European Commission

Flash Eurobarometer 392

PREFERENCES OF EUROPEANS TOWARDS TOURISM

SUMMARY

Fieldwork: January 2014

Publication: February 2014

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

Flash Eurobarometer 392 - TNS Political & Social

Eurobarometer

Flash Eurobarometer 392

Preferences 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 "Strategy, Corporate Communication Actions
and Eurobarometer" Unit)

TABLE OF CONTENTS

INTRODUCTION

This Flash Eurobarometer was carried out at the request of the European Commission's Directorate-General for Enterprise and Industry by the TNS Political & Social network in the 28 Member States of the European Union, and in Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Norway, Serbia, Montenegro and Israel, between 6 and 11 January 2014. This wave is a follow-up to Flash Eurobarometer no. 370, conducted in January 2013.

This report presents all the results from this survey, according to the following structure:

- The **first chapter** presents the reasons why respondents go on holiday and the information sources and tools they use to research and organise their holidays.
- The **second chapter** is dedicated to the holiday experience: the main travel destinations, the type and duration of vacation and the level of satisfaction. A section related to safety issues and complaints is also included in this chapter.
- The **third chapter** deals with the profile of travellers: the proportion of respondents who travelled in 2013 and for what type of vacation.
- The **fourth chapter** analyses the barriers for going on vacation.
- Finally, the **fifth chapter** is dedicated to respondents' plans for holidays in 2014, including the potential impact of the current economic situation on these plans.

Where possible, results are compared with the last wave of the survey.

Some 31,122 respondents from different social and demographic groups were interviewed via telephone (landline and mobile phone) in their mother tongue on behalf of the Directorate-General for Enterprise and Industry. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" 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% where the respondent was able to give 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	LT	Lithuania
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	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
HR	Croatia	SI	Slovenia
IE	Ireland	SK	Slovakia
IT	Italy	FI	Finland
CY	Republic of Cyprus*	SE	Sweden
LV	Latvia	UK	The United Kingdom
TR	Turkey	EU28	European Union – 28 Member States
MK	Former Yugoslav Republic of Macedonia**		
IS	Iceland		
NO	Norway		
ME	Montenegro		
RS	Republic of Serbia		
IL	Israel		

* Cyprus as a whole is one of the 28 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 EU28 average.

** 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.

* * * * *

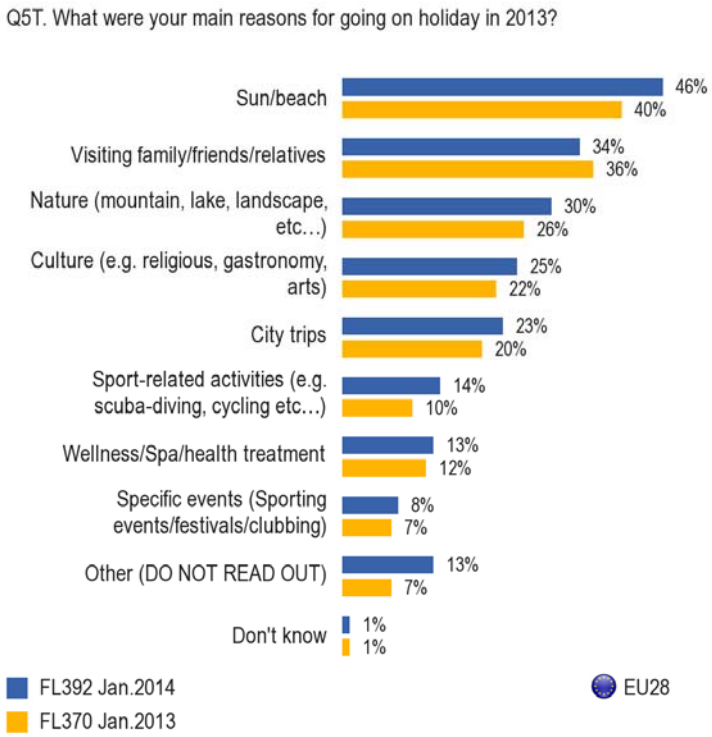
We wish to thank all the people interviewed who took the time to participate in this survey.

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

I. RESEARCHING AND PLANNING A HOLIDAY

1.1 Reasons for going on holiday in 2013

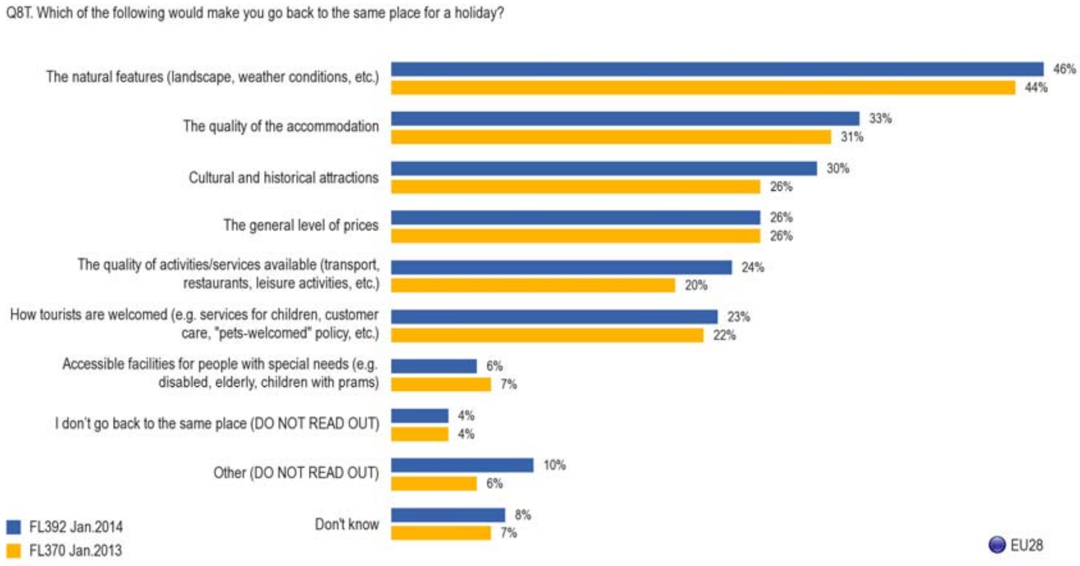
Spending time in the sun or at the beach was once again the most popular reason for going on holiday in 2013, mentioned by nearly half (46%, +6 since last year’s survey) of respondents who travelled at least once for a minimum of four nights. About a third (34%, -2) mention visiting family/friends/relatives as one of their main reasons.



1.2 Respondents’ reasons for returning to the same place for holidays

Nearly half the respondents (46%) say that the **natural features** of a holiday destination would persuade them to go back for another holiday – a slight increase from the 44% who said so in the previous survey. The quality of accommodation is the next most significant factor (33%, +2), followed by cultural and historical attractions (30%, +4).

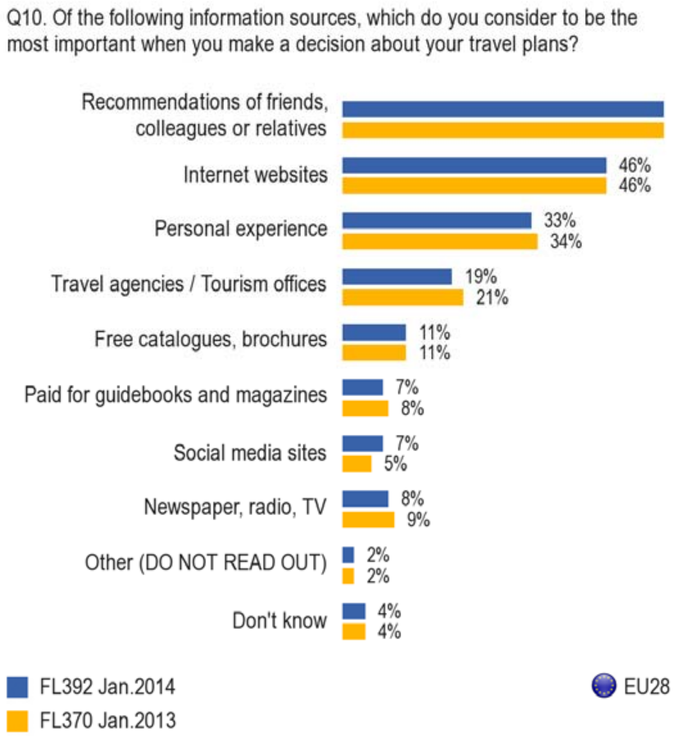
In all but three countries, **natural features** such as the landscape and the weather are the most important reason to return to the same place for another holiday. The three exceptions are Serbia, where the **general level of prices** (39%) is the top answer; Malta, where respondents mention **cultural and historical attractions** (39%) as the main reason; and Israel, where the **quality of the accommodation** (33%) is mentioned as the main reason.



1.3 Most-used sources of information for planning a holiday

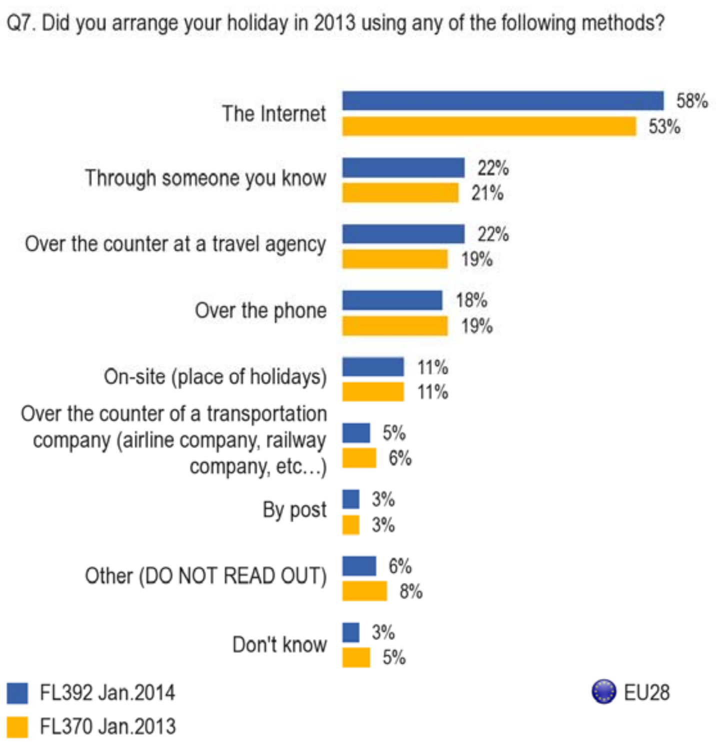
When asked which sources of information they consider most important when making decisions about their travel plans, over half of respondents (56%) mention the recommendations of friends, colleagues or relatives, while 46% mention Internet websites. A third (33%) of respondents consider personal experience to be important.

As illustrated below, these results are very similar to the previous survey.



1.4 How respondents arranged their holidays in 2013

For those people who travelled at least once in 2013 for a minimum of four nights, the Internet (58%) was by far the most common way of organising a holiday, with an increase of +5 compared with last year. Roughly a fifth of respondents organised their holiday through someone they knew (22%, +1), over the counter at a travel agency (22%, +3), or over the phone (18%, -1).

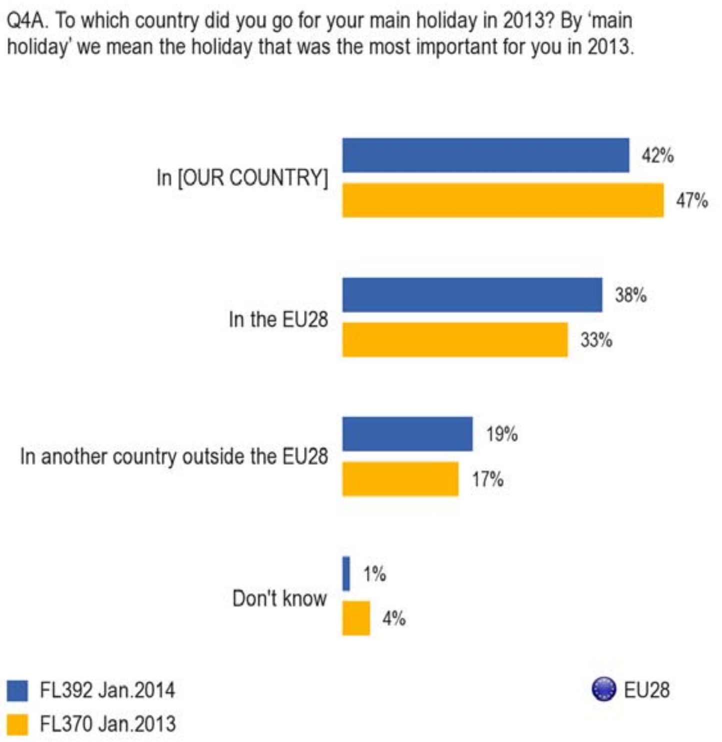


The **Internet** was the main method used to arrange holidays in 2013 in 27 of the 28 EU Member States – the exception being Croatia – and in four of the seven non-EU countries, the exceptions being Montenegro, the Former Yugoslav Republic of Macedonia and Serbia.

II. THE HOLIDAY EXPERIENCE

2.1 Destinations for holidays taken in 2013

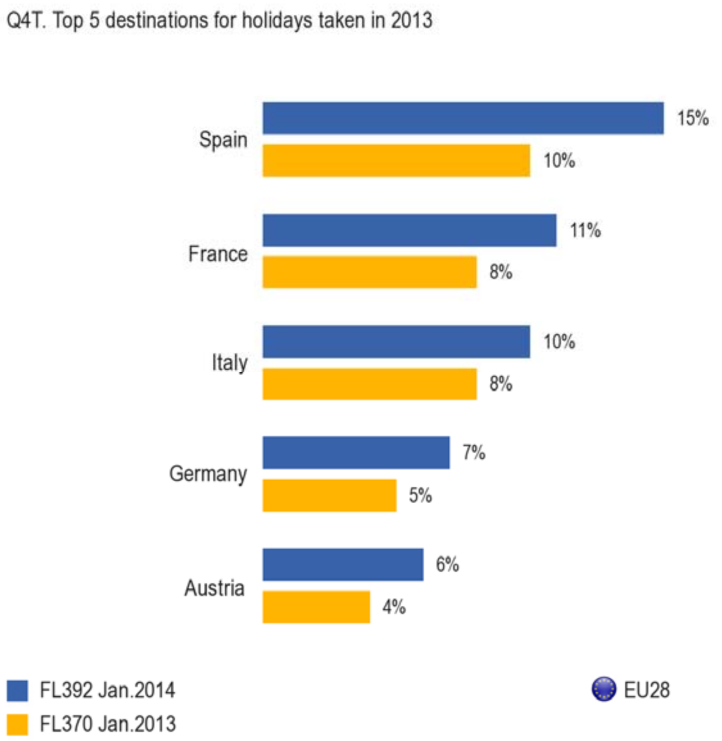
Among respondents who went on holiday in 2013 for a minimum of four nights, four in ten (42%) spent their **main holiday**[3] **in their own country** in 2013 (-5 since last year). Nearly four in ten (38%) went **to another EU country** for their main holiday (+5)[4] and roughly a fifth (19%, -2) took a holiday **in a country outside the EU**.



The picture is very similar when considering all holidays taken in 2013. A majority of respondents (57%, -1) say they went on holiday in their own country in 2013, while a similar proportion also holidayed in an EU country (54%, +9). Over a quarter (27%, +3) went somewhere outside the EU.

The top five holiday destinations remain unchanged since last year: Spain was still the most popular destination in 2013, being visited by 15% of respondents, up from 10% a year earlier. Next came France (11%, +3), Italy (10%, +2), Germany (7%, +2) and Austria (6%, +2).

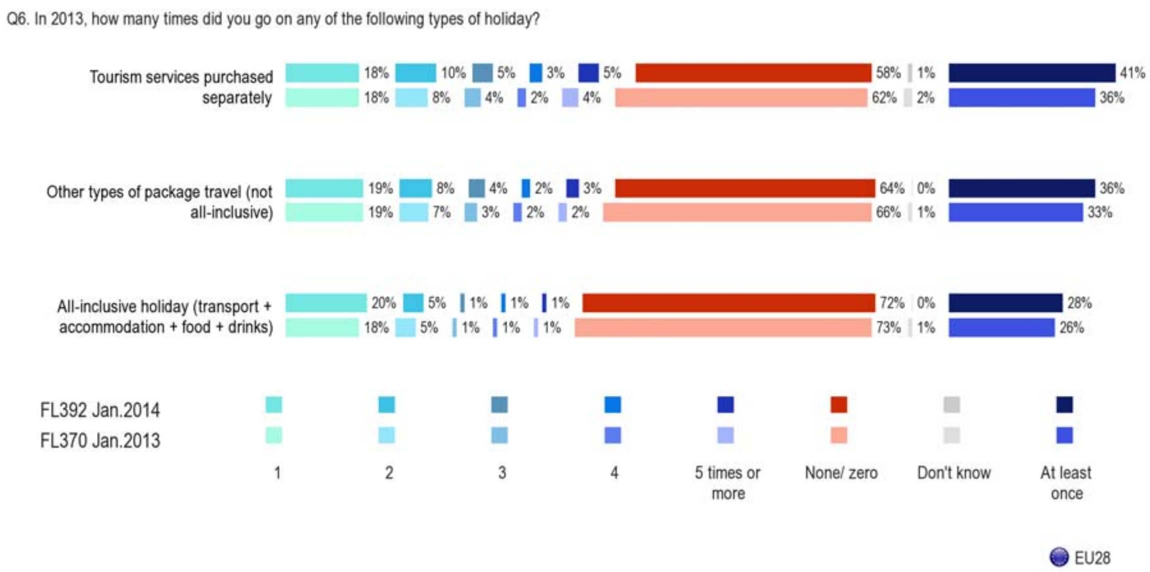
3 The “main holiday” was described to respondents as “the holiday that was most important for you in 2013”.
4 The results of the previous wave (FL370 Jan 2013) were recalculated to include Croatia in the category “In the EU28”. This naturally leads to slight differences compared to the results for “In the EU27” presented in last year’s report.



2.2 Types of holidays taken in 2013

– Booking the various parts of a holiday separately remains more popular among Europeans than a package holiday –

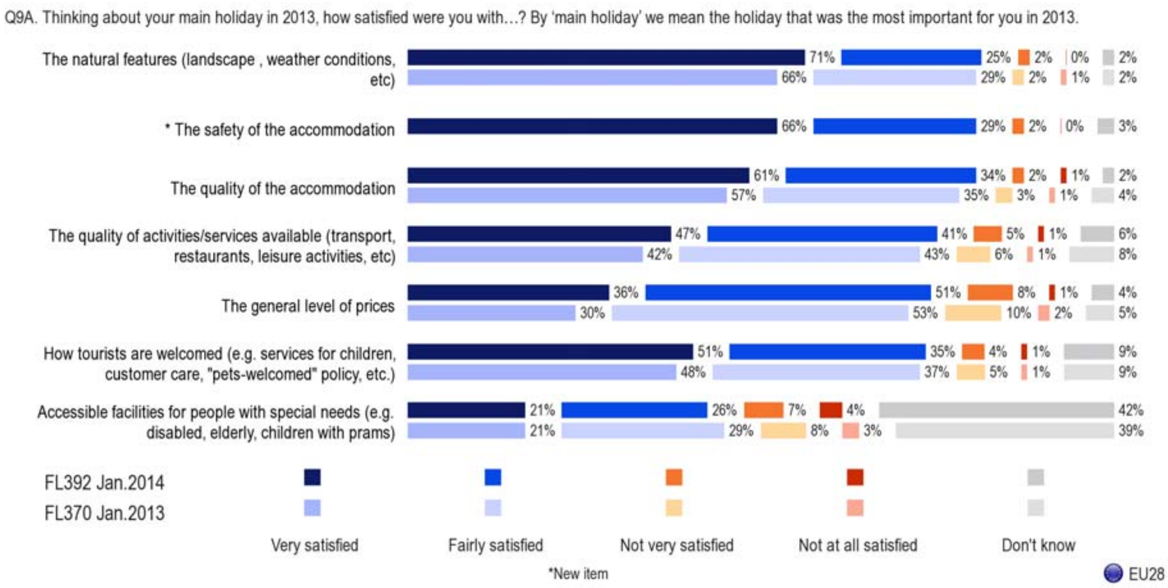
Still focusing on respondents who travelled at least once in 2013 for a minimum of four nights, four in ten (41%, +5 compared with last year's survey) went on at least one holiday where the various parts of their trip were purchased separately. Over a third of people (36%, +3) went on a package holiday that was not all-inclusive, while more than a quarter of respondents (28%, +2) went on an all-inclusive holiday.



2.3 Satisfaction with the main holiday taken in 2013

Respondents express a high level of satisfaction with most aspects of their main holiday in 2013. Nearly all respondents (96%) were satisfied with the **natural features**, such as the landscape and weather conditions, while a similarly high proportion (95%) were satisfied with **the safety of their accommodation** and with the **quality of their accommodation**.

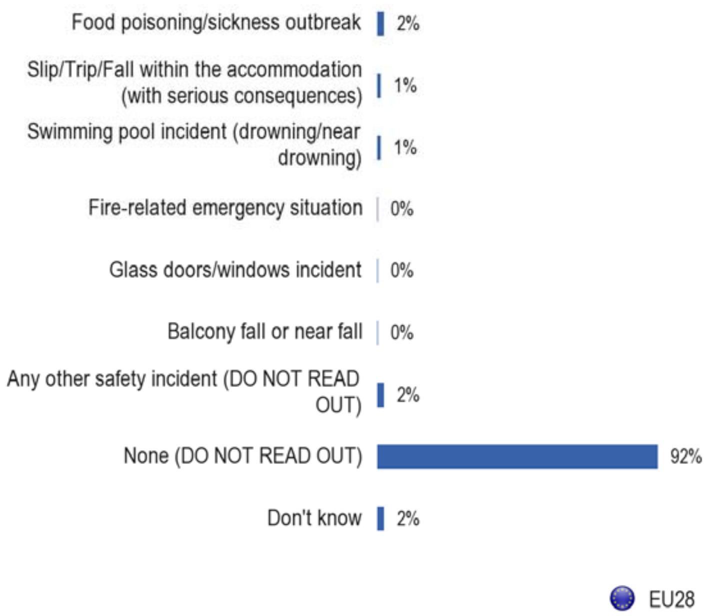
Nearly nine in ten people (88%) were satisfied with **the quality of activities/services** available, 87% of respondents expressed satisfaction with the **general level of prices**, and much the same proportion (86%) felt satisfied with **the way tourists were welcomed**. Satisfaction was noticeably lower concerning the availability of **accessible facilities for people with special needs** (47%) than for the other six aspects, but this can largely be explained by the fact that a high proportion (42%, +3) were unable to give an answer on this item.



2.4 Safety issues encountered during the main holiday in 2013

Only a minority of respondents (6%) experienced safety problems with paid accommodation during their 2013 holiday, mostly food poisoning or sickness (2%), followed by a slip, trip or fall (1%) and swimming pool incidents (1%).

Q9B. Did you or any of your party experience any of the following safety issues while using paid accommodation during your main holiday in 2013?

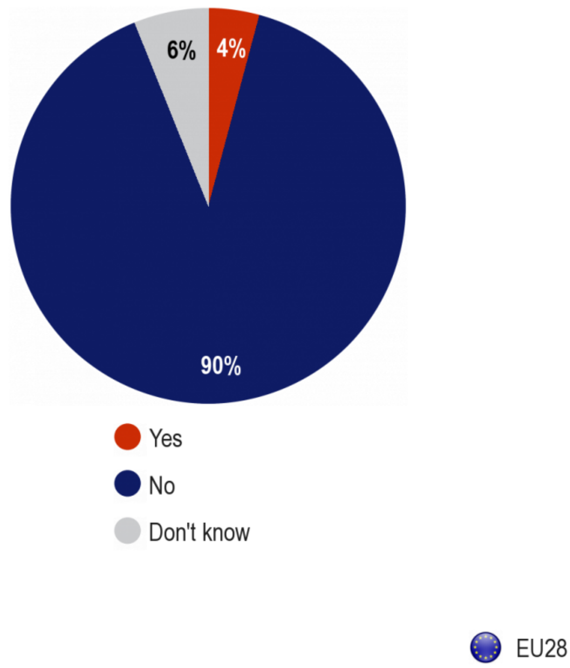


2.5 Complaints registered during a holiday in 2013

Only 4% of all respondents who travelled at least once in 2013 registered a formal complaint during their holiday.

Most formal complaints concerned the accommodation (41%), followed by transport (22%), restaurants (17%) and leisure activities (8%).

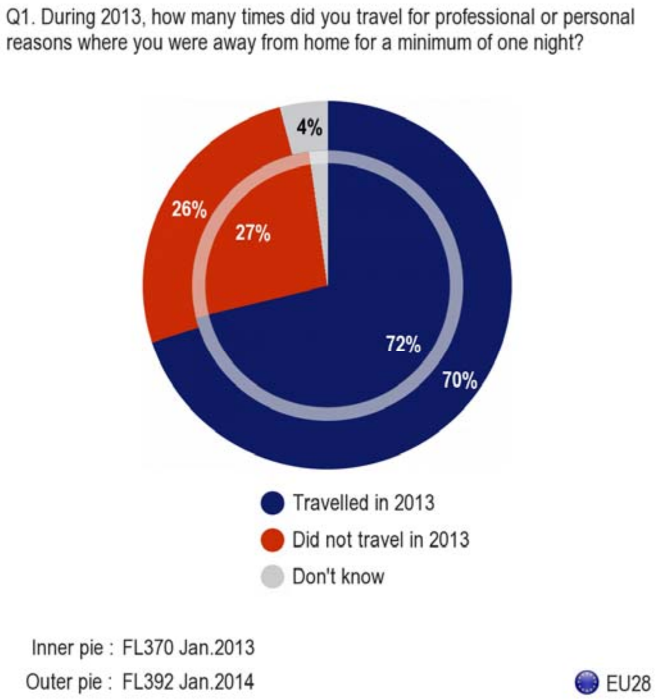
Q9C. Did you register a formal complaint about any service provided during your holiday in 2013?



III. TRAVELLERS' PROFILES IN 2013

3.1 Proportion of respondents who travelled in 2013

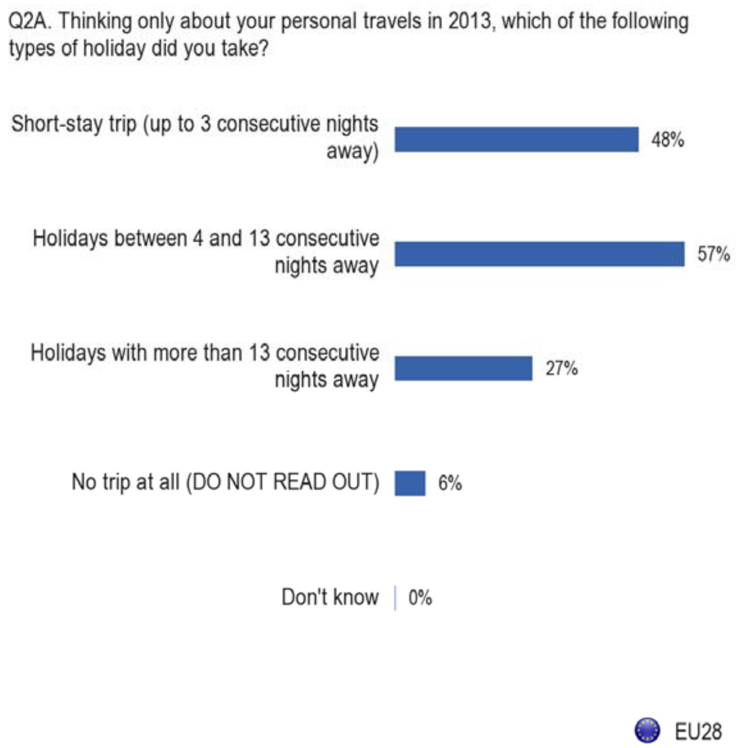
Overall, seven in ten people (70%) travelled at least once in 2013, a slight decrease (-2) since last year's survey.



Turkey is the only one of the 35 countries where a majority of respondents did not travel at least once in 2013: 47% did not travel, compared with 44% who did. In all other countries, a majority of respondents spent at least one night away from home. Respondents in Norway (90%), Austria (85%), Iceland (85%), Ireland (85%) and Sweden (85%) travelled the most, while, after Turkey, respondents in Hungary (54%), Lithuania (55%), Romania (55%) and the Former Yugoslav Republic of Macedonia (55%) travelled the least.

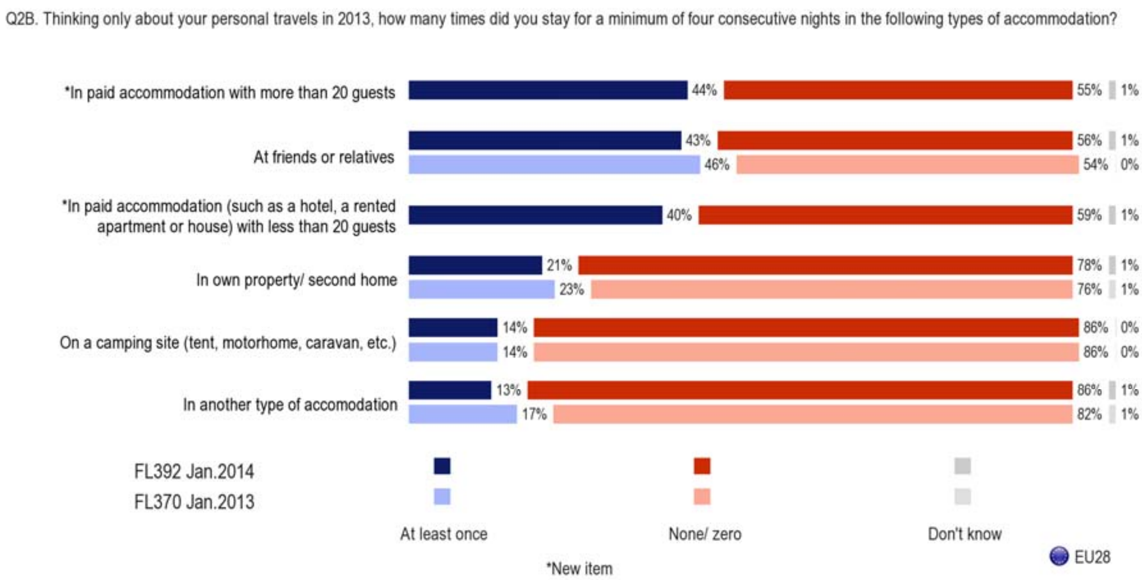
3.2 Holidays of a minimum of four nights taken in 2013

A majority (57%) of respondents who travelled at least once in 2013 said that they took holidays that lasted between four and 13 nights away, while just under half (48%) mentioned short-stay trips of up to three nights. A quarter of respondents (27%) travelled for more than 13 consecutive nights.



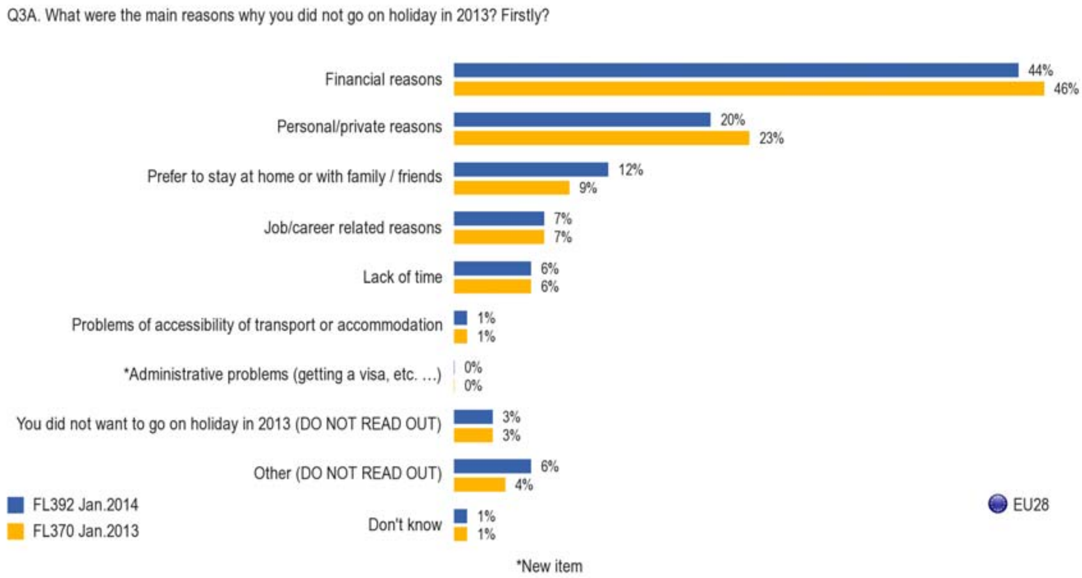
3.3 Type of accommodation

Regarding **the type of accommodation**, over four in ten respondents (44%) who travelled for at least one night in 2013 stayed in paid accommodation with more than 20 guests. A slightly lower proportion (40%) stayed in paid accommodation with fewer than 20 guests. Interestingly, 24% stayed exclusively in paid accommodation (no matter the size). Over four in ten respondents (43%, -3 since the previous survey) stayed with friends or relatives. A fifth of people (21%, -2) stayed in their own property/second home, while 14% (no change) stayed on a campsite, and 13% (-4) stayed in another type of accommodation.



IV. OBSTACLES TO GOING ON HOLIDAY IN 2013

When asked the main reasons why they did not go on holiday in 2013, the main cause mentioned by over four in ten respondents (44%), was financial reasons – a slight decline (-2) since the last wave. A fifth of respondents (20%, -3) mentioned personal or private reasons for not going away.



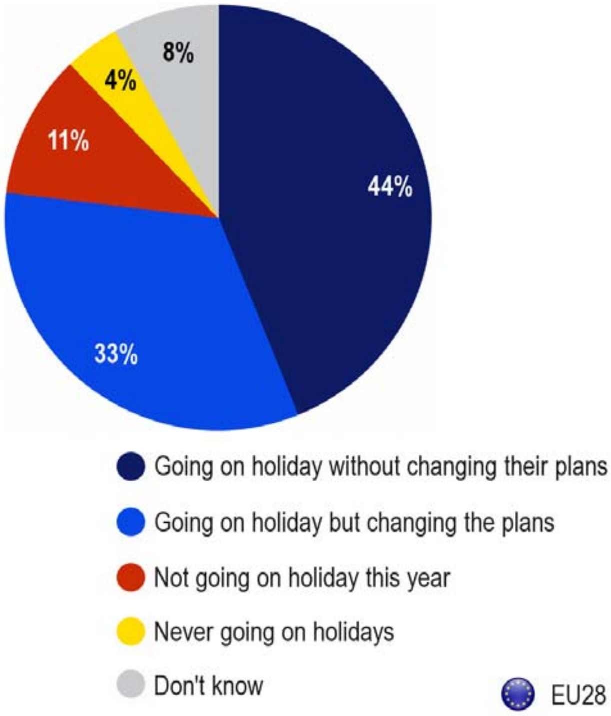
In 12 countries, at least 50% of the respondents who did not go on holiday in 2013 gave **financial reasons** as an explanation, with particularly high proportions in Greece (74%), Cyprus (69%), Bulgaria (66%) and Serbia (66%).

V. HOLIDAY PLANS FOR 2014

5.1 Impact of the current economic situation on holidays planned for 2014

Asked whether the current economic situation has had an impact on their holiday plans for 2014, over four in ten people (44%) say they will go on holiday this year without changing their plans, while a third (33%) will still go on holiday but will change their plans. About a tenth (11%) will not go on holiday as a result of the economic situation.

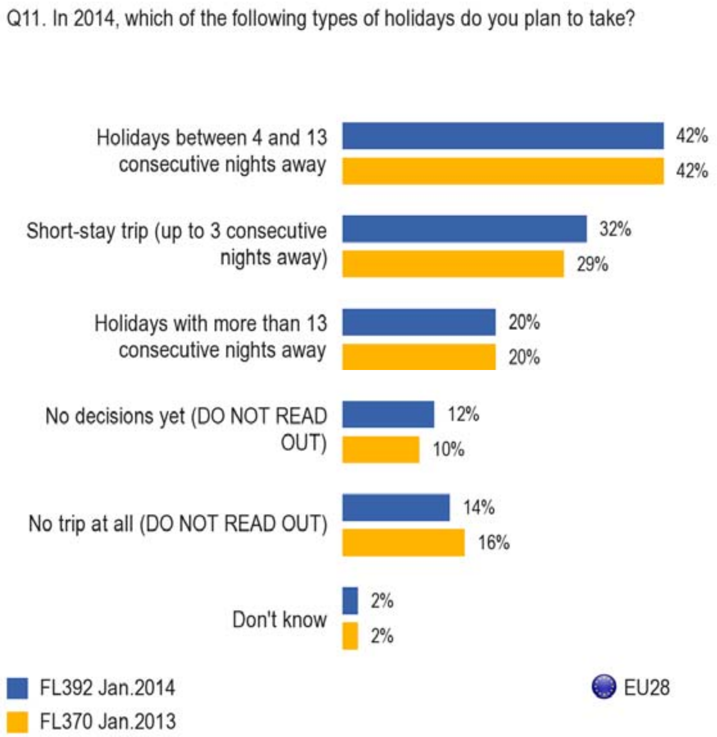
Q13(2). Does the current economic situation have an impact on your holiday plans for 2014?



Two countries stand out as having an especially high proportion of respondents who say **they will not go on holiday** as a result of the economic situation: Turkey (38%) and Greece (26%).

5.2 Duration of holidays planned for 2014

Over four in ten respondents (42%, no change compared with last year) are planning to take holidays lasting between 4 and 13 consecutive nights in 2014, while 32% (+3) are planning to take short-stay trips of up to three consecutive nights. A fifth (20%, no change) are planning more than 13 nights away.



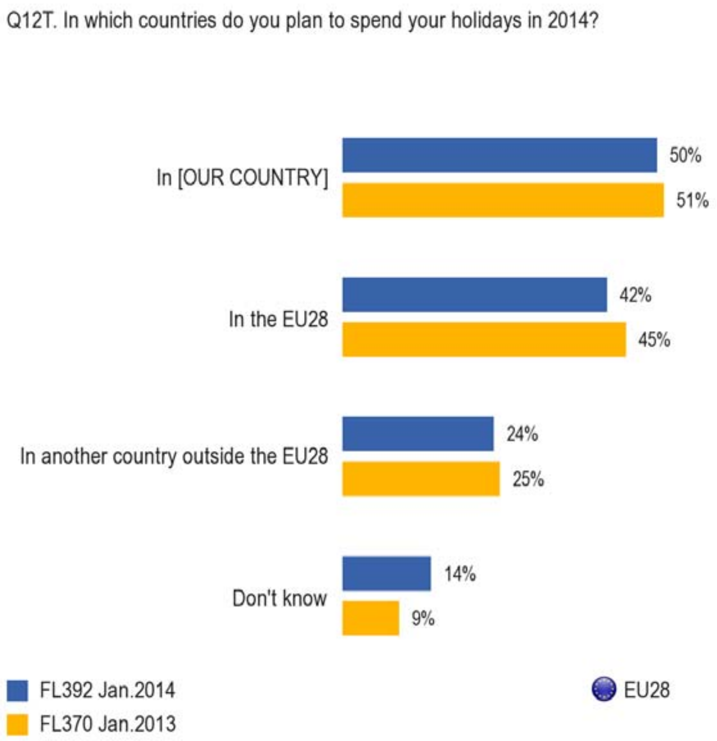
These results are very much in line with the holidays that respondents took in 2013: respondents were most likely to take holidays lasting between 4 and 13 consecutive nights, followed by short-stay trips and longer holidays of 13 nights or more.

5.3 Destinations chosen for 2014

Looking ahead to their 2014 holiday, half of the respondents (50%, -1 compared with last year) who said previously that they planned to travel in 2014 mentioned they plan to spend their holidays – both their main holidays and others – in their own country. Four in ten respondents (42%, -3) anticipate they will spend their holiday in another EU country and about a quarter (24%, -1) say they will go to another country outside the EU[5].

In ten EU Member States, more than 50% of people intend to **spend their holiday in their own country**. In Greece, 84% of people plan to do this, as do 80% in Croatia and 73% in Bulgaria. At the other extreme, only 3% of people in Luxembourg, 11% in Malta and 16% in Belgium intend to take a holiday in their own country.

[5] It should be noted that the total percentage shown in the following graph may exceed 100% due to rounding.


Q12T. In which countries do you plan to spend your holidays in 2014?
In [OUR COUNTRY]
50%
51%
In the EU28
42%
45%
In another country outside the EU28
24%
25%
Don't know
14%
9%
FL392 Jan.2014
FL370 Jan.2013
EU28

TECHNICAL SPECIFICATIONS

FLASH EUROBAROMETER 392

"Preferences of Europeans towards tourism"

TECHNICAL SPECIFICATIONS

Between the 6 and the 10 of January 2014, TNS political & social, a consortium created between TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 392 about 'Preferences 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 ('Strategy, Corporate Communication Actions and Eurobarometer' Unit).

The FLASH EUROBAROMETER 392 covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over. It was also conducted in the Former Yugoslav Republic of Macedonia, Iceland, Israel, Norway, the Republic of Serbia, Turkey and Montenegro . The survey covers the national population of citizens 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); except in the Former Yugoslav Republic of Macedonia, Israel, the Republic of Serbia and Montenegro where interviews were carried out using local call center systems. In every country respondents were called both on fixed lines and mobile phones; except in the Former Yugoslav Republic of Macedonia, Israel, the Republic of Serbia and Montenegro where respondents were called on fixed lines only. The basic sample design applied in all countries is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".

TNS have developed their 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 provides a consistent approach across all countries.

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%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	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%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.004	6/01/2014	8/01/2014	8.939.546
BG	Bulgaria	TNS BBSS	1.000	6/01/2014	9/01/2014	6.537.510
CZ	Czech Rep.	TNS Aisa s.r.o	1.000	6/01/2014	8/01/2014	9.012.443
DK	Denmark	TNS Gallup A/S	1.009	6/01/2014	8/01/2014	4.561.264
DE	Germany	TNS Infratest	1.500	6/01/2014	10/01/2014	64.336.389
EE	Estonia	TNS Emor	500	6/01/2014	7/01/2014	945.733
EL	Greece	TNS ICAP	1.000	7/01/2014	9/01/2014	8.693.566
ES	Spain	TNS Demoscopia S.A	1.500	7/01/2014	10/01/2014	39.127.930
FR	France	TNS Sofres	1.505	6/01/2014	9/01/2014	47.756.439
HR	Croatia	HENDAL	502	7/01/2014	8/01/2014	3.749.400
IE	Ireland	IMS Millward Brown	1.000	6/01/2014	9/01/2014	3.522.000
IT	Italy	TNS ITALIA	1.506	7/01/2014	10/01/2014	51.862.391
CY	Rep. of Cyprus	CYMAR	502	8/01/2014	8/01/2014	660.400
LV	Latvia	TNS Latvia	500	7/01/2014	8/01/2014	1.447.866
LT	Lithuania	TNS LT	500	7/01/2014	8/01/2014	2.829.740
LU	Luxembourg	TNS Dimarso	500	6/01/2014	8/01/2014	404.907
HU	Hungary	TNS Hoffmann Kft	1.010	6/01/2014	8/01/2014	8.320.614
MT	Malta	MISCO International Ltd	503	7/01/2014	8/01/2014	335.476
NL	Netherlands	TNS NIPO	1.001	6/01/2014	8/01/2014	13.371.980
AT	Austria	TNS Austria	1.002	7/01/2014	9/01/2014	7.009.827
PL	Poland	TNS Polska	1.500	7/01/2014	10/01/2014	32.413.735
PT	Portugal	TNS EUROTESTE	1.001	7/01/2014	10/01/2014	8.080.915
RO	Romania	TNS CSOP	1.013	6/01/2014	7/01/2014	18.246.731
SI	Slovenia	RM PLUS	502	7/01/2014	9/01/2014	1.759.701
SK	Slovakia	TNS AISA Slovakia	1.000	6/01/2014	10/01/2014	4.549.956
FI	Finland	TNS Gallup Oy	1.001	7/01/2014	9/01/2014	4.440.004
SE	Sweden	TNS SIFO	1.000	7/01/2014	9/01/2014	7.791.240
UK	United Kingdom	TNS UK	1.502	6/01/2014	10/01/2014	51.848.010
TOTAL EU28			**26.555**	**06/01/2014**	**10/01/2014**	**412.555.713**
TR	Turkey	TNS Piar	1025	8/01/2014	10/01/2014	54.844.406
MK	Former Yugoslav Republic of Macedonia	TNS BBSS	505	8/01/2014	10/01/2014	1.678.404
IS	Iceland	Capacent Gallup	501	8/01/2014	10/01/2014	252.277
NO	Norway	TNS Gallup Norway	500	6/01/2014	8/01/2014	3.886.395
ME	Montenegro	TNS Medium Gallup	505	8/01/2014	9/01/2014	492.265
RS	Serbia	TNS Medium Gallup	510	8/01/2014	10/01/2014	6.409.693
IL	Israel	TNS Teleseker	501	8/01/2014	10/01/2014	4.257.500
TOTAL			**26.555**	**06/01/2014**	**11/01/2014**	**484.376.653**