at least four nights in their own country. This is particularly the case for Greek (87%), Italian and Turkish respondents (both 80%) and those in Bulgaria (79%). In contrast, domestic holidays were least common amongst respondents in Luxembourg (2%) and Belgium (14%).

When talking about the most popular destinations for 2012, Spain remains the most popular one (10%), followed by France, Italy (both 8%) and Germany (5%). Austria (4%), Croatia, Greece and the UK (all 3%) make up the rest of the top eight[5].

- Holidays where the components of the trip, such as transport and accommodation, were bought separately were slightly more popular than package holidays in 2012 -

In 2012 just over one third (36%) of respondents went on at least one holiday where the various components of their trip were organised separately. This represents a decline of 13 percentage points compared to 2011. Conversely, package travel (not all-inclusive) increased in popularity by 10 points to 33%[6].

Just over one quarter of respondents went on at least one all-inclusive holiday in 2012 - little change compared to 2011 (-1).



Base: 69% from the total number of respondents
(Those who went on a personal holiday for a minimum of four consecutive nights during 2012)

5 Does not include domestic holidays.
6 Items 2 and 3 for Q6 were modified since the last wave.

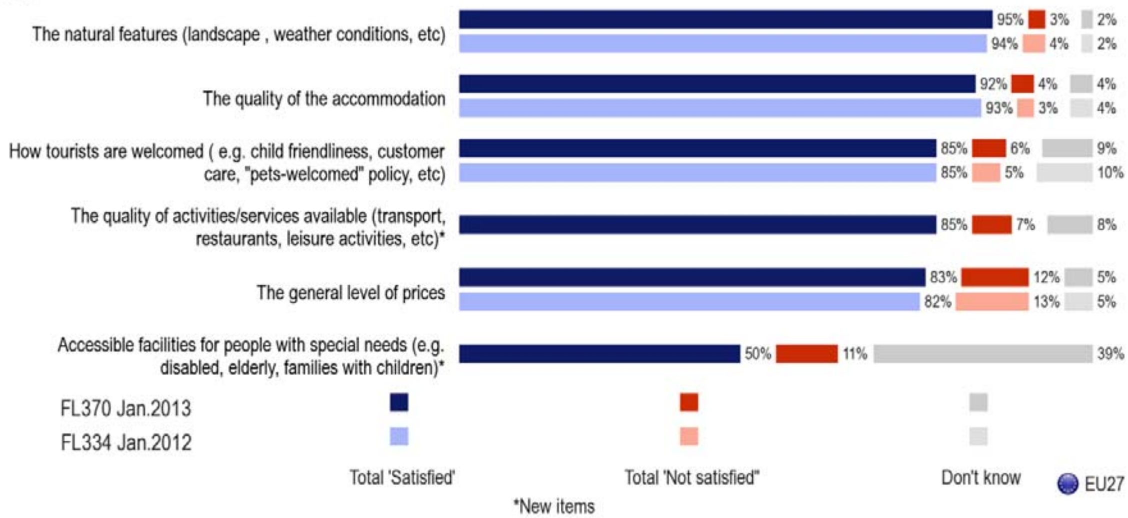
- Respondents were most satisfied with the natural features and the accommodation quality of their main holiday in 2012 -

Almost all respondents (95%) say that they were satisfied with the natural features, such as landscapes and weather conditions, on their main holiday in 2012. Almost as many (92%) say they were satisfied with the quality of their accommodation. At least eight out of ten were satisfied with how tourists were welcomed (85%). The same proportion (85%) also say they were satisfied with the quality of activities/services available. 83% were satisfied with the general level of prices (83%).

Only half of all respondents say they were satisfied with the accessible facilities for people with special needs (50%), whereas 11% were not satisfied.

There have been no notable changes since the previous wave of the survey.

Q9. Thinking about your main holiday in 2012, how satisfied were you with...? By 'main holiday' we mean the holiday that was the most important for you in 2012.



Base: 69% from the total number of respondents
(Those who went on a personal holiday for a minimum of four consecutive nights during 2012)

- Respondents prefer to make complaints about holiday service by talking to the staff member responsible for handling complaints -

If they needed to complain about any service provided during their holiday, most respondents would prefer to do this by talking to the staff member responsible for complaints (42%). Around one in five (18%) would prefer to write a letter or email, while about one in ten would prefer to fill in an online or paper complaint form (both 11%) or complain by phone (10%).

III. TRAVELLERS' PROFILE IN 2012

- More than seven out of ten respondents spent at least one night away from home when travelling for work or private reasons in 2012 -

Just over seven out of ten respondents (71%) spent at least one night away from home when travelling for work or private purposes in 2012, while 27% said they had not done this. There has been little change since the last wave, when 72% had travelled and 26% had not.

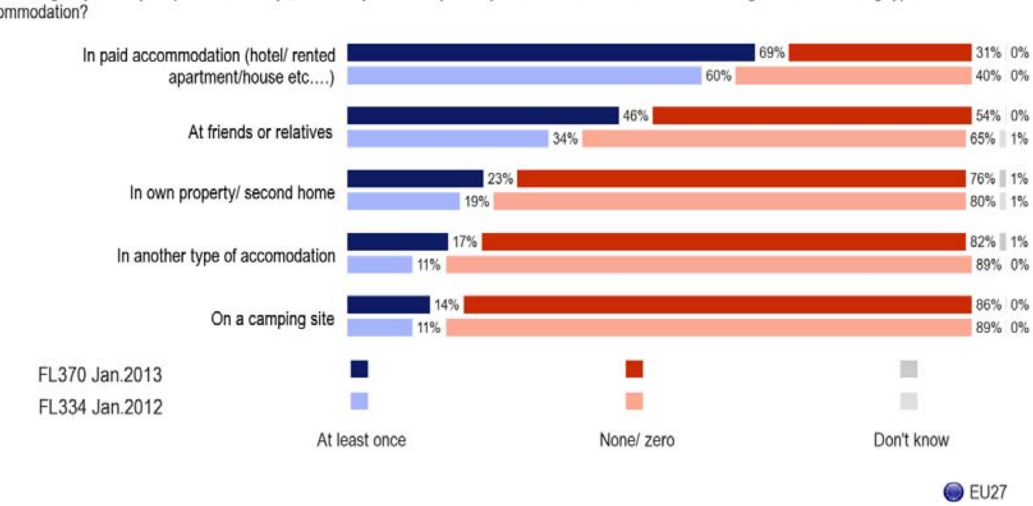
Turkey is the only country where fewer than half of all respondents had travelled in 2012 (42%). In the other 33 countries at least 52% of respondents had spent at least one night away from home for business or private travel. Icelandic (92%) and Norwegian (91%) respondents are the most likely to have travelled in 2012. Apart from those in Turkey (42%), respondents in Portugal (52%), Lithuania (54%) and Hungary (56%) are the least likely to have spent one night away from home in 2012.

- Paid accommodation was the most common option for personal holidays of at least four nights in 2012 -

Respondents who said they took a personal holiday of at least four consecutive nights in 2012 were asked about the kind of accommodation they stayed in. More than two thirds (69%) stayed in paid accommodation such as a hotel or apartment at least once, which is an increase of nine percentage points compared to holidays in 2011. Staying with friends or relatives also increased in popularity, up from 34% in 2011 to 46% in 2012.

Almost one quarter stayed in a property they own (23%, +4 points compared to 2011), while 17% stayed in another type of accommodation at least once (+6). Over one in ten (14%) stayed on a camping site at least once, a slight increase compared to 2011 (+3).

Q2. Thinking only about your personal holidays, how many times did you stay for a minimum of four consecutive nights in the following types of accommodation?



Base: 71% from the total number of respondents
(Those who travelled for a minimum of one night in 2012)

IV. HOLIDAY DISABLING FACTORS 2012-2013

- Financial reasons the main reason for not going on a holiday in 2012 -

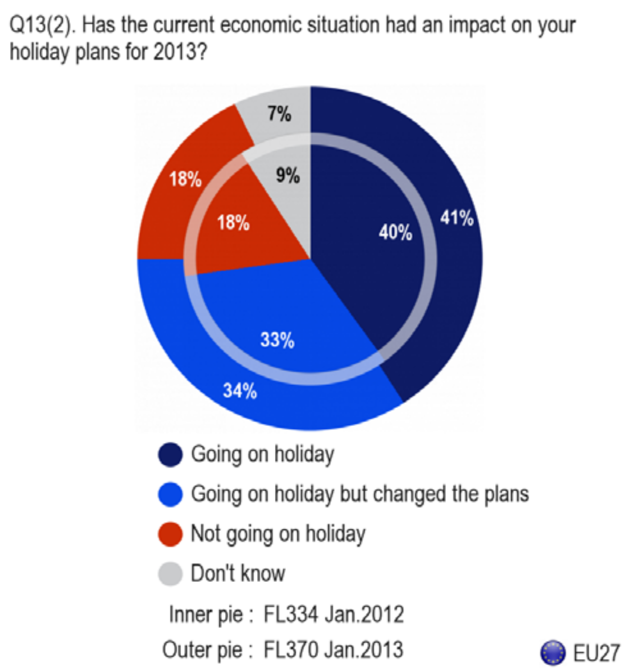
Financial reasons are the most common response for not going on holiday in 2012 (46%), while 23% cite personal or private reasons. Less than one in ten (9%) say that they preferred to stay at home or with family or friends, while 7% cited job reasons and 6% said they did not have the time. A small proportion said they had problems accessing transport or accommodation (1%), while 3% said they did not want to go on a holiday.

There have only been minor changes since the previous wave.

- Although three quarters of EU respondents are planning to go on holiday in 2013, 34% have changed their holiday plans due to the economic situation -

Although 75% of respondents say they are planning a holiday for 2013, 34% say they have changed their plans as a result of the current economic situation. Around one in four (41%) say their holiday plans for 2013 have not been affected by the economy, while 18% say they are not planning a holiday.

There has been little change in these results since the previous wave of the survey.



Base: Total number of respondents

The majority of respondents in all but two countries plan to go on holiday in 2013 - the exceptions are Turkey (44%) and Malta (48%). In fact, at least nine out of ten Norwegian (92%), Austrian (91%), German and Icelandic (90%) respondents plan to take a holiday in 2013.

V. HOLIDAY PLANS FOR 2013

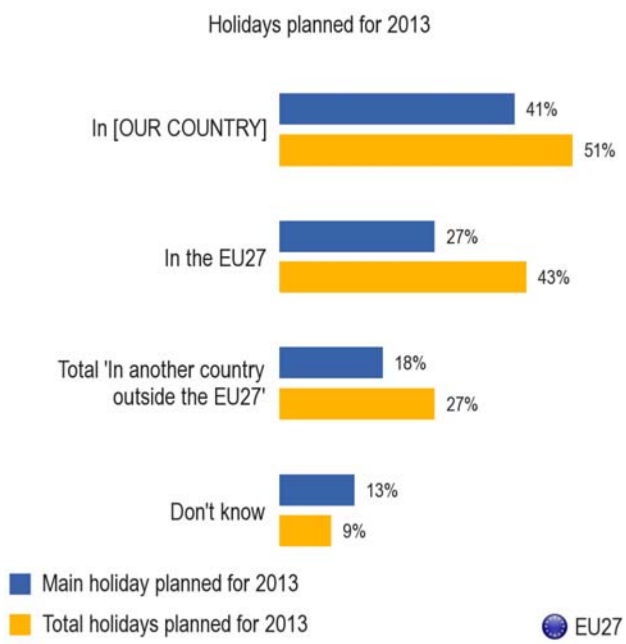
- Four out of 10 respondents expect to take a holiday lasting between four and 13 consecutive nights in 2013 -

Just over four out of ten (42%) respondents say they are planning to take a holiday lasting between four and 13 consecutive nights, while just over a quarter (29%) say that they intend to make a short-stay trip of up to three nights. One in five (20%) say that they plan to take a holiday lasting more than 13 consecutive nights. 16% of respondents say they are not planning any trips, while 10% say they are yet to make any decisions.

There has been little change in these results since the previous wave.

- ***Respondents' own country: the destination chosen for 2013[7] -***

Although not a majority, most respondents living in the EU plan to take their main holiday in their own country (41%), while 27% plan to visit another EU country. Almost one in five (18%) plan to visit a country outside the EU for their main holiday[8].



Base: 72% from the total number of respondents
(Those who plan to take holidays during 2013)

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7 When asking the question (OUR COUNTRY) is replaced by the name of the country in which the interview is conducted (i.e. if a Belgian respondent plans to spend his/her holiday in Belgium the answer is coded under 'In (OUR COUNTRY)').

8 The results for 'in the EU27' do not include domestic holidays taken by respondents living in an EU27 country: e.g. domestic holidays taken by Spanish respondents are not included in the "in the EU27" results. The results for 'in another country outside the EU27' do not include domestic holidays taken by respondents living in a country outside the EU27: e.g. domestic holidays taken by Israeli respondents are not included in the 'in another country outside the EU27' results.

Considering all holidays planned for 2013, the pattern is the same. Just over half (51%) are planning domestic holidays, 43% holidays in an EU country, and 27% are planning holidays in a country outside the EU.

Spain remains the most popular destination (12%), followed by Italy (8%) and France (7%). Austria, Germany, Greece, the UK (all 4%) and Croatia (3%) make up the rest of the top eight[9].

9 Does not include domestic holidays.

TECHNICAL SPECIFICATIONS

FLASH EUROBAROMETER 370

"Attitudes of Europeans towards Tourism"

TECHNICAL SPECIFICATIONS

Between the 24th and the 30th of January 2013, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 370 about "Attitudes of Europeans towards Tourism".

This survey has been requested by the EUROPEAN COMMISSION, Directorate-General for Enterprise and Industry. It is a general public survey co-ordinated by the Directorate-General for Communication ("Research and Speechwriting" Unit). The FLASH EUROBAROMETER 370 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over. It was also conducted in Croatia, Turkey, Former Yugoslav Republic of Macedonia, Iceland, Norway, Serbia and Israel. The survey covers the national population of citizens (in these countries) as well as the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire. All interviews were carried using the TNS e-Call center (our centralized CATI system). In every country respondents were called both on fixed lines and mobile phones. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".

TNS has developed its own RDD sample generation capabilities based on using contact telephone numbers from responders to random probability or random location face to face surveys, such as Eurobarometer, as seed numbers. The approach works because the seed number identifies a working block of telephone numbers and reduces the volume of numbers generated that will be ineffective. The seed numbers are stratified by NUTS2 region and urbanisation to approximate a geographically representative sample. From each seed number the required sample of numbers are generated by randomly replacing the last two digits. The sample is then screened against business databases in order to exclude as many of these numbers as possible before going into field. This approach is consistent across all countries.

A comparison between the sample and the universe was carried out. The Universe description was derived from the national statistics office. The weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. Gender, age, region, social class and the vote in the referendum on the Stability Treaty were introduced in the iteration procedure.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.002	24/01/2013	30/01/2013	8.939.546
BG	Bulgaria	TNS BBSS	1.002	24/01/2013	30/01/2013	6.537.510
CZ	Czech Rep.	TNS Aisa s.r.o	1.000	24/01/2013	30/01/2013	9.012.443
DK	Denmark	TNS Gallup A/S	1.007	24/01/2013	30/01/2013	4.561.264
DE	Germany	TNS Infratest	1.500	24/01/2013	30/01/2013	64.409.146
EE	Estonia	TNS Emor	500	24/01/2013	30/01/2013	945.733
EL	Greece	TNS ICAP	1.002	24/01/2013	30/01/2013	8.693.566
ES	Spain	TNS Demoscopia S.A	1.500	24/01/2013	30/01/2013	39.035.867
FR	France	TNS Sofres	1.506	24/01/2013	30/01/2013	47.756.439
IE	Ireland	IMS Millward Brown	1.000	24/01/2013	30/01/2013	3.522.000
IT	Italy	TNS Infratest	1.500	24/01/2013	30/01/2013	51.862.391
CY	Rep. of Cyprus	CYMAR	505	24/01/2013	30/01/2013	660.400
LV	Latvia	TNS Latvia	508	24/01/2013	30/01/2013	1.447.866
LT	Lithuania	TNS LT	500	24/01/2013	30/01/2013	2.829.740
LU	Luxembourg	TNS Dimarso	500	24/01/2013	30/01/2013	404.907
HU	Hungary	TNS Hoffmann Kft	1.007	24/01/2013	30/01/2013	8.320.614
MT	Malta	MISCO International Ltd	504	24/01/2013	30/01/2013	335.476
NL	Netherlands	TNS NIPO	1.001	24/01/2013	30/01/2013	13.371.980
AT	Austria	TNS Austria	1.001	24/01/2013	30/01/2013	7.009.827
PL	Poland	TNS OBOP	1.500	24/01/2013	30/01/2013	32.413.735
PT	Portugal	TNS EUROTESTE	1.021	24/01/2013	30/01/2013	8.080.915
RO	Romania	TNS CSOP	1.026	24/01/2013	30/01/2013	18.246.731
SI	Slovenia	RM PLUS	505	24/01/2013	30/01/2013	1.759.701
SK	Slovakia	TNS AISA Slovakia	1.000	24/01/2013	30/01/2013	4.549.955
FI	Finland	TNS Gallup Oy	1.004	24/01/2013	30/01/2013	4.440.004
SE	Sweden	TNS SIFO	1.000	24/01/2013	30/01/2013	7.791.240
UK	United Kingdom	TNS UK	1.500	24/01/2013	30/01/2013	51.848.010
TOTAL EU27			**26.601**	24/01/2013	30/01/2013	**408.787.006**
HR	Croatia	Puls	504	24/01/2013	30/01/2013	3.749.400
TR	Turkey	TNS PIAR	1.000	24/01/2013	30/01/2013	54.844.406
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	505	24/01/2013	30/01/2013	1.678.404
IS	Iceland	Capacent ehf	505	24/01/2013	30/01/2013	252.277
NW	Norway	TNS Gallup AS	500	24/01/2013	30/01/2013	3.886.395
RS	Republic of Serbia	TNS Medium Gallup	513	24/01/2013	30/01/2013	6.409.693
IL	Israel	TNS Teleseker	500	24/01/2013	30/01/2013	4.257.500
TOTAL			**30.628**	24/01/2013	30/01/2013	**483.865.081**