



## **Flash Eurobarometer 334**

# **Attitudes of Europeans towards tourism**

## **SUMMARY**

Fieldwork: January 2012

Publication: March 2012

This survey has been requested by Directorate-General for Enterprise and Industry and co-ordinated by Directorate-General for Communication (DG COMM “Research and Speechwriting” Unit).

This document does not represent the point of view of the European Commission.  
The interpretations and opinions contained in it are solely those of the authors.

**Flash Eurobarometer 334 - TNS Political & Social**

**Flash Eurobarometer 334**

**ATTITUDES OF EUROPEANS  
TOWARDS TOURISM**

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

Survey co-ordinated by Directorate-General for Communication

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## INTRODUCTION

This Flash Eurobarometer, "Attitudes of Europeans Towards Tourism" (No 334), 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. Serbia and Israel were not included in previous waves of this survey.

The objectives of the survey were to study:

- respondents' motivation for going on holiday in 2011,
- the types of research and modes of organisation that people use before taking a holiday,
- attitudes towards tourism ( e.g. preferred holiday destinations, and the types of holiday that respondents favour),
- respondents' travel profiles in 2011,

the reasons why respondents did not go on holiday in 2011, including the potential impact of the current economic crisis and respondents' holiday plans for 2012

The interviews were carried out by telephone (fixed-line and mobile phone) between 10 and 14 January 2012 with nationally representative samples of citizens, in the 27 EU Member States, Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Norway, Iceland, the Republic of Serbia and Israel. The sample size varied between countries, ranging from about 500 in the smallest countries to about 1.500 in the largest (see section "Technical Specifications" in the Annexes where the actual sample sizes for the 34 countries are indicated).

To correct for sampling disparities, a post-stratification weighting of the results was implemented, based on the main socio-demographic variables.

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*The Eurobarometer web site can be consulted at the following address:*

*[http://ec.europa.eu/public\\_opinion/index\\_en.htm](http://ec.europa.eu/public_opinion/index_en.htm)*

*We would like to take the opportunity to thank all the respondents across the continent who have given of their time to take part in this survey.*

*Without their active participation, this study would simply not have been possible.*

Note**ABBREVIATIONS**

EU27	European Union – 27 Member States
NMS12	The 12 new Member States
DK/NA	Don't know / No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
DE	Germany
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus
LT	Lithuania
LV	Latvia
LU	Luxembourg
HU	Hungary
MT	Malta
NL	The Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	The United Kingdom
HR	Croatia
TR	Turkey
MK	Former Yugoslav Republic of Macedonia
IS	Iceland
NO	Norway
RS	Republic of Serbia
IL	Israel

## 1. RESEARCHING AND PLANNING A HOLIDAY

***Half of the respondents who went on holiday for at least four nights say that rest/recreation was one of their main reasons for going.***

Almost half (48%) of respondents say they went on holiday for rest/recreation (including wellness/health treatment), while just under a third (32%) took a holiday in order to spend time with their family. Over a quarter (28%) of respondents say they went on holiday for the sun or the beach, with the same proportion (28%) saying that they went to visit relatives or friends. This question was not asked in earlier waves of the survey. Previously, respondents were asked what influenced their choice of destination, and in 2011 the main attractions were given as the environment (32%), cultural heritage (27%), and entertainment (14%).

***A location's natural features and the quality of the accommodations are the features most likely to persuade holiday-makers to go back to a previously chosen destination.***

Half (50%) of respondents say they would go back to a place for its natural features, such as the weather or the landscape, while a third (32%) say that the quality of the accommodation would persuade them to return. Around a quarter (27%) of respondents say that the general level of prices would be a reason for them to go back to the same place. Factors influencing "loyalty" to a destination have been polled for the first time with the present survey.

***A majority of respondents consider the recommendations of friends, colleagues or relatives when making decisions about travel.***

A majority (52%) of respondents say that the recommendations of friends, colleagues or relatives are important to them when making travel decisions, while four people in 10 (40%) say that internet websites are important in the decision-making process. Personal experience is cited as an important factor by a third (32%) of respondents.

Over one person in 10 says that travel/tourist agencies (16%) and free catalogues and brochures are important (11%). Less than one respondent in 10 says that the other factors like: newspapers, radio and TV (7%), paid-for guidebooks and magazines (7%) and social media sites (5%) are important when it comes to making decisions about travel plans.

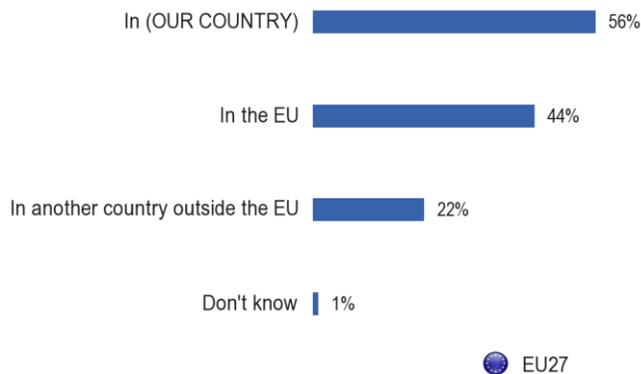
**A majority of respondents organized their holiday via the internet, which was by far the most popular method.**

A majority (53%) of those who took a holiday lasting at least four nights say that they used the internet to make their arrangements. Just under a quarter (23%) of respondents says that they made their plans through a travel agency, with a similar number (22%) saying that they arranged their holiday through someone they know. Under one person in five (18%) made their arrangements over the phone, while less than a tenth of respondents made their arrangements on-site (9%) or over the counter of a transport company (4%).

## 2. THE HOLIDAY EXPERIENCE

**A majority of respondents who went on holiday in 2011 stayed in their own country.**

Q5. In which country(ies) did you go for a minimum of 4 nights in 2011?



*Base: 60% from the total number of respondents (15 848 respondents)*

*(Those who went on holiday for at least four nights in 2011)*

*When asking the question (OUR COUNTRY) is replaced by the name of the country the interview is conducted*

**Holidaying in the own country** domestically was most popular in Turkey (91%), followed by Greece (80%), Bulgaria (77%), Italy (74%) and Croatia (73%). Domestic holidays were least common in Luxembourg (2%) and Malta (5%). **'In the EU'** was the most common in Luxembourg (93%), Malta (91%), Belgium (76%) and Cyprus (73%). But relatively few respondents went for a holiday in the EU in Turkey (6%). Holidaying **in another country outside the EU** was the most popular option in Slovenia (69%) and in Serbia (44%).

Over a tenth of EU respondents (11%) who went on holiday said they visited Spain. This is followed by Italy (9%), France (8%), Germany (5%), Austria (5%), and Greece (4%). Excluding the answers of the people who stayed in their own country for holidays, the most visited countries are Spain (17%), Italy (17%), France (16%), Germany (13%) and the UK (10%).

***Half of respondents went on a holiday where the components of their trip, such as transport and accommodation, were bought separately.***

A majority of people in 15 of the 34 countries covered by the survey say that they took a holiday in 2011 where **transportation and accommodation were booked separately**. This approach was particularly common among holidaymakers in Ireland (69%), Denmark (65%), Germany (63%), and the Czech Republic (60%). This kind of holiday was least popular in Hungary (30%), Turkey (31%) and Estonia (32%).

***Over three quarters of respondents who took a holiday in 2011 used a car or motorbike at least once to reach their destination.***

Over three quarters (78%) of respondents say that they travelled at least once by car or motorbike when journeying to their holiday destination, while just under half (46%) say that they went by airplane. Nearly three out of 10 (29%) people say that their journey included at least one train trip, with two out of 10 (20%) respondents having taken at least one bus journey on the way to their holiday destination. A further 14% of respondents say that they rode on at least one boat in order to reach their holiday destination.

When it comes to airplane trips, while 50% of EU15 respondents took at least one plane journey, only 24% of NMS12 respondents did so.

***Over 90% of respondents express satisfaction with the natural features and the quality of accommodation at their holiday destination.***

Travellers' satisfaction has been polled for the first time with this survey.

Over nine out of 10 (94%) respondents say that they were satisfied with the **natural features** of the place they went to on holiday. A similarly large majority (93%) of respondents say that they were satisfied with the **quality of accommodation** in the place they stayed.

Over eight people in 10 (85%) were satisfied by **the way in which tourists were welcomed**, with 47% saying they were very satisfied and 38% fairly satisfied. Just 5% say they were not satisfied with the welcome shown to tourists.

Over eight respondents in 10 (82%) were also satisfied by **the general level of prices**.

Just under eight out of 10 people (79%) say they were satisfied by **the activities on offer**.

### 3. TRAVELLERS' PROFILE IN 2011

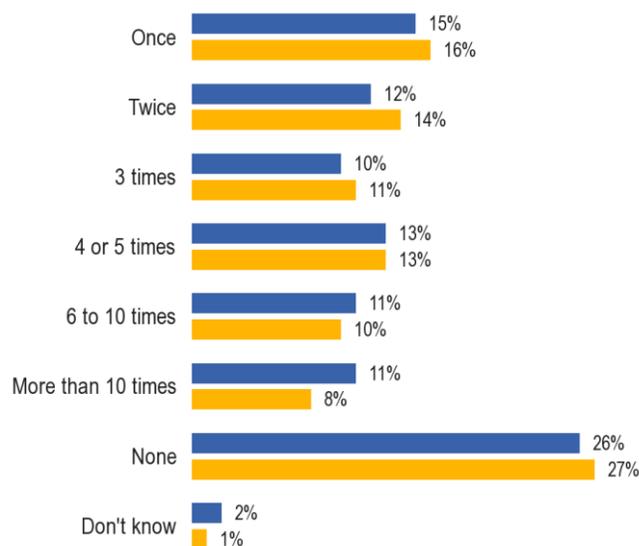
**Over seven out of 10 respondents travelled either for business or private purposes in 2011.**

Over seven out of 10 (72%) respondents said they travelled at least once in 2011 - confirming the results obtained for 2010, when the survey was conducted on a smaller sample.

In all but two of the 34 countries under consideration here – namely Serbia (42%) and Turkey (44%) – a majority of respondents said that they had made an overnight trip for either private or business purposes at least once in 2011. Among EU countries, the lowest rate of citizens travelling occurred in Malta (50%) and Portugal (54%).

The results show a fairly even distribution in terms of the number of times people travelled for business or private purposes for at least one night during 2011. 15% of respondents said that they travelled once in 2011 (-1 point compared with 2010); 12% travelled twice (-2 points); 10% went away from home three times (-1 point); 13% travelled four or five times (no change on the previous year); 11% went away from home between six and 10 times (+1 point); and 11% travelled more than 10 times (+3 points). Just over a quarter (26%) of respondents did not travel at all (-1 point).

Q1. During 2011, how many times have you travelled for business or private purposes, where you were away from home for a minimum of one night?



■ FL334 Jan. 2012

■ FL328 Feb. 2011

● EU27

Men (74%) were slightly more likely than women (70%) to have travelled overnight in 2011. Younger respondents were more likely to have travelled. While 79% of 15-24 year-olds said that they had spent at least one night away, this falls to 76% among 25-39 year-olds, 74% among 40-54 year-olds, and to 65% among the 55+ group.

***A majority of respondents who went on holiday for less than four nights stayed in paid accommodation.***

Staying in this type of accommodation was the most common option among respondents in Ireland (70%), Israel (67%), Finland (64%) and Luxembourg (64%). At the other end of the scale, relatively few people stayed in paid accommodation in Serbia (20%), Macedonia (37%), Croatia (39%) and Estonia (40%).

Just under half (47%) said that they stayed with friends or relatives while just under a fifth (18%) of respondents said they stayed in their own property or second home, while over one in 10 said they stayed in another type of location (14%) or on a camping site (12%).

NMS12 respondents were more likely to say that they stayed in a second home than EU15 respondents, by a margin of 28% to 17%. People in the countries were also more likely than those in the EU15 to say that they stayed with friends or relatives, by a margin of 59% to 44%.

Respondents in the 25-39 age group (59%) are the most likely to have stayed in paid accommodation, while 15-24 year-olds are the most likely to have stayed with friends or relatives. Respondents aged 55 and over are the least likely to have stayed in paid accommodation and also with friends or relatives.

***A majority of respondents who spent at least one night away in 2011 stayed in paid accommodation for at least four nights.***

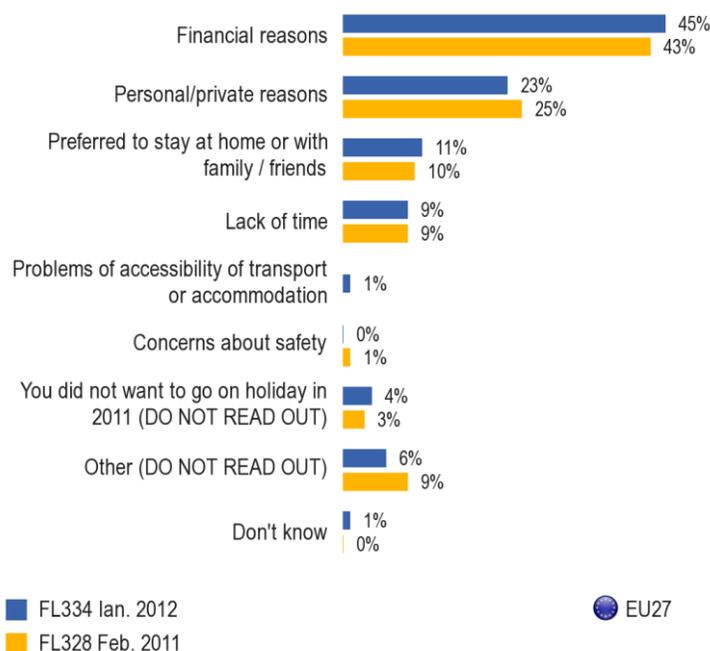
EU15 respondents who spent at least one night away during 2011 are more likely to have spent four or more nights in paid accommodation than those in the NMS12 (by a margin of 62% to 49%). Staying in **paid-for accommodation** for four or more nights was most common in the Netherlands (73%), Slovenia (71%) and Denmark (70%). Least common was in Estonia (36%), Lithuania (37%) and Serbia (39%).

#### 4. HOLIDAY DISABLING FACTORS IN 2011 AND 2012

**Nearly half of the people who did not go on holiday in 2011 chose not to do so for financial reasons.**

Over four out of 10 (45%) respondents said that they did not go on holiday for financial reasons, which is slightly more than the 43% who said this in the February 2011 survey. Just under a quarter (23%) of respondents said that they chose not to go away for personal or private reasons, down slightly on the 25% of people who said this in the previous wave. Roughly one respondent in 10 (11%) said that they preferred to stay at home with family or friends (+1 point compared with the previous survey) and that they did not go due to lack of time (9%, no change since last year).

Q4. What was the main reason why you did not go on holiday in 2011?



Base: 28% from the total number of respondents (7 342 respondents)  
(Those who didn't travel in 2011)

In 12 countries a majority of respondents who did not go on holiday in 2011 said that they did not do so for **financial reasons**. People most commonly offered this explanation in Bulgaria (71%), Greece (70%), Hungary (66%), Ireland (62%) and Romania (62%). Relatively few people did not go on holiday for financial reasons in Austria (15%), Denmark (17%) and Finland (20%). Respondents in the 25-39 and 40-54 age groups (52% and 55% respectively) were more likely to say they did not go away for financial reasons than people in the 15-24 or 55+ age groups (39% and 37% respectively).

***Three quarters of EU respondents are planning to go on holiday in 2012, but a third might change their holiday plans on account of the economic situation***

While 42% of EU15 respondents said that they were going on holiday in 2012 and had not changed their plans, only 32% of people in the NMS12 gave this response.

In almost all surveyed countries a majority of respondents said that they were planning to go on holiday in 2012 with the highest proportions of people saying this occurring in Denmark (89%), Finland (89%), Germany (87%), Norway (87%) and Austria (86%). The three countries where less than half of respondents said they were planning a holiday are Turkey (43%), Malta (45%) and Serbia (45%).

In five countries, at least three out of 10 people said that they were not planning to go on holiday in 2012: Turkey (45%), Portugal (40%), Greece (35%), Serbia (34%) and Bulgaria (30%).

## **5. HOLIDAYS PLANNED FOR 2012**

***Four out of 10 respondents expect to take a holiday lasting between four and 13 consecutive nights in 2012.***

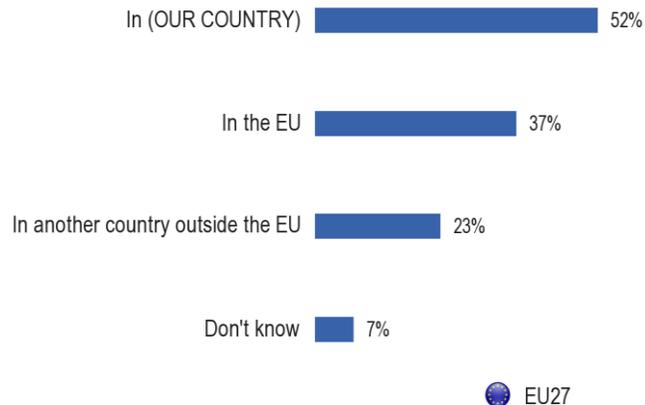
Four out of 10 (41%) respondents said that they planned to take a holiday lasting between four and 13 consecutive nights, while just over a quarter (27%) said that they intended to make a short-stay trip of up to three nights. Around a fifth (19%) said that they planned to take a holiday lasting more than 13 consecutive nights. In addition, 15% of respondents said spontaneously that they were not planning to take any trips, with 12% saying spontaneously that they had not yet made any decisions.

In six countries a majority of respondents gave the answer 'a holiday of between four and 13 consecutive nights': Norway (55%), Slovenia (55%), the UK (55%), Denmark (53%), Ireland (52%) and the Czech Republic (50%). Relatively few people said they were planning a holiday of this duration in Greece (23%), Turkey (23%), Hungary (24%), Latvia (24%) and Serbia (24%).

***Over half of respondents who were planning to take a holiday in 2012 intended to go somewhere in their own country.***

A majority (52%) of respondents said that they planned to spend their holidays in their own country, while 37% said that they intended to go on holiday in the EU. Just under a quarter (23%) of respondents said that they planned to go on holiday in another country outside the EU, while 7% said they didn't know where they were going to spend their holiday.

Q14. In which country(ies) do you plan to spend your holidays in 2012?



Base: 71% from the total number of respondents (18 800 respondents)  
(Those who want to take holidays in 2012)

When asking the question (OUR COUNTRY) is replaced by the name of the country the interview is conducted

The plan of having a trip in **their own country** in 2012 was the most common answer in Greece (80%), Turkey (80%), Croatia (77%) and Bulgaria (73%). Relatively few respondents said they expected to holiday domestically in Luxembourg (2%) and Malta (3). Trip **in the EU** was the commonest answer in Luxembourg (80%), Cyprus (72%), Malta (70%), Belgium (65%) and Denmark (60%). Holidaying in the EU was a relatively uncommon plan in Turkey (11%), France (19%) and Greece (20%). **Outside the EU was the** most popular in Slovenia (55%), Serbia (41%), Macedonia (37%), Austria (34%), Denmark (34%) and Germany (33%). However, relatively few respondents said they were planning a holiday in a non-EU country in Cyprus (8%), Greece (8%), Hungary (9%) and Romania (9%).

In terms of the specific countries in which respondents said they were planning to spend their holidays, the most popular intended destinations were Spain (10%), Italy (7%), France (6%), Greece (4%), Austria (3%), Germany (3%) and the UK (3%).

## **ANNEXES**

## **TECHNICAL SPECIFICATIONS**

**FLASH EUROBAROMETER 334**  
"Attitudes towards tourism"  
**TECHNICAL SPECIFICATIONS**

Between the 10<sup>th</sup> and 14<sup>th</sup> of January 2012, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 334 about 'Attitudes toward 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 334 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, FYROM, Iceland, Norway, Republic of 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 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 is consistent across all countries.

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.002	10/01/2012	14/01/2012	8.939.546
BG	Bulgaria	TNS BBSS	1.000	10/01/2012	14/01/2012	6.537.510
CZ	Czech Rep.	TNS Aisa s.r.o	1.000	10/01/2012	14/01/2012	9.012.443
DK	Denmark	TNS Gallup A/S	1.000	10/01/2012	14/01/2012	4.561.264
DE	Germany	TNS Infratest	1.500	10/01/2012	14/01/2012	64.409.146
EE	Estonia	TNS Emor	500	10/01/2012	14/01/2012	945.733
EL	Greece	TNS ICAP	1.002	10/01/2012	14/01/2012	8.693.566
ES	Spain	TNS Demoscopia S.A	1.501	10/01/2012	14/01/2012	39.035.867
FR	France	TNS Sofres	1.502	10/01/2012	14/01/2012	47.756.439
IE	Ireland	IMS Millward Brown	1.000	10/01/2012	14/01/2012	3.522.000
IT	Italy	TNS Infratest	1.501	10/01/2012	14/01/2012	51.862.391
CY	Rep. of Cyprus	CYMAR	500	10/01/2012	14/01/2012	660.400
LV	Latvia	TNS Latvia	503	10/01/2012	14/01/2012	1.447.866
LT	Lithuania	TNS Lithuania	503	10/01/2012	14/01/2012	2.829.740
LU	Luxembourg	TNS Dimarso	502	10/01/2012	14/01/2012	404.907
HU	Hungary	TNS Hoffmann Kft	1.000	10/01/2012	14/01/2012	8.320.614
MT	Malta	MISCO International Ltd	501	10/01/2012	14/01/2012	335.476
NL	Netherlands	TNS NIPO	1.000	10/01/2012	14/01/2012	13.371.980
AT	Austria	TNS Austria	1.000	10/01/2012	14/01/2012	7.009.827
PL	Poland	TNS OBOP	1.501	10/01/2012	14/01/2012	32.413.735
PT	Portugal	TNS EUROTESTE	1.001	10/01/2012	14/01/2012	8.080.915
RO	Romania	TNS CSOP	1.003	10/01/2012	14/01/2012	18.246.731
SI	Slovenia	RM PLUS	500	10/01/2012	14/01/2012	1.759.701
SK	Slovakia	TNS AISA Slovakia	1.001	10/01/2012	14/01/2012	4.549.955
FI	Finland	TNS Gallup Oy	1.002	10/01/2012	14/01/2012	4.440.004
SE	Sweden	TNS SIFO	1.000	10/01/2012	14/01/2012	7.791.240
UK	United Kingdom	TNS UK	1.498	10/01/2012	14/01/2012	51.848.010
<b>TOTAL EU27</b>			<b>26.523</b>	<b>10/01/2012</b>	<b>14/01/2012</b>	<b>408.787.006</b>
HR	Croatia	Puls	503	10/01/2012	14/01/2012	3.749.400
TR	Turkey	TNS PIAR	1.000	10/01/2012	14/01/2012	54.844.406
	Former Yugoslav Rep. of					
MK	Macedonia	TNS Brima	501	10/01/2012	14/01/2012	1.678.404
IS	Iceland	Capacent ehf	501	10/01/2012	14/01/2012	252.277
NW	Norway	TNS Gallup AS	500	10/01/2012	14/01/2012	3.886.395
IL	Israel	TNS Teleseker	563	10/01/2012	14/01/2012	4.257.500
RS	Republic of Serbia	TNS Medium Gallup	503	10/01/2012	14/01/2012	6.409.693
<b>TOTAL</b>			<b>30.594</b>	<b>10/01/2012</b>	<b>14/01/2012</b>	<b>473.833.379</b>

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Political & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

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:

<b>Observed percentages</b>	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
<b>Confidence limits</b>	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points