

Survey on the attitudes of Europeans towards tourism

Summary Wave 3

Fieldwork: February 2011

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This survey was requested by the Directorate General Enterprise and Industry, and coordinated by Directorate General Communication.

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 EB Series #328

Survey on the attitudes
of Europeans
towards tourism
Wave 3

Conducted by
The Gallup Organization, Hungary
upon the request of Directorate General
Enterprise and Industry



Survey co-ordinated by
Directorate General Communication

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THE GALLUP ORGANIZATION

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Introduction

This Flash Eurobarometer “*Survey on the attitudes of Europeans towards tourism*” (N° 328) has been conducted at the request of Directorate General Enterprise and Industry in the 27 EU Member States and in five additional countries: Croatia, Turkey, the former Yugoslav Republic of Macedonia, Norway and Iceland.

The objectives of this survey were to study:

- respondents’ travel profiles in 2010 – distinguishing between “short private” and holiday trips
- the reasons why respondents did not go on holiday in 2010
- the characteristics of citizens’ main holiday trip in 2010 (e.g. method of transport used)
- the financial aspects of taking a holiday (e.g. how to save money while being on holiday)
- various attitudes of citizens towards tourism (e.g. their preferred holiday destinations)
- respondents’ vacation plans for 2011.

In February 2009 and 2010, similar Flash Eurobarometers were conducted (N° 258 & 291)¹ in the 27 EU Member States; the three waves of the survey asked EU citizens about their holidays in 2008, 2009 and 2010 as well as their vacation plans for 2009, 2010 and 2011. The current report presents comparative data between those three waves.

The fieldwork was conducted between 24 and 28 February, 2011. Over 30,000 randomly selected citizens aged 15 and over were interviewed in the 27 EU Member States, Croatia, Turkey, the former Yugoslav Republic of Macedonia, Norway and Iceland. The sample size varied between countries, ranging from about 500 in the smallest countries to about 2,000 in the largest (see section “Survey details” in the Annex where the actual sample sizes for the 32 countries are indicated).

Interviews were predominantly carried out by telephone. However, due to the low fixed-line telephone coverage in Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia and the former Yugoslav Republic of Macedonia, face-to-face interviews were also conducted in those countries (70% telephone and 30% face-to-face interviews). Note: Flash Eurobarometer surveys systematically include mobile phones in samples in Austria, Finland, Italy, Portugal and Spain.

To correct for sampling disparities, a post-stratification weighting of the results was implemented, based on the main socio-demographic variables. More details on survey methodology are included in the Annex of the Analytical Report (see section “Survey details”).

Some questions in this survey were only presented to a sub-group of respondents (e.g. just those who had not travelled in 2010); as a result, the sample size per country could be relatively small (e.g. n=105 in Norway) and differences in country rankings, for example, should be treated with caution.

¹ http://ec.europa.eu/public_opinion/flash/fl_258_en.pdf & http://ec.europa.eu/public_opinion/flash/fl_291_en.pdf

Main findings

Travel trends in 2010

- Almost three-quarters (73%) of EU citizens said they had travelled, either for business or private purposes, at least once in 2010; 32% had made at least one holiday trip and at least one “short private” trip, 24% had made at least one holiday trip but no “short private” trips and 12% had made at least one “short private” trip but no holiday trips. Slightly less than 3 in 10 (29%) EU citizens had not travelled for leisure purposes in 2010.
- Respondents in Turkey and Hungary were the most likely to say that they had not travelled for private purposes (68% and 60%, respectively). In another four countries, at least 4 in 10 respondents had not made short private trips or holiday trips: Slovakia (40%), Estonia (41%), Portugal (43%) and Romania (46%).
- Comparing travel for leisure purposes in 2008, 2009 and 2010, it could be seen that, in the current wave, respondents were somewhat less likely to say that they had not travelled for leisure purposes (29% in 2010 vs. 32%-33% in 2008/2009). Furthermore, last year’s survey results had shown a decrease in the proportion of EU citizens who had made at least one “short private” trip and at least one holiday trip (from 39% in 2008 to 27% in 2009; -12 points); respondents in the current wave, however, were – once again – more likely to have made at least one holiday trip and at least one “short private” trip (from 27% in 2009 to 32% in 2010; +5 points).

Financial aspects

- Across almost all countries included in this survey, the largest proportion of respondents – who had not taken a holiday in 2010 – said this was because of financial reasons; such reasons were cited by more than 6 in 10 respondents in Hungary (68%), Bulgaria (65%) and Romania (62%).
- When asked which holiday leisure activities EU citizens would give up first if savings were needed while they were actually on holiday, the largest proportions of interviewees selected “beauty or wellness treatments” (27%; + 3 percentage points compared to 2009) and shopping (21%; unchanged compared to 2009).

Holiday focus and attractions

- The largest proportion of holidaymakers across the EU (36%) said that the major motivation for their main holiday in 2010 had been “rest and recreation”. Just under one in five (18%) had wanted a sun/beach holiday and 17% said the main objective had been to visit friends or relatives.
- In almost all countries surveyed, respondents who preferred to spend their holidays in “traditional” tourist destinations outnumbered those who favoured visiting “alternative or emerging” destinations. Countries with a high proportion of respondents who preferred “emerging” tourist destinations were Iceland (43%), Norway and the former Yugoslav Republic of Macedonia (both 44%).
- More than a third (36%) of EU citizens answered that a non-traditional destination would allow them to explore local cultures and lifestyles. As in the previous waves of this survey, financial considerations also played a role: 21% mentioned “better value for money” and 17% selected “cheaper costs/lower prices”.
- When deciding on a holiday destination, the largest proportions (32%) of EU citizens named the location’s environment (e.g. its overall attractiveness) as the key consideration. Cultural heritage (27%) and options for entertainment (14%) were the second and third most widespread responses in regard to factors that influenced a choice of destination.

Arranging a holiday

- A share of 44% of holidaymakers across the EU had travelled to their main holiday destination by car or motorbike; this is the lowest proportion measured since the first wave of this survey (47%-48% in 2008/2009). At the same time, taking a flight to go on holiday had never been as popular as in 2010 (39%; +4 points compared to 2009).
- In most countries surveyed (25 out of 32), more than half of holidaymakers had organised their holiday individually. The proportions of respondents who had made at least one holiday trip in 2010 and had booked their main holiday themselves were highest in Turkey (80%), Iceland (79%), Croatia (78%), Romania (77%), Hungary (76%), Latvia (74%), Greece (74%), Lithuania (73%) and Poland (72%).
- About one in seven (14%) had booked travel tickets or accommodation through a travel agency and 10% had booked a package tour or all-inclusive holiday through a travel agency. A somewhat higher proportion (13%) had opted for a package tour or all-inclusive holiday booked via the Internet.
- Fifty-eight percent of EU citizens said that the views of friends and colleagues were the (first or second) most important sources of information when making decisions about travel and holiday plans. The Internet was considered to be the main source of information by 45% of respondents, and a lower proportion (29%) mentioned personal experience.
- Respondents who had been on a “cultural” holiday were less inclined than their counterparts to rely on personal experience (25% compared to, for example, 30% of holidaymakers who had wanted sun/beach) and more likely to rely on guidebooks and magazines (19% compared to, for example, 11% of holidaymakers who had wanted a sun/beach holiday).
- As in previous waves, the largest difference in terms of information sources when comparing respondents with a preference for “off the beaten track” holidays and those who preferred more “traditional” holiday destinations was seen when looking at the importance of the Internet: 54% of the former respondents said that the Internet was an important source of information when planning a holiday compared to 42% of the latter.

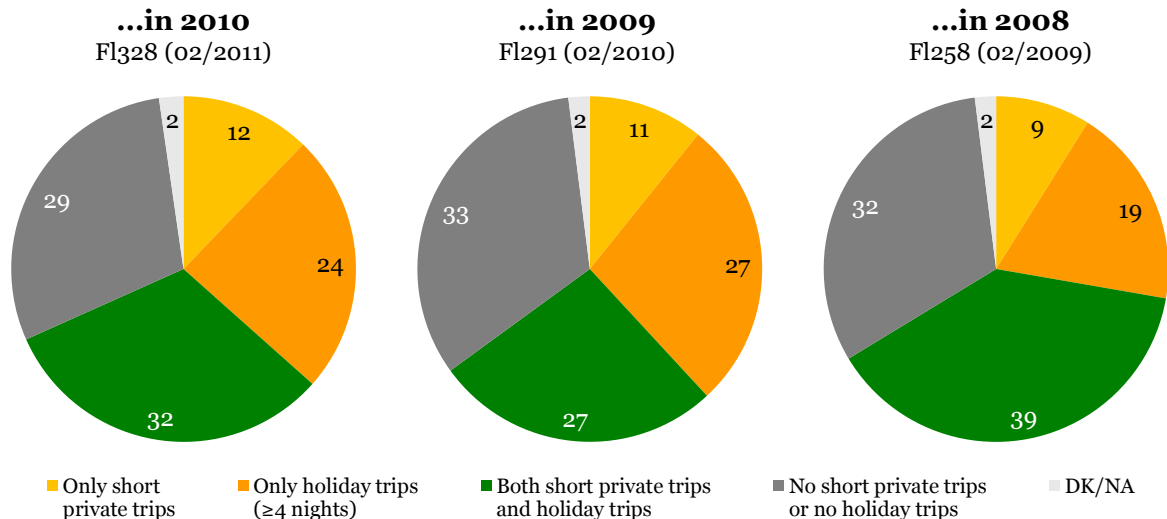
Vacation plans for 2011

- When asked about their holiday destination in 2011, almost 4 in 10 (38%) EU citizens answered that they were planning a holiday in their home country. One in five interviewees said they were planning to take a holiday within the EU and a somewhat lower proportion (16%) indicated that a non-EU country would be their main holiday destination in 2011.
- Almost a quarter (23%) of respondents did not know yet where they would spend their main holiday in 2011 or preferred not to answer this question; roughly 1 in 20 (4%) interviewees spontaneously said they would not go on holiday in 2011.
- In 15 countries, a majority of these respondents were planning to spend their holiday in their own country; the highest shares were found in Turkey (88%), Croatia (86%), Greece (85%) and Bulgaria (82%). In nine countries, the largest proportion of respondents, who were planning a holiday in 2011, had chosen a destination elsewhere in the EU; respondents in Luxembourg were the most likely to have made such a choice (62%). Finally, in two countries, about half of respondents were planning a holiday outside the EU: Slovenia (51%) and the former Yugoslav Republic of Macedonia (50%).

1. Travel trends in 2010

Almost 7 in 10 (68%) EU citizens said they had travelled – for private reasons – at least once in 2010: 32% had made at least one holiday trip and at least one “short private” trip, 24% had made at least one holiday trip but no “short private” trips and 12% had made at least one “short private” trip but no holiday trips. About 3 in 10 (29%) EU citizens had not travelled for leisure purposes in 2010.

“Short private” trips and/or holiday trips – EU27



Q2. And how many of these were short private trips, where you stayed away for less than four nights?
 Q3(2011-2010)/Q4(2009). How many times did you go on holiday in 2010/2009/2008, where you either stayed in paid accommodation / or in your second home for a minimum of four nights?
 %, Base: all respondents, EU27

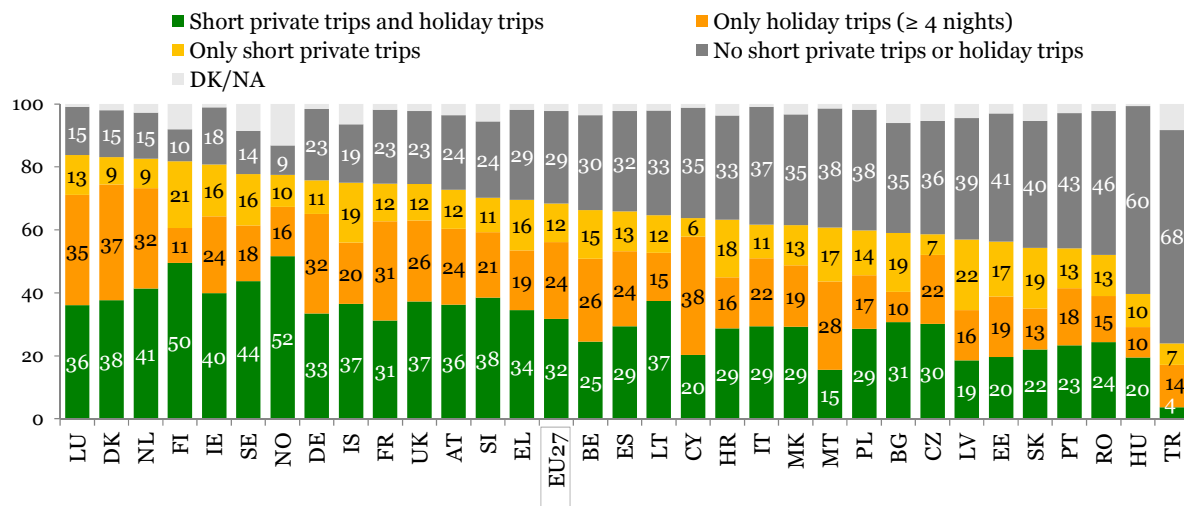
Comparing travel for leisure purposes in 2008, 2009 and 2010, it could be seen that, in the current wave, respondents were somewhat less likely to say that they had not travelled for leisure purposes (29% in 2010 vs. 32%-33% in 2008/2009). Furthermore, last year’s results had shown a decrease in the proportion of EU citizens who had made at least one “short private” trip and at least one holiday trip (from 39% in 2008 to 27% in 2009; -12 points); respondents in the current wave, however, were – once again – more likely to have made at least one holiday trip and at least one “short private” trip (from 27% in 2009 to 32% in 2010; +5 points).

Country variations

In eight countries, less than one in five respondents had not made any “short private” or holiday trips in 2010: Norway (9%), Finland (10%), Sweden (14%), Denmark, Luxembourg and the Netherlands (all 15%), Ireland (18%) and Iceland (19%). Respondents in Turkey and Hungary were the most likely to say that they had not travelled for private purposes (68% and 60%, respectively). In another four countries, at least 4 in 10 respondents had not made short private trips or holiday trips: Slovakia (40%), Estonia (41%), Portugal (43%) and Romania (46%).

In about half of the countries surveyed, the current survey showed a decrease in the proportion of respondents who had not travelled for leisure purposes; Latvia and Malta have seen the largest decrease in this proportion. A different picture emerged when looking at the results for Cyprus and Estonia; both countries have seen an increase in the proportion of respondents who had not travelled for leisure purposes.

“Short private” trips and/or holiday trips in 2010



Q2. And how many of these were short private trips, where you stayed away for less than four nights?
 Q3. How many times did you go on holiday in 2010, where you either stayed in paid accommodation / or in your second home for a minimum of four nights?

%, Base: all respondents, by country

Socio-demographic considerations

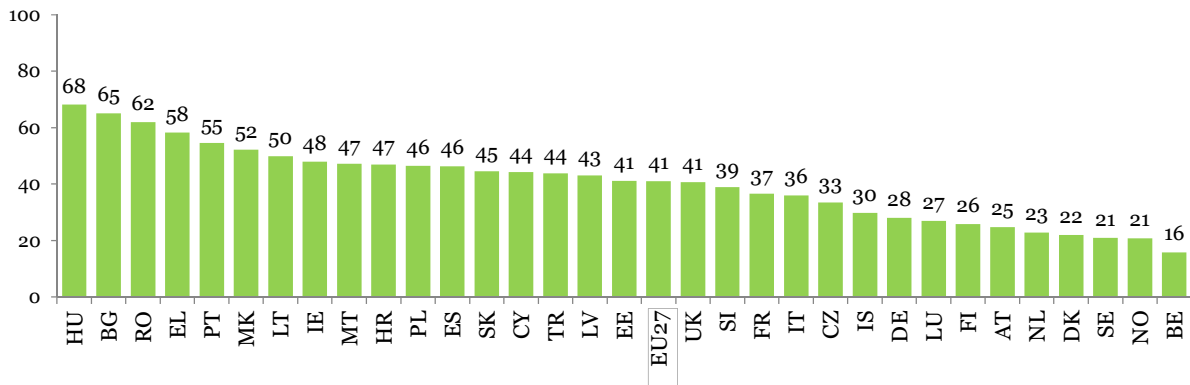
Certain socio-demographic groups were less likely to have travelled for leisure purposes: the over 54 year-olds (38% had not travelled vs. 22% of 15-24 year-olds), respondents with the lowest level of education (53% vs. 17% of those with the highest level of education), rural residents (33% vs. 23% of metropolitan residents), manual workers and non-working respondents (38% vs. 17% of employees).

2. Reasons for not taking a holiday in 2010

Respondents who had not taken a holiday in 2010 (and those who had not travelled at all) were asked to specify the main reason why they had not gone on holiday. Roughly 4 in 10 (41%) EU citizens – who had not gone on holiday in 2010 – said this was due to **financial reasons**. All other explanations for not going on holiday (as listed in the survey) were selected by considerably fewer respondents: 22% stated **personal or private reasons**, 11% said they had had **no time** and 9% had **preferred to stay at home or be with family and friends**. A minority of respondents said they had **not been motivated** to take a holiday in 2010 (3%) or **preferred to just make short trips** (3%). Virtually no respondents (1%) said they had not gone on holiday because of **safety/security considerations**. Overall, these results have hardly changed compared to 2008 and 2009.

Across almost all countries included in this study, the largest proportion of respondents – who had not taken a holiday in 2010 – said this was due to **financial reasons**; such reasons were cited by more than 6 in 10 respondents in Hungary (68%), Bulgaria (65%) and Romania (62%). In Greece, Portugal and the former Yugoslav Republic of Macedonia, more than half of respondents gave a similar response (58%, 55% and 52%, respectively). In sharp contrast, less than a sixth (16%) of Belgians and less than a quarter of respondents in Norway and Sweden (both 21%), Denmark (22%) and the Netherlands (23%) said they had not gone on holiday because they were financially constrained.

Financial reasons for not having gone on holiday in 2010



Q4. What was the main reason why you did not go on holiday in 2010?
 %, Base: respondents who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010), by country

Socio-demographic considerations

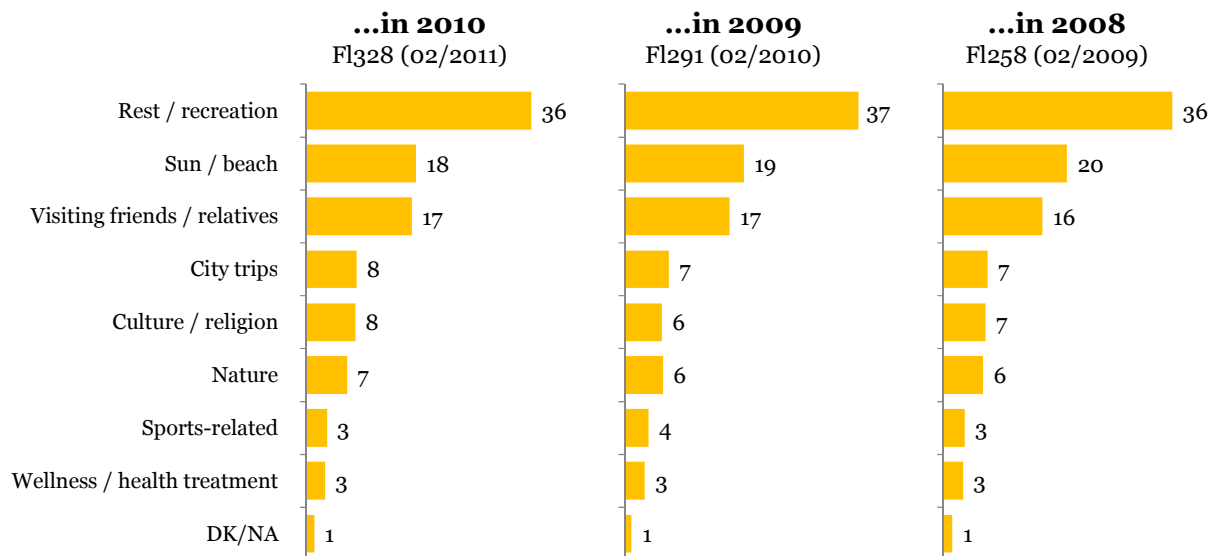
Financial reasons for not having gone on holiday in 2010 were cited more frequently by 25-54 year-olds, respondents with low and average levels of education, manual workers and respondents living in urban areas.

3. Characteristics of main holiday trip in 2010

3.1 The major motivation for going on holiday in 2010

The largest proportion of holidaymakers across the EU (36%) said that the major motivation for their main holiday in 2010 had been “rest and recreation”. A share of 18% had wanted a sun/beach holiday and 17% said the main objective had been to visit friends or relatives. “City trips”, “nature” and “culture and religion”, as an objective, were each selected by less than a tenth of holidaymakers (7%-8%). A minority of interviewees who took a holiday mentioned sports- or health-related factors as the major motivation for their main holiday in 2010 (both 3%).

The major motivation for EU citizens’ main holiday trip – EU27



Q5(2011-2010)/Q6(2009). What was the major motivation for your main holiday trip in 2010/2009/2008?
 %, Base: respondents who made at least one holiday trip, EU27

Country variations

In almost all countries included in this study, the largest proportion of holidaymakers said they were looking primarily for “**rest and recreation**” when they went on their main holiday in 2010. The proportion selecting “rest and recreation” was the highest in Cyprus (64%). In two other countries, more than half of respondents gave a similar response: Malta (53%) and Greece (51%). In Austria, Denmark, Sweden and Norway, on the other hand, the largest proportion of respondents selected “**sun/beach**” as the major motivation for their main holiday trip in 2010 (21%-29%).

Socio-demographic considerations

Younger EU citizens were more attracted by “sun and beach” (23% of 15-24 year-olds vs. 12% of the over 54 year-olds), while older respondents more frequently selected “wellness/health treatments”, “nature” and “culture and religion” (for example, 9% of the over 54s selected “nature” compared to 4% of 15-24 year-olds). The 25-54 year-olds, on the other hand, were more likely to say that the major motivation for their main holiday had been “rest and recreation” (40%-41% vs. 30%-31% of younger and older respondents).

3.2 Methods of transport used for 2010 holidays

In 2010, 44% of holidaymakers across the EU had travelled to their main holiday destination by car or motorbike; this is the lowest proportion measured since the first wave of this survey (47%-48% in 2008/2009). At the same time, taking a flight to go on holiday has never been as popular as it was in 2010 (39%; +4 points compared to 2009). As in previous years, less than a fifth of EU citizens who took a holiday in 2010 had travelled by train (7%), bus (6%) or boat (3%).

Country variations

Slovenes and Croats were the most likely to have travelled by **car or motorbike** for their main holiday trip in 2010 (69% and 65%, respectively). Such a means of transport was also frequently used by respondents in Bulgaria and Poland (both 59%).

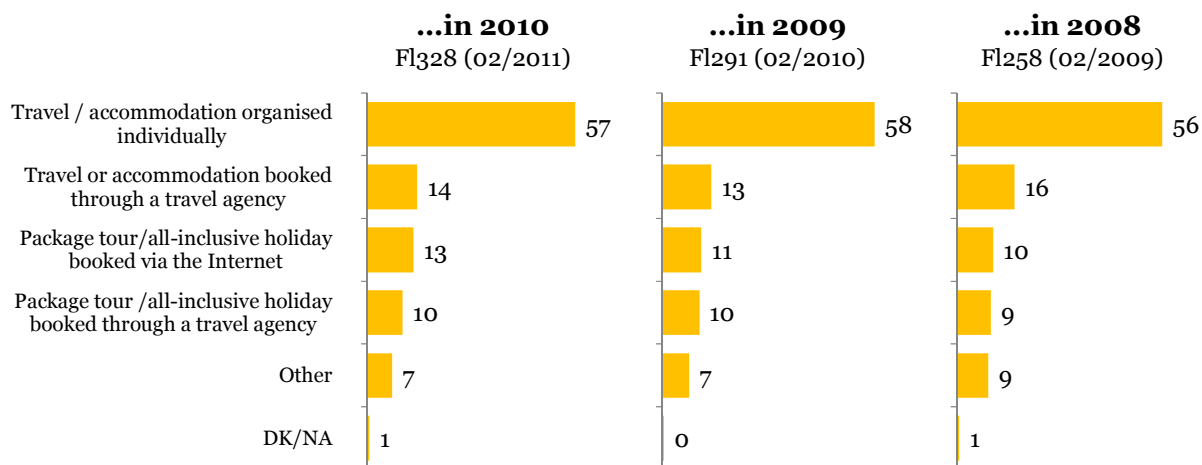
Socio-demographic considerations

Men were more likely to have travelled to their main holiday destination by car or motorbike (46% vs. 41% of women). Across the different age groups, 25-54 year-old holidaymakers were most liable to have travelled by car or motorbike (47%-49% vs. 38%-39% of 15-24 year-olds and the over 54s). Other groups of holidaymakers who were more likely to have travelled by car or motorbike were manual workers and respondents living in rural areas.

3.3 How respondents organised a holiday trip in 2010

Almost 6 in 10 (57%) holidaymakers across the EU had personally organised their main holiday in 2010. About one in seven (14%) had booked travel tickets or accommodation through a travel agency and 10% had booked a package tour or all-inclusive holiday through a travel agency. A somewhat higher proportion (13%) had opted for a package tour or all-inclusive holiday booked via the Internet. Once again, these results are comparable to those of earlier waves.

How EU citizens organised their main holiday trip – EU27



Q7(2011-2010)/Q10(2009). How did you organize your main holiday trip in 2010/2009/2008?
%, Base: respondents who made at least one holiday trip, EU27

Country variations

In most countries surveyed (25 out of 32), more than half of holidaymakers **had organised their holiday individually**. The proportions of respondents who had made at least one holiday trip in 2010 and had booked their main holiday themselves were the highest in Turkey (80%), Iceland (79%), Croatia (78%), Romania (77%), Hungary (76%), Latvia (74%), Greece (74%), Lithuania (73%) and Poland (72%). In the Czech Republic, on the other hand, just 40% of holidaymakers had organised their main holiday themselves.

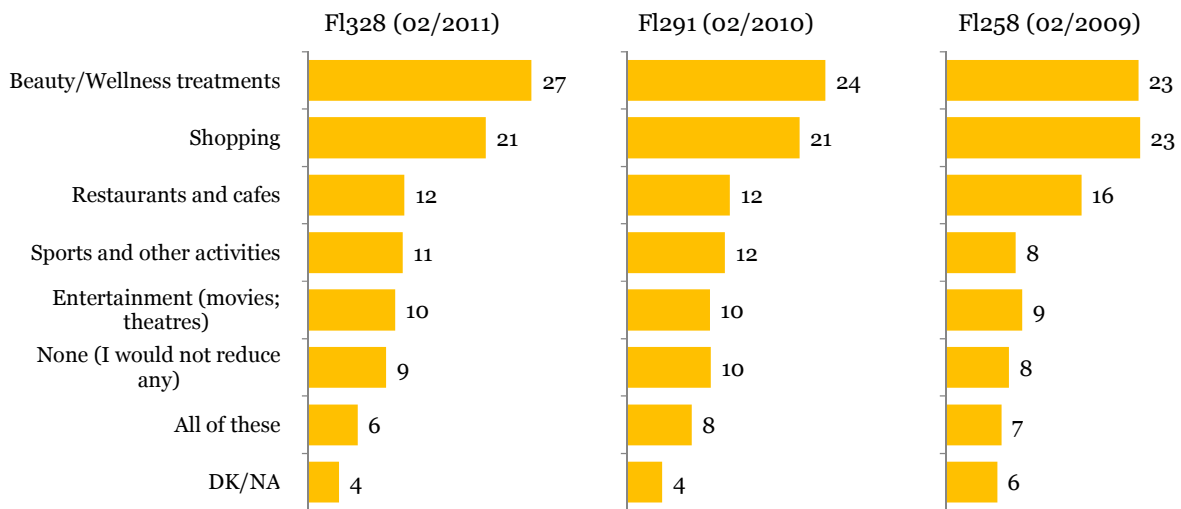
Socio-demographic considerations

Holidaymakers who organised their trip individually were more likely to be male (59% vs. 55% of women), highly educated (61% vs. 52% of the least-educated respondents), living in metropolitan and urban areas (58%-59% vs. 54% of rural residents) and manual workers (65% vs. 55%-60% of other occupational groups). The over 54 year-olds were less inclined to organise their holidays themselves (53% vs. 57%-60% of other age groups).

4. Financial aspects: types of holiday leisure activities that would be given up first

When asked which holiday leisure activities EU citizens would give up first if savings were needed when they were actually on holiday, the largest proportions of interviewees selected “beauty or wellness treatments” (27%; + 3 percentage points compared to 2009) and shopping (21%; unchanged compared to 2009). EU citizens were – once again – less likely to be willing to reduce visits to restaurants and bars to save money while on holiday (12%). A similar proportion (11%) would be willing to give up or reduce sports activities while on holiday and a slightly lower proportion (10%) would reduce spending on entertainment, such as visits to the theatre. Finally, 9% of EU citizens would reduce none of the listed leisure activities, while 6% said they would try to save money by reducing all types of activities (as listed in the survey).

Holiday leisure activities that EU citizens would reduce most to save money when on holiday – EU27



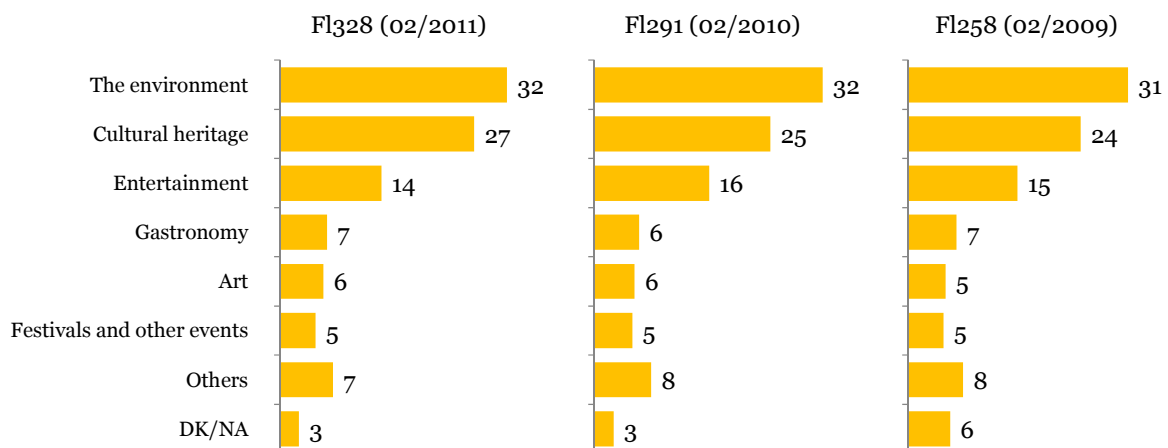
Q8(2011-2010)/Q15(2009). When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?
%, Base: all respondents, EU27

5. Considerations when planning a holiday and choosing a destination

5.1 Choosing a holiday destination

When deciding on a holiday destination, the largest proportion (32%) of EU citizens named **the location's environment** (e.g. its overall attractiveness) as the key consideration. **Cultural heritage** (27%) and **options for entertainment** (14%) were the second and third most widespread responses in regard to factors that influenced a choice of destination.

Attractions influencing the choice of destination – EU27



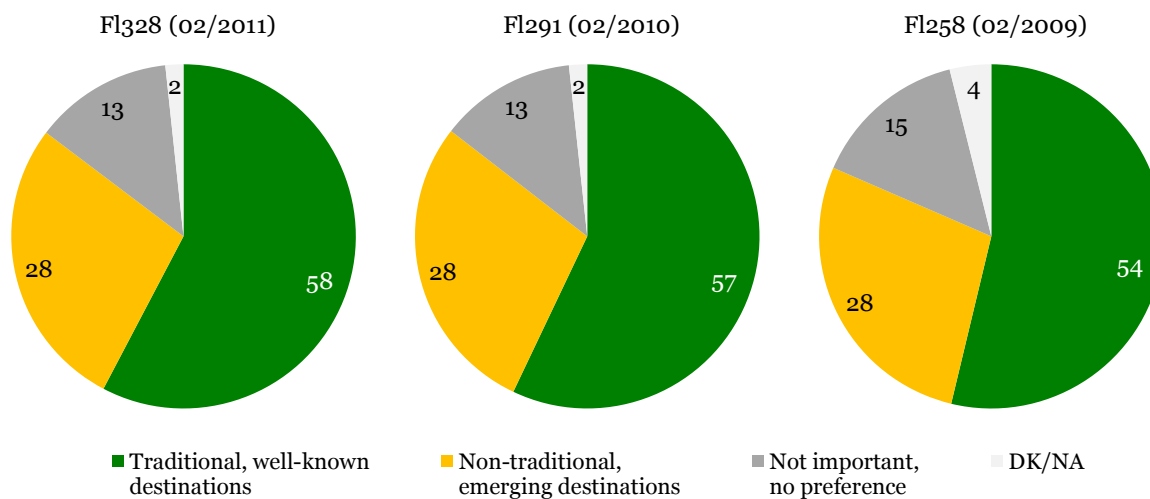
Q12(2011-2010)/Q20(2009). From the following attractions, please choose the one that has the major influence on your choice of destination?
%, Base: all respondents, EU27

5.2 Preferred holiday destinations

Most EU citizens (58%) preferred to spend their holidays in **conventional tourist destinations** (or at least what they considered as “traditional” or “well-known” destinations). About half as many (28%) would rather go **“off the beaten track”** and explore less obvious tourist targets (these will be referred

to as “emerging” destinations in the terminology of this summary). About one in seven (13%) respondents had no preference about the type of destination, and 2% could not – or did not want to – specify a preference. These figures were similar to those observed in the previous wave of the survey (2010).

Preferred holiday destinations – EU27



Q9(2011-2010)/Q17(2009). What type of holiday destinations do you prefer?
%, Base: all respondents, EU27

In almost all countries surveyed, respondents who preferred to spend their holidays in “traditional” tourist destinations outnumbered those who favoured visiting “alternative or emerging” tourist destinations. The proportion of interviewees with a preference for traditional tourist destinations was the highest in Slovakia (69%). In addition, more than 6 in 10 respondents in Greece (65%), Italy and Malta (both 64%), the Czech Republic and Poland (both 62%), and Turkey (61%) preferred well-known destinations. In Iceland, on the other hand, respondents were more likely to select “emerging” destinations than they were to select “traditional” destinations (43% vs. 35%).

Socio-demographic considerations

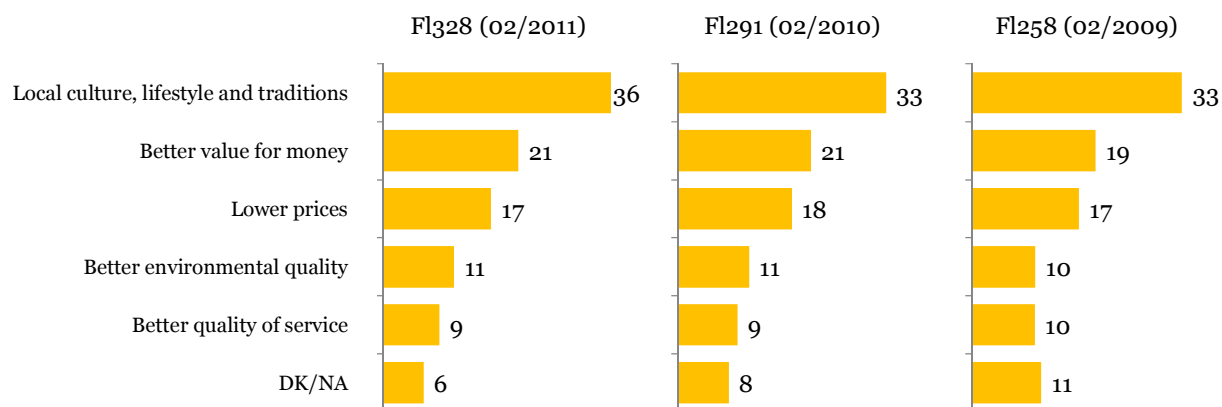
Respondents who favoured emerging destinations were more likely to be young (37% of 15-24 year-olds vs. 22% of the over 54s), highly educated or still in full-time education (33% and 39%, respectively, vs. 18% of respondents with the lowest level of education), self-employed or employees (30%-31% vs. 25% of non-working respondents and manual workers).

5.3 Anticipated benefits of emerging destinations

Irrespective of respondents’ preferences, the survey asked for their opinions about the main rationale for choosing an “alternative” tourist destination. More than a third (36%) of EU citizens answered that such a destination would allow them to explore local cultures and lifestyles. As in the previous waves of this survey, financial considerations also played a role: 21% of EU citizens mentioned “better value for money” and 17% selected “cheaper costs/lower prices”. Environmental concerns (e.g. a less polluted environment) played a role for 11% of interviewees, while a similar proportion (9%) expected a better quality of service at non-traditional travel destinations.

These results were similar to those of earlier waves; nonetheless, a small increase was seen in the share of respondents who expected to be able to explore local cultures and traditions at emerging holiday destinations (+3 percentage points since 2010).

The main expectations from a non-traditional, emerging destination – EU27



Q10(2010&2011)/Q18(2009). What would be your main expectation from a non-traditional, emerging destination?
%, Base: all respondents, EU27

Country variations

Expectations about emerging destinations varied widely across the different countries included in this study. As in the previous wave, respondents in the Nordic countries and the Netherlands (countries where many respondents preferred emerging destinations) were among the most likely to say that their main expectations of an emerging destination lay in the discovery of **local culture and lifestyle**: 63% in Denmark, 62% in the Netherlands, 54% in Norway, 53% in Finland, 51% in Iceland and Sweden. In the current wave, these countries were joined by Latvia (54%; +18 percentage points compared to 2010).

In other countries, emerging destinations were expected to be more suited to budget travellers. A quarter – or more – of respondents in Ireland (30%), Spain (28%), Portugal (26%), Lithuania (26%) and Italy (25%) mentioned “**better value for money**”, while “**cheaper costs/lower prices**” was the most frequently selected answer in Poland (38%), Hungary (33%), Romania (31%) and Turkey (27%). Furthermore, in Romania, Lithuania, Poland and Hungary, a majority of respondents mentioned either “better value for money” or “lower prices”.

Main expectations of “traditional” vs. “non-traditional” holidaymakers

Expectations when visiting emerging destinations differed significantly between those who preferred such locations and those who would normally favour “traditional” destinations. While 49% of respondents who favoured non-conventional destinations expected that this would allow them to explore local cultures and lifestyles, the corresponding proportion for respondents who preferred traditional destinations was 31%. Members of the latter group were, however, more likely to expect lower prices (20% vs. 11% among the former group of respondents) and better value for money when visiting emerging destinations (23% vs. 18%).

Socio-demographic considerations

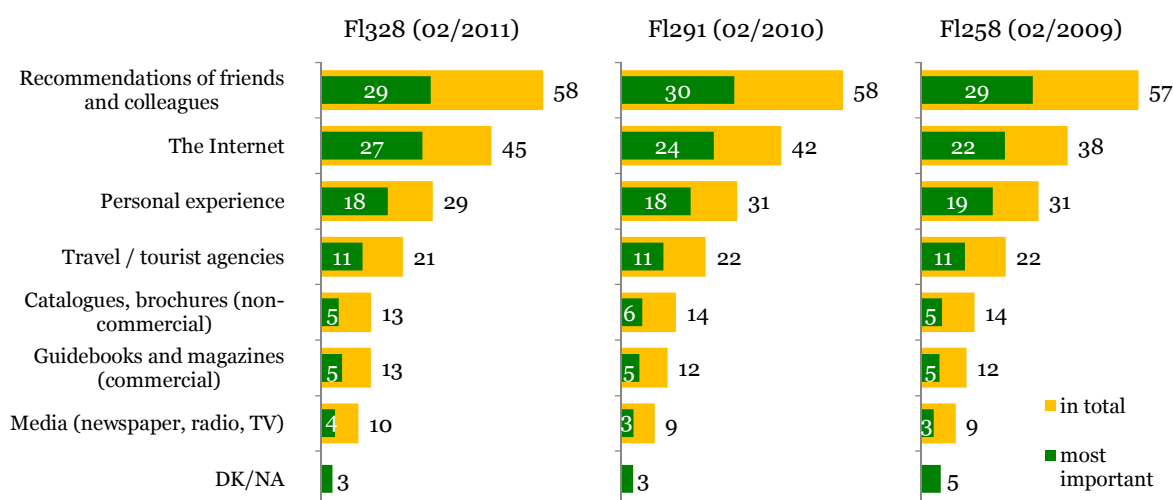
Respondents with the highest level of education, full-time students, those living in metropolitan areas, employees and the self-employed were more likely to say that visiting a non-traditional tourist destination would allow them to explore local cultures and lifestyles. For example, 46% of respondents with the highest level of education and 40% of full-time students mentioned this attraction of emerging destinations compared to 22% of respondents with the lowest level of education.

5.4 Sources of information used when making holiday plans

EU citizens were asked to define their two main *information sources* they used when making decisions about travel and holiday plans. Adding up the percentages of the *first* and *second* selections, almost 6 in 10 (58%) EU citizens answered that recommendations of friends and colleagues would be the first or second most important source of information when making decisions about travel and holiday plans. The Internet was considered to be the main source by 45% of respondents, and a lower proportion (29%) mentioned personal experience. Other ratings were travel/tourist agencies (21%), non-commercial brochures (e.g. those of a regional tourism association, 13%), commercial guidebooks (13%) and the media (e.g. newspapers, TV or radio, 10%).

For most sources of information used when making decisions about travel and holiday plans, almost no change was seen when comparing the 2009, 2010 and 2011 results; nonetheless, an increase was observed in the proportion of respondents who considered the Internet to be the main source of information (from 38% in 2009 to 42% in 2010 and 45% in 2011; +7 percentage points from 2009).

Information sources when deciding about holidays – EU27



Q11a(2011-2010)/Q19a(2009). From the following information sources, which one do you consider to be the most important when you make a decision about your travel (/holiday) plans? Q11b(2011-2010)/Q19b(2009). And what is the second most important? %, Base: all respondents, EU27, DK/NA shown for the first option only

Information sources by holiday focus and preferred holiday destinations

Analysing EU citizens' choices by the focus of their main holiday in 2010, it was not surprising to see that holidaymakers who had visited friends or family were somewhat more likely to say that recommendations of friends and colleagues would be the first or second most important source of information when making decisions about travel and holiday plans.

Respondents who had been on a "cultural" holiday were less inclined than their counterparts to rely on personal experience (25% compared to, for example, 30% of holidaymakers who had wanted a sun/beach holiday) and more likely to rely on guidebooks and magazines (19% compared to, for example, 11% of holidaymakers who had wanted a sun/beach holiday).

As in the previous waves of the survey, the largest difference in terms of information sources when comparing respondents with a preference for "off the beaten track" holidays and those who preferred more "traditional" holiday destinations was seen when looking at the importance of **the Internet**: 54% of the former respondents said that it was an important source of information when planning a holiday compared to 42% of the latter.

Socio-demographic considerations

Men were more likely to consider the Internet to be an important source of information when planning a holiday (49% vs. 40% of women) and they were also slightly more likely to count on personal experience (31% vs. 28% of women). Women, on the other hand, were more likely to say that travel and tourist agencies were the best information sources (24% vs. 18% of men).

Travel and tourist agencies were also more frequently listed by the over 54 year-olds (26% vs. 17%-19% across other age groups), respondents with the lowest level of education (33% vs. 16% of respondents with the highest level of education), respondents living in urban and rural areas (22% vs. 17% in metropolitan areas), manual workers and non-working respondents (24% vs. 18% of self-employed respondents and employees).

The Internet, on the other hand, was more frequently mentioned as an information source by younger respondents (58% of 15-39 year-olds vs. 26% of the over 54 year-olds), those with a high level of education and full-time students (54% and 57%, respectively, vs. 19% of respondents with the lowest level of education), respondents living in metropolitan areas (50% vs. 42%-45% of those in rural and urban areas), self-employed respondents and employees (51% and 58%, respectively, vs. 45% of manual workers and 33% of non-working respondents).

6. Vacation plans for 2011 – planned destinations

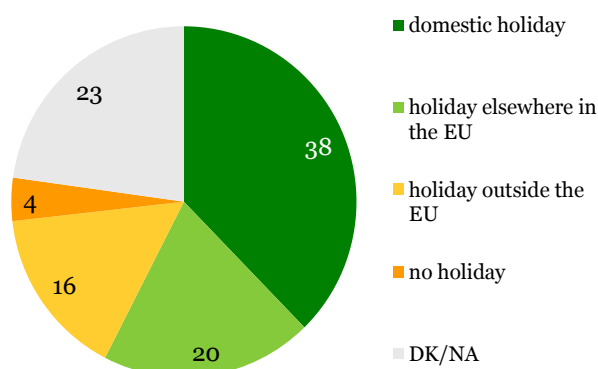
When asked about their holiday destination in 2011, almost 4 in 10 (38%) EU citizens answered that they were planning a holiday in their home country. One in five interviewees said they were planning to take a holiday within the EU and a somewhat lower proportion (16%) indicated that a non-EU country would be their main holiday destination in 2011.

Almost a quarter (23%) of respondents did not know yet where to spend their main holiday in 2011 or preferred not to answer this question, while roughly 1 in 20 (4%) interviewees spontaneously said they would not go on holiday in 2011².

Italy, Spain and France were the most popular holiday destinations for EU citizens (who were planning a holiday in 2011³). About 3 in 10 EU citizens, who were planning a holiday in 2011, said they were thinking about spending it in one of these three countries (8% in France, 9% in Spain and 12% in Italy), regardless of whether they were residents of those countries or of another EU country.

Planned destination of the main holiday – EU27

...in 2011



Q13(2011)/Q15(2010)/Q23(2009). Where do you plan to spend your main holiday in 2011/2010/2009?
%, Base: all respondents, EU27

² Although respondents in earlier waves were also presented with a question about their planned holiday destination, due to differences in the questionnaire (and the group of respondents that were presented with this question), the results of these questions cannot be compared across different waves/years.

³ Note: this group excludes respondents who said they would not take a vacation in 2011, but includes respondents who were still undecided about the destination of their main holiday in 2011.